



27th

International Ferro-alloys Conference

13-15 November 2011
Intercontinental Berlin, Germany

450 delegates
already registered

The world's largest and most influential gathering in the ferro-alloys marketplace

Register ONLINE
before 16 September
& **SAVE**
€300

NEW additions in Berlin 2011:

- **Ownership of the hotel** – a closed off environment for genuine deal making
- **Simultaneous seminar streams** – for you to plan around your networking
- **Networking facilities** – professional business lounge and games room
- **Junior miner show case**

“Great for networking.”

Quirios Produtos Quimicos, Brazil

Gold sponsor:



Bronze sponsor:



Media partner:



Supported by:



See inside for new additions and conference agenda

27th International Ferro-alloys Conference



Metal Bulletin Events' **27th International Ferro-alloys Conference (IFA)** will once again bring together the world of ferro-alloys under one roof in Berlin on 13-15 November. With over **1000 delegates expected**, this flagship event will again live up to its reputation as the event of the year for the industry. Do you trade, produce or use ferro-alloys? Then you cannot afford to miss out.

With enhanced networking opportunities, this conference is a genuine deal making environment. For the first time we are **taking over the entire hotel** – only registered delegates will be able to stay in the hotel which means even better opportunities to meet relevant companies. There will be a **professional business lounge**, and an area to hold discreet business meetings. A new games room has been created to provide delegates with an opportunity to network in an informal and relaxed environment.

The conference is being taken to another level this year as we are investing in a **more in-depth and flexible programme with simultaneous seminar streams**. The agenda will have significantly extended content, and will provide more on the market knowledge on all major ferro-alloys markets. This set up will ensure that the conference covers all major issues in the industry, and will secure an even better line up of speakers. Find out where the markets are headed, price forecasts and supply/demand trends.

Can you afford to miss out on these unrivalled networking opportunities?
We look forward to seeing you in Berlin.

Who should attend?

- Miners
- Ferro-alloys producers
- Ferro-alloys traders
- Steel mill ferro-alloys buyers
- Logistics service providers
- Finance providers
- Industry consultants
- Equipment providers

7 benefits of attending

- 1 Networking and genuine deal-making opportunities**
Over 1000 delegates expected
- 2 In-depth presentations from key industry decision makers**
Including producers, end users and traders
- 3 Simultaneous seminar streams**
More relevant content for you to plan your day
- 4 Keeping up-to-date with market developments**
The future of the industry will be discussed and decided in Berlin
- 5 For the first time we are taking over the entire hotel**
Only registered delegates will be able to stay in the hotel which means even better opportunities to meet relevant companies
- 6 For the first time we are providing a professional business lounge**
An area to hold discreet business meetings
- 7 New games room**
A fun environment has been created to provide a more relaxed networking atmosphere




Networking programme

Sunday 13 November

Pre-conference networking day:

- | | |
|-------|---|
| 14:00 | Registration desk opens: access to networking area with coffee and a complimentary bar open for the day |
| 14:00 | Free bar (2pm onwards) |
| 18:00 | Regional food will be available |

Monday 14 November

- | | |
|-------|---|
| 08.30 | Registration and coffee: coffee will be available all day |
| 12.30 | Networking lunch sponsored by  |
| 17.30 | Networking drinks reception |

Tuesday 15 November

- | | |
|-------|--|
| 08.30 | Registration and coffee: coffee will be served all day |
| 13.30 | Networking lunch |

Sponsorship & exhibition opportunities

Reach out to international decision makers and budget holders at the world's leading ferro-alloys conference

What's available?

Raise your company profile before, during and after the event using our unique sponsorship options. Sponsorship offers longevity and packages are tailored so that your company can gain exposure from the time of inception to the event itself.

Platinum, Gold, Silver & Bronze sponsorship packages are available, offering various degrees of exposure. We can customize a variety of options to suit your budget, objectives and aspirations. Examples include:

Pre-conference 'icebreaker' drinks reception

Network with and welcome potential clients with your branding prominent to several hundred professionals and partners, themed ideas welcome!

Networking drinks reception

Be at the forefront and mingle as the host after a business packed first day

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

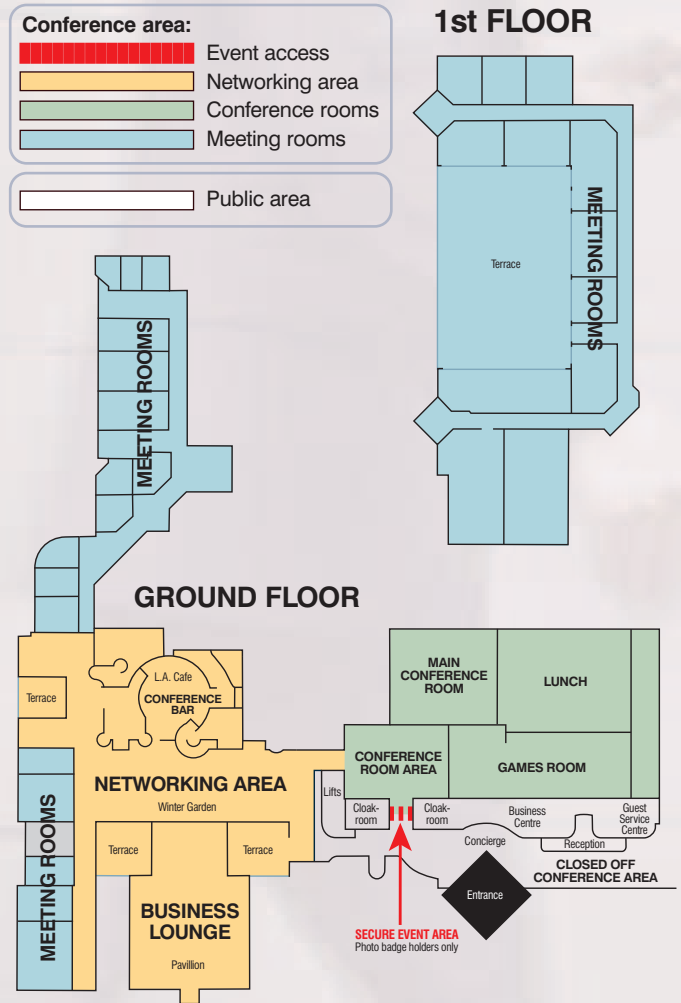
Ensure your message is communicated to all the delegates

Exhibition space

Showcase your company services & products whilst establishing business contacts

Conference layout

This year Metal Bulletin Events' 27th IFA Conference has ownership of the whole hotel, giving you more networking opportunities and meeting rooms available for hire. In order to access the hotel you will need your conference photo badge.



Meeting room packages



To enhance your networking capabilities we are providing you access to on-site meeting spaces with delegate pass bundles to keep all your meetings within the closed conference environment.

With savings available, the meeting rooms offer the most attractive and effective networking facility – hurry as only a few meeting rooms are available...

call **Dmitri Volodko**
on + 44 (0) 20 7779 8439
or email dvolodko@metalbulletin.com

10 person meeting room €1,000 per day

20 person meeting room €2,000 per day

Meeting room for 2 days
plus 5 delegate places €8,000

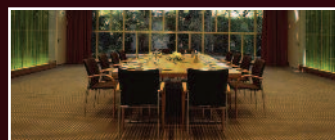
Discount: €4,000

Meeting room for 2 days
plus 10 delegate places €14,000

Discount: €8,000

Meeting for 2 days plus
20 delegate places €24,000

Discount: €18,000



Sunday 13 November 2011

14:00 Registration desk opens: access to networking area with coffee and a complimentary bar open for the day

18:00 Regional food will be available

Day One:

Monday 14 November 2011

08:00 Registration and coffee: coffee will be available all day

09:00 Opening of the plenary session

09:15 Shape of the Ferro-alloys markets – what has changed since we left off last year?

- Disappointment over the market's performance – who feels let down and why?
- Supply and demand balance, why is the market oversupplied?
- Is it a temporary issue or is it here to stay? How are producers responding to that challenge?
- How does it affect market dynamics and prices?
- How will it affect medium and small players, will there be a need for consolidation?
- Recent IPO's – what message does it send to the market?
- If the price of Ferro-alloys stay low, how will it affect investor relations and the environment for future deals?

09:45 China's economy and implications for the Ferro-alloys industry

- China's economy is slowing down but the steel demand keeps strong, for how long?
- Update on the WTO enquiry towards the export regulations, what will be China's response?
- Reviewing currency issues: how does the current Yuan influence the foreign exchange in Ferro-alloys markets
- China's production capacity: is there still place for investments?

10:15 Economic factors affecting the Industry

- Euro vs Asian vs USA perspective- who is going strong?
- Outlook on the economies and purchasing power, who is supported by strong currency?
- What is the driver for commodities demand in those regions? What impact will it have on the world markets
- How can it change in the future?

10:45 Networking coffee break

11:30 Steel demand and implications for the Ferro-alloys market

- Where is steel production growing and where did it slow down?
- What sectors is it growing strongly in, construction, automotive or others?
- What is the situation on the emerging markets? Are they still pushing ahead or slowing down
- Is steel production in the emerging markets enough to sustain the demand?
- How does it transfer to the Ferro-alloys demand? Can they sustain it by domestic production?

12:00 Stainless steel market – is it still shaping the Ferro-alloys industry?

- Where do we see a big growth in consumption? Is production growing at the same pace?
- Will China massively outgrow European and U.S producers?
- Does production spread evenly across applications?
- Is there a change in how stainless Steel producers are sourcing raw materials for stainless steel? What implications can it have on the Ferro-alloys producers?
- Why stainless steel producers are reluctant to invest in the raw material sources? How can it influence the market?

12:30 Networking lunch sponsored by



14:00 Specialist session: CHROME

Chairman's welcoming note: Overview of the Chrome market dynamics

14:20 Energy efficiency in the chrome smelting business – will it shape the future of the industry?

- Energy cost in the finished product price-how important is it?
- What do producers do to get competitive advantage? Is the trend to smelt closer to the mine?
- What is the efficiency level in the emerging markets?
- How the energy efficiency can affect the global structure of the industry?
- Carbon tax – how can it affect the market?

14:50 China's factor – what to look out for?

- Imports of chrome ore to China vs imports of alloys to China – what does it mean for the industry if it continues?
- Will China be interested in securing more chrome ore assets? If so where?
- Investing in autonomous resources or sourcing through agents? What will be the trend?
- Stainless Steel production in China, can it soon become a net exporter? What will be the response of the government?
- How can it affect the ferro-chrome markets worldwide?
- Stocks in Chinese ports, what is the material and who does it belong to?

15:30 Networking coffee break

16:00 Future of the Ferro-chrome business in South Africa – where do we stand?

- Why did producers in South Africa cut their production down? How did it influence the market balance?
- Will South Africa follow the steps of Zimbabwe and introduce exports quotas on chrome –ore soon?
- What will be the future of the regulations over beneficiation of ore?
- Future investments in South Africa- will political concerns prevent the growth?
- Will the growth in UG2 continue? How does it influence the situation in the primary market?

16:30 Executives' panel discussion: Prices and future supply/demand balance

- What were the challenges in the chrome business in the past year and what were the disappointments?
- Current prices for chrome-ore and ferro-chrome, was there a cost push?
- What price can the market bear? How will it affect price margins? Where will the price settle and who will decide it?
- What is the availability of stainless scrap and how does it affect current prices?
- Contracts management, what will be the benchmark for prices? Will Europe follow the spot market trends coming out of China?
- Producers in South Africa and Turkey have cut their production. Why is demand for chrome going down? How did nickel prices affect it?
- Where will Ferro-chrome come from in the future? What will be the future of Kazakhstan & Zimbabwe as an alternative to South Africa?

17:30 Networking drinks reception

14:00 Specialist session: NICKEL

Chairman's welcoming note: Is the outlook for Nickel still unclear?

14:20 Stainless steel demand – where does it place Nickel?

- Will the extremely high demand from last year be sustained? Can it reverse in Europe?

- Will big producers of stainless steel split off their stainless operations from the carbon business?
- Will they relocate their operations to Asia as export there is no longer viable?
- How fragmentation of the market could potentially hit the prices of nickel?
- What will happen to the cost of coke and oil? How will it affect nickel producers?

15:00 **New projects in the pipeline- can we expect new capacities soon in the current market situation?**

- At the current nickel prices, will the projects still come on line?
- Is the growth in demand for nickel expected? Will it be sustained by the new projects?
- South East Asia as a new hub for Nickel?

15:30 **Networking coffee break**

16:00 **Chinese hunger for Nickel – how does it influence global markets?**

- Will the growth in Chinese economy and industries continue?
- Nickel pig iron in China, does China has a problem with sourcing Ferro-nickel?
- What impact does it have on the final products price? How can it affect stainless steel prices in Europe?
- Can you produce the same quality stainless steel using NPI?
- Will this trend continue and how can it impact global nickel prices in the long run?

16:30 **Executives' panel discussion: Prices and future supply/demand balance**

- Prices of nickel were supported by Hedge Funds, how did that influence the market and the prices?
- What is the scrap availability and how did it affect primary producers and supplies?
- Coke and ore costs-what role does it play in the current prices?
- Is demand from aerospace applications still going strong?
- The start up of Nickel ETF – what impact will it have on the availability of material and prices?

17:30 **Chairman's closing remarks and Drinks reception**

14:00 **Specialist session: MOLYBDENUM & VANADIUM**

Chairman's welcoming note: What will drive these markets forward?

14:20 **New applications for Moly: Nuclear plants**

- How does it work and where comes the demand for Moly?
- How big a market can it potentially be? Who is likely to supply it?

14:50 **Executives' panel discussion: Prices and future supply/demand balance of Moly**

- Is there new production coming on line?
- Will Copper mines continue to mushroom? What impact will it have on Moly output?
- Will domestic demand for Moly in China continue to grow? With no endless supplies how will the government address this issue?
- Exports from China have been going down, what impact will it have on the world markets and prices?
- Will it shift the balance towards producers in US and Chile?
- Why even when consumption was going up have the prices been going sideways?
- Why the market was imbalanced? What implications can it have in the long run?
- When will consumption outgrow production and what price pressure will it present?
- What will be the steel consumption and how will it relate to moly consumption
- Moly trading on the LME, how did it affect the market in the past year?

15:45 **Networking coffee break**

16:15 **Vanadium applications in energy storage batteries**

- Power storage batteries- how big is that market and where is it likely to grow?
- What are the main drivers for using vanadium lead batteries as a power bank?
- What will be the implications for the prices of Ferro-vanadium?

16:45 **Executives' panel discussion: Prices and future supply/demand balance of Vanadium**

- Demand from the steel production- in which applications did we see growth?
- HSL steel- what was consumption rate depending on the region?
- What is demand for vanadium in construction steel in China?
- New regulation on the horizon: rebar grade 3 to replace grade 2. How will it influence vanadium market in China?
- What will be the quality and quantity of vanadium from China? What will be the new capacities and how quickly will they go ahead?
- Will China stop exporting Vanadium and become neutral? How can it influence the export quotas?
- Vanadium and rare earths- will they continue to be considered as one? What affect will it have on quotas?

17:30 **Chairman's closing remarks and Drinks reception**

14:00 **Specialist session: COBALT**

Chairman's welcoming note: Overview of the market's dynamics, will cobalt bounce off the ground?

- What dictated the market's performance in the past year?
- What can we expect in the year to come? Will cobalt follow other Ferro-alloys markets or set off in the new direction?

14:30 **Cobalt as a conflict material**

- What are the latest legislations referring to cobalt as a conflict commodity?
- What implications does it have on the producers and end users? Can it affect the prices?
- Certification process, what can be done to reduce negative impact?

15:00 **Cobalt trading on LME – how did it influence the prices?**

- Update on LME pricing and warehousing mechanism
- View of the market from the LME perspective, what are the current market conditions?
- How did the LME contracts go down in Asian circles and did it have impact on prices in the region?

15:30 **Networking coffee break**

16:00 **Potential for cobalt in aerospace applications**

- What is the main usage of cobalt in the high temperature applications?
- Is there any alternative to cobalt in aerospace material?
- Will this market continue to grow and what prospects does it bring for cobalt producers?

16:30 **Executives' panel discussion: Current cobalt prices – what are the implications for the industry?**

- Under or Oversupply where does the trend go?
- What will be the effect on smelters and miners, will production move closer to China?
- Is cobalt the next big thing for Chinese investments in Africa?
- Cobalt as a by-product, what is the output available?
- Nickel prices and its affect on the cobalt
- What is the potential for the expansion? Will new project come on line soon?

17:30 **Chairman's closing remarks and Drinks reception**

Day Two:

Tuesday 15 November 2011

08:30 **Registration and coffee: coffee will be served all day**

09:00 **Opening of the plenary session: JUNIOR MINERS SHOWCASE**

In the current economical climate with prices going down will the new start ups still be going ahead? Overview of the new projects development in all major ferro-alloys markets:

Chrome, Manganese, Nickel, Silicon, Molybdenum, Cobalt, Tungsten, Vanadium

10:30 **Networking coffee break**

11:00 **Specialist session: MANGANESE**

Chairman's welcoming note: Global outlook for the Manganese industry – where is the market heading?

11:15 **Global steel production – what are the implications for the raw materials and manganese suppliers?**

- Is the shift away from manganese metal used in high grade steel production still underway? Will it continue and if so where?
- What is happening in Europe? Which applications of carbon steel are being pushed in Western Europe?
- What applications are being pushed in Asia and Southern and Eastern Europe?
- What happened to the US, European and Japanese steel production after the economic crisis?
- How much capacity was permanently lost, will it continue to go down or recover?
- Intensity of manganese used in steel making, what issues play part when deciding? What will be the trend?

11:45 **China's ports inventories and crude steel demand – what is the current situation?**

- Are they planning to sell it or are they planning to keep it?
- Whose material is it-producers, traders, end users?
- What quality of ore is it and where does it come from?
- How can it potentially influence the market and prices?
- Outlook at China's crude steel demand and how does it transfer to its Ferro-manganese suppliers? If there is a steel capacity there, why is the ferro-alloys market suffering?
- What does it mean for the domestic production of ore and alloys?
- Is China interested in investment opportunities in manganese ore because of lack of high grade ore? Where are they looking to invest?
- Will China become a net importer of Ferro-manganese?

12:15 **REACH Update and Worldwide Regulatory Creep**

- How REACH will be enforced and what actions can be taken against those European producers that will not comply?
- Are other countries outside of the European zone like China, Japan or Mexico looking to impose similar sorts of regulations?
- How that could potentially influence the market of Manganese in the future

12:35 **Executives' panel discussion: Supply/demand balance and environmental concerns in the manganese industry**

- Why did the prices not go up when output was being reduced?
- Are producers still consolidating and expanding? Is the market healthy enough to do that?
- Is it a viable scenario for Europe? Is China doing it?
- If China steel production slows down how will it affect demand for ore? How will it influence global markets?
- Recent WTO ruling criticising China over export quotas on manganese – is there a potential for change?

- Is India a new China? Will Indian's fast consumption of steel make them an importer of steel in the future?
- How do Indian ore exports affect supplies and prices worldwide?
- Cost competitiveness of the European and Asian producers, what are the costs of energy in smelting? How does it compare to the prices of the material?
- Environmental concerns and its affect on the energy prices.
- Will the restrictions get tighter? How will it affect the market?
- Electrolytic manganese alloy and the environment, what is the story going forward?
- Will it move towards Africa or will it stop all together?
- What is the availability of manganese ore? Are new projects coming on line, how will the current prices and political situation influence the new miners going on stream?

13:30 **Chairman's closing remarks and networking lunch**

11:00 **Specialist session: SILICON**

Chairman's welcoming note: Will the market for Ferro-silicon keep moving slowly?

11:20 **Silicon application in the photovoltaics – is the future bright?**

- What is the global demand for polysilicon used in solar applications?
- What role will crystalline silicon solar cells play in the PV technologies?
- How much material will be needed for this market in the future and how can it affect the overall global supplies of silicon?

11:50 **Ferro-silicon-aluminium and its usage – new player on the market**

- What are the qualities of the material and how much silicon is used to produce it?
- What markets will it serve? Who is likely to supply them?
- How will it affect mature markets? Can it be a game changer?

12:20 **Update on the cost of raw materials in the production of ferro-silicon**

- Cost of power supplies- where did the prices of energy stay the same and where did they shift?
- Is the price for Blue Coke still moving up? What level will it settle on?
- How will it affect ferro-silicon prices?

12:45 **Executives' panel discussion: Supply/demand balance and the outlook for new players in the market**

- Update on the major Ferro-silicon producers situation, is China still leading production?
- Will China invest in more capacity outside and if so where?
- WTO's ruling over Chinese export quotas on silicon metal-what will be their response?
- Have output in Europe, Russia and Brazil stayed the same?
- What are the trade patterns? Who is supplying which markets and is it likely to change?
- What is the global crude steel output at the moment and how is it likely to affect ferro-silicon producers?

13:30 **Networking lunch**

11:00 **Specialist session: MINOR METALS & RARE EARTHS**

Chairman's welcoming note: Changing applications and shrinking supplies-what is the future of the industry?

11:15 **Overview of the Niobium market – expansion projects in the pipeline**

- What applications are being developed at the moment in Niobium?

- What is the supply/demand balance in the market, is there enough capacity to sustain steel applications?
- Where are the new projects being developed and which markets will they serve

11:45 **Indium and Selenium – from applications to supplies**

- Application in solar cells – are producers adapting effectively?
- Demand from the solar industry- can producers follow up with the current capacities?
- Potential opportunities for the producers and impact on the global supplies?
- Chinese supplies of Indium and Selenium, how much material is leaving the country?
- Who is likely to take it? Why Japanese producers are less likely to buy Chinese materials?

12:15 **Tantalum and the conflict commodities regulation- how does it really affect the industry?**

- What is the legislative framework surrounding that topic, what changed in the past year?
- Is there potential for undersupply? How will it work with regulation barrier?
- What effect has the current legal situation had on tantalum prices?

12:45 **Executives' panel discussion: Chinese control over rare earth's market**

- Mining tax in China – how did it effect the production of rare earths?
- What effect on prices will the tight supply from China have?
- Export quota restrictions and consolidation in Inner Mongolia- how did it change the structure of the industry?
- Is recycling of rare earths a way to challenge China's control over the market?
- Current export quotas- can Europe feel disappointed?
- Will the recent WTO ruling over export quotas of key raw materials bring potential for change?

13:30 **Networking lunch**

11:00 **Specialist session:
TUNGSTEN**

Chairman's welcoming note: Demand and supply drivers assessed

11:20 **Tungsten as a conflict mineral – update on the SEC regulation**

- Who is responsible for tracking the origins of the material? What about scrap?
- How much will it cost for the producers to comply with the new regulations?
- What implications could it have on the market and prices?

11:50 **Market for tungsten in China – will it continue to dominate?**

- Why the market in China has exploded in recent years?
- Where does demand come from? Is it still mainly carbide tools?
- Is China looking to increase tungsten quantities used in steel tools?
- Export quotas in China are going down, will it continue?
- Illegally transported Ferro-tungsten from China. How does it affect the market? Will the Government react?

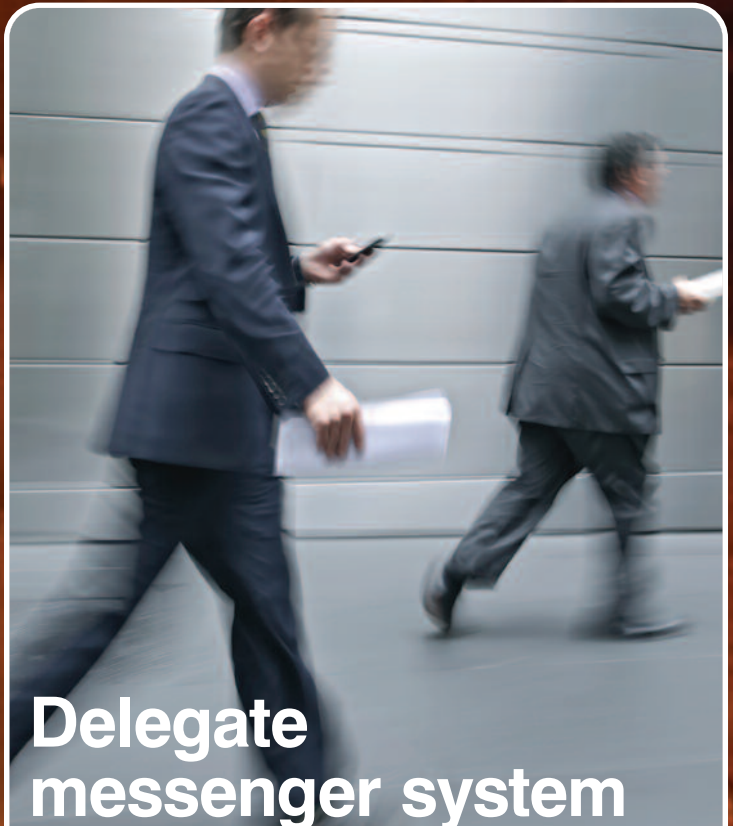
12:20 **New applications for tungsten in cellular phones and LCD screens**

- How tungsten fits in this market? Can it be easily substituted?
- What is the potential for tungsten suppliers?
- What challenges can it bring to the overall global supply?

12:50 **Executives 'panel discussion:
Looking out for new supplies**

- Are we looking at a deficit in tungsten any time soon? Will the shortages get bigger?
- Is comparison to the rare earths situation accurate?
- Can we expect new production facilities coming on line?
- How long will the prices be down and how will it affect new projects coming on line?

13:30 **Networking lunch**



Delegate messenger system

Networking Opportunities – would you like to be able to communicate with other delegates before the event?

You can! Our unique Delegate Messenger System gives you the chance to speak to other registered delegates one month prior to the event. This is an ideal opportunity to set up important business meetings at the event.

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A closed conference environment

Ownership of the hotel and only photo badge holders will be allowed access

