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20th Zinc & its Markets Seminar

9-11 May 2016

Madrid Hesperia Hotel, Spain

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The opportunity to visit either Técnicas Reunidas to hear about the latest R&D in hydrometallurgy and mineral processing, or Glencore Asturiana, one of the world's biggest zinc smelters



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20th Zinc & its Markets Seminar

The zinc market is a state of flux, and getting a clear picture of where it is headed requires in-depth debate and analysis. Metal Bulletin's Zinc & its Market Seminar has been providing just that for several decades now. Sign up now for the 2016 conference in Madrid to hear the latest on zinc market drivers and network with over 160 key industry executives from around the globe.

With demand having risen only slightly in 2015 and LME prices at a seven-year low, the much talked-of bull market in zinc seems like a distant memory. There are many positive supply pointers for zinc with mine closures and producer cutbacks reining in concentrate availability, but as with other commodities today, the focus is very much on demand. Will economic transition in China dampen or boost the outlook? Will galvanizing and other end-uses be able to soak up supply and some of the stock overhang? And what will all this mean for prices and premiums?

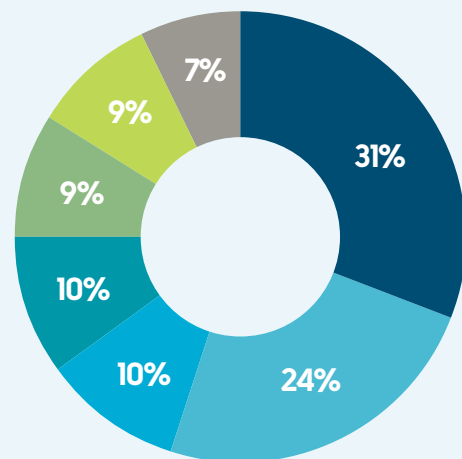
"An interesting and informative view from a variety of different zinc markets."

Henry Wilkinson, Trader, FBM Metals UK Ltd

"Great opportunity for networking... and to share professional knowledge."

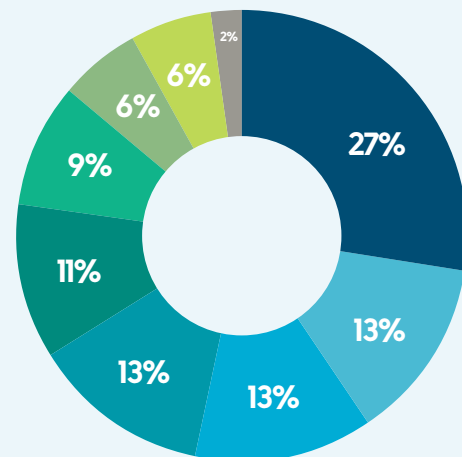
Daniel Suter, Business Unit Director, Impag AG

Attendees in 2015 by job title:



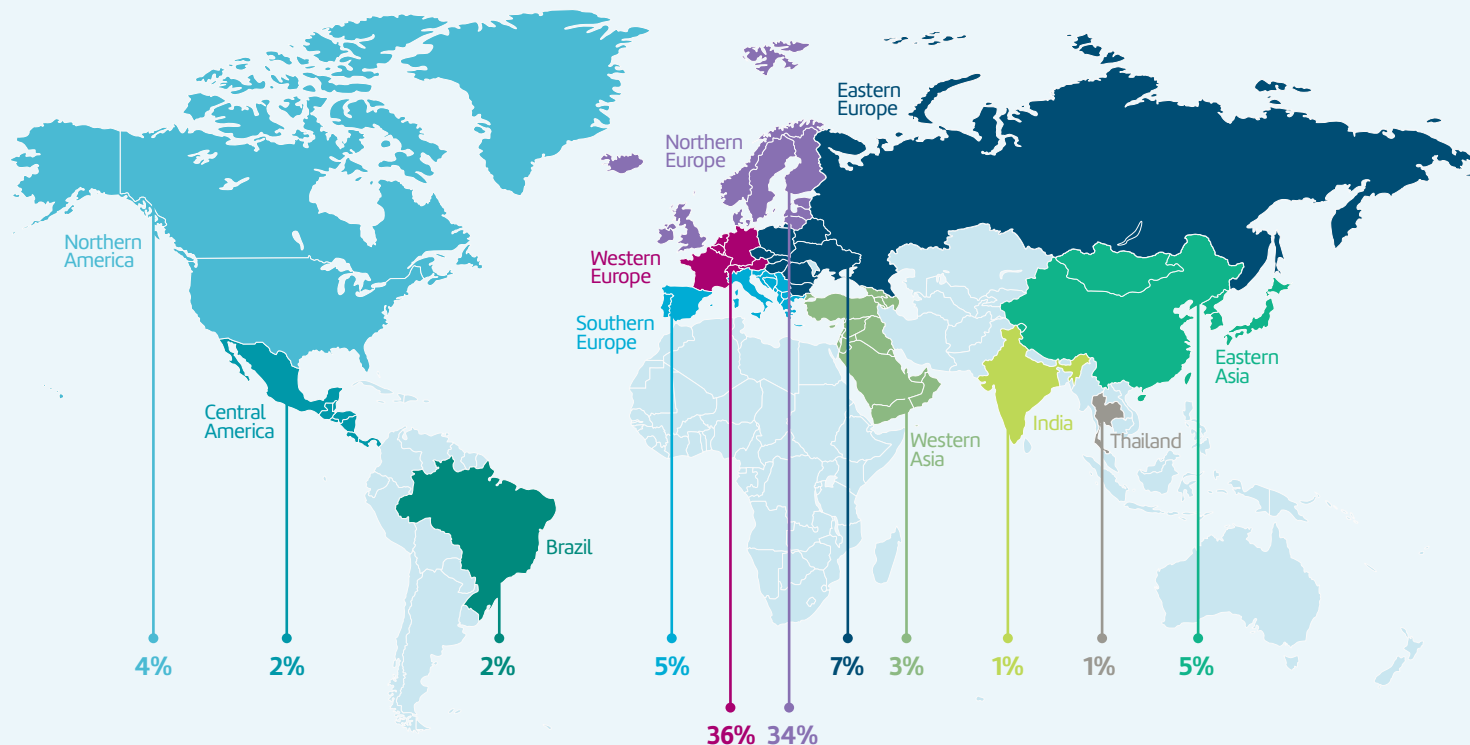
- CEO/Chairman/Director/President/Managing Director
- Analyst/Consultant/Advisor/Researcher
- Sales/Marketing/Business Development/Commercial Manager
- Head of Department or Region
- Trader
- Other
- Purchasing/Procurement

Attendees in 2015 by industry sector:



- Downstream/Fabricator/Consumer
- Recycler
- Integrated Miner-Smelter
- Banker/Broker
- Technology/Consulting
- Logistics
- Other
- Smelter

Attendees in 2015 by region:



Companies who attended in 2015:

- Ace Group
- Alex Stewart (Inspection) Estonia LLC
- Allgemeine Gold- und Silberscheideanstalt
- Antwerp Commodity Services
- ArcelorMittal Automotive Europe
- Bank of America Merrill Lynch
- Befesa Zinc
- Binani Zinc Ltd
- Blenheim Capital Management LLC
- BMO Capital Markets
- Boliden
- Boliden Smelters
- Bolmet SA
- C.Steinweg Belgium NV
- China Minmetals Nonferrous Metals Co Ltd
- CHR Metals
- CMI Industry
- DK Recycling und Roheisen GmbH
- Dynacast Europe
- European General Galvanizers Association
- Euroports Inland Terminals
- Fastmarkets Ltd
- FBM Metals (UK) Ltd
- Flaurea Chemicals SA
- Glencore International AG
- Global Chemical Co Ltd
- Global Steel Dust Ltd
- Goldman Sachs International
- Grillo-Werke AG
- Halcor SA
- Huta Cynku Miasteczko Slaskie SA
- Hydrometal SA
- Impag Ag
- IMR Metal Powder Technologies
- International Lead & Zinc Study Group
- International Zinc Association
- Itochu Corporation
- Jean Goldschmidt International SA
- JP Morgan
- KCM AD
- KME Italy
- L Bruggemann KG
- London Metal Exchange
- Macquarie Group Limited
- Marzinc Marmara Recovery
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- Metalsider2 Spa
- Mimeta SA
- NBIM
- NFM Alloyz
- Nizi International SA
- Noble Resources UK Ltd
- Nyrstar Sales & Marketing AG
- Ocean Partners UK Limited
- Oddo & Cie
- Outotec Oyj
- Pacorini Metals
- Paul Weil Company
- Recytech
- Resource Capital Funds
- Rezinal
- Schenck Process UK Ltd
- Societe Generale Corporate & Investment
- Sorin Corporation
- SSAB Europe Oy
- Standard Chartered
- Stebbins Engineering
- Sudamin Rohstoff GmbH
- Tata Steel Limited
- Tecnicas Reunidas SA
- The Brock Metal Company Ltd
- ThyssenKrupp Metallurgical Products GmbH
- Traxys Europe SA
- Umicore Zinc Chemicals
- United Metals Enterprise Co Ltd
- US Zinc
- voestalpine Rohstoffbeschaffung
- Votorantim GmbH
- Wedge Group Galvanizing Ltd
- Wilhelm Grillo Handelsges. mbH
- Wood Mackenzie Ltd
- Zaklady Gorniczo Hutnicze Boleslaw
- Zinc Nacional SA
- Zinq Voigt & Schweitzer
- ZM Silesia SA

Provisional programme

Monday 9 May

12:00 **Optional visit to Técnicas Reunidas**

18:00 **Seminar welcome reception**

Day one: Tuesday 10 May

08:00 **Registration desk opens**

09:00 **Opening remarks**

09:15 **Welcome address**

Keynote session:

09:35 **Senior zinc executives examine and discuss global industry challenge and strategy**

- Are analyst predictions that zinc has the best base metal fundamentals in 2016 living up to expectations?
- After almost flat demand growth in 2015, will we see an improvement in global usage this year?
- Economic transition in China – what will this mean for industry balances there – and for global industry health?
- Should we be concerned about the ability to maintain a steady concentrate pipeline in the current price and project financing environment?
- What role will recycling and secondary sources play in future supply scenarios?
- Integration and/or diversification: structural change in the mining and smelting segments
- What are zinc's greatest technological challenges – and are they being driven by balance sheet, quality or environmental imperatives?

10:50 **Refreshment break sponsored by** **GLENCORE**

Session II: Dissecting demand – is it strong enough to provide support?

11:30 **Getting a handle on global demand growth prospects**

- The macroeconomic outlook and implications for demand
- How much will slower growth in China impact on the overall demand picture?
- Can new uses provide impetus for growth in the more mature markets?
- What of emerging market demand – is a real surge in usage still somewhere in the distance?

12:00 **Consumption outlook in the world's biggest marketplace**

- What will the “new normal” mean for industrial and economic development in China?
- How will this impact on the steel industry – zinc's biggest customer?
- Will galvanized steel usage outstrip overall steel growth rates?
- What of oxide, alloys, brass etc – are these struggling to maintain their market share?

12:30 **Steel industry dynamics – do they augur well for zinc demand?**

- Have we seen the worst of the global steel slump? What regional trends are evident?
- How is coated and galvanized sheet faring within the overall picture?
- Will the battle for automotive sheet have significant implications for zinc?
- Will lower zinc prices encourage more galvanized products?
- Looking down the lens – where will the next surge in galv demand come from longer-term?

13:00 **Lunch sponsored by**



Session III: Mine-side dynamics and the concentrate-smelter balance

14:30 **Examining the mine supply pipeline post Century and other curtailments**

- Cutbacks and closures – how much of an impact are they having as we move through 2016 and beyond?
- At current prices are miners still making money – and can we expect further retrenchment?
- Where will new production come from to meet the next pick-up in demand?
- Can the mine base respond as quickly as it did in the last bull market given limited resource financing?
- Will we see a widening of TC spreads over the longer term reflecting greater raw material complexity?

15:00 **Chinese zinc growth – assessing the outlook for domestic production and the import-export balance**

- Will China continue to ramp up mine capacity at home?
- Capacity investment and utilisation in the zinc smelting business
- Will the surge in concentrate imports over metal in 2015 become a pattern?
- How profitable is the country's production base at current metal prices?

15:30 **Peruvian production – leading the way in Latin American mine supply?**

- After an increase of over 10% last year, has Peruvian mine growth stumbled on cost hurdles?
- What expansions and investments are planned and when? Have they got the finance in place?
- What more can the country offer in terms of zinc geology and reserves?
- Markets for Peruvian zinc concs – at home and abroad

16:00 **Refreshment break sponsored by** **GLENCORE**

Session IV: Has the bull market story disappeared – or merely been deferred?

16:30 The Markets Panel – the experts share and compare views

- Dubbed as the base metal with the most upside potential – will zinc make its mark in 2016 or 2017?
- Is the story now one of demand and the need to mop up the stocks?
- How important is China to the overall supply-demand equation – and market strength?
- Beyond China, what else will determine demand levels in 2016?
- Which regions or end-uses could potentially show strong increases in the next 12-18 months?
- How are global inventories – both on and off warrant – affecting prices and premiums?
- Has stock financing as a money earner lost its lustre?
- On the raw materials side, who now holds the balance of power – miners or smelters?
- Have the mine closures and cutbacks come soon enough to impact on 2016 TCs or will the main effect be next year?

17:45 Close of Day 1 and informal networking drinks

Day two: Wednesday 11 May

08:30 Registration desk opens

09:00 Opening remarks

Session V: New directions in smelting and recycling

09:10 Converting raw materials and market challenges into opportunities in primary zinc smelting

- As Century and others close what type of concentrate will replace these more conventional feeds?
- What can primary smelters do to address the issues of concentrate complexity and impurities?
- Optimising the value of by-products in the feed – as well as minimising waste flows
- How important is having vertically or horizontally integrated operations?

09:40 Pushing the boundaries of secondary feeds in primary smelting

- With standard technology and processes, what is the typical percentage of secondary oxides in smelter feedstock?
- What options are there for increasing this throughput in brownfield operations?
- What technical hurdles must be overcome in terms of impurities, halogens, etc?
- What energy and other costs savings can be made through enhanced secondary feed?

10:10 The growth business that is EAF recycling – drivers, feeds, processes and products

- How much more can potentially come from the recycling of steel industry waste?
- Legislation as a driver for EAF dust optimisation – how does this vary from region to region and country to country?
- In what form is zinc being recovered from EAF dust and what are the value-added options when it comes to saleable product?
- What are the main technical, logistical and operational challenges for an EAF recycler?

10:40 Refreshment break

Session VI: Global trends in galvanizing and other applications – what implications for zinc suppliers?

11:10 General galvanizing – addressing market drivers and demand dynamics?

- What sort of demand outlook is being seen in construction, infrastructure, engineering and other sectors?
- Have lower prices for zinc led to increased interest in galv rather than paints or other coatings?
- Has the batch galvanizing sector done all it can to raise efficiencies while maintaining product quality?

11:35 Zinc usage in the brass rod and related industry sectors

- What are the main brass types and alloy content?
- Are the higher-zinc brasses seeing market growth?
- Scrap versus primary metals – what drives purchasing decisions for brass semis producers?
- How is zinc priced in the final product?

12:00 The market for zinc sheet – on the up or under pressure?

- How big is the zinc sheet market, where is it produced and used?
- How well is zinc sheet faring in construction applications such as roofing, facades and downpipes?
- Are there any other decorative or industrial uses for zinc sheet that are gaining ground?

12:25 The role of zinc in renewable and grid-scale energy storage

- Who needs low-cost and efficient storage and for what applications?
- Developing large-scale batteries that respond to the need for a cleaner, more efficient energy mix
- Materials choices in battery technology: which can provide a robust, scalable solution?

12:50 Close and lunch

16:00 Depart on optional visit to Glencore Asturiana

Optional field trips

Tecnicas Reunidas Technology Centre

9 May 2016

The Technology Centre of Tecnicas Reunidas is home to the processes that made possible zinc refineries such as Mooresboro (Horsehead), Portovesme (Glencore-Xstrata), Iijima-Akita (Dowa) and Skorpion (Vedanta). The field trip will give the visitor the chance to see the infrastructures required for the development of new processes in the hydrometallurgy industry, starting with initial research and reaching demonstration and commercial implementation.

Delegates will take a 30-minute bus ride from the hotel to the Technology Centre,

which is located nearby Madrid Barajas airport. The visit will show Tecnicas Reunidas facilities for R&D, Engineering and Analysis, which include laboratories and pilot and demonstration plants, as well as the exhibition area. After the visit and a light lunch hosted by Tecnicas Reunidas, delegates will return to the hotel in time for the Seminar welcome reception.

Note: Upon registering for the Seminar delegates will receive more information on how to book onto the visit.



Provisional itinerary

- 12:00 Departure from Seminar hotel
- 13:00 Lunch provided by Tecnicas Reunidas
- 13:45 Health and Safety
- 14:00 Presentation
- 14:30 Visit of R&D Facilities
- 15:30 Q&A, coffee and farewell
- 16:15 Arrival at Seminar hotel

Glencore Asturiana Zinc Smelter

11-12 May 2016

Glencore Asturiana is one of the largest single-site zinc smelters in the world with a saleable zinc capacity of 492,000 tpy. Located in northern Spain in the port of San Juan de Nieva, it is also one of the world's lowest cost operations, its production range including zinc ingots, galvanizing products and die-casting alloys. Delegates will fly from Madrid to Aviles on the evening of May 11, for an overnight stay in a local hotel with dinner hosted by Glencore Asturiana. The following morning they will make

the short journey to the smelter where they will tour the roasting and leaching plants, tankhouse and melting and casting facilities. After a light lunch they will depart for Asturias-Oviedo airport for onward flights home.

Note: Participation in the visit is at the discretion of Glencore Asturiana and will be limited to two persons per company. Upon registration for the Seminar you will be sent more information on how to book onto the field trip.



Provisional itinerary

Wednesday 11 May

- 16.00 Depart Madrid
- 20.10 Arrive Aviles for dinner and overnight stay

Thursday 12 May

- 09.00 Arrive smelter for introduction and tour
- 14.00 Depart for Asturias-Oviedo airport

Sponsorship and exhibition opportunities



Showcase your company, **increase** your brand awareness and **enhance** your networking opportunities by becoming a sponsor of the 20th Zinc and its Markets Seminar. Sponsorship opportunities developed by Metal Bulletin Events have become **essential tools** for organisations in fulfilling their marketing objectives. There are a range of sponsorship opportunities which will enable your company to raise your brand profile, before and at the event, as well as highlighting your company to an audience of senior executives and key decision-makers from across the sector.

Book early to guarantee your place and ensure the best location

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For sponsorship and exhibition opportunities please contact:

Charles Osborne

Tel: +44 (0) 20 7779 8109

Email: cosborne@metalbulletin.com

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REGISTRATION RATES

Package	Price	Saving
SUPER EARLY BIRD OFFER until 5 February	£1,199 <input type="checkbox"/>	£400
EARLY BIRD OFFER until 23 March	£1,399 <input type="checkbox"/>	£200
FULL PRICE after 23 March	£1,599 <input type="checkbox"/>	

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What is your company's main business activity:

***Delegates must provide their unique email address in order to receive booking confirmation and access to the delegate messenger system.**

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- ☐ **I would like to pay by bank transfer.**
Option only available before 11 April 2016

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