Wood Mackenzie Metals and Mining European Briefing

Tuesday 21 July | Virtual event

Wood Mackenzie
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Session 1: A juncture for the industry

08:30 – 08:35	**Welcome & introduction** **Simon Morris**, Vice President - Head of Metals
08:35 – 08:50	**What is Wood Mackenzie's economic outlook and what are the key indicators we are watching for?** **Peter Martin**, Principal Economist
08:50 – 09:10	**What damage has been inflicted on commodities so far in 2020 and how much worse might it get?** *An overview of the impact of a tumultuous 6 months, a summary of the most impacted commodities, and a reality check on the potential impact for the sector if the recovery is not as strong as hoped* **Julian Kettle**, Vice Chairman - Metals & Mining
09:10 – 09:30	**What are the key decisions that will determine how the mining sector recovers?** *A discussion on how the fortunes of a range of commodities might vary depending on which path the world takes as it emerges from the shadow of the coronavirus* **Gavin Montgomery**, Director - Head of Battery Raw Materials; **Gillian Moncur**, Director - Head of Copper; **Paul Gray**, Vice president – Iron Ore;
09:30– 09:40	**Session break and networking**

Session 2: Supplying the future

09:40 – 10:00	**Has the Coronavirus fundamentally changed the industry's future supply trajectory?** *A look at whether we will see a structural change in the supply dynamics as a result of coronavirus – both near term and projects* **Ami Shivkar**, Principal Analyst - Aluminium & Alumina Markets; **Georgina Marchorst,** Senior Manager - Zinc Mine Costs ; **Nick Pickens**, Director - Copper Raw Materials
10:00 – 10:20	**Scrap – will it be the saviour of the environment or simply the (over)supply safety valve?** *An exploration of the role scrap plays in meeting global demand, its 'green' credentials and how the coronavirus has exposed its vulnerability as a predictable source of supply* **Renate Featherstone**, Principal Analyst – Multi-Commodity Research; **Eleni Joannides**, Senior Manager - Copper Markets; **Farid Ahmed**, Principal Analyst – Lead Markets
10:20 – 10:30	**Session break and networking**

Sessions 3 & 4 follow over page

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Session 3: Financing the future

10:30 – 10:50	**What does the future supply pipeline look like and do the economics stack up?** *Analysis of the size of the investment that will be required to meet the world's demand for mined commodities, and a consideration of which commodities are going to struggle to attract investors.* **Derryn Maade**, Vice President - Global Head of Bulks; **Janette Tourney**, Senior Research Analyst – Copper Mine Costs
10:50 – 11:10	**How has the ownership of supply evolved in the 21st century, who is in control today and what are the potential implications for the future?** *Analysis of how the ownership structures of key commodities has evolved over the last decade and what the consequences might be for supply chains in the coming years.* **Andrew Mitchell**, Director - Head of Nickel; **Carl Firman**, Principal Analyst - Bauxite & Alumina Supply; **Milan Thakore**, Senior Analyst – Battery Raw Materials; **Simon Morris**, Vice President - Head of Metals;
11:10– 11:20	**Session break and networking**

Session 4: Protecting the future

11:20-11:40	**What is the true carbon footprint of the metals we produce - and what needs to be done to make it 'green'?** *An exploration of the regulatory and societal forces that are driving the focus on green metals, a focus on the true carbon cost of aluminium and what a route to further decarbonisation might look like.* **Edgardo Gelsomino**, Director - Head of Aluminium; **James Whiteside,** Director - Head of Multi-Commodity Research
11:40-12.00	**What role will ESG play in shaping the mining landscape of the future?** *Considering the scale of new supply that will need to be brought online, to what degree will the mitigation of ESG risks or imposition of ESG-related constraints shape mining over the next decade?* **Hugo Brennan,** Principal Analyst - Head of Metals & Mining Sector Risk, Verisk Maplecroft**;** **Rory Townsend**, Principal Analyst - Head of Gold Research
12:05	**Forum close**