A strategic market outlook for global steel OCTG, line pipe, mechanical and structural tube and pipe

KEY SPEAKERS INCLUDE:
- Prof. Dr William H. Q. Zhang, Vice President of Strategic Planning and Business Development, WSP Holdings, China
- Antonio Marcegaglia, Chief Executive Officer, Marcegaglia, Italy
- François Michalec, Director, ESTA, France
- Oliver Ellermann, General Director, BDS - Bundesverband Deutscher Stahlhandel, Germany
- Vijesh Chawla, Associate Vice President - Marketing, Jindal Saw Ltd, India
- Costas Danilatos, Commercial Manager, Corinth Pipeworks, Greece
- Pete Kelly, Senior Director, Europe, J.D. Power Automotive Forecasting, UK
- Dr. Bhaskar Dutta, CEO, Al Jazeera Steel Products Co., SAOG, Sultanate of Oman
- Duncan Pell, Commercial Director, Interpipe, Ukraine
- James Ley, Senior Analyst, Hatch Iron & Steel Consulting, UK
- Günter Luxenburger, Director Sales & Marketing, Dillinger Hutte, Germany

KEY TOPICS TO BE DISCUSSED, INCLUDE:
- OCTG markets as global economies recover
- Surveying Chinese demand and supply over the next 12 months
- The challenges and benefits of vertical integration across slab, plate and pipe mills
- Global HSS and structural markets: Where are the signs for optimism for structural products producers?
- Mechanical and precision pipe: a return of demand in the automotive sector?
- Major opportunities in large diameter line pipe
- Recent developments in high-end HFI pipes

For more information, please visit www.metalbulletin.com/events/stp
Day One: Monday, May 17th

08:15  Registration desk opens

09:05  Welcoming remarks
Borusan Mannesmann Boru, Turkey

Session 1: Market overview as the world emerges from recession

09:15  Outlook for market in 2010: Reasons for optimism?
- Current market trends
- Dumping or legitimate competition: the “threat” of China
- Middle East OCTG and construction markets
- Improving automotive outlook
- What are the challenges to be wary of as we look to improving market conditions?
antonio marcegaglia, Chief Executive Officer, marcegaglia, Italy

09:45  What now for the future of European tube and pipe production?
- How has the recession hit European welded and seamless mills?
- What sectors have been particularly hard hit?
- The new steel landscape: Have European manufacturers lost ground to emerging market rivals?
françois michalet, Director, ESTA, France

10:15  How has the downturn affected distribution?
- What issues have been created post-downturn?
- Competition for outside the EU
- How can European distributors remain competitive in major markets?
- Outlook for the next 12 months
oliver ellermann, General Director, BDS - Bundesverband Deutscher Stahlhandel, Germany

10:45  Surveying Chinese demand and supply over the next 12 months
- Chinese tubular goods: price of coil vs. price of tube and pipe
- Chinese seamless export pricing
- How are American and European protectionists moved viewed by Chinese producers?
prof. dr william h. q. zhang, Vice President of Strategic Planning and Business Development, WSP Holdings, China

11:15  Morning refreshments and networking break

Session 2: OCTG markets

12:00  OCTG markets post-downturn
- How have medium and long-term demand for and supply of seamless and welded OCTG been affected by the global recession?
- Can China continue to be the motor of global steel markets?
- What are the consequences of the slump in Russian demand?
- Demand for high-grade OCTG over next 10 years
- Looking to Iran and Iraq: challenges and potential benefits of these huge markets
- Advancement in premium connections and couplings technology
- The increased importance of corrosion-resistant alloys
- End-user views of the current marketplace
- Q&A
Duncan Pell, Commercial Director, Interpipe, Ukraine
Oliver Stephenson, Lead Market Analyst, ODS-Petrodata, Singapore

13:00  Networking Lunch

Session 3: Welded and large diameter line pipe

14:30  Large diameter line pipe market overview
- Effects of the downturn on supply and demand
- Current and future trade flows
- Developing markets of promise
James ley, Senior Analyst, Hatch Iron & Steel Consulting, UK

15:00  Recent developments in high-end HFI pipes for critical line pipe applications
- The challenging offshore and onshore HFI line pipe projects
- Recent advancements on HFI pipe production limits (26” OD and 25mm WT)
- Advanced control strategy to meet strict quality specification requirements
Athanasios tazedakis, HFI Mill Director, Corinth Pipeworks, Greece
Costas Danilatos, Commercial Manager, Corinth Pipeworks, Greece

15:30  How will LSAW-pipe market emerge from the downturn?
- LSAW-pipe market
- Line pipe plate market
- Actual situation vs. expectations
Günter Luxenburger, Director Sales & Marketing, Dillinger Hutte, Germany

16:00  Afternoon refreshments and networking break

Session 4: Welded and large diameter line pipe continued

16:30  Developing large diameter line pipe production capacity in the Middle East and Asia
- Current regional LSAW capacity
- New markets and growing opportunities in the region: Iran and Iraq
Vijesh Chawla, Associate Vice President – Marketing, Jindal Saw Ltd, India

17:00  Panel discussion: Major opportunities in large diameter line pipe
- Overview of major planned projects
- Trader’s perspective on the market and trade flows
- New proposed projects through Turkey: Nabaco, Nord Stream and South Stream
- Strategies for competing for mega-projects
Costas Danilatos, Commercial Manager, Corinth Pipeworks, Greece
Senior representative, Borusan Mannesmann Boru, Turkey
Günter Luxenburger, Director Sales & Marketing, Dillinger Hutte, Germany
Vijesh Chawla, Associate Vice President – Marketing, Jindal Saw Ltd, India
James ley, Senior Analyst, Hatch Iron & Steel Consulting, UK (moderator)

18:00  Chairperson’s closing remarks and end of day one

19:00  Complimentary Bosphorus Cruise

Note: This programme is provisional only and both timings and content may be subject to change. ©Metal Bulletin, part of Euromoney Institutional Investor PLC group.
Day Two: Tuesday, May 18th

08:45  Morning refreshments

09:20  Chairperson’s opening remarks
James Ley, Senior Analyst, Hatch Iron & Steel Consulting, UK

Session 5: Automotive, construction & mechanical sectors

09:30  A return of demand in the automotive sector?
- Signs for optimism in global automotive
- Automotive carbon and stainless steel tube
- Will emerging market manufacturers be more prominent in the sector post-recession?
Pete Kelly, Senior Director, Europe,
J.D. Power Automotive Forecasting, UK

10:00  Mechanical and precision pipe
- How encouraging signs in global automotive translates into good news for precision pipe producers
- Do developed country producers still have a competitive advantage in the precision sector?

10:30  Global HSS and structural markets: Where are the signs for optimism for structural products producers?
- Producers survival strategies during recession
- EU hollow construction markets
- The reality of demand: how has the downturn really affected steel demand for construction in the GCC and North Africa
- Where are the global construction market-driven opportunities now?
Senior representative, Borusan Mannesmann Boru, Turkey

11:00  Morning refreshments and networking break

Session 6: ERW pipe, HRC and plate markets

11:30  ERW pipe production and market in GCC
- Production capacity and market in GCC
- History and development of sales in this market and exports outside GCC
- API grade production and market
- Policy for survival
Dr. Bhaskar Dutta, CEO, Al Jazeera Steel Products Co., SAOG, Sultanate of Oman

12:00  The challenges and benefits of vertical integration across slab, plate and pipe mills
- Cost competitiveness of backwards vertical integration
- Case study: implementing the strategy
- Current challenges of financing M&A and vertical integration

12:30  HRC and Plate markets
- Developing plate mill capability
- The markets for plate as we emerge from the downturn
- How coil prices are affecting cost competitiveness of emerging markets

13:00  Chairperson’s closing remarks and end of conference

13:35  Networking lunch

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Titles include
- Seamless Steel Tube and Pipe Market Tracker
- Welded Steel Tube and Pipe Market Tracker
- Five Year Outlook for the Global OCTG Market
- Five Year Outlook for the Large-diameter Linepipe Market

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We can customise a variety of options to suit your budget, objectives and aspirations, examples include:

- **Welcome Reception** – network and welcome potential clients with your branding prominent
- **Host a Delegate Lunch** – entertain a large number of existing and potential clients
- **Coffee Break Sponsor** – get your message across with high visibility branding
- **Delegate Bag Sponsor** – your company logo on the move for maximum effect
- **Brochure Distribution** – ensure your message is communicated to all the delegates

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The Steel Tube and Pipe exhibition area acts as the heart of the networking activity and provides the perfect opportunity to showcase your company, services and achievements whilst establishing business contacts and ensuring your clients know where to find you.

Exhibiting at the Steel Tube and Pipe Conference is an investment into your company’s future success; it will provide you with the ultimate tool to achieve your goals by delivering a targeted audience.

**As an exhibitor you will have the opportunity to:**
- Network and do business with industry decision makers
- Target new customers, build and reinforce relationships
- Create greater company exposure
- Showcase your products, services and achievements
- Launch a new company, service or product
- Increase your sales
- Attend the conference and improve your industry knowledge
- Relax and enjoy communicating with colleagues old and new at the evening receptions

FORTHCOMING EVENTS

**China Iron Ore Conference**
29 - 31 March 2010 - Beijing

**16th International Iron Ore Conference**
4 - 6 May 2010 - Prague

**5th Asian Stainless Steel Conference**
31 May - 2 June 2010 - Tianjin

**3rd North African Steel Conference**
8 - 10 June 2010 - Cairo

**9th International Stainless and Special Steel Summit**
7 - 9 September 2010 - Rome

For more information about those events please visit [www.metalbulletin.com/events](http://www.metalbulletin.com/events)
Metal Bulletin Events is pleased to announce its 5th Steel Tube and Pipe Conference. With detailed analysis of the carbon and stainless welded and seamless tube and pipe market, the event provides an excellent annual forum for producers, traders and procurement managers in the oil, gas, construction, automotive and mechanical engineering markets.

Meet your purchasing and sales counterparts, do new business and benefit from the latest market information.

“\textit{It is an excellent platform for knowledge sharing and networking. Apart from providing good market insight, some of the presentations were hugely informative specifically on technological developments}”

“\textit{Very useful to understand what is happening worldwide in the OCTG market}”

“\textit{Unique event for pipe manufacturers and technical service providers to network and exchange views.”}”

“\textit{Very professional with excellent focused content}”

**Reasons to attend:**

- Analyse the outlook for new projects – how many planned pipe mills will be completed?
- Keep abreast of producer strategies – what is the supply outlook for OCTG, line pipe, hollow structural sections, and precision seamless and precision welded pipe?
- Update on trade focus – what is the outlook for Chinese and Russian tube and pipe production, how much oversupply will there be and which products will be most affected?
- Understand the ramifications of the current market for tube and pipe distributors – what are the latest developments in end user markets?

**Delegate breakdown**

- 31% CEO/Chairman/Managing Director/Executive Director/Director
- 25% General Manager/Departmental Manager
- 32% Sales Director/Sales Manager/Marketing Director/Marketing Manager
- 4% Trader/Broker
- 8% Other

**Complimentary Bosphorus Cruise**

17th May 2010 • Time: 19:00 - 20:30

All conference delegates will be able to take a complimentary Bosphorus tour on the evening of 17 May.

Capture the excitement of the Bosphorus, the busy waterway that links the Black Sea with the Mediterranean and the historic meeting point of Europe and Asia. Encompassing Istanbul’s best loved sights, this Bosphorus sight-seeing cruise will provide insight into the many layers of history that have built up along the river.

Enjoy the timelessly majestic and elegant dome of the Hagia Sophia, the rococo façade of the Dolambahce Palace and the elegant Cirgan Palace, once home to Sultan Abdulaziz and now a grand hotel. Pass beneath the Bosphorus Bridge, one of the largest suspension bridges in the world.

Watch the sun set behind the domes and minarets of this historic city.

This is your perfect opportunity to relax and escape the city’s chaotic streets.

For more information and to register please visit [www.metalbulletin.com/events/stp](http://www.metalbulletin.com/events/stp)
### DELEGATE DETAILS

To register additional delegates please photocopy this form.

If your details above are incorrect please amend them here.

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Please indicate your three main metals interests in order of preference:

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What is your company’s main business activity?

Companies within the EU please quote your sales tax number:

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### 5th Steel Tube & Pipe Conference 2010

**REGISTRATION RATES**

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<th>Before 2 April</th>
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<td>Conference Fee</td>
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**FEE:** The fee includes attendance at all conference sessions, welcome receptions, lunches, and refreshment breaks.

**ACCOMMODATION:** The conference fee does not include hotel accommodation. An allocation of rooms has been reserved at the conference hotel. Delegates will be sent an accommodation booking form along with confirmation of registration. This form should be completed and returned to the hotel.

### METHODS OF PAYMENT

Please sign the form in order for registration to be processed.

Signature

Date

- [ ] To make a payment by credit card please visit [www.metalbulletin.com/events/stp](http://www.metalbulletin.com/events/stp)
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(Option only available before 17 April 2010)

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**IMPORTANT:** Please make sure you quote your full invoice number, details can be found on your invoice.

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**To register, or for further information, contact Roger Cooke:**

**Tel:** + 44 (0) 20 7779 8673  
**Fax:** + 44 (0) 20 7246 5200  
**Email:** rcooke@euromoneyplc.com  
**Online:** [www.metalbulletin.com/events/stp](http://www.metalbulletin.com/events/stp)

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**Venue information**

Intercontinental Hotel, Istanbul (Ceylan Istanbul)  
ASKER OCAGI CADASI NO. 1  
ISTANBUL 34435 • TURKEY  
Tel: +90-212-3684444  
Fax: +90-212-3684499

**Booking your accommodation**

Your registration fee does not include the hotel accommodation, a booking form will be emailed to you along with your confirmation.