10th Steel Tube & Pipe Conference

March 8-9, 2017
Doubletree Houston Greenway Plaza Hotel, Houston, Texas

America’s largest gathering for the steel tube and pipe industry

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YOUR TICKET TO SUCCESS IN 2017

For ten years the AMM Steel Tube & Pipe Conference has grown to become the biggest gathering for the North American steel tube and pipe industry.

In 2017 we're taking it to the next level.

Market insight from across the supply chain

At the conference you will get exclusive insight into market trends and forecasts from every part of the value chain. Take advantage of this unique opportunity to gain succinct and comprehensive industry awareness.

Unrivalled networking opportunities

Being a part of the region's most influential event means seeing and being seen. Showcasing your company's achievements will improve your brand awareness and give you a chance to stand out from the crowd.

New speakers include:

- Conrad Winkler, President & CEO, EVRAZ North America
- John Hritz, President & CEO, JSW Steel North America
- Joe Phillips, President, Sooner Pipe
- Bob Dvorak, Executive Chairman, B&L Pipeco Services
- Steve Tait, President & CEO, B&L Pipeco Services
- Jim Owsley, Vice President Supply Chain, DistributionNOW

End users get one FREE pass
and any additional for only $500

For more information email marketing@amm.com
The US steel tube and pipe industry remains under pressure due to ongoing challenging oil and gas markets.

These trying times require a strategic approach which can only be formulated with current and accurate market understanding.

That’s exactly what this conference will provide.

By job title:
- C-suite 39%
- Sales and Marketing 21%
- Manager 7%
- Product Manager 7%
- Analyst 6%
- Operations 5%
- Technical 5%
- Business Development 4%
- Procurement 4%
- Distribution 2%

By value chain segment:
- Tubular and pipeline producers 28%
- Distributors and service centres 25%
- Tubular raw materials producers 15%
- Energy infrastructure, Oilfield services and E&P 8%
- Welding and treating technology 12%
- Logistics providers 7%
- Financial services and consultancies 7%
- Manager 7%

In 2016 we gathered over 400 attendees:
Day one - March 8

7.00am  Registration and morning refreshments

8.25am  Chairperson’s opening remarks

Session One: Producer’s outlook

8.30am  Keynote presentation: Success in spite of challenging market conditions
  - What factors will be considered in strategically planning for 2017 given current tubular markets?
  - How will TMK IPSCO adapt to prosper given challenging market conditions?
  - What steps can the industry take collectively to ensure a prosperous future?
  
  Piotr Galitzine, CEO, TMK IPSCO

9.00am  Strategies for success
  - How is EVRAZ North America strategizing to navigate these headwinds?
  - When will oil and gas markets recover? Where will we see tubular demand?
  - Do certain types of pipe in terms of wall thickness, grade or diameter show greater future prospects than others?

  Conrad Winkler, President & CEO, EVRAZ North America

9.30am  Innovation and new approaches
  - How will Vallourec achieve cost-effective and innovative results in a low price environment?
  - What kind of technical challenges are likely to dominate in the future?
  - Which strategies will be adopted by Vallourec to create solutions for these anticipated issues?

  Nicolas de Coignac, President, Vallourec North America;
  Senior Vice President, Vallourec Group

10.00am  Networking refreshment break
Session Two: Market analysis - Where will demand for tubular products come from?

10.45am **Line pipe capacity utilization in the US**
- What is the capacity utilization in the USA for line pipe? What does this mean for each part of the supply chain?
- How have dynamics changed in terms of demand for OCTG and line pipe?
- What impact have trade case rulings had on the profitability of line pipe production?

*Geoff O’Donnell, Product Manager- Line Pipe, Energex Tube*

11.10am **AMM pricing: Steel tube and pipe prospects**
- A summary of steel tube and pipe pricing in 2016: What happened and why?
- What does this mean for 2017? Which factors should be considered when thinking about supply and demand moving forward?
- What does AMM have to offer in terms of pricing products and how can these be used within the workflow of companies which require benchmark prices?

*Thorsten Schier, Senior Editor, American Metal Market*

11.35am **Oil and gas recovery: Does this mean immediate recovery for tubular demand?**
- An overview of future drilling activity and what this means for steel tube and pipe demand?
- How will drilled uncompleted (DUC) wells be utilized in ramping up oil production?
- How will the DUC wells impact demand for tubular products? How long will the lag be?

*Nicole Leonard, Analyst, Bentek Energy*

12.00pm **Market analysis question and answer session**

*Geoff O’Donnell, Product Manager- Line Pipe, Energex Tube*

*Thorsten Schier, Senior Editor, American Metal Markets*

*Nicole Leonard, Analyst, Bentek Energy*

12.20pm **Technology spotlight presentation**

*Paolo Messina, Executive Manager, Danieli*

12.45pm **Networking lunch**
Session Three: New realities for pipe producers

2.15pm Strategies for 2017 and beyond: What is the new reality faced by producers?
   • What strategies are being utilized by pipe producers to remain profitable?
   • Have duties placed on some imported HRC changed the price competition between welded and seamless tube?
   • How do utilization rates compare to this time last year? What is expected for 2017?
   • Is recovery on the horizon or will turbulence dominate the immediate and medium term?

   Joel Johnson, CEO, Borusan Mannesmann
   John Hritz, President & CEO, JSW Steel North America
   Piotr Galitzine, CEO, TMK IPSCO

3.30pm Networking refreshment break

4.00pm Raw materials analysis: Procurement trends
   • How have duties placed on imports of HRC from certain countries changed procurement strategies for welded pipe producers?
   • Are there other sources of price competitive HRC available?
   • How will this change price dynamics when it comes to welded vs seamless pipe?
   • Will price changes be passed on to consumers of tube and pipe?

   Gabe Rudek, Raw Materials Manager, TMK IPSCO

4.30pm Trade case update: Rulings, appeals, impact
   • Outcome analysis: What do the rulings mean? Will there be appeals?
   • Were the rulings just? What led to these outcomes?
   • Are there likely to be any further trade cases which will impact the steel tube and pipe industry?
   • How will the trade cases impact different parts of the supply chain? Who stands to gain and who stands to face challenges?

   John Gurley, Partner, Arent Fox
   Donald Cameron, Partner, Morris Manning & Martin

5.15pm Technology spotlight presentation

5.45pm End of day one and networking drinks reception
Day two - March 9

8.00am  Registration and morning refreshments

8.55am  Chairperson’s opening remarks

9.00am  The outlook for API tube and pipe mills
• What will be the impact of new OCTG capacity entering the market in the next couple of years?
• Will changes to dumping duties against South Korean OCTG impact US ERW OCTG mills moving forward?
• How will duties on API coil and plate supplies affect ERW and LSAW mills?
• An overview of US steelmakers’ API offerings
  Kim Leppold, Senior Analyst, Metal Bulletin Research

Session Four: Viewpoints from distributors and purchasers

9.30am  New realities for distributors: The changing relationship between producers and end users
• Have trade cases changed the procurement strategies of distributors? Is domestic procurement cost-effective?
• How have market conditions impacted the way in which distributors do business with producers and end users? Is this a new reality?
• Is there a danger that producers and end users will try and bypass distributors? What is preventing this from becoming widespread?
  Bob Dvorak, Executive Chairman, B&L Pipeco Services
  Steve Tait, President & CEO, B&L Pipeco Services
  Jim Owsley, Vice President Supply Chain, DistributionNOW
  Joe Phillips, President, Sooner Pipe

10.45am  Networking refreshment break
End user panel: Demand prospects for OCTG and line pipe

- Will demand for tube and pipe increase? Where will this demand be generated?
- How have geopolitical events impacted the oil and gas industry? Are there any ensuing anticipated changes on the horizon?
- Have the impact of trade case rulings been passed down the value chain to end users of tubular goods?
- Do prospects for a particular type or diameter of tubular product seem more promising?
- Are there any major projects underway which will stimulate demand?
- What key purchasing considerations should distributors and producers bear in mind when planning strategically for 2017?

Perry Roberts, Senior Director- Procurement & Material Management, Energy Transfer

Additional panelists to be announced

12.30pm Technology spotlight presentation

1.00pm Networking lunch

Session Five: Emerging opportunities both domestic and global

2.30pm Mergers and acquisitions across the supply chain

- What market factors are driving M&A transactions in 2017? Will the energy sector see any dramatic changes?
- Are there any exciting M&A deals on the horizon? Are these coming from the pipe producers, distributors or end users of tubular products?
- How will capacity and buying power be impacted by these changes?

Vince Pappalardo, Managing Director, Brown Gibbons Lang & Company

3.00pm Line pipe replacement legislation explained

- What does the Protecting Our Infrastructure of Pipelines and Enhancing Safety (Pipes) Act actually say?
- How is this legislation likely to impact replacement of line pipe across the US?
- Are there plans for future legislation which may generate further demand for line pipe?

David Murk, Manager, Pipelines Midstream & Industry Operations, American Petroleum Institute

3.30pm Overview of global OCTG and line pipe markets: Potential opportunities for US producers

- What is the current market situation for US pipe producers?
- How does short term outlook for OCTG and line pipe differ by region?
- Routes to different markets: What is the best strategy for approaching markets in North and Central Africa, the Middle East, South America and beyond?

Roman Filimonov, Consultant, Metal Bulletin Research

4.00pm Technology spotlight presentation

4.30pm End of day two and close of conference
American Metal Market

The leader in metals price reporting since 1882

American Metal Market aims to provide leading pricing intelligence, including independent industry benchmarks, for the metal and mining industry. Our group’s global portfolio of news, analysis, conferences and insight services complement these price benchmarks.

Founded to establish transparency in the metals markets, we set the standard for price reporting 135 years ago and in the process defined the benchmarks widely quoted today.

Companies across the globe use AMM prices to:
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- Purchase materials
- Understand future raw material costs
- Estimate project costs in proposals and estimates
- Perform inventory valuations
- Create forecast models

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