

10th
Steel Tube & Pipe
Conference

March 8-9, 2017

Doubletree Houston Greenway Plaza Hotel,
Houston, Texas

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the steel tube and pipe industry**

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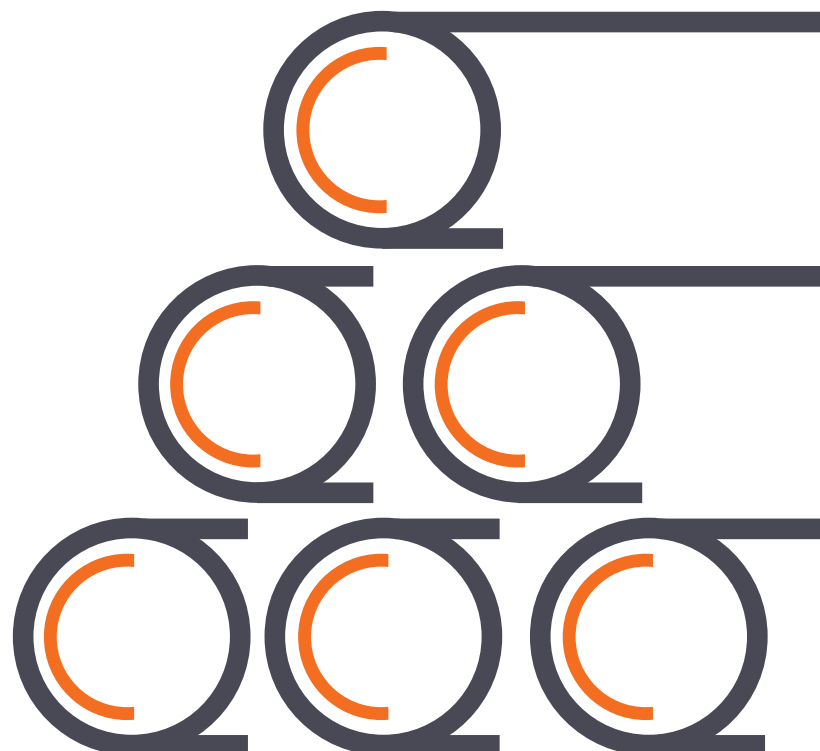


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For ten years the AMM Steel Tube & Pipe Conference has grown to become the biggest gathering for the North American steel tube and pipe industry.

In 2017 we're taking it to the next level.



Market insight from across the supply chain

At the conference you will get exclusive insight into market trends and forecasts from every part of the value chain. Take advantage of this unique opportunity to gain succinct and comprehensive industry awareness.



Unrivalled networking opportunities

Being a part of the region's most influential event means seeing and being seen. Showcasing your company's achievements will improve your brand awareness and give you a chance to stand out from the crowd.



New speakers include:

- **Conrad Winkler**, President & CEO, **EVRAZ North America**
- **John Hritz**, President & CEO, **JSW Steel North America**
- **Joe Phillips**, President, **Sooner Pipe**
- **Bob Dvorak**, Executive Chairman, **B&L Pipeco Services**
- **Steve Tait**, President & CEO, **B&L Pipeco Services**
- **Jim Owsley**, Vice President Supply Chain, **DistributionNOW**

End users get one FREE pass

and any additional for only \$500

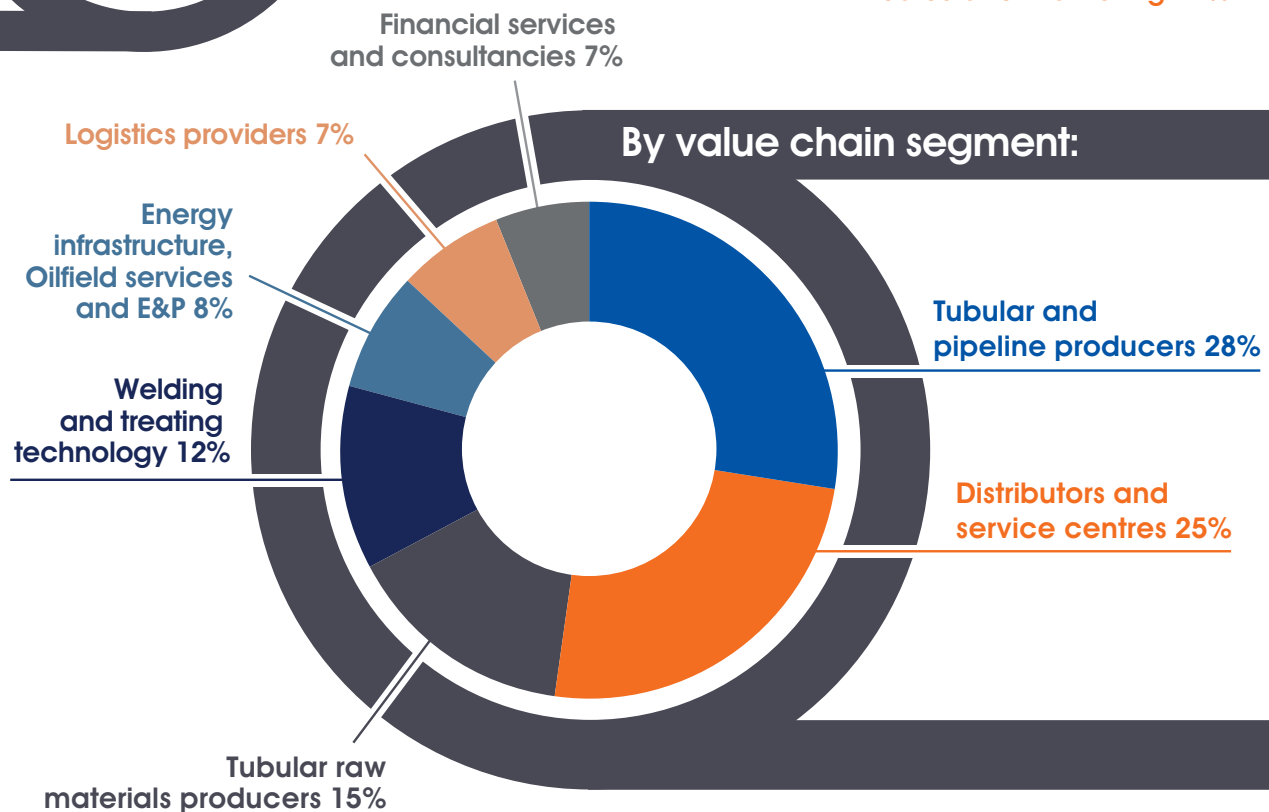
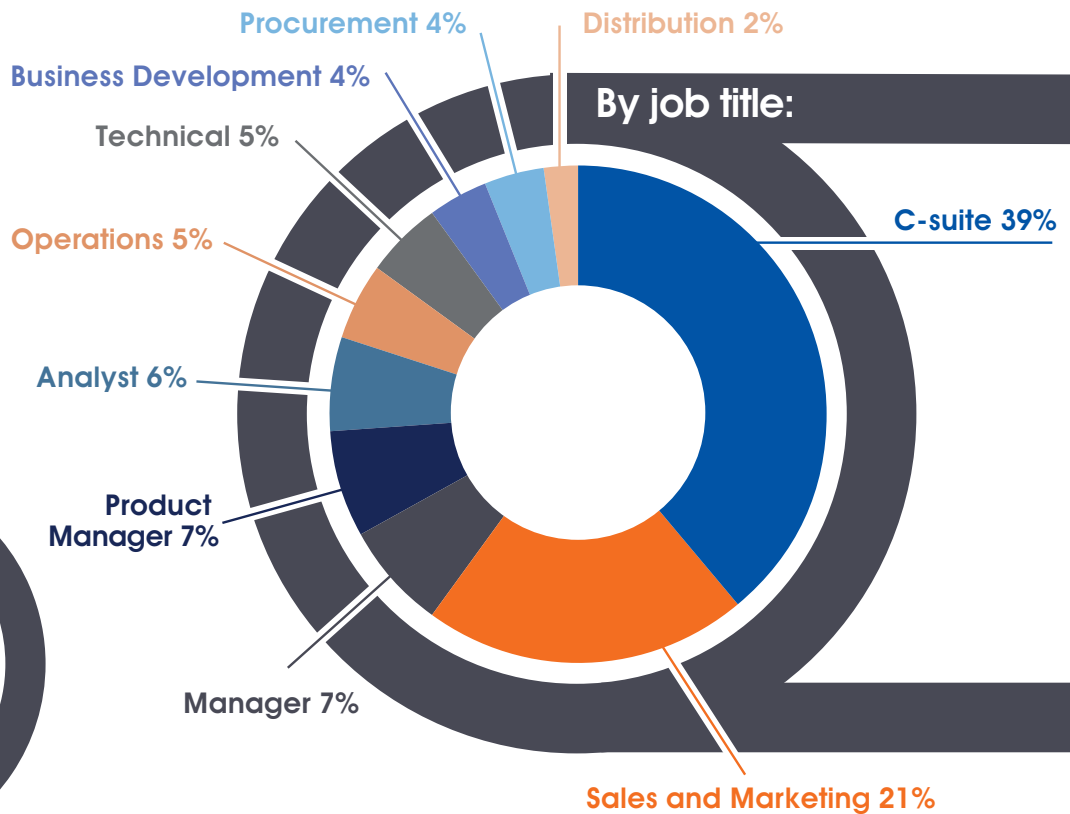
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The US steel tube and pipe industry remains under pressure due to ongoing challenging oil and gas markets.

These trying times require a strategic approach which can only be formulated with current and accurate market understanding.

That's exactly what this conference will provide.

In 2016 we gathered over 400 attendees:





Conference Agenda

Day one - March 8

7.00am **Registration and morning refreshments**

8.25am **Chairperson's opening remarks**

Session One: Producer's outlook

8.30am **Keynote presentation: Success in spite of challenging market conditions**

- What factors will be considered in strategically planning for 2017 given current tubular markets?
- How will TMK IPSCO adapt to prosper given challenging market conditions?
- What steps can the industry take collectively to ensure a prosperous future?

Piotr Galitzine, CEO, **TMK IPSCO**

9.00am **Strategies for success**

- How is EVRAZ North America strategizing to navigate these headwinds?
- When will oil and gas markets recover? Where will we see tubular demand?
- Do certain types of pipe in terms of wall thickness, grade or diameter show greater future prospects than others?

Conrad Winkler, President & CEO, **EVRAZ North America**

9.30am **Innovation and new approaches**

- How will Vallourec achieve cost-effective and innovative results in a low price environment?
- What kind of technical challenges are likely to dominate in the future?
- Which strategies will be adopted by Vallourec to create solutions for these anticipated issues?

Nicolas de Coignac, President, **Vallourec North America**;
Senior Vice President, **Vallourec Group**

10.00am **Networking refreshment break**



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Session Two: Market analysis - Where will demand for tubular products come from?

10.45am **Line pipe capacity utilization in the US**

- What is the capacity utilization in the USA for line pipe? What does this mean for each part of the supply chain?
- How have dynamics changed in terms of demand for OCTG and line pipe?
- What impact have trade case rulings had on the profitability of line pipe production?

Geoff O'Donnell, Product Manager- Line Pipe, **Energex Tube**

11.10am **AMM pricing: Steel tube and pipe prospects**

- A summary of steel tube and pipe pricing in 2016: What happened and why?
- What does this mean for 2017? Which factors should be considered when thinking about supply and demand moving forward?
- What does AMM have to offer in terms of pricing products and how can these be used within the workflow of companies which require benchmark prices?

Thorsten Schier, Senior Editor, **American Metal Market**

11.35am **Oil and gas recovery: Does this mean immediate recovery for tubular demand?**

- An overview of future drilling activity and what this means for steel tube and pipe demand?
- How will drilled uncompleted (DUC) wells be utilized in ramping up oil production?
- How will the DUC wells impact demand for tubular products? How long will the lag be?

Nicole Leonard, Analyst, **Bentek Energy**

12.00pm **Market analysis question and answer session**

Geoff O'Donnell, Product Manager- Line Pipe, **Energex Tube**

Thorsten Schier, Senior Editor, **American Metal Markets**

Nicole Leonard, Analyst, **Bentek Energy**



12.20pm **Technology spotlight presentation**

Paolo Messina, Executive Manager, **Danieli**

12.45pm **Networking lunch**

Session Three: New realities for pipe producers

2.15pm **Strategies for 2017 and beyond: What is the new reality faced by producers?**

- What strategies are being utilized by pipe producers to remain profitable?
- Have duties placed on some imported HRC changed the price competition between welded and seamless tube?
- How do utilization rates compare to this time last year? What is expected for 2017?
- Is recovery on the horizon or will turbulence dominate the immediate and medium term?

Joel Johnson, CEO, **Borusan Mannesmann**

John Hritz, President & CEO, **JSW Steel North America**

Piotr Galitzine, CEO, **TMK IPSCO**

3.30pm **Networking refreshment break**

4.00pm **Raw materials analysis: Procurement trends**

- How have duties placed on imports of HRC from certain countries changed procurement strategies for welded pipe producers?
- Are there other sources of price competitive HRC available?
- How will this change price dynamics when it comes to welded vs seamless pipe?
- Will price changes be passed on to consumers of tube and pipe?

Gabe Rudek, Raw Materials Manager, **TMK IPSCO**

4.30pm **Trade case update: Rulings, appeals, impact**

- Outcome analysis: What do the rulings mean? Will there be appeals?
- Were the rulings just? What led to these outcomes?
- Are there likely to be any further trade cases which will impact the steel tube and pipe industry?
- How will the trade cases impact different parts of the supply chain? Who stands to gain and who stands to face challenges?

John Gurley, Partner, **Arent Fox**

Donald Cameron, Partner, **Morris Manning & Martin**

5.15pm **Technology spotlight presentation**

5.45pm **End of day one and networking drinks reception**

Day two - March 9

8.00am **Registration and morning refreshments**

8.55am **Chairperson's opening remarks**

9.00am **The outlook for API tube and pipe mills**

- What will be the impact of new OCTG capacity entering the market in the next couple of years?
- Will changes to dumping duties against South Korean OCTG impact US ERW OCTG mills moving forward?
- How will duties on API coil and plate supplies affect ERW and LSAW mills?
- An overview of US steelmakers' API offerings

Kim Leppold, Senior Analyst, **Metal Bulletin Research**

Session Four: Viewpoints from distributors and purchasers

9.30am **New realities for distributors: The changing relationship between producers and end users**

- Have trade cases changed the procurement strategies of distributors? Is domestic procurement cost-effective?
- How have market conditions impacted the way in which distributors do business with producers and end users? Is this a new reality?
- Is there a danger that producers and end users will try and bypass distributors? What is preventing this from becoming widespread?

Bob Dvorak, Executive Chairman, **B&L Pipeco Services**

Steve Tait, President & CEO, **B&L Pipeco Services**

Jim Owsley, Vice President Supply Chain, **DistributionNOW**

Joe Phillips, President, **Sooner Pipe**

10.45am **Networking refreshment break**



11.30am **End user panel: Demand prospects for OCTG and line pipe**

- Will demand for tube and pipe increase? Where will this demand be generated?
- How have geopolitical events impacted the oil and gas industry? Are there any ensuing anticipated changes on the horizon?
- Have the impact of trade case rulings been passed down the value chain to end users of tubular goods?
- Do prospects for a particular type or diameter of tubular product seem more promising?
- Are there any major projects underway which will stimulate demand?
- What key purchasing considerations should distributors and producers bear in mind when planning strategically for 2017?

Perry Roberts, Senior Director- Procurement & Material Management,
Energy Transfer

Additional panelists to be announced

12.30pm **Technology spotlight presentation**

1.00pm **Networking lunch**

Session Five: Emerging opportunities both domestic and global

2.30pm **Mergers and acquisitions across the supply chain**

- What market factors are driving M&A transactions in 2017? Will the energy sector see any dramatic changes?
- Are there any exciting M&A deals on the horizon? Are these coming from the pipe producers, distributors or end users of tubular products?
- How will capacity and buying power be impacted by these changes?

Vince Pappalardo, Managing Director, **Brown Gibbons Lang & Company**

3.00pm **Line pipe replacement legislation explained**

- What does the Protecting Our Infrastructure of Pipelines and Enhancing Safety (Pipes) Act actually say?
- How is this legislation likely to impact replacement of line pipe across the US?
- Are there plans for future legislation which may generate further demand for line pipe?

David Murk, Manager, Pipelines Midstream & Industry Operations,
American Petroleum Institute

3.30pm **Overview of global OCTG and line pipe markets: Potential opportunities for US producers**

- What is the current market situation for US pipe producers?
- How does short term outlook for OCTG and line pipe differ by region?
- Routes to different markets: What is the best strategy for approaching markets in North and Central Africa, the Middle East, South America and beyond?

Roman Filimonov, Consultant, **Metal Bulletin Research**

4.00pm **Technology spotlight presentation**

4.30pm **End of day two and close of conference**

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Get in touch for more information:

Mary Connors

+1 646 274 6250

mconnors@amm.com



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