

16th



World Copper Conference 2017

3-5 April 2017, Santiago, Chile

Part of
CESCO Week

The definitive copper conference

Why attend?

Join the largest annual gathering of top mining executives

Discover whether fundamentals will sustain 2016 price gains

Hear supply-side strategies from leading CEOs

Benefit from pre-event networking and participation at high-profile social functions

Confirmed speakers

Oscar Landerretche, Chairman of the Board, **Codelco**

Daniel Malchuk, President Americas, Minerals Operations, **BHP Billiton**

Iván Arriagada, CEO, **Antofagasta PLC**

Arnaud Soirat, Chief Executive, Copper & Diamonds, **Rio Tinto**

Jorge Gómez, Executive President, **Minera Collahuasi**

Nelson Pizarro, Chief Executive Officer, **Codelco**

Daniel Muniz Quintanilla, Chief Financial Officer, **Grupo Mexico**

Incorporating

The International Exploration Forum

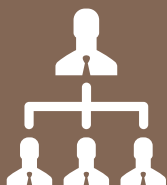
Metallurgical Sulphuric Acid Seminar

Site Visits - Chuquicamata and Ministro Hales

Technical Case Studies

Workshop - Demand and Substitution

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DELEGATES



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Register your place today www.worldcopperconference.com

CRU's World Copper Conference will be held during CESCO Week Chile from the 3-5 April 2017. These partnered events provide the most important commercial and networking opportunities in the industry.

Over 475 senior executives, including the most influential copper market CEO's from 35 countries, will convene at this crucial inflection point for the copper industry.

Delegates and speakers at the **CRU World Copper Conference** are amongst the most knowledgeable participants in the market and an important source of opinion on the myriad of issues that could influence the market.

Why will the CRU World Copper Conference 2017 be so important?

By the time of the 2017 Conference, the industry will be embarking on the road to recovery.

After a five year period of strong growth in mine supply, a lack of new projects will be the main catalyst behind a price recovery and deficits later this decade and into the early 20's.

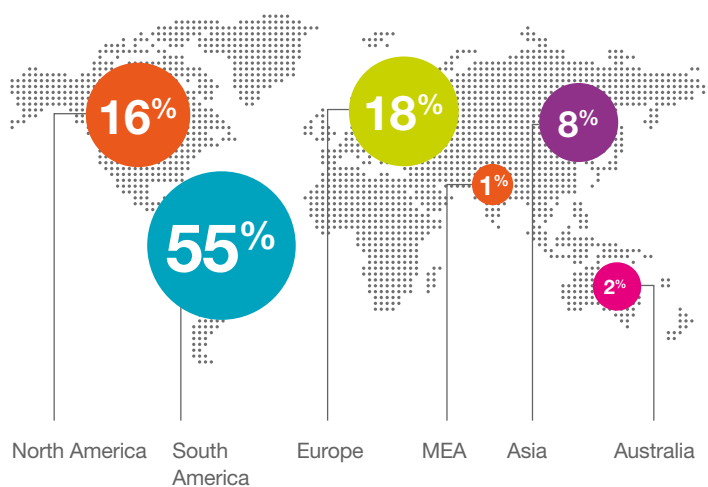
The market is already showing signs of tightening and downside risks are decreasing. Upside risks will dominate the outlook in the short- and long-term and key questions that will need to be answered include will the SRB take advantage of 2017 prices to make additional purchases and how much copper do they have? Also, how will the growth in electric vehicle ownership, particularly in China, affect the copper market?

Much of next year's surplus will be concentrated into the first quarter due to the Chinese New Year, and a much more balanced market is expected from April onwards making the timing of the conference perfect to help you plan for the remainder of 2017 and beyond.

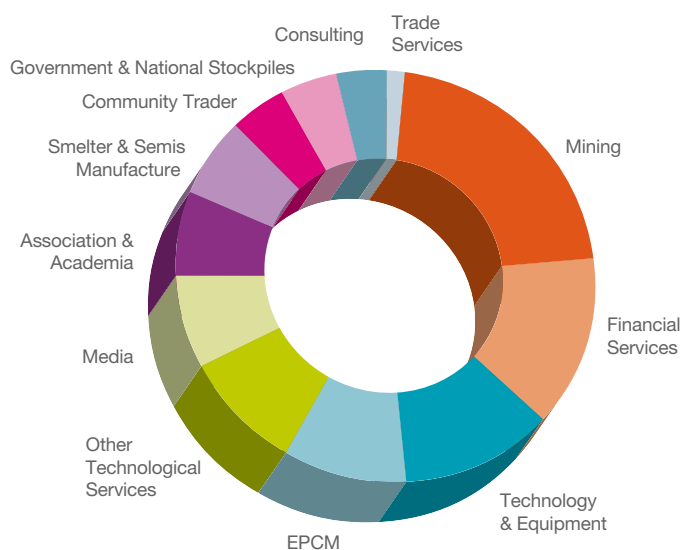
We look forward to welcoming you to Santiago to be part of the discussions that could shape the future of copper markets worldwide.

Who attends?

Attendance by region



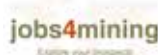
Typical breakdown of attendees



Supporters and Media Partners



Association Partner:



Programme

Sunday 2 April

Depart for site visit to Chuquicamata and Ministro Hales

Chuquicamata is an open pit copper and gold mine and is the largest mine of its type in the world, it is located 15km North of Calama in the Antofagasta region. Ministro Hales is located 2.600 meters above sea level, it is an open pit mine in operation since 2010 producing copper calcine, copper and silver concentrates.

Monday 3 April

08:00 **Registration opens**

09:00 **Site visit to Chuquicamata and Ministro Hales**

12:00 **Exhibition opens**

Auditorium sponsored by



12:30-17:30 International Exploration Forum

In light of high wages, low productivity and resource competition what strategies should the Chilean government be taking to boost exploration?

Mid-size Mining in Chile

- Opportunities and development
- Bottlenecks and incentive mechanism for its development and success
- Could the creation of exploration funds renew equity interest in the mining sector?
- To what extent can technological and productivity improvements drive down the cost of exploration and mine development?

Do countries with high degrees of tax stability, good geology and political stability still exist?

- Is there an alternative to mining in frontier markets long term?
- What are banks really looking for in feasibility studies?

Keynote presentation: To what extent will the next cycle be driven by Chinese demand vs. lack of supply?

- Will the Chinese government continue to pursue favourable policies for growth ahead of the 19th Congress of the Chinese Communist Party?
- How feasible are large scale infrastructure projects such as 'One Belt One Road' and the Mega City project?
- To what extent is excessive bureaucracy hampering exploration?

14:30-16:00 ICA Workshop: copper demand and substitution

For the latest information on how electric vehicles, substitution, Chinese demand and regulations are projected to influence copper use join this interactive and focussed workshop

- How important are electric vehicles for future copper demand?
- Is substitution from aluminum alloy wire & cable a cause for concern?
- What is the real impact of China's 13th five-year investment plan on copper demand?
- What are the key new regulations affecting copper use and what impact will they have?

Moderator: Colin Bennett, Market Analysis and Outreach, International Copper Association
Speakers
Anthony Lea, President, International Copper Association

18:00 **Welcome reception** Sponsored by



SNC • LAVALIN

Tuesday 4 April

08:00 **Registration opens**

08:00 **Exhibition opens**

08:00 **Welcome coffee** Sponsored by
Auditorium sponsored by



09:00 **Chairman's Welcome Address**
Robert Perlman, Chairman, CRU

09:05 Opening Presentation

Aurora Williams, Minister of Mines, Government of Chile (TBC)

09:20 Keynote session: Mining strategies for the 2020s

- Delivering short- and long-term investor value – what are the key challenges at this point in the cycle?
- What measures are being taken to improve productivity?
- How has the project pipeline evolved over the last five years and what is the long-term incentive price for new projects?
- Are maintenance and related cost reductions sustainable?
- How are energy, water, social and labour related challenges likely to evolve?

Nelson Pizarro, Chief Executive Officer, **Codelco**

Daniel Malchuk, President Americas, Minerals Operations, **BHP Billiton**

Ivan Arriagada, CEO, **Antofagasta PLC**

Jorge Gómez, Executive President, **Minera Collahuasi**

Arnaud Soirat, Chief Executive, Copper and Diamonds, **Rio Tinto**

Vanessa Davidson, Director of Copper Research and Strategy, **CRU**

11:20 **Networking break** sponsored by



11:50 Session 1: Next level technology

Delivering high levels of productivity, safety, environmental protection, and predictability whilst reducing labour costs, energy costs and capital intensity is a perennial challenge in the mining industry. In an environment of unpredictable energy costs, depleting ores and grades, water scarcity, complex concentrates and high degrees of public and governmental scrutiny, the bar to bringing new mines, desalinisation plants and energy projects on stream is set much higher. This session will analyse the latest technological advances to assist the industry adhere to its stated aims whilst maximising value for all stakeholders.

Paige Wilson, Senior Vice President – Americas, **Bechtel**

Michael Harris, Managing Director Business Development, Copper and Latin America, **Rio Tinto**

Eduardo Gallestey, Global Technology Manager for Mining and Metals, **ABB**

Further speakers to be announced

12:40 Highlight presentation

Oscar Landerretche, Chairman of the Board, **Codelco**

13:00 **Lunch** sponsored by



The lunch will begin with a 20 minute networking reception, followed by a seated main course & dessert.

Programme

14:30 Session 2: Economic and market expectations

- What is the size of the surplus in 2017?
- Will the market enter deficit in 2018 or 2019?
- What is the price outlook?
- Is India going to drive the next super cycle, and, if so, when?
- Are all the Chinese smelter projects really going to go ahead and what impact would Chinese cathode self-sufficiency have on refined and concentrate trade flows?
- The outlook for mine production, smelter and refining capacity and the impact on TC/RCs
- Will the SRB be buyers or sellers in 2017?
- What is the outlook for the USD?
- Is there upside potential for Chinese GDP?

Natasha Kaneva, Executive Director, Global Commodities, **J.P. Morgan**
Bart Melek, Global Head of Commodity Strategy, **TD Securities**
Max Layton, Managing Director, Commodities Research, Global Investment Research, **Goldman Sachs**
Robert Edwards, Managing Consultant, Copper, **CRU**
Further panelists to be announced

15:30 Panel discussion: Strategies for financing mines, desalination and energy projects

- A look at the diversification of the investor base and funding sources through debt, equity and hybrid products
- NI 43101 and other bankable feasibility studies
- Strategies for dealing with technical and other project risks when seeking finance
- Build-Operate-Transfer schemes and their role in financing mining infrastructure
- Given the immediate need for new large scale projects, are commodity price forecasts sufficient to attract banks and investors?

Moderator: Cynthia Urda Kassis, Partner & Co-Head of Mining & Metals Group, **Shearman and Sterling LLP**
Speakers to be announced

14:30-17:00 Case Study Collection

The showcase session will once again provide an opportunity for companies to highlight how their technology, process or performance innovations are helping miners and smelters improve their efficiency and sustainability.

If you have an innovative solution to mining or smelting challenges that you would like to present, please contact:
dominic.halahan@crugroup.com

17:00 **Close of day two**

Wednesday, 5 April

08:00 **Registration opens**

08:00 **Exhibition opens**

08:00 **Welcome coffee** Sponsored by
Auditorium sponsored by

09:00 **Chairman's opening remarks**

09:05 Keynote Session: Growth Markets

- Focus on China
- The Macri government and Argentina's potential in the copper market
- What strategies is the Peruvian government employing to improve community relations?

Keynote Session: Growth Markets (continued)

- India's growth story and Vedanta- Sterlite copper strategy and plans
Daniel Muniz Quintanilla, Chief Financial Officer, **Grupo Mexico**
P Ramnath, Chief Executive Officer, **Vedanta - Sterlite Copper**
Jiangqiang Wu, President, **Chinalco China Copper**
Daniel Meilan, Secretary of Mining, Ministry of Energy & Mines, **Argentine Federal Government**
Michael Staffas, President, **Boliden Mines**

10:45 Session 3: Copper scrap

- What is the short-term outlook for the copper scrap market?
 - Examining smelting and refining capacity balances
 - Smelter and semis capacity growth trends in China and their impact on the concentrates and scrap markets
 - Current trends on exchanges and financial markets and their impact
 - Analysing China's progress toward scrap self-sufficiency
- Michael Lion**, President, **Lion Consulting Asia Ltd**, and **Everwell Resources**

11:05 **Questions and answers**

11:10 **Networking break** sponsored by

Outotec

11:40 Highlight Presentation

Donald R. Lindsay, President and Chief Executive Officer, **Teck Resources Ltd**

12:00 Session 4: Key issues related to future copper demand

- Impact on electric vehicles and overall electro-mobility trends
 - Threat from Aluminium and Aluminium alloy in wire & cable
 - China's 13th five-year plan – Update and expansion of copper impact analysis
 - Key regulatory environments and their copper impact
- Moderator: Colin Bennett**, Market Analysis and Outreach, **International Copper Association**
Speakers
Anthony Lea, President, **International Copper Association**
Li Bin, Chief Engineer, **Jiangsu Shangshang Cable Group**

12:45 Presentation to be announced

13:05 **Lunch**

The lunch will begin with a 20 minute networking reception, followed by a seated main course & dessert.

14:30 Metallurgical Sulphuric Acid Seminar

- Improvements in SO₂ capture in Chile – timing and effectiveness of proposed programmes
 - Changes in smelting industry structure and investment in the Americas
 - Long-term incentive prices and site costs – are they sufficiently attractive to bring potential SXEW mines on stream?
 - Will Electo Winning mines delay closure due to good market conditions beyond 2017?
 - Can sulfide leaching replace copper supply at Electo Winning facilities in Chile?
 - The global and Latin American sulphuric acid market outlook
 - What is the potential for acid price change beyond 2017?
- Seminar Chairman: Peter Harrison**, Senior Consultant, **CRU**
Jorge Cantallops, Director of Research, **Cochilco**
Piotr Ortonowski, Senior Consultant, Copper, **CRU**

16:30 **Close of conference**



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As the conference attracts such an influential audience, it provides a fantastic opportunity for you to raise your company profile. We have designed a range of sponsorship packages to help you meet your marketing objectives and raise your brand awareness. Each of these packages can be tailored to meet your business needs and options include:



- **Gold sponsorship opportunities**

- Registration Desk
- Auditorium
- Translation

- **Silver sponsorship opportunities**

- Conference Wi-Fi
- Writing Folder

- **A limited number of exhibition stands are also available**

Reserving an exhibition stand or branding opportunity gives you an opportunity to raise awareness of your products/services and network with existing and potential clients. To discuss which option will deliver the best return for your business please contact Paul Terry on:

+44 (0)20 7903 2131 or email paul.terry@crugroup.com



“ Great way to learn about trends and meet key industry and government leaders.”

Charles Moore, Director Resources and Strategy, Department of State Development, South Australian Government

“ The CRU World Copper Conference is the essential conference for anyone interested in the copper industry. A must attend - it's that simple.”

Dane Davis, Commodities Research Analyst, Barclays



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<input type="checkbox"/> From 17th January 2017 – Until 5th March 2017	US\$1,825	MID TIER RATE
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CONFERENCE INFORMATION

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On receipt of your booking we will send you
details on the CRU preferential rates available at the
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Cancellations must be received in writing prior to
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