



المؤتمر السعودي الدولي الأول للحديد والصلب

# The First Saudi International Iron & Steel Conference

16-18 September 2019, King Faisal International Conferences Hall Intercontinental Hotel, Riyadh, Saudi Arabia



**BOOK NOW  
AT JUST**

**\$400**

Super early bird (50% of full price)

Organized by

Media Partner

Advisory Partner

Managing Partner

Planning Partner



+966 58 094 7392



events@ncsi.org.sa



events.ncsi.org.sa



المؤتمر السعودي الدولي الأول للحديد والصلب

## The First Saudi International Iron & Steel Conference

16-18 September 2019, King Faisal International Conferences  
Hall Intercontinental Hotel, Riyadh, Saudi Arabia



# CONFERENCE TOPICS & THEMES

- 1 Outlook of GCC iron and steel industry
- 2 Saudi economic diversification, investment into infrastructure, and local content initiatives
- 3 UAE demand drivers after Dubai Expo 2020
- 4 Outlook for Arab region steel demand and investments into new production capacity
- 5 Global trade wars and protectionism - how it is affecting trade flows and regional steelmakers
- 6 Global steel overcapacity – progress in tackling and challenges remaining
- 7 India's potential to become the new steel demand driver
- 8 Investments into higher value-added steel production
- 9 The challenge of rising production costs and how to handle them
- 10 Technological innovations to help increase efficiency/reduce cost of steelmaking



Conference  
official language  
is English



Live translation  
into Arabic is  
available



+966 58 094 7392



events@ncsi.org.sa



events.ncsi.org.sa



# المؤتمر السعودي الدولي الأول للحديد والصلب The First Saudi International Iron & Steel Conference

16-18 September 2019, King Faisal International Conferences  
Hall Intercontinental Hotel, Riyadh, Saudi Arabia



## PARTICIPANTS

### SPEAKERS CATEGORIES



- Leaders of Saudi, GCC & International steel producers
- Regional and International steel traders
- Raw material producers & suppliers
- Analysts and steel industry associations
- Regional government bodies
- Technology and scientific organisations

### AUDIENCE CATEGORIES



- Representatives from the global iron and steel industries
- Representatives from the conversional iron and steel industries
- Traders of steel products
- Official agencies and bodies
- Businessmen and investors
- Press and media agencies

# 5

### Reasons to attend this event:

- First time in Saudi Arabia
- Organised by KSA National Committee for Steel Industry
- Ample networking opportunities with global steel industry leaders
- Attend the exhibition & meet global & local companies
- Hear thought leaders present useful case studies, advice, & strategies



Conference  
official language  
is English



Live translation  
into Arabic is  
available



+966 58 094 7392



events@ncsi.org.sa



events.ncsi.org.sa



المؤتمر السعودي الدولي الأول للحديد والصلب

# The First Saudi International Iron & Steel Conference

16-18 September 2019, King Faisal International Conferences Hall Intercontinental Hotel, Riyadh, Saudi Arabia



## PROGRAMME

The event will be available in English and Arabic with simultaneous translation

### 16th September 2019

16:00 – 18:00	Pre-registration desk
18:00 – 21:00	Networking reception

### 17th September 2019 – Day 1

09:00	National anthem & verse from Holy Qura'an (Al-Hadeed #57, verse 25)
09:05 – 09:10	Chairman's opening & honorary introduction
09:10 – 09:20	Honorary patronage speech
09:20 – 09:25	Chairman of council of Saudi Chambers Dr. Sami Al-Obaidi
09:25 – 09:30	Chairman's welcome closing
09:30 – 10:30	<p>Session 1 – Saudi Arabian economic growth back on track</p> <p>Saudi Arabian economic growth and, with it, steel demand, are poised to recover following a challenging few years due to lower oil prices. The Kingdom is implementing its Saudi Vision 2030 programme that aims to reboot construction activity and encourage new end-uses for steel. As part of its economic diversification drive, Saudi Arabia is supporting the development of local content, which will provide a push for new manufacturing capacities in the kingdom. Buoyed by the recovery in oil prices, the Saudi government's 2019 budget forecasts increased spending versus 2018, with capital spending set to rise 20% to SAR 246 billion. This is likely to give a boost to steel demand. However, with protectionism becoming the new buzzword worldwide following the imposition of US Section 232 tariffs last year, and with interest rates rising, the economic recovery remains fragile and must be properly managed. This session will examine the prospects for Saudi economic growth, the opportunities ahead and how they will be exploited, and also the potential challenges to growth and how they can be overcome.</p> <p><b>Key Themes:</b></p> <ul style="list-style-type: none"> <li>• Saudi economic outlook</li> <li>• Saudi government incentives for private sector investment</li> <li>• Saudi government initiatives for domestic/international partner investment into economic diversification</li> <li>• Non-oil based industries of NIDLP program – steel industry towards VISION2030</li> <li>• Mining opportunities in Saudi Arabia</li> <li>• Saudi economic cities – impact on economic diversification/steel demand</li> <li>• Saudi infrastructure/construction investment outlook</li> <li>• Saudi foreign trade data collection/accessibility</li> <li>• Power/gas availability for industrial expansion</li> </ul>
10:30 – 11:30	Extended networking - Coffee break and side exhibition tour <span style="float: right;">SPONSORED BY: </span>
11:30 – 12:30	<p>Session 2 – World steel outlook</p> <p>Although fears over global steel overcapacity have subsided to some degree, the threat has not disappeared, especially given Chinese economic growth is less certain than it once was. Growing protectionism has made some regions more vulnerable to surplus exports than others. The focus is gradually shifting to India as the next growth driver – but is the latter's ambitious 300 million tonnes/year capacity target justified? In the US, the economy appears to be booming despite President Trump's promises of a massive infrastructure-spending programme yet to materialise. This session will look at the prospects for global steel demand growth, with particular focus on key steel producing and consuming countries.</p>



+966 58 094 7392



events@ncsi.org.sa



events.ncsi.org.sa



المؤتمر السعودي الدولي الأول للحديد والصلب

# The First Saudi International Iron & Steel Conference

16-18 September 2019, King Faisal International Conferences Hall Intercontinental Hotel, Riyadh, Saudi Arabia



## PROGRAMME

The event will be available in English and Arabic with simultaneous translation

	<p><b>Key Themes:</b></p> <ul style="list-style-type: none"> <li>• Overcapacity – progress in tackling and challenges remaining</li> <li>• Protectionism – how it is affecting trade flows and what this means for regional steelmakers</li> <li>• China – increasing EAF steelmaking/scrap use</li> <li>• China – steel demand outlook amid fears of reduced government investment</li> <li>• India – the next global demand growth driver?</li> <li>• India – is a 300m tonnes/year capacity target by 2030 justified?</li> <li>• Turkey – the prospects for economic and therefore steel demand recovery</li> <li>• USA – The outlook for infrastructure investment</li> </ul>
<p><b>12:30 – 14:00</b></p>	<p>Prayer &amp; lunch</p> <p style="text-align: right;">SPONSORED BY: </p>
<p><b>14:00 – 15:00</b></p>	<p><b>Session 3 – Producers' panel</b></p> <p>Investment into specialised “value-added” steel, as well as digitalisation, have become popular concepts in recent years. However, as we live in a world of finite resources, competitively sourcing input materials required for steelmaking is becoming difficult. This session will bring together the world's largest steel producers to discuss today's key challenges in steelmaking, as well as any further obstacles that may appear on the horizon, and the techniques and processes being put in place to deal with them.</p> <p><b>Key Themes:</b></p> <ul style="list-style-type: none"> <li>• Investments into higher value-added steel production/prospects for new steel demand sources</li> <li>• The challenge of rising production costs and how to handle them</li> <li>• Raw material sourcing strategies</li> <li>• Digitalisation</li> <li>• The effect of graphite electrodes shortages on steelmaking</li> </ul>
<p><b>15:00 – 15:30</b></p>	<p>Prayer &amp; Coffee break</p> <p style="text-align: right;">SPONSORED BY: </p>
<p><b>15:30 – 16:30</b></p>	<p><b>Session 4 – Technology panel</b></p> <p>The steel industry has long been at the forefront for innovation into new technology. With increasing consideration for the environment, and a focus in recent years on cutting costs, however, new technologies are required more than ever to make steelmaking simultaneously more efficient and less polluting. In this session the world's leading technology suppliers will discuss the latest technological innovations, including improvements in DRI and EAF technology, the preferred steelmaking route in the Middle East, as well as the prospects for alternatives to powering steelmaking with fossil fuels.</p> <p><b>Key Themes:</b></p> <ul style="list-style-type: none"> <li>• Technological innovations to help increase efficiency/reduce cost of steelmaking</li> <li>• EAF and DRI-making technology developments</li> <li>• Automotive steel production technology developments/higher steel sheet quality production</li> <li>• Steel industry environmental footprint improvement through technology</li> <li>• Hydrogen as a fuel for steelmaking</li> <li>• Finex developments</li> <li>• Iron as a by-product</li> </ul>
<p><b>16:30 – 16:45</b></p>	<p>Coffee break (15mins)</p> <p style="text-align: right;">SPONSORED BY: </p>
<p><b>16:45 – 18:00</b></p>	<p><b>Session 5 – Local content initiatives &amp; the steel industry</b></p> <p>In order to support the development of local industry and encourage economic diversification, Saudi Arabia is pushing for increased use of local content in economic output. This is exemplified by Saudi Aramco's In-Kingdom Total Value Add (IKTVA) programme, which has benefited Saudi pipemakers. It also highlights the need for investment into production of certain steel products not available in the Kingdom, such as plate and round billet, that will be required for economic diversification. Local content development will also provide increased employment opportunities, thereby driving consumer spending on steel-containing goods. This session will look at the progress made so far by local content initiatives and the challenges still ahead.</p>



+966 58 094 7392



events@ncsi.org.sa



events.ncsi.org.sa



المؤتمر السعودي الدولي الأول للحديد والصلب

# The First Saudi International Iron & Steel Conference

16-18 September 2019, King Faisal International Conferences Hall Intercontinental Hotel, Riyadh, Saudi Arabia



## PROGRAMME

The event will be available in English and Arabic with simultaneous translation

	<p><b>Key Themes:</b></p> <ul style="list-style-type: none"> <li>• The progress of Saudi's local content initiatives/what needs to be done to achieve the goal</li> <li>• The role of IKTVA and MUSANED in driving the steel demand locally</li> <li>• The objectives of the local content towards national employments</li> </ul>
<b>18:00 – 18:05</b>	Chairman's closing remarks
<b>19:30 – 21:30</b>	Gala dinner (Palms Golf Club)

### 18th September 2019 – Day 2

<b>09:00 – 09:10</b>	Chairman's opening remarks	
<b>09:10 – 10:30</b>	<p><b>Session 6 – Saudi Arabian new economical cities – industry &amp; projects</b></p> <p>The Saudi construction industry is the kingdom's largest steel consumer. However, its output has fallen considerably since 2015 when state spending was curtailed due to lower oil prices. This, coupled with new steel capacity coming on line, resulted in a sizeable steel supply surplus in Saudi Arabia, especially for rebar. The outlook for construction has nevertheless improved with an array of huge projects set to break ground as part of the Saudi Vision 2030. This session will look at the latest developments in the Saudi construction sector and how they bode for future steel demand.</p> <p><b>Key Themes:</b></p> <ul style="list-style-type: none"> <li>• Saudi construction sector outlook</li> <li>• Largest construction sector projects that will drive steel demand</li> <li>• Progress of new economic cities</li> <li>• Challenges obtaining finance for projects</li> <li>• Private sector participation in construction projects growing?</li> <li>• Labour issues in the construction sector</li> <li>• Developments in pre-engineered building use in construction</li> </ul>	
<b>10:30 – 11:00</b>	Coffee break	SPONSORED BY: <b>SMS@group</b>
<b>11:00 – 12:30</b>	<p><b>Session 7 – New end-use sectors for Saudi steel</b></p> <p>Another key facet of Saudi Vision 2030 is plans to accelerate the kingdom's long-touted diversification away from oil dependence. This should see the establishment of sectors such as automotive production, shipbuilding and military equipment manufacturing, all of which will provide new opportunities for steel consumption. Along with Saudi's aim to increase local content, the development of these new industries will require investment into new steelmaking capacity for products not currently available in the kingdom. This session will examine the prospects for new Saudi steel end-user sectors.</p> <p><b>Key Themes:</b></p> <ul style="list-style-type: none"> <li>• Government progress on diversifying economy</li> <li>• Investments into car manufacturing</li> <li>• Investments into military equipment manufacturing</li> <li>• Shipbuilding sector prospects</li> <li>• Challenges and opportunities in sourcing feedstock</li> <li>• Investment into domestic plate production and other local content developments</li> </ul>	
<b>12:30 – 14:00</b>	Prayer & lunch	SPONSORED BY:  <b>التجمعات الصناعية Industrial Clusters</b>
<b>14:00 – 15:00</b>	<p><b>Session 8 – Using trade rules to restore a fair-trading environment</b></p> <p>Despite being a WTO member and having the tools at its disposal, Saudi Arabia has a limited track record of using trade defence mechanisms to support its steel industry. In the past, this was because the kingdom depended on steel imports. However, following years of investment into new steel capacity that has</p>	



+966 58 094 7392



events@ncsi.org.sa



events.ncsi.org.sa



المؤتمر السعودي الدولي الأول للحديد والصلب

# The First Saudi International Iron & Steel Conference

16-18 September 2019, King Faisal International Conferences Hall Intercontinental Hotel, Riyadh, Saudi Arabia



## PROGRAMME

The event will be available in English and Arabic with simultaneous translation

	<p>increased self-sufficiency, and a global trade war that threatens to re-direct steel shipments to the Arabian Peninsula, many observers deem it time for Saudi to consider more active trade defence. This session will look at steel trade defence cases around the world and the prospects for Saudi Arabia initiating its own.</p> <p><b>Key Themes:</b></p> <ul style="list-style-type: none"><li>• Global trade wars – state-of-play and impact on Saudi Arabia</li><li>• The strategic importance of the steel sector – preserving the interests of all stakeholders in troubled times</li><li>• The GCC trade remedy system – seeking protection for Saudi producers</li><li>• Seeing beyond trade remedies – what other trade instruments can Saudi producers invoke to guarantee fair trade?</li></ul>
15:00 – 15:30	Coffee break <span style="float: right;">SPONSORED BY: <b>SMS</b>  <b>group</b></span>
15:30 – 16:30	<p>Session 9 – Panel debate</p> <p>With so much uncertainty in global and regional macro environment and in the steel industry itself, making firm forecasts for the future is almost impossible. That makes open discussion even more crucial for market participants to refine their views of how markets will develop over the coming months and years. In this final panel industry executives review and discuss the challenges and opportunities outlined in the previous sessions.</p>
16:30 – 16:40	Chairman's closing remarks



## VENUE & ACCOMODATION

KING FAISAL CONFERENCE HALL  
(INTERCONTINENTAL HOTEL)

ADDRESS: KING SAUD RD, RIYADH 11481, SAUDI ARABIA  
TEL: +966 11 465 5000



+966 58 094 7392



events@ncsi.org.sa



events.ncsi.org.sa

# CURRENT SPONSORS



## المؤتمر السعودي الدولي الأول للحديد والصلب The First Saudi International Iron & Steel Conference

16-18 September 2019, King Faisal International Conferences Hall Intercontinental Hotel, Riyadh, Saudi Arabia

### RHODIUM



### PLATINUM



### LUNCH - DAY 1



### LUNCH - DAY 2



### COFFEE BREAK - DAY 1



### COFFEE BREAK - DAY 2



### GOLD



### SILVER



### BRONZE



AL-Jazeera Factories For Steel Products  
مصانع الجزيرة للمنتجات الفولاذية



Organized by

Media Partner

Advisory Partner

Managing Partner

Planning Partner



+966 58 094 7392



events@ncsi.org.sa



events.ncsi.org.sa