North American Ferroalloys Conference

26th - 28th September 2018, Chicago, United States

Wednesday 26th September - Pre-Day Conference

17:30 Welcome drinks party
Connect with old and new friends in a relax environment before the meetings kick-off the next day.

Thursday 27th September – Day One

08:00 Registration desk opens

08:55 Opening remarks

Chairperson: Amy Bennett, Principal Consultant, Metal Bulletin Research

Session I: Foundations for a stronger domestic steel industry?

09:00 Outlook for the US economy and politics
- How is the US economy performing in 2018? What is the growth rate forecast for 2019?
- Which domestic economic developments are impacting the demand for steel raw materials?
- NAFTA and Section 232: What has been the impact of NAFTA renegotiations and Section 232?
- Midterm elections: Looking at the big picture of how this can shape the American political landscape for many years to come

Dean Pinkert, Partner, Hughes Hubbard & Reed LLP

09:30 Section 232: What are the benefits and negatives?
- Understanding Section 232 and its implications so far
- What are the predictions for the future?
- With Section 232, has the US entered a period of protectionism?

Moderator: Chris Kavanagh, Senior Pricing Reporter, American Metal Markets
Peter Koenig, Of Counsel Attorney, Squire Patton Boggs
Chris Weld, Partner, Wiley Rein
Laurence Lasoff, Partner, Kelley Drye & Warren

10:30 Networking coffee break

Session II: Supply and demand of ferroalloys and steel outlook

11:00 Assessing the alloys: Taking a closer look at supply and demand dynamics
- Domestic production and consumption: What is the outlook for silicon, manganese, molybdenum and vanadium for the domestic steel market?
- Tariff 232: How is the US coping with international competition?
- China and its environmental regulations: How has the alloy industry been impacted?
- Which alloys will be in more demand in 2019?

Moderator: Amy Bennett, Principal Consultant, Metal Bulletin Research
Mark Smith, CEO, Largo Resources
Dmitry Pastour, CEO, Unichrome AG

11:45 Carbon and stainless steel outlook: How do the winds blow in 2018?
- How has the domestic steel industry been affected by Section 232?
- Has the relationship between the US steel market and international market changed much?
- What are the growth trends and market forecasts for 2019?
- Overview of US steel product types and implications for alloy demand

Amy Bennett, Principal Consultant, Metal Bulletin Research

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12:15  How are pricing trends developing within America and in other regions?
   • Looking back: What have been the pricing trends of 2018?
   • How has Tariff 232 affected prices within the American market?
   • How are supply and demand dynamics across different regions impacted by higher prices?
   • Which steel markets are driving the raw materials prices?
   **Chris Kavanagh, Senior Pricing Reporter, American Metal Markets**

12:45  Networking lunch

**Session III: Battery boom and its impact on the ferroalloys industry**

14:15  Panel: The electric revolution: Understanding the global impact
   • Aluminium versus steel: With lightweight cars, can steel continue to “do the job”?
   • Which alloys do automotive makers need steel products to keep steel as the essential raw material in auto making?
   • Will vehicle manufacturers add more noble alloys (vanadium and niobium) to the steel mix?
   • Vanadium-flow batteries, will they become the future battery in the renewable energy sector? What will the consequences be for the steel industry?
   • Graphite: What is graphite’s future demand picture for batteries and its use by steel mills?
   **Moderator: Chris Kavanagh, Senior Pricing Reporter, American Metal Markets**
   **Terry Perles, President, TTP Squared, Inc.**
   **Kevin Riddell, Senior Manager, LMC Automotive [to give brief presentation]**

15:00  Implications on trade laws and the silicon and solar industry
   **James May, CEO, Midland Silicon Company**

15:30  Networking break

**Roundtables**

16:00  Silicon metal and renewables
   **Discussions include:**
   • How have trade laws impacted the silicon industry?
   • Silicon metal: How has the industry been affected by the aluminium tariffs?
   • What opportunities are available for silicon in the renewable energy market?
   **Peter Koenig, Of Counsel Attorney, Squire Patton Boggs**
   **James May, CEO, Midland Silicon Company**

17:00  Manganese alloy and ferrosilicon
   **Discussions include:**
   • The disconnect between prices for manganese ore and ferromanganese
   • What is the supply and pricing outlook for manganese ore?
   • How has the Chinese manganese market been affected by the environmental regulations?
   • What is the global impact of reduced ferrosilicon production in China?
   **Pedro Larrea, CEO, Ferroglobe**

18:00  End of day one
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