

Russian Coal Markets Conference 2009

September 22 - 24 2009

Grand Hotel Europe, St Petersburg, Russia



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How does the Russian coal industry thrive in these troubled times?

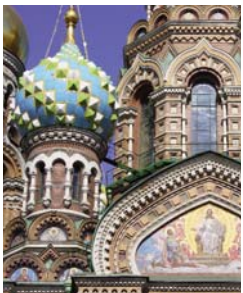


A key supplier to both the European and - increasingly - the Asian steam coal markets, its future would seem more than ever to depend on strong prices and the opportunity to heave into costs.

For the world markets a healthy Russian coal producing sector is a must but, maintaining financial health is as steep a challenge for the Russian producers as any other worldwide.

But the markets do offer clear glimmers of, if not wild optimism, at least of opportunity for the Russians.

- The promise of Ukraine emerging as a significant exporter of both met and steam coal would seem to place the Ukraine in pole position as a supplier in Europe.
- With a collapsing steel demand at home, Russian coking coal exporters have approached the world markets with much lower price expectations than the Australian market leaders and could, as a result, find rich pickings.
- SUEK's Muchka Bay terminal on the Pacific offers a timely window on one of the big surprises of the 2009 market place – a rampant importing Chinese power sector.
- Static South African export levels, plus weak South American and US exports, reduces Russia's competition in its European backyard.



The questions facing the Russian producers range from the familiar (Will the railways show sufficient flexibility to enable the exporters to compete?) to the unfamiliar (Will the weakening rouble costs be brought down to a level where Russia's competitiveness is enhanced?)

Despite the gloom, companies both Russian (Mechel) and Ukrainian (Metinvest) have shown themselves keen to look to the future and invest in a significant amount of US coking coal production. But the obverse of the coin is falling production at home where some companies (SUEK, Kuzbassrazrezugol, Raspadskaya, Mittal) are cutting back production sharply and others digging in at current mining levels (SBU).

Come to the Russian Coal Markets Conference in St Petersburg in September and join Russia's leading producers and the world's leading coal market analysts to plot a way through the thickets of recovery for the balance of 2009 and into the markets of 2010 and the years ahead.



Exhibition and Sponsorship Opportunities

The **Russian Coal Markets Conference** gives you a unique opportunity to exhibit your products and services to senior executives in the coal, transport and power industries. A limited number of exhibition booths and sponsorship opportunities remain available at this event.

If your company is interested in sponsoring or exhibiting at this event, please contact:

Julia Potter, email: julia.potter@mccloskeycoal.com

For further information about the conference or venue please contact:

Letoya Anderson, email: letoya.anderson@mccloskeycoal.com

Agenda

Tuesday 22 September

18:00 - 20:00 Early registration and Welcome Reception
This event is available to sponsor

Day One: Wednesday 23 September

07:45 Registration opens

Session One: Keynote Opening Session

Chair: Gerard McCloskey, Founder of The McCloskey Group

- 09:00** Opening address
Andrey Malakhov, Deputy Governor of Kemerovo Region, Coal Industry and Energy
- 09:20** Changing dynamics of the Russian coal industry
Sergey Shatirov, First Deputy of the Committee for Industrial Affairs, Russian Federation
- 09:40** China the world power house - Growing demand for the world's coal and the growing use of Russian imports
Madam Liu Caiying, Vice President, China National Coal Association
- 10:00** Global economic outlook for power and steel - Has the world economy reached the bottom of the cycle?
Senior Representative, Nomura

10:30 Refreshment Break - *This event is available to sponsor*

Session Two: Russian thermal coal production - Perfectly placed for future demand

Chair: Gerard McCloskey, Founder of The McCloskey Group

- 11:00** Overview of Russian power industry
Alexander Kovaltchouk, General Director, Coal Market Research Institute
- 11:20** How is Russia's largest thermal coal producer positioning itself for the future?
Anna Belova, Vice CEO, Strategy & Corporate Development, SUEK

11:40 Panel Discussion

- **Lev Rybak**, Director, MIR Trade
- **Oleg Rozenberg**, Member, Board of Directors, Mechel
- **Igor Shelukhin**, Managing Director, Non-Commercial Partnership For Support Of Mining Industries Development

12:30 Delegate Lunch - *This event is available to sponsor*

Session Three: Transportation and Ports - Can Russia compete when the wind blows cold?

Chair: Gerard McCloskey, Founder of The McCloskey Group

- 13:40** Future outlook for Russian railfreight
Viktor Kvitko, Head of Department Federal Tariff Service of Russia
- 14:00** Black Sea port developments
Dmitry Galimov, Deputy Director, Tis-Ruda (Invited)

14:20 Panel Discussion

- **Normunds Mekshs**, LaCon Port (Invited)

15:00 Refreshment Break - *This event is available to sponsor*

Session Four: How is the Ukrainian coal industry positioned for the future?

Chair: David Price, Editor, Steam Coal Forecaster, McCloskey

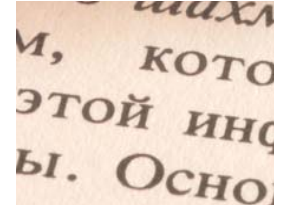
- 15:30** Ukrainian privatisation, long term impact to the industry
Mihail Voloshin, Director General Coal of Ukraine (Invited)
- 15:50** Developing exports markets for the Ukrainian coal industry
Vladimir Husák, Metinvest (Invited)

16:10 Anthracite Panel Discussion

- **Dmitry Zaharov**, Head of Exports, Russian Coal

17:00 End of Day One

18:00 - 20:00 Cocktail Reception - *This event is available to sponsor*



Day Two: Thursday 24 September

Session Five: Outlook for the recovery of the power markets: How do utilities view future demand?

Chair: Mark Walters,
Head of Coal Sales & Origination, Deutsche Bank

- 09:00 Italy's changing energy mix and the future of coal
Giorgio Ruscito, Managing Director, Fuelmed
- 09:20 Have the last twelve months changed the outlook forever on counterparties and contracts?
Eurof Lloyd-Lewis, Partner, Barlow Lyde & Gilbert
- 09:40 Future development of Russian power utilities
Dominique Fache,
General Director for Russia and CIS, ENEL

10:00 Buyers Panel Discussion

- **Graham Parker**, Fuel Trading Manager, E.ON UK
- **Yavuz Tasdelen**, General Co-ordinator, Enisa-Nuryak Group
- **Xavier Devos**, Coal Procurement Manager, Electrabel

10:40 **Refreshment Break** - This event is available to sponsor

Session Six: Coking Coal and Steel: Will Russia maintain its ranking in the European market?

Chair: Gerard McCloskey, Founder of The McCloskey Group

- 11:00 Supporting the coking coal sector for the return to exports
Gerard McCloskey, Founder of The McCloskey Group
- 11:30 Impact of the global downturn on Russian steel demand and supply
Suzanne Freegard,
European Editor, Steel Business Briefing
- 11:50 Challenges to financing within the commodities industry
Arkadiy Ostrovskiy, Head of Corporate Finance,
Asian Pacific Energy Projects (APEP)
- 12:10 Outlook on the current state and prospects for Ukrainian coke
Anatoly Starovoi, Director-General of Ukrainian
National Scientific, Industrial Association, Ukrkoks

12.30 Panel Discussion - Future for domestic and overseas coking coal supply

- **Oleg Rozenberg**, Member, Board of Directors, Mechel
- **Graham Mascal**, CEO, Lubel Coal
- **David Rossiter**, Coal Team, Corus (Invited)

13:30 **Close of Conference**

Previous Delegates

Akcansa Cimetón San VE TIC A.S • Alex Stewart Assayers RUS • Anglo American Russia • Anglo Coal • Antwerp Bulk Terminal nv • Arch Coal Inc • Belon • Bloomberg News • BNP Paribas • Britannia Bulk Plc • Bulk Trading SA • Camreg Limited • CarboPego SA • Cargill • CDFE - Total • Cemex • Chevron • Coal & Oil Copmany • Coal Procurement SA • Coal Procurement South Africa • Coeclerici Coal & Fuels SpA • Council of the Russian Federation • Dalkia Polska S.A • Data Accum • Deutsche Bank • Dong Energy • Douglas Services Ltd • Dufenco S.A. • Ed Capital Management LLC • EDF Trading Ltd • Eickhoff Bergbautechnik GmbH • Enel Trade SPA • ENKAPower • ENRC Logistics LLP • E.ON UK • Essent Trading International SA • European Bulk Services(EBS)B.V • Evonik Trading GmbH • Exporting Commodities International • Flame SA • Fortum Power & Heat Oy • Fuelmed SRL • Gazprom • Glencore • Global Coal • Goldman Sachs • GTA Mining & Foreign Trade Ltd • Hanseatic Coal & Coke Trading GmbH • Hargreaves (UK) Services Ltd • HC Trading International • Helsinki Energy • HMS Bergbau AG • Hyundai Steel • Idemitsu Kosan Company Limited • IMC Consulting • Impakta Holding D.O.O • Independent Transport Company • Industrial Cargos Magazine • Inter Balt Ltd • Ishhar Overseas Fze • J.P.Wolstenholme & Associates Ltd • JSC Raspadskaya Coal Company • JSC Ventpils Tirdzniecibas Osta • Lafare Aslan Cimento A.S • LLC EnelRus • Lubel Coal Company • Mechel Trading AG • Merrill Lynch Commodities (Europe) Ltd • MIR Trade AG • Mitsubishi Corp • Morgan Stanley • Nippon Steel Corporation • Noble • OBA - Bulk Terminal Amsterdam • Odak Group • Omni Trading Overseas Ltd • Open Joint Stock Company • Ovet BV • Oxbow • Patmond Energy Ltd • Peabody COALTRADE, Inc. • PEC Limited • Port Visotsk • PT Vietmindo Energitama • Renaissance Capital • Riga Central Terminal LLC • Rio Tinto Alcan • Russian Railways • RWE Supply & Trading • Saigal Seatrade Pvt Ltd • Santolina Consultants Inc. • Scottish Power Limited • Servicios Integrales Angilvi S.A • Seven Investment • Severstal resurs • SGS Vostok Limited • Simpson Spence & Young Ltd • Slovenego s.r.o. • Standard Bank plc • StatoilHydro • Steel Business Briefing Ltd • SUEK AG • Sumisho Coal • Taltek / General Coal Trading UK • Telf AG Moscow Representation • Telf B&T UK Ltd • The Royal Bank of Scotland • Tis - Ruda • Total Coal International • Turkish Coal Enterprise • UC Rusal • United Industrial Corporation • United Metallurgical Company • Vantaan Energia Oy • Vietmindo Energitama • Vitol • Weglokoks SA • Yildirim Foreign Trade & Marketing Inc.

Venue - Grand Hotel Europe

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Positioned on Nevsky Prospekt, St Petersburg's most splendid avenue, it is surrounded by some of the world's greatest cultural treasures.

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Booking Form

The fee for attending the Russian Coal Markets Conference is €1,800 (plus any local taxes as applicable) excluding accommodation, meals and leisure facilities at the hotel. Delegates will be responsible for their own costs relating to room service, spa treatments, bar and mini bar.

Booking details

Name	Position	
Company		
Address	Sector	
	Town	
Postcode/Zip	Country	
Tel ()	Fax	Mobile
Email	Website	

Name(s) of additional delegate(s):

Name	Position
Name	Position

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Terms and Conditions

Date & Venue: September 22 - 24 2009, **Grand Hotel Europe**, Nevsky Prospekt, Mikhailovskaya Ulitsa 1/7, St. Petersburg, Russia.
Tel: +7 812 329 6000 **Website:** www.grandhoteleurope.com/stpetersburg

Fees: €1,800 per delegate. All fees include lunch, refreshments and conference papers. Payment is required prior to the event. Bookings posted less than 30 days before the event should be confirmed by telephone. IHS (Global) Limited will not be held liable for non-arrival of your registration confirmation details. If you do not receive confirmation of your registration please call us. All invoices and registrations processed must be honoured in full, unless cancellation has been received under the terms stated below.

Cancellations: Cancellations received in writing 30 days before the date of the conference will receive a full refund less a service charge of €200. We regret that no refunds can be made for cancellations received after the time. Substitutes are welcome at no extra charge. It may be necessary for reasons beyond the control of the organisers to alter the content and timing of the programme or the speakers. In event of cancellations the organisers are not liable for any fees incurred in relation to travel and accommodation costs. This contract is subject to English Law.



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