

ENGAGE 2.0

The Virtual Connect : Webinar Series

07-11th Mar' 2022



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What is **ENGAGE**?

ENGAGE 2.0 is a 5 day webinar series to be held from 07-11th March 2022.

The global steel industry dynamics are evolving rapidly with industry prioritising decarbonisation as the way forward through current disruptions.

Our endeavour is to discuss the changing market dynamics of finish steel and raw material to facilitate decision making.



Sessions



Minutes of Knowledge
Sharing



Speakers



Industry Verticals

Coal

Impact of Coking Coal Prices on Global Steel Industry

- ✓ Impact of Steel Output Curbs in China
- ✓ Asia Pacific Demand Driving Global Market
- ✓ How Could High Prices Impact the Global Steel Industry?
- ✓ Decarbonisation and the Future of Met Coal



10th Mar'22
04:45 - 05:30 PM IST

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Speakers



Mr Steven Vercammen
Senior Expert, McKinsey
& Company, Belgium



Mr Friso De Clercq
Solution Expert, McKinsey
& Company, Belgium

**McKinsey
& Company**



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Coal

Will Global Thermal Coal Prices Stabilize in 2022?

- ✓ Indonesia's Domestic Supply Concerns and Coal Exports in 2022
- ✓ Logistical Bottlenecks in South Africa Likely to Pressure Supplies
- ✓ Decline in High-Grade Coal Production in Australia
- ✓ Will Environmental Restrictions Further Impact China's Domestic Coal Supplies?



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03:30 - 04:15 PM IST

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Speaker



Mr Siddharth Choudhary

Head, Thermal Coal
(Mena & Indian Ocean)
Trafigura, UAE


TRAFIGURA



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Coal

Emerging Trends in Met Coke Trade Dynamics

- ✓ China's Emissions Targets, Rising Scrap use and Coke Exports
- ✓ India: Growing Demand, Rising Import Costs
- ✓ Pivot to Asia and Emerging Met Coke Trade Dynamics
- ✓ Carbon Prices in Europe and the Road Ahead



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Mr Om Jalan

Managing Director,
Bengal Energy, Kolkata, India





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Iron Ore

Developments in Indian Mineral Policies & Way Forward

- ✓ How have Recent Changes in Mmdr Amendment Act Benefitted India's Mining Industry?
- ✓ Changing Market Dynamics Post Mine Block Auctions
- ✓ Recent Developments on Nmi



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Iron Ore

Growing Importance of Pellet Feed in India's Steelmaking

- ✓ Increasing Pellet Capacities in India
- ✓ Benefits Over Sinter Usage
- ✓ Massive Push for Decarbonization & Green Steel
- ✓ Outlook of Indian Pellet Industry



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Mr U. S. Ramachandra Raju
Head, Pellet Plant Operations,
Odisha Asset, AM/NS India

**AM/NS
INDIA**



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Iron Ore

Indian Iron Ore Production Scenario - Outlook CY'22

- ✓ Indian Iron Ore Production Scenario - Pre & Post Mine Block Auctions
- ✓ Production Ramp-up Plans of Key Miners
- ✓ India's Iron Ore Production Outlook - 2022



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Scrap & Recycling

India's Scrap Generation from ELV in Next 5 yrs?

- ✓ India Scrap Consumption Index
- ✓ New Upcoming Facility of Recycling?



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Speaker



Mr Sachin Shetty
Managing Partner,
Quesrow Consulting, India



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Scrap & Recycling

Global Ferrous Scrap Price Outlook in Near Term

- ✓ Energy Price
- ✓ Freight
- ✓ Container Availability
- ✓ Demand Pattern Asia
- ✓ India Scrap Import Fading Slowly Almost 3.5 from Earlier 6 mnt



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Mr Sanjoy Ghosh

Head of Supply Chain,
BSRM, Bangladesh





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Scrap & Recycling

Change in Global Ferrous Scrap Trade Flow

- ✓ Export Ban
- ✓ Self Consumption
- ✓ Carbon Emission
- ✓ BF/EF/IF Share
- ✓ China Import



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Scrap & Recycling

Tokyo Steel's Strategy on the Dynamism of Global Scrap Flow

- ✓ Japanese Ferrous Scrap Market Overview - Generation, Consumption & Exports
- ✓ Impact of the Lifting of Chinese Ban on Scrap Imports
- ✓ Strategy of Key Mills on Changing Global Ferrous Scrap Trade Flows



09th Mar'22
11:00 - 11:45 AM IST

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Speaker



Mr Gaku Ito
General Manager, Sales
Tokyo Steel, Japan



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Steel

The Indian Steel Market Outlook in H1 FY'23

- ✓ Current Dynamics of Steel Market – Supply & Demand
- ✓ Strategy to Cope with Unknown Raw Material Prices – are Current Price Levels Sustainable?
- ✓ Export Allocations by Indian Mills in Next Few Months
- ✓ Situation of Steel Inventories in the System
- ✓ Upcoming Steel Capacity and its Impact on the Market



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01:00 - 01:45 PM IST

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Mr Alain Legrix de La Salle

Director and VP,
Sales and Marketing,
AMNS India and VP at
ArcelorMittal

**AM/NS
INDIA**



Steel

Indian Steel Pipes and Tubes Market Outlook - H1 FY'23

- ✓ Demand Drivers for Structural Steel Pipes & Tubes in H1 FY'23
- ✓ Steel Pipes Usage in Construction and Infrastructure
- ✓ Strategy to Cope with Unknown Raw Material Prices
- ✓ Changing Market Dynamics Due to Covid-19 – Opportunities & Challenges



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12:30 - 01:15 PM IST

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Speaker



Mr Anubhav Gupta
Chief Strategy Officer
(APL Apollo), India





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Steel

 **Growth Prospects for India's
Renewable Energy Market in FY'23**



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India's Secondary Steel Sector - Perils & Opportunities



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Steel

Changing Trade Dynamics of Global Steel Market

- ✓ How Did the Global Steel Market Perform in 2021?
- ✓ What to Expect in 2022 - Steel Production, Exports & Imports
- ✓ Key Drivers to Look Out for in 2022



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 **South East Asia Steel
Market Outlook - 2022**



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Steel

Key Drivers of Chinese Steel Market in 2022

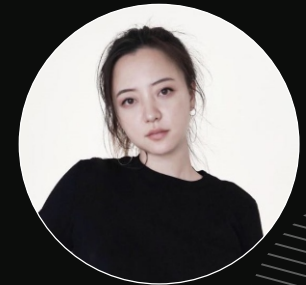
- ✓ Steel Production Cuts & Demand Outlook - 2022
- ✓ How will it Impact Chinese Steel Exports & Imports?
- ✓ Impact of Steel Production Cuts on Raw Material Demand
- ✓ China's Determination to Go Green



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Speaker



Ms Jing Zhang

Analyst, Iron Ore Department,
MySteel, China



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 **Steel Futures**



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Ferro Alloys & Graphite Electrode

 **What to Expect from the Indian Ferro Chrome Industry in 2022?**



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Ferro Alloys & Graphite Electrode

Growth Prospects for Graphite Electrodes Consumption

- ✓ China EAF Capacity Growth to Boost GE Market
- ✓ How Could Steel Production Curbs in China in CY'22 Impact the Market?
- ✓ Asia Pacific Driving the Surge in Global Consumption
- ✓ Export Outlook for Indian Producers
- ✓ High Needle Coke and Energy Prices Pushing Ge Prices Higher



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Speaker



Mr Gordon Johnson

CEO & Founder,
GLJ Research, USA



GLJ Research
Unique Ideas. Deep Analysis.



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Carbon Emission (Technology)

How are Indian Steel Mills Gearing up to Tackle Carbon Emissions?

- ✓ Domestic Stainless Steel Production Outlook
- ✓ Stainless Steel Production in China to Plateau?
Chian's Ferro Chrome Import Outlook
- ✓ Will Consolidation in India's Chrome Ore Market
Keep Prices High, Especially for Higher Grades?
- ✓ Chrome Ore Trade Dynamics



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Carbon Emission (Technology)

Coal Gasification - Its Relevance in the Indian Context



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Carbon Emission (Technology)

China's Hydrogen DRI



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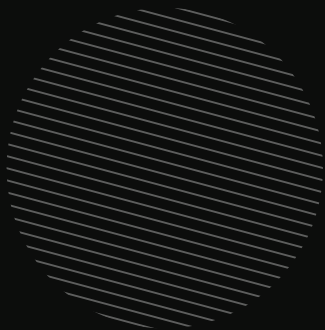
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