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ESF24

EUROPEAN STEEL FORUM

5-7 NOV 2024

MESSE ESSEN

ESSEN, GERMANY



Event Host

HATCH KÜTTNER

ABOUT THE FORUM

Join us for this prestigious international conference where steel industry executives will share their visions, strategies and challenges for steel as technology and production processes continue to evolve. Sessions will focus on meeting environmental and economic demands with technical, yet practical solutions.

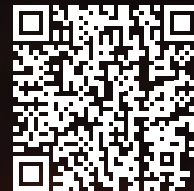
The program will delve into the latest advances in green steel, iron feedstock, carbon neutrality, and carbon-free energy as well as the design, financing, and execution of steel projects and facilities. Panel discussions will offer candid conversations focused on key issues facing European and North American industry leaders.

The event provides global networking for attendees, as well as the opportunity to tour thyssenkrupp Steel Europe AG.

WHO SHOULD ATTEND

The European Steel Forum historically attracts industry leaders from 29 countries. The event will be hosted in Germany for the first time since its inception and we look forward to having our greatest participation and largest global representation for this conference yet. Young steel professionals to veteran industry leaders will benefit from the expertise and experience presented at the forum.

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SCHEDULE

TUESDAY, 5 NOVEMBER

08:30 **Welcome and Introduction**

Peter Weber, Metals Director, Europe, and Regional Managing Director, Hatch Küttner; Ronald Ashburn, Executive Director, AIST and José Noldin, AIST European Member Chapter Chair and Chief Executive Officer, GravitHy

09:00 **Structural Changes in the Iron Ore Industry to Meet the Carbon Neutrality Requirements of the Steel Industry**

As the steel industry decarbonizes, it will continue to depend heavily on the iron ore industry to supply the required iron feed. The key question for steel producers is: what is the iron ore industry doing to help the steel industry to decarbonize? We will explore the outlook for the supply of different iron ore products such as blast furnace pellets and direct reduction-grade pellets over the next two decades. The presentation will evaluate different iron ore-producing regions such as Australia, Brazil, India and CIS on the readiness for decarbonization. The discussion will provide updates on the challenges for different iron ore producers or regions, and what new technologies and strategies could be adopted by iron ore producers for decarbonizing the steel industry.

Presenter: Siddhartha Sengupta, Principal, Hatch Advisory

09:30 **Customer Vision on Green Steel Products**

Responsible steel production is not only clean steel production, but also good business, as steel end users decarbonize their own supply chains. The steel industry is indeed ready and willing to be a reliable partner in this effort. But as consensus on the definition of green steel remains elusive, what do end users truly seek from producers? And how can governments throughout the world help resolve this issue? We'll ask a panel of steel customers about the products, the solutions and the relationships they'd most like to see from steel.

Moderator: Mauro Milocco, Executive Vice President, Danieli Germany

Panelists:

- Nicole Voigt, Managing Director and Partner, Boston Consulting Group
- René Gissinger, Managing Partner, Pipe GmbH & Co. KG
- Marc Delobelle, Head of Fossil Free Materials Purchasing, Volvo Group

10:30 Break

SCHEDULE

11:00 **Global Iron Feedstock Strategies for a Transforming Steel Industry**

The availability and cost structure of raw materials to feed tomorrow's steel industry are under scrutiny. The current preferred route of vertical integration, keeping material streams within one company, might not be the option for the future. Iron ore might be reduced where it is sourced or where energy (low-carbon electricity, natural gas) is available in abundance and competitive. Decoupling iron from steelmaking could be the path to look at future iron feedstock strategies, creating new players and global trade dynamics. In this panel, recognized experts will discuss and share their different perspectives on the future of iron feedstock.

Moderator: Felix Firsbach, Vice President, Badische Stahl-Engineering GmbH

Panelists:

- José Noldin, Chief Executive Officer, GravitHy
- Saeed Alghafri, Chief Executive Officer Steel, Emirates Steel Arkan
- Gilberto Cardoso, Founder and Chief Executive Officer, Tarraco Commodities Solutions
- Carolina Lasse, Vice President Product Management and Multimodal Solutions, Deutsche Bahn
- Daniel Carvalho, Director, Metals & Mining Consulting, Wood Mackenzie

12:30 Lunch

14:00 **Innovation in Plant Design – Part I**

The search for greater efficiencies, safer environments and better-performing products is relentless, so innovation and steelmaking have gone hand in hand. That is evident in the newest steelmaking facilities, which are more automated, safer and better performing than ever. Representatives from the major technology providers will showcase some of their latest innovations and describe how they are aiding steelmakers in lowering carbon emissions and improving their competitiveness.

Moderator: Mauro Bianchi Ferri, Managing Director, Acciarium Srl

Panelists:

- Rolando Paolone, Chief Executive Officer and Chief Technology Officer, Danieli Group, Danieli & C. SpA
- Nils Voermann, Global Managing Director: Advisory, Digital, Environment and Technologies, Hatch
- Harald Holzgruber, Chief Executive Officer, INTECO Melting and Casting Technologies GmbH

14:45 **Innovation in Plant Design – Part II**

The search for greater efficiencies, safer environments and better-performing products is relentless, so innovation and steelmaking have gone hand in hand. That is evident in the newest steelmaking facilities, which are more automated, safer and better performing than ever. Representatives from the major technology providers will showcase some of their latest innovations and describe how they are aiding steelmakers in lowering carbon emissions and improving their competitiveness.

Moderator: Mauro Bianchi Ferri, Managing Director, Acciarium Srl

Panelists:

- Gerald Wimmer, Vice President Converter Steelmaking, Primetals Technologies Austria GmbH
- Christian Fröhling, Executive Vice President Metallurgy, SMS group
- Paolo Argenta, Executive Vice President, Tenova

15:30 Coffee Break

16:00 **Industry Leader Panel**

European steel demand continues to face significant challenges: global overcapacity, geopolitical uncertainty, high inflation, monetary tightening and elevated energy prices. Even so, producers are executing on multi generational investments necessary to meet climate goals. In this session, several industry leaders from both the EU and the U.S. will share perspectives on the challenges and opportunities for the steel industry to thrive in the years ahead.

Moderator: Ronald Ashburn, Executive Director, AIST

Panelists:

- Al Behr, Executive Vice President – Raw Materials, Nucor Corp.
- Michael Bott, Director Decarbonization Project, Dillinger Hütte AG
- Traci Forrester, Executive Vice President, Environmental and Sustainability, Cleveland-Cliffs Inc.
- Kristian Notebaert, Chief Technology Officer Decarbonization, ArcelorMittal Europe – Flat Products
- Thomas Toner, Senior Advisor and Vice President Operations, SSAB Americas

17:30 **Reception**

WEDNESDAY, 6 NOVEMBER

08:30 **Welcome**

Stéphane Raymond, Regional Managing Director, Hatch

08:45 **Transformation of the European Steel Industry for Carbon Neutrality**

The rebuilding of the European steel industry is well underway, with six green hydrogen-direct reduced iron (DRI) projects approved and 11 electric arc furnace (EAF) conversions in progress. Given the long-term projects so far, in combination with bridging technologies introduced at the production sites, it appears that the targeted 50% reduction in CO₂ emissions by 2030 is now secured. Still, much work remains. The panel will update attendees on the work completed to date and will give an outlook for the mid-term chances and challenges of the transformation.

Moderator: Jürgen Cappel, Managing Director, Cappel Stahl Consulting GmbH

Panelists:

- Martin Pei, Executive Vice President and Chief Technology Officer, SSAB
- Kristian Notebaert, Chief Technology Officer Decarbonization, ArcelorMittal Europe – Flat Products
- Boris Kohnen, Competence Center Metallurgy, thyssenkrupp Steel Europe
- Thomas Bürgler, Managing Director, Chief Executive Officer, K1-Met
- Sebastian Börner, Transformation Team, Dillinger Hütte AG

10:15 Coffee Break

SCHEDULE

10:45 **Carbon-Free Energy Sources for the European Steel Industry**

Even as European steelmakers overhaul their mills for low-carbon steel production, one critical question remains unanswered: Will the steel industry have secured sufficient sources of renewable electricity and hydrogen by the time these projects come on-line? And even if they have, will the infrastructure be in place to facilitate the safe and sufficient transportation of hydrogen? During this discussion, experts in energy supply, gas production and energy infrastructure will share their views on Europe's energy future.

Moderator: Johannes Schenk, Professor of Metallurgy, Montanuniversität Leoben

Panelists:

- Guido Schumacher, Chief Technology Officer, CWP Global
- Johann Rinnhofer, Chief Executive Officer, thyssenkrupp nucera Australia Pty. Ltd.
- Bettina Hübschen, Managing Director, Saarländische Wasserstoffagentur GmbH
- Karsten Pinkwart, University of Karlsruhe
- Christian Koulic, Global Market Executive Metals, TotalEnergies SE

12:15 Lunch

13:45 **Financing Green Steel Projects**

The transformation of the European steel industry is a daunting technical challenge, but it also is a tremendous financial challenge, requiring the deployment of billions of euros in capital. Our panelists will discuss the challenges associated with securing funding for green steel and the roles that governments, financial institutions, export credit agencies and commercial lenders are playing in this effort.

Moderator: Jonathan Lee, Senior Principal, Advisory Management, Hatch

Panelists:

- Ekaterina Ksoll, Managing Director, Rothschild & Co.
- Klaus Houben, Business Development Director – Europe, Export Development Canada
- Tim Langenbach, Vice President and Senior Technical Advisor for Metals & Mining, KfW
- Matthias Winkeler, Vice President of Metals and Mining, ING Bank

15:15 Coffee Break

“Very informative sessions; a great networking environment.”

— European Steel Forum 2023 attendee

- 15:45 **Keynote**
Mario Arvedi Caldonazzo, Chief Executive Officer, Gruppo Arvedi
- 16:15 **Execution Strategies for Large-Scale Steel Projects**
The transformation of Europe's steel industry is predicated on a dual approach: significant investment in new technologies and greenfield projects alongside immediate, less capital-intensive improvements in existing facilities. In these challenging times, the successful implementation of such projects requires that producers overcome supplier and price instability, mitigate risk, and develop effective execution models. We'll hear from several experts on how producers are doing just that.
Moderator: Guus Kessler, Project Director, Tata Steel Europe
Panelists:
- Stéphane Raymond, Regional Managing Director, Hatch
 - Carl Orrling, Vice President, SSAB Transformation Office, SSAB
 - Miles Shephard, Vice President, IDOM Inc.
 - Martin Zappe, Program Director, SALCOS
- 19:30 **Reception and Gala Dinner**
Erich-Brost-Pavilion Zollverein

THURSDAY, 7 NOVEMBER

- 08:00 **Bus Departs From Messe Essen for Plant Tour**
09:00 **Plant Tour of thyssenkrupp Steel Europe AG**
13:00 **Bus Returns to Messe Essen**
- 09:00 **Clean Hydrogen for Clean Steel Workshop**
The U.S. Department of Energy's Hydrogen and Fuel Cell Technologies Office (HFTO) is hosting a workshop in coordination with ESF24, focused on advancing steel decarbonization technologies involving clean hydrogen. The Clean Hydrogen for Clean Steel Workshop is organized under the Mission Innovation initiative to build global collaboration and share knowledge as the field develops and demonstrations take shape. This workshop will help identify research needed to accelerate technology development and address barriers to industry commercialization. We are seeking experts to join this discussion to shape the future of the global research and innovation agenda in clean steel technologies.
Workshop space is limited. To view the agenda and request an invitation to attend, visit [AIST.org](https://www.aist.org).

* Please note program times and content are subject to change. For the most up-to-date information, visit [AIST.org/ESF](https://www.aist.org/ESF).

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