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DIRECTORATE FOR SCIENCE, TECHNOLOGY AND INNOVATION
STEEL COMMITTEE

Draft Summary Record: 81st Session of the Steel Committee

8 September 2016
Paris, France

This document was revised to reflect a minor correction in paragraph 11 and to include an annex with the list of participants.

Contact(s):
Filipe SILVA, tel: +33 1 45 24 92 12; e-mail: Filipe.SILVA@oecd.org
Kateryna PEREPECHAY, tel: +33 1 45 24 44 54; e-mail: Kateryna.PEREPECHAY@oecd.org

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Draft Summary Record: 81st Session of the Steel Committee

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Paris, France

1. The Chairman of the OECD Steel Committee, Mr. Risaburo Nezu, welcomed participants to the meeting.

2. Mr. Dirk Pilat, Deputy Director of the Directorate for Science, Technology and Innovation, made a short statement, reminding participants that all discussions at the Steel Committee should be compliant with antitrust and competition laws. Presentations, discussions and conversations at the Steel Committee should not deal under any circumstances with agreements and understandings that unduly restrict competition or restrain trade.

THURSDAY 8 SEPTEMBER

1. Adoption of the draft agenda

DSTI/SU/SC/A(2016)2/REV1

3. Mr. Anthony de Carvalho explained the underlying reasons for the last minute revision made to the agenda. The revision reflected the need to separate the discussion on a Global Forum on steel excess capacity from the discussions at the Steel Committee. He added that the discussions on a Global Forum would take place on Friday 9 September 2016 and noted that the Steel Committee meeting would take place only on Thursday 8 September. Mr. de Carvalho also overviewed additional changes to the agenda, including those related to item4 on *Steel and raw materials: policies for open markets and trade*.

4. The Mexican delegate noted that the last minute change in the agenda created important logistical problems. He explained that this change limited the ability of the Mexican steel industry representative to participate and share his views with the Committee.

5. The agenda was adopted without modification.

2. Approval of the summary record of the 80th session

DSTI/SU/SC/M(2016)1

6. The summary record of the 80th meeting of the Steel Committee was approved and adopted.

3. World economic outlook and steel market developments

World economic outlook

7. The Secretariat from the Economics Department (Mr. Mark Baker) presented the main messages of the OECD's Economic Outlook, released in June 2016. The OECD currently projects GDP growth to remain weak, despite a gradual improvement in 2017 to 3.3%, from a rate of 3% in 2016. The forecasts for global growth were revised downwards compared to the projections made in November 2015. At that time, world GDP growth was forecast at 3.3% in 2016 and 3.6% in 2017. Recent months have been characterized by subdued domestic demand and productivity growth in advanced economies amid a further growth slowdown in many emerging economies. Commodity prices have stabilized and financial market sentiment has slightly improved after considerable volatility earlier in the year. World industrial production has been driven mostly by advanced economies in recent months, whereas the economic slowdown in emerging economies has weighed on industrial production growth as well as on global trade. Mr. Baker also overview the impacts of the Chinese economic rebalancing and BREXIT referendum results.

Global steel market situation

DSTI/SU/SC(2016)3

8. The Secretariat (Mr. Anthony De Carvalho and Mr. Filipe Silva) presented the global market situation of the steel industry, emphasising developments in raw material markets and recent financial situation in steel markets. Mr. de Carvalho summarised the developments in raw material markets — iron ore, cocking coal and ferrous scrap. He noted that prices of key steelmaking raw materials fell sharply in 2015 amid weak demand, but began to stabilise in the beginning of 2016. Since then, prices have shown significant monthly gains, though scrap prices have receded again recently. The iron ore market has been in oversupply, reflecting reduced demand due to subdued world production of steel and supply increases particularly from Australia. The coking coal market has recovered rapidly, and prices are currently at their highest level this year. Scrap prices increased sharply in March, April and May of this year, but have since receded.

9. Mr. Silva overviewed the recent financial performance of steelmaking companies, highlighting that the financial situation in the steel sector is very fragile. He added that large liabilities have been weighing on steelmakers' balance sheets, reducing their margin of manoeuvre to restructure as needed. Mr. Silva warned that continued subdued financial performance in a context of already very fragile balance sheets pose serious risks to the steel sector and could affect other parts of the economy. He concluded by noting that any avoidance of bankruptcies and firm exit in this context will only add to the challenge.

10. Dr. Nae Hee Han, World Steel Association presented preliminary views on the steel demand outlook. According to Dr. Han, recent developments suggest better than expected global steel demand growth in 2016 and 2017 when compared to the outlook earlier this year, supported mainly by Asia (notably China). Nevertheless, growth momentum continues subdued and no immediate turnaround is expected. Developed economies are expected to show stable but low levels of steel demand growth and emerging economies are projected to diverge in their growth patterns. Demand growth is mostly consumption-driven as investment continues to be weak, despite the low interest rate environment. Risks to the outlook include China's economic growth deceleration, mounting geopolitical uncertainties and the low oil price momentum.

11. The delegate from the United States expressed concerns about the increased indebtedness of steelmaking companies and reinforced that the avoidance of exits of inefficient firms would only add to the excess capacity challenge. The delegate from the European Union noted the modest recovery in steel

markets, amid a very weak outlook. She also expressed concerns about the restarting of production in facilities that had previously been mothballed, while steel demand is likely to continue to contract in some economies, and stressed the urgent need for restructuring, amid unaddressed excess capacity. The delegate from Mexico echoed the concerns expressed by the United States and the European Union. In response to a comment from the Chairman, Mr. Silva, added that the low interest rate environment had also been allowing companies to sustain high debt levels, but that any potential increase in interest rates in the current context of high indebtedness would only had to the seriousness of the financial situation.

12. The delegate from TUAC noted the negative impacts of rising income inequality upon production and steel demand. He explained that reforms may not only entail a reallocation of resources but also have an impact upon the distribution of income, and stressed that the distributional impact of reforms needs to be taken into account. In response to some of these comments, Mr. Baker pointed towards the OECD's work on addressing inequality and highlighted related analysis in the current as well as forthcoming editions of the *Going for Growth* publication series.

13. The delegate from China provided a statement on the Chinese steel industry and the different concrete measures currently being taken by China to address the excess capacity challenge, with the objecting of attaining a reduction in steelmaking capacity between 100mmt and 150mmt by 2020, including a reduction of 45mmt by the end of 2016. A room document summarising China's position was distributed at the meeting.

14. The Committee was informed that the paper on recent market developments [DSTI/SU/SC(2016)3] is planned for declassification and members are requested to send any comments or corrections within three weeks after the Committee, after which the report would be included in the public domain of the OECD Steel Unit’s website.

Regional steel market developments

15. Mr. Karl Tachelet, European Steel Association explained that domestic demand in the EU has been showing signs of gradual recovery, supported by improvements in steel using industries (e.g. housing and automotive). He added that steel imports have been rising since 2012, and noted that EU mills are losing its share in the domestic and export markets.

16. Dr. Vaysel Yayan, Turkish Steel Producers Association, stressed that Turkey’s steelmaking capacity utilisation rate has shown a sharp drop due to the growing global excess capacity and widespread low prices. He noted that, despite growing domestic consumption, Turkey’s steel production has dropped and any additional demand is covered by imported steel. Increasing imports led to production stops or decreases, as well as to the closure of some facilities, a trend that continued throughout 2016.

17. Mr. Yuri Mishin, Russian Steel Consortium, explained that Russian crude steel capacities and production decreased by over 20% and obsolete capacities were partially replaced by modern equipment over the last 25 years. He stressed that, regarding domestic steelmaking capacity, there is no state financing, support or subsidies in the sector. He added that the latest industrial policy measures (e.g. those regarding environmental, safety and energy-saving issues) regulate the activity of existing steel producers and limit new capacity additions.

18. Mr. Shigeru Hagiuda, Japan Iron and Steel Federation, highlighted some factors that could stimulate demand in the Japanese steel industry in the coming years (e.g. several projects for the 2020 Tokyo Olympics). He noted however, that some negative factors — e.g. weak demand from key manufacturing steel-using sectors, the strong yen and the impacts of global excess capacity—, result in uncertain prospects for the Japanese industry.

19. The representative from the Korean Iron and Steel Association explained that although domestic steel production has been stagnant due to a delayed recovery in manufacturing sectors, steel demand has started to moderately recover during the first half of 2016, supported by positive developments in the construction sector. He noted however that there are growing concerns over rising imports and excessive trade remedy measures, which hamper the restructuring in the steel sector currently being undertaken in Korea, also affecting the competitiveness of the steel industry in Korea. He noted that economies should take WTO-consistent trade remedy measures, and industrial restructuring should be implemented in line with open market principles.

20. The representative from NAFTA stressed the weak momentum in North American steel markets, as well as the negative impact of global steel overcapacity and steel import surges. He noted that the regional steel industry has experienced redundancies, idling of major steel facilities and bankruptcies. He further added that the North American steel market has been characterised by an increase in the market share of imported products. He concluded by stating that global steel overcapacity remains the biggest challenge for the North American and global steel markets.

21. Mr. Rafael Rubio, ALACERO, overviewed the challenges affecting the steel industry in Latin America. Steel consumption, production and imports have declined in 2016 due to low economic activity and decreasing demand for steel. He added that the annual growth of exports has increased (growth was however relatively modest in volume terms), and that as a response to the growing share of imported steel products in the domestic market, industry and governments are taking actions against unfair imports, leading to a number of trade measures in the region.

4. Steel and raw materials: policies for open markets and trade

DSTI/SU/SC(2016)4, DSTI/SU/SC(2016)5

Steel trade and trade policy developments

22. The secretariat (Mr. Hokuto Otsuka and Mr. de Carvalho) provided an overview of the latest developments in steel trade and steel trade policy measures. World steel exports and production have increased since 2013 but are expected to slightly decline in 2016. A number of new initiations and determinations of AD/CVD measures against unfairly imported steel products keeps historically high level. As noted in previous reports prepared for the Steel Committee, several economies that previously did not use such measures are now becoming more frequent users.

23. Some delegates noted that trade remedy measures are not distortive as long as they are consistent with WTO rules. It was suggested that trade distorting measures are distinguished from legitimate cases in the future.

Steelmaking raw materials

24. The Secretariat (Ms. Kateryna Perepechay) introduced a report on the developments in markets for steelmaking raw materials that sheds light on the potential gains of more open export policies on these materials. Ms. Perepechay began her presentation with an overview of the incidence of export restrictions on main steelmaking raw materials over the past years. She then presented key insights from the OECD METRO model simulation that was used to assess the gains of more open export policies on steelmaking raw materials. Ms. Perepechay explained that open raw material export policies lead to positive effects throughout the steel supply chain. She also presented the insights derived from an initial assessment of the linkages between export restrictions and innovation in the mining sector and stressed the importance of further in-depth analysis.

25. The Secretariat from the Trade and Agriculture Directorate (Ms. Jane Korinek) presented a new data visualization which provides an interactive, intuitive interface to data on minerals and metals. The OECD has inventoried export restricting measures placed on 66 metals and minerals by all major exporters. This Inventory of export restrictions includes export bans, quotas, taxes, non-automatic licenses and any other export restricting measures. A hierarchy has been established based on the trade distorting potential of each measure. The Inventory has been combined with reserves and production data collected by the US Geological Survey, and trade data from UN-Comtrade, to provide a more comprehensive picture of global metals and minerals markets.[1]

26. The Secretariat from the Directorate for Financial and Enterprise Affairs (Mr. Tyler Gillard) presented OECD work on responsible mineral supply chains. Mr. Gillard explained that over the past few years the OECD has led a global movement to prevent the production and trade of minerals, used in everyday products, from benefiting armed groups and perpetrators human rights abuses. He noted that in 2009, the OECD in partnership with non-OECD economies has developed the Due Diligence Guidance for Responsible Supply Chains of Minerals from Conflict-Affected and High-Risk Areas (hereafter the Guidance) with the objective of helping companies respect human rights and avoid contributing to conflict through their mineral or metal purchasing decisions and practices. Mr. Gillard explained that the Guidance was adopted in 2011 and has now entered its fourth year of implementation. The Guidance is supported by an implementation programme that has been particularly successful in reaching out to governments and businesses of producing, processing and consuming countries, as well as in developing practical tools to support implementation by companies. Mr. Gillard also informed that together with China’s Chamber of Commerce for Metals and the Ministry of Commerce, the OECD supported the development of the Chinese Due Diligence Guidelines for Responsible Mineral Supply Chains to implement responsible mineral sourcing and due diligence in conformity with the Guidance.

27. The work undertaken by the Secretariat on the developments in markets for steelmaking raw materials received broad support from Steel Committee delegates. Some delegates noted the outcomes of recent WTO cases concerning restrictions to raw materials trade. The delegate from the European Union commented on the Secretariat's report and noted that export restrictions continue to distort prices on raw materials traded internationally. She welcomed the results of the analysis and noted the importance of the finding that the downstream industries both domestically and internationally benefit from the elimination of export taxes. She also noted opening to trade on steelmaking raw materials in several economies since 2015. The delegate from the United States further welcomed the removal of export tax on scrap in Argentina.

28. Delegates of the Steel Committee also expressed their interest in work on raw materials undertaken by the Trade and Agriculture Directorate and the Directorate for Financial and Enterprise Affairs. The delegates from the European Union and Russian Federation expressed their support for future work on import restrictions on raw materials to be conducted by the Secretariat of the OECD Trade and Agriculture Directorate. Delegates also expressed support for continuous updating of the OECD inventory of raw materials export restrictions.

[1] The interactive data visualization is publically available at http://www.compareyourcountry.org/trade-in-raw-materials.

5. Global relations

DSTI/SU/SC(2016)7

29. As a restricted item, the summary record of these discussions is provided separately as [DSTI/SC/M(2016)2/ADD1]

6. Programme of Work and Budget for 2017-18

DSTI/SU/SC(2016)2

30. The Secretariat (Mr. Anthony de Carvalho) overviewed the PWB priorities received from Member and Associate countries. He stressed the importance that delegations which had not yet done so, inform the Secretariat of their priority rankings by 16 September 2016. Mr. de Carvalho explained that the Secretariat would send a revised draft Programme of Work and Budget (PWB) by mid-October. The Steel Committee will be invited to consider and approve its PWB for 2017-18, through written procedure and by no later than 31 October 2016. The PWB will then be considered by the Budget Committee on 15 November 2016 and submitted for approved by Council by 1 December 2016.

31. The Committee discussed next steps regarding the PWB, the timeline for approval, as well as the degree of flexibility in the PWB. Some delegates requested the Secretariat to keep the Committee up to date regarding the different deadlines and process.

7. Standard-setting: review of OECD legal instruments

Oral report

32. At the 2013 Ministerial Council Meeting (MCM), Ministers reaffirmed the OECD's role as a global standard-setter and called on the Organisation to "proactively update and upgrade its existing standards and respond to any gaps in global standard-setting where appropriate". With a view to strengthening and maximising the impact of OECD legal instruments, an OECD-wide standard-setting review has recently been launched. The goal of the review is to ensure that OECD legal instruments continue to respond, in a timely manner, to the new challenges that governments are facing, thereby strengthening their impact and relevance for the Membership and beyond. The Steel Committee's standards are laid out in Council's 1978 Decision to establish the Steel Committee.[2]

33. Ms. Céline Folsché, from the Legal Directorate of the OECD, provided information on the review process as it relates to the guidelines set out in the mandate of the Steel Committee, and the actions required of the Steel Committee.

34. Some delegates requested the Secretariat to put some of the elements for consideration and requested actions in written. The Secretariat clarified that an Action Plan would be prepared and circulated shortly. With respect to timing, the goal would be to have the consolidated document ready for the 2017 MCM, meaning that the Steel Committee would need to agree on the document by March/April 2017.

[2] The instrument is available at http://webnet.oecd.org/OECDACTS/Instruments/ListByCommitteeView.aspx

8. Steelmaking capacity developments

DSTI/SU/SC(2016)6

35. The Secretariat (Mr. Filipe Silva) provided a presentation about capacity data that covered two aspects. First, he briefly presented the assessment of the current situation concerning global capacity developments in light of ongoing investments and closures in the steel industry. Second, he proposed a framework to enhance the monitoring and review process of OECD steelmaking capacity estimates.

36. Regarding recent capacity developments, some delegates noted that increases in steelmaking capacity are taking place in regions where demand is decreasing and alerted for the risks of increasing capacity in a context of uncertain demand.

37. Delegates generally welcomed the capacity framework proposal, supporting the idea of increased transparency about steelmaking capacity, in light of the current excess capacity situation. Some delegates called for broad, inclusive and active participation in the exercise, both in terms of governments and other stakeholders. Delegates expressed their preferences for timely and regular reports on capacity developments, noting that one annual report would be reasonable. Delegates also agreed that it was important that data was shared and provided at the highest level of detail possible, but noted that aspects related to proprietary information would need to be given due consideration. Other aspects discussed included the definition of capacity closure as well as the need for better information on the social impacts of steel plant closures.

9. Update on OECD work related to structural adjustment

Oral reports

38. The Secretariat (Mr. Nick Johnstone) provided the Committee with an overview of new work being undertaken in the Directorate for Science, Technology and Innovation on the effects of regulations which differ by plant vintage on exit. Mr. Johnstone noted that this analysis has been conducted in the context of increasing regulatory stringency for new plants compared to existing plants. The insights of this analysis were derived from the case study of environmental regulations faced by plants which have coal-fired boilers, including steel plants. Mr. Johnstone presented the preliminary results of the analysis as well as the main implications.

39. The Secretariat from the Economics Department (Ms. Muge Mcgowan) informed the Committee about the on-going work undertaken by the OECD Economics Department on exit policies and the channels through which they shape aggregate productivity growth. Ms. Mcgowan explained that while much of existing research focus on policy-induced entry barriers, there is a lack of information about the policies that shape the exit margin — this work aims at filling in this gap. Ms. Mcgowan provided an overview of the main phases of the project and informed the Committee about the next steps.

10. Chairman's Statement

Room document

40. The draft Chairman’s statement, summarising the market situation and providing some key conclusions of the Committee’s discussions, was distributed to delegates for review and comments. The Committee provided comments, and the Statement was revised accordingly. The revised statement was placed on the OECD’s website as a press release shortly after the meeting (see Annex 1).

11. Designation of the Chair and Bureau

41. Under the OECD Rules of Procedure, the Committee should designate its Chair and Bureau for the coming year at its last meeting of the year or no later than 31 December. The Committee's Bureau currently comprises a Chair and three Vice-chairs. The Committee's Bureau was comprised of a Chair (Mr. Risaburo NEZU) and two Vice-Chairs (Mr. Ronald LORENTZEN and Mr. Jean-Pierre FEYAERTS). The Secretariat (Mr. Anthony De Carvalho) informed the Committee that Chairman NEZU and Vice-Chair FEYAERTS will be stepping down from the bureau this year. Mr. de Carvalho further noted that the Secretariat had received nominations for the new Bureau composition. With no objections raised, the Secretariat officially declared Mr. Ronald K. LORENTZEN (United States) as Chair and Mr. Takanari YAMASHITA (Japan) and Mr. Lieven TOP (Belgium) as Vice-chairs, as the members for the 2016 Bureau.

12. Future meetings and other business

42. The Committee's 82nd and 83rd sessions are tentatively scheduled for 23-24 March 2017 and for 28-29 September 2017, respectively.

ANNEX 1. CHAIRMAN'S STATEMENT

UNCERTAIN SIGNS OF STEEL MARKET RECOVERY, BUT URGENT STRUCTURAL CHALLENGES REMAIN UNADDRESSED

Statement from Risaburo Nezu, Chairman of the OECD Steel Committee

The Committee:

- discussed the limited signs of recovery in the global steel market, and expressed concerns about corporate financial vulnerabilities and the unaddressed overcapacity and structural imbalances;
- reiterated the urgency of addressing the significant excess capacity challenge and its causes and effects in the steel industry and workers;
- welcomed the outcomes of the G20 Leaders Summit on 4-5 September 2016, and the forthcoming discussions amongst G20 and OECD members on a Global Forum on Steel Excess Capacity on 9 September 2016;
- expressed concerns about steel trade barriers and distortions and their underlying causes; and
- exchanged views on developments in raw material markets and on the effects of raw material export restrictions.

Limited signs of recovery in steel markets, but significant structural challenges remain unaddressed

The world economic outlook remains weak. Recent months have been characterised by subdued domestic demand and productivity growth in advanced economies amid a further growth slowdown in many emerging economies. According to the OECD's latest Economic Outlook of 1 June 2016, world GDP growth is projected to remain weak, despite a gradual improvement from 3% in 2016 to 3.3% in 2017.

The market situation in the steel industry has improved minimally since the beginning of the year. The three-year period from 2015 to 2017 is expected to be characterised by a gradual bottoming out of global steel demand growth. Preliminary views on the steel demand outlook by the World Steel Association suggest better than expected global steel demand growth in 2016 and 2017 when compared to the outlook earlier this year, supported mainly by Asia, albeit with a lower rate of demand contraction in China. Nevertheless, growth momentum continues to be subdued and no immediate turnaround is expected. Developed economies are expected to show stable but low levels of steel demand growth and emerging economies are projected to diverge in their growth patterns. Demand growth is mostly consumption-driven as investment continues to be weak, despite the low interest rate environment. Risks to the outlook include economic growth deceleration in some regions, mounting geopolitical uncertainties, increased corporate debt, and low oil price momentum.

World steel production continued to decline sharply during the first few months of 2016, but since then the rate of decline has diminished. In July 2016, world production registered a slight increase in year-on-year terms. The gradual improvement means that world production for the first seven months of this year is 1.2% below the January-July 2015 level. In 2015, world steelmaking capacity was estimated to have reached 2, 367.7 mmt, posting average annual growth of 5.7% since 2005. However, world capacity growth slowed to approximately 2% per annum in 2014 and 2015, and should subside further in 2016-18. Most of the growth in steelmaking capacity over the last decade has occurred in non OECD economies, which accounted for 72% of global steelmaking capacity in 2015. With global demand conditions remaining relatively weak in the coming years, it is anticipated that investment activity in the steel sector will slow. Capacity in the OECD area is expected to remain roughly unchanged until 2018, with a small number of new projects being offset by capacity closures. Global steelmaking capacity is projected to increase by almost 58 mmt in the 2016-18 period, thus reaching 2, 425.5 mmt by 2018. The Committee agreed to further its work on steelmaking capacity data, namely by focussing on more comprehensive information, with a view to increasing transparency and timely dissemination of capacity developments.

Recovery in demand in most regions is minimal, with estimated demand in 2016 at only 1.5 billion tonnes, thus indicating unsustainable oversupply, with over 800 mmt of excess capacity. Relatively minor adjustments in supply with some capacity closures and mothballing of steelmaking facilities, suggest that steel markets could be bottoming out. However, it is still uncertain whether the positive momentum is robust or sustainable. Significant headwinds related to corporate financial vulnerabilities and unaddressed overcapacity further cloud the outlook. Therefore, the momentum should be used to work out the necessary structural and supply-side and policy adjustments, including, removing different types of barriers to exit, bearing in mind implications for workers while the industry restructures.

The Committee welcomed the outcomes of the G20 Leaders Summit on 4-5 September 2016, and the forthcoming discussions amongst G20 and OECD members on a Global Forum on Steel Excess Capacity on 9 September 2016.

Trade measures continue to increase as a reaction to unresolved market distortions and other factors

The global steel industry continues to face difficult conditions due to excess capacity, weak global demand for steel and growing trade tensions. There has been a sharp increase in steel trade actions by governments, while global steel trade remains relatively robust, with world exports of steel having averaged more than 300 mmt per year since 2014. Trade actions should respect international obligations.

Steelmaking raw materials markets should be kept as open as possible

The Committee discussed steelmaking raw material markets and related export policy developments. The use of export restrictions worldwide remains high despite the fact that the market balance for many steelmaking raw materials has eased and prices have fallen significantly in recent years. The Committee discussed preliminary research showing that more open raw material export policies can have positive effects throughout the steel supply chain, both domestically and internationally. The Committee also discussed the possible linkages between export restrictions and innovation in the mining sector, which is crucial for ensuring sufficient availability of raw materials in the long term, noting that the WTO allows for specific exceptions.

ANNEX 2. LIST OF PARTICIPANTS

Participants List for Steel Committee (STEEL)
Liste des Participants pour Steel Committee (STEEL)

All Sessions

Argentina/Argentine

Mr. Gabriel Gaspar TABOADA	*Minister in charge of the OECD* *Embassy of Argentina*

Australia/Australie

Mr. John RYAN	*Minister-Counsellor Industry, Innovation and Science* *Permanent Delegation of Australia to the OECD*
Ms. Elizabeth YOUNG	*Director* *Rules & Remedies Section, Goods & Investment Branch* *Department of Foreign Affairs and Trade*
Mr. Gary DAVIS	*Manager, Building and Steel Strategies* *Industry Transition Branch* *Department of Industry, Innovation and Science*

Austria/Autriche

Ms. Daniela Christiana BICHIOU	*External Relations and Governance Counsellor* *Permanent Representation of Austria to OECD*
Mr. Roman STIFTNER	*Managing Director* *Austrian Mining and Steel Association*

Belgium/Belgique

M. Jean-Joël SCHITTECATTE	*Ambassadeur, Représentant Permanent* *Permanent Delegation of Belgium to the OECD and UNESCO*
Ms. Maria-Antoinetta SIMONS	*Conseiller* *Permanent Delegation of Belgium to the OECD*
M. Jean-Pierre FEYAERTS	*Counsellor* *Directorate General for Economic Analysis and Global Economy* *Federal Public Service Economy, SME's, Self-employed and Energy*
Mr. Henk MAHIEU	*Directeur* *Cabinet Kris Peeters* *Belgian Federal Government*
Mme Viviane PEREMANS	*SPF Economie, P.M.E., Classes moyennes et Energie*
Mr. Lieven TOP	*Policy Advisor* *Ministère flamand de l'Economie, les Sciences et l'Innovation*
Mr. Cédric VAN DER ESSEN	*Attaché, Directorate general Economic potential - Directorate Basic Industries* *FPS Economy*

Brazil/Brésil

Mr. Marcelo AVILA	*Brazil Steel Institute*
Mr. Gregory Louis BESHARA	*Secretary, Public Governance, Steel, AIE, AEN,* *Brazil Embassy in France*
Mr. MARCO POLO LOPES	*Executive President* *Brazil Steel Institute*

Canada

Mr. Martin MOEN	*Director General, North America Trade Policy Bureau* *Trade Agreements and Negotiations* *Global Affairs Canada*
Mr. Gerard PEETS	*Director General, Manufacturing and Life Sciences*

	Industry Sector *Innovation, Science and Economic Development Canada*
M. André MONCION	*Deputy Director, Trade Remedies and North America Trade* *North America and Investments* *Affaires mondiales Canada*
Mr. Joseph GALIMBERTI	*President* *Canadian Steel Producers Association*
Mr. Henry WEGIEL	*Director Government and Trade Relations* *Corporate Affairs* *ArcelorMittal Dofasco*
Mr. Paul CONLIN	*Trade Counsel* *Canadian Steel Producers Association*
Mr. William KENDALL	*Counsellor for Trade, Agriculture, Science, Technology and Industry* *Permanent Delegation of Canada to OECD*

Chile/Chili

Mr. Rodrigo MONARDES	*Counsellor in Trade & Investment* *Permanent Delegation of Chile to the OECD*
Mr. EDUARDO CEBALLOS	*Jefe de division de Acreditacion* *Instituto Nacional de Normalizacion*

Chinese Taipei/Taipei chinois

Mr. Chien-jen CHEN	*Project Manager* *Metal Industries Research and Development Center*
Mr. Peng-yong CHEN	*Section Chief* *Bureau of Industrial Development* *Ministry of Economic Affairs*
Mr. Chin-Kang FAN CHIANG	*Assistant General Manager* *Chine Steel Corporation*
Mr. zong-liang JIANG	*Executive Secretary* *Bureau of Foreign Affairs* *Ministry of Economic Affairs*

Ms. Yuling LIU	*Economic Secretary* *Economic Division* *Taipei Representative Office in France*
Ms. Antonia MEI	*Deputy Director* *Economic Division* *Taipei Representative Office in France*
M. Chin-chuan SHEN	*Secretary General* *Taiwan Steel and Iron Industries Association*

Colombia/Colombie

Ms. Catalina CRANE	*High-Level Contact for OECD* *Director of Colombia's OECD office* *Embassy of Colombia*
Mr. Juan Manuel LESMES	*Executive Director* *Asociación Nacional de Empresarios de Colombia (ANDI)*
Mr. Sebastián TRUJILLO SAÉNZ	*Colombia Relations to the OECD* *Colombian Embassy in France*
Ms. Carolina ZULUAGA	*Finance Ministry Colombia*

Czech Republic/République tchèque

Ms. Vera ZAZVORKOVA	*First Secretary* *Permanent Delegation of the Czech Republic to the OECD*
Dr. Martin KARFUS	*Ministerial Counsellor - Head of Unit* *Ministry of Industry and Trade*

Finland/Finlande

Ms. Helena SILVONEN	*First Secretary* *Department for External Economic Affairs* *Ministry of Foreign Affairs*
Ms. Mia HURTTA	*Counsellor*

	Permanent Delegation of Finland to the OECD
Mr. Juho KORTENIEMI	*Counsellor (Industry, Energy and Regional Development)* *Permanent Delegation of Finland to the OECD*

France

M. Pierre DUQUESNE	*Ambassadeur, Représentant Permanent* *Représentation Permanente de la France auprès de l'OCDE*
Mr. Edmond ABBOU	*Chef du secteur OCDE/SGAE* *Chef du département OCDE* *Secrétariat Général des Affaires Européennes (SGAE)*
M. François BAZANTAY	*Adjoint Chef du Bureau MULTICOM1* *Direction Générale du Trésor* *Ministère de l' Economie et des Finances*
M. Stéphane BERGER	*Chargé de mission* *Direction Générale des Entreprises* *Ministère de l'Economie, de l'Industrie et du numérique*
M. Marc JAMET	*Adjoint au chef du bureau de la politique commerciale et du soutien à l'export* *Direction Générale des Entreprises* *Ministère de l'Economie, de l'Industrie et du numérique*
M. Olivier MARTIEL	*Economic Advisor* *Service des Affaires économiques et financières* *Permanent Delegation of France to the OECD*
M. Alexis SAHAGUIAN	*Adjoint au Chef du Bureau* *Direction Générale du Trésor* *Ministère de l'Economie et des Finances*
Mme Elise SERRUT	*Chargée de mission politique commerciale* *Direction Générale des Entreprises* *Ministère de l'Economie, de l'Industrie et du numérique*
Ms. Claire SPAGNOL	*Adjointe au Chef de Bureau* *Direction générale du Trésor* *Ministère de l'Economie et des finances*

Germany/Allemagne

Mr. Alexander HECK	*Head of Executive Office & Corporate Affairs* *Salzgitter AG*
Dr. Reinhard PFENDER	*Head of Division* *Federal Ministry for Economic Affairs and Energy (BMWi)*
Mr. Ulf ZUMKLEY	*Head of Division* *Steel, Defense and Security Industry* *Federal Ministry for Economic Affairs and Energy (BMWi)*
Mr. Stefan GRÜNHAGE	*Senior Manager* *Sales Srategy/Planning* *ThyssenKrupp Steel Europe AG*
Mr. Ulrich Nikolaus OBERNDORFER	*Economic Advisor* *Permanent Mission of the Federal Republic of Germany to the OECD*
Dr. Martin THEURINGER	*Director Economics* *German Steel Federation*

Hungary/Hongrie

Mr. Gábor HORVÁTH	*Counsellor* *Permanent Delegation of Hungary to the OECD*
Mr. David HEGYESI	*Department for Industry and Construction Economy* *Ministry of National Economy*

India/Inde

Mr. Syedain ABBASI	*Joint Secretary* *Ministry of Steel*
Mr. Venugopal MENON	*Attache Trade* *Embassy of India*
Ms. Aruna SHARMA	*Secretary* *Ministry of Steel*

Italy/Italie

Mr. Amedeo TETI	*Director General for International Trade Policy* *Ministry of Economic Development*
Mr. Giovanni Maria ROSSONI	*Head of Technical Secretariat of the Undersecretary of State On. Scalfarotto* *Ministry of Economic Development*
Mr. Carlo LOMBARDI SATRIANI	*Director* *Federacciai*
Dr. Adriano MULAS RAVERA	*Trade Officer* *D.G. International Trade Policy* *Ministry of Economic Development of Italy*
Ms. Carla DI PAOLA	*Trade Attaché* *Permanent Delegation of Italy*

Japan/Japon

Mr. Masayuki NOTA	*Principal Deputy Director* *Iron and Steel Division, Manufacturing Industries Bureau* *Ministry of Economy, Trade and Industry (METI)*
Mr. Shigeru HAGIUDA	*General Manager* *Market Research & International Economic Affairs Division* *The Japan Iron and Steel Federation*
Mr. Jiro KOBAYASHI	*General Manager, Head of European Office* *Nippon Steel and Sumitomo Metal Corporation*
Mr. Risaburo NEZU	*Senior Research Adviser of the Research Institute of Economy, Trade and Industry* *Chairman of the Steel Committee* *RIETI*
Mr. Tetsuro FUKUNAGA	*Special Advisor* *Ministry of Economy,Trade and Industry(METI)*
Ms. Kunita NOZOMI	*Assistant Director* *Ministry of Economy Trade and Industry (METI)*
Mr. Takuma INAMURA	*Counsellor* *Permanent Delegation of Japan to the OECD*
Mr. Masaya SUGIMOTO	*Deuxième Secrétaire*

Permanent Delegation of Japan to the OECD

Kazakhstan

Mr. Kanat BAITOV	*Deputy Chairman* *Ministry of Investment and Development of the Republic of Kazakhstan*
Mr. Timur USSEYEV	*Chief Expert* *Industrial Development and Safety Committee* *Ministry for Investments and Development of the Republic of Kazakhstan*
Mr. Turar ZHOLMAGAMBETOV	*Senior Expert* *Kazakhstan Institute of Industrial Development*

Korea/Corée

Mr. Sang Hee PARK	*First Secretary* *Permanent Delegation of the Republic of Korea to the OECD*
Mr. Jae-Hoon AN	*Deputy Director* *Ministry of Trade, Industry & Energy*
Mr. Jeong-Hyuk JANG	*Manager* *Research and Trade Department* *Korea Iron and Steel Association*
Mr. Joongbaek JUNG	*Group Manager* *Steel Business Strategy Dept. International Trade Affairs Group* *POSCO*
Mr. Sung-Chul (Steve) KANG	*General Manager* *POSCO Europe Office*
Mr. Min-Seub KIM	*Associate* *Korea Iron and Steel Association*
Mr. Byoung-Woo LEE	*Senior Managing Director* *General Administration & Support Division* *Korea Iron and Steel Association*
Mr. Jae-Bin SONG	*Executive Vice Chairman* *Korea Iron and Steel Association*

Mr. kim TAEK	*Korean Iron & Steel Association (KOSA)*

Latvia/Lettonie

Ms. Elina BRIMERBERGA	*Deputy Permanent on OECD issues* *Permanent Delegation of Latvia to the OECD*

Luxembourg

Ms. Ana Dolores ESCOBEDO	*Director International Government Affairs* *Public policy and government affairs* *ArcelorMittal*
Ms. Nadjeli HERAS	*Commercial Policy Representative* *Global Trade Policy* *ArcelorMittal*
Mr. Lucas LENCHANT	*Corporate Government Affairs Manager* *ArcelorMittal*

Malaysia/Malaisie

Mr. Mohd. Nazriq LAMIEN	*Senior Assistant Director* *Sectoral Policy Division* *Ministry of International Trade & Industry (MITI)*

Mexico/Mexique

Mr. Guillermo GARCIA HERNANDEZ	*Minister-Counsellor for the Ministry of Economy* *Secretaria de Economia* *Permanent Delegation of Mexico to the OECD*
Ms. Flavia FARINETTI	*Counsellor for Economic Affairs* *Ministry of Economy* *CONSULTANT*
Mr. Víctor Manuel AGUILAR PÉREZ	*Head of the International Trade Practices Unit* *Ministry of Economic Development*

Mr. Orlando PÉREZ GÁRATE	*Director General for International Trade Rules* *Ministry of Economy*
Mr. Jesús Maria FLORES AYALA	*Director of International Affairs* *Tenaris Tamsa*
Mr. Guillermo Francisco VOGEL HINOJOSA	*President* *National Chamber of the Iron and Steel Industry (CANACERO)*
Mr. Jorge GUZMAN TREVIÑO	*Head of legal and government affairs* *ArcelorMittal Mexico*

Norway/Norvège

Mr. Olav MYKLEBUST	*Minister Councellor, Deputy Permanent Representative* *Permanent Delegation of Norway to the OECD and UNESCO*
Ms. Inger Hammersmark ULLEBERG	*First Secretary* *Permanent Delegation of Norway to the OECD*

People's Republic of China/République populaire de Chine

Mr. Changzheng BIAN	*Deputy Director* *Bureau of Industry, Security, Import and Export Control* *Ministry of Commerce*
Mr. Bo CHEN	*Third Secretary* *Economic and Trade Office* *Embassy of the People's Republic of China*
Ms. YuanYuan GAO	*Minister-Counselor* *Chinese Embassy in France*
Ms. Yuan GU	*Director* *Investigation Bureau of Industry Injury* *Ministry of Commerce*
Mr. Qianliang JIANG	*Deputy Director General* *Ministry of Commerce (MOFCOM)*
Ms. Yu LUO	*First Secretary* *Department of International Trade and Economic Affairs*

	Ministry of Commerce (MOFCOM)
Mr. Zunqing YANG	*Deputy Secretary General* *China Iron and Steel Association*
Ms. Bin ZHANG	*First Secretary, Commercial and Economic Affairs* *Chinese Ministry of Commerce (MOFCOM)* *Embassy of the People's Republic of China*
Mr. Feng ZHU	*Deputy Director* *Ministry of Commerce (MOFCOM)*
Mr. Jianyi ZHU	*Counsellor* *Economic and Commercial Counsellor's Office* *Embassy of the People's Republic of China*
Ms. Xiaojuan ZHU	*Director* *Bureau of Industry, Security , Import and Export Control (BISIEC)* *Ministry of Commerce*

Poland/Pologne

Mr. Milosz KARPINSKI	*Counsellor, Energy, Environment* *Permanent Delegation of Poland to the OECD*
Mr. Miroslaw MOTYKA	*Expert* *Advisor in the Ministry of Economic Development* *Polish Steel Association*
Ms. Anna NOSAL	*Chief Expert* *Innovation Department* *Ministry of Economic Development*

Portugal

Ms. Anabela SILVA	*Head of Division* *Directorate General for Economic Activities* *Ministry of Economy*
Mr. Paulo AREOSA FEIO	*Counsellor* *Permanent Delegation of Portugal to the OECD*

Romania/Roumanie

Ms. Gabriela - Magdalena PIRVU	*Senior Counsellor* *Directorate Industrial Policy & Competitiveness* *Ministry of Economy, Trade and Relations with Business Environment*

Russian Federation/Fédération de Russie

Mr. Timur EYVAZOV	*Minister Counselor on OECD Matters* *Embassy of the Russian Federation in France*
Mr. Mikhail MATVEEV	*Deputy Head of division* *Deparment of Trade Negotiations* *Ministry of Economic Development of the Russian Federation*
Mr. Yuri MISHIN	*Adviser, Industry Policy* *Management Committee* *Russian Steel Consortium*
Mr. Victor SMIRNOVSKIY	*Counsellor* *OECD affairs* *Embassy of the Russian Federation in France*
Ms. Elena STOYANOVA	*Deputy Director of Department of Europe* *North America and International Organisations* *Ministry for Economic Development and Trade of the Russian Federation*
Mr. Dmitry TONKOV	*Head of Division* *Department of Trade Negotiations* *Ministry of Economic Development of the Russian Federation*
Mr. Alexey USHAKOV	*Head of Division* *Department of metallurgy and materials* *Ministry of Industry and Trade of the Russian Federation*
Mr. Pavel VOROBYEV	*Economist* *Corporate Strategy Department* *Severstal*

Saudi Arabia/Arabie saoudite

Mr. Abdulaziz Sanad AL-SANAD	*Director General*

	World Trade Service Center
Mr. Abdullah ALDAWOOD	*Director of Industrial Sectors industrial development Ministry of energy , industry and mineral resources*
Mr. Mohammed Saleh ALJABR	*Vice Chairman - National Steel Committee Iron & Steel The Council for Saudi Chambers of Commerce and Industry*

Slovak Republic/République slovaque

Mr. Dusan JURIK	*Industry and Innovation Ministry of Economy of the Slovak Republic*
Ms. Judita VANKOVA	*Counsellor Permanent Delegation of the Slovak Republic to the OECD*
Mr. Radovan VARGA	*Deputy Director Foreign Trade Policy Department Ministry of Economy of the Slovak Republic*

Spain/Espagne

Mr. Andrés BARCELÓ	*Director General UNESID (Union d'Entreprises Sidérurgiques)*
Mr. Alfonso DE LAS HERAS	*Conseiller Industriel Délégation Permanente de l'Espagne auprès de l'OCDE*

Sweden/Suède

Ms. Josefine HOLMQUIST	*Counsellor Permanent Delegation of Sweden to the OECD and UNESCO*
Ms. Helena HERNNÄS	*Trainee Permanent Delegation of Sweden to the OECD*

Switzerland/Suisse

Ms. Dominique JORDAN PERRIN	*Cheffe du secteur OCDE* *Département fédéral de l'économie, de la formation et de la recherche - DEFR* *Secrétariat d'Etat à l'économie - SECO*

Turkey/Turquie

Mr. Mesut AYDIN	*Counsellor* *Permanent Delegation of Turkey to the OECD*
Mr. Caner BOZAT	*Assistant Expert* *General Directorate of Export* *Ministry of the Economy*
Ms. Nilay CAMCI	*Trade Expert* *General Directorate of Investment Incentives and Foreign Investment* *Ministry of the Economy*
Mr. Yasin OCAL	*Planning Expert* *Department of Industry* *Ministry of Development*
Mr. Veysel YAYAN	*Secretary General* *Turkish Steel Producers' Association*

United Kingdom/Royaume-Uni

Mr. Lyall SYME	*Manager, International Trade* *Tata Steel Europe* *Tata Steel Limited*
Mr. Fergus HARRADENCE	*Department for Business, Energy & Industrial Strategy* *Department for Business, Energy & Industrial Strategy*
Mr. Grant MOSEDALE	*Senior Policy Adviser, International Market Access, Trade Policy Unit* *ITEC* *Department for Business, Energy & Industrial*

	Strategy
Mr. Jonathan PETCHEY	*Senior Policy Adviser, International Market Access, Trade Policy Unit Department for Business, Energy & Industrial Strategy*
Mr. Gareth STACE	*Director UK Steel*

United States/États-Unis

Ms. Julie AL-SAADAWI	*Manager, Steel Import Monitoring and Analysis (SIMA) ITA/Enforcement And Compliance International Trade Administration (ITA)*
Ms. Mayra ALVARADO	*Trade and Agriculture Advisor Permanent Delegation of the United States to the OECD*
Mr. John BASS	*General Manager Public Affairs Nucor Corporation*
Mr. Philip BELL	*President Steel Manufacturers Association*
Ms. Eileen BRADNER	*Senior Director and Counsel Federal Government Affairs Nucor Steel Corporation*
Mr. Kevin DEMPSEY	*Senior Vice President Public Policy and General Counsel American Iron and Steel Institute*
Ms. Amber FORD	*ArcelorMittal*
Mr. Thomas GIBSON	*President and CEO American Iron and Steel Institute*
Mr. Timothy GILL	*Chief economist American Iron and Steel Institute (AISI)*
Ms. Holly HART	*Director of Legislative Department United Steelworkers of America - USWA*
Mr. Robert HEILFERTY	*Deputy Chief Counsel for Enforcement and Compliance Office of General Counsel U.S. Department of Commerce*

Ms. Jean KEMP	*Director, Industrial Metals, Materials & Energy* *Office of Market Access and Industrial Competitiveness* *Office of the US Trade Representative (USTR)*
Ms. Stephanie LANGKAMP	*Senior Policy Advisor* *Office of Policy, Import Administration* *US Department of Commerce*
Mr. Ronald LORENTZEN	*Deputy Assistant Secretary for Enforcement and Compliance* *US Department of Commerce*
Ms. Kate MCNULTY	*Multilateral Trade Affairs* *Department of State*
Mr. Adam PARR	*Vice-President* *Policy and Communications* *Steel Manufacturers Association*
Mr. Paul PIQUADO	*Assistant Secretary for Enforcement and Compliance* *US Department of Commerce*
Mr. Alan PRICE	*Partner, Wiley Rein* *Steel Manufacturers Association*
Mr. Roger SCHAGRIN	*Executive Director* *Committee on Pipe and Tube Imports*

EU/UE

Mr. Gwenole COZIGOU	*European Commission - DG Grow C*
Ms. Aleksandra Ewa KOZLOWSKA DABKOWSKA	
Ms. Violeta MITOVA	*Policy Officer* *DG Trade, Market Access, Industry, Energy and Raw Materials* *European Union*
Mr. Francisco PEREZ CAÑADO	*Head of Unit G3* *DG Trade* *European Union*
Ms. Signe RATSO	*Director* *DG TRADE* *European Union*

European Bank for Reconstruction and Development (EBRD)/Banque européenne de reconstruction et de développement (BERD)

Mr. Christopher BEAUMAN *Senior Adviser*

Business and Industry Advisory Committee (BIAC)/Comité consultatif économique et industriel (BIAC)

Ms. Marcela BARBOSA *Market Analyst*
Vale International SA

Ms. Mirona COROPCIUC *Environmental Manager*
EUROMINES

Mr. Marcio SENNE DE MORAES *Director of External Affairs*
External Affairs
Vale SA

Trade Union Advisory Committee (TUAC)/Commission syndicale consultative (TUAC)

Mr. Andrew BRADY *Unite The Union*

Mr. Luis COLUNGA *IndustriAll Europe*

Mr. Ronald JANSSEN *Senior Policy Adviser*

Mr. Fernando LOPES *Assistant General Secretary*
Responsible for base Metals Sector
IndustriALL Global Union

Mr. Robert SNEDDON *EU and International*
UK Community

Mr. Mischa TERZYK *Policy Adviser*
IndutriALL European Trade Union

ALACERO

Mr. Rafael RUBIO	*Director General*

EUROFER

Mr. Axel EGGERT	*Director General* *General Directorate*
Mr. Karl TACHELET	*Director for International Affairs* *International Affairs*

TUAC

Tony BRADY

World Steel Association

Dr. Edwin BASSON	*Director General*
Dr. Nae Hee HAN	*Director Economic Affairs and Chief Economist*

OECD/OCDE

Ms. Gabriela RAMOS	*OECD Chief of Staff, G20 Sherpa and Special Counsellor to the Secretary-General* *SGE*
Ms. Muge ADALET MCGOWAN	*Economist* *ECO/SPAD*
Mr. Mark BAKER	*Economist*

	ECO/MPD
M. Nicola BONUCCI	*Director* *SGE/LEG*
Mr. Anthony DE CARVALHO	*Head of Unit - Senior Economist/Policy Analyst* *STI/SPD/STEEL*
Ms. Céline FOLSCHÉ	*Legal Advisor* *SGE/LEG*
Mr. Tyler GILLARD	*Legal Adviser, Pro-Active Agenda and Due Diligence Project* *DAF/INV*
Mr. Nick JOHNSTONE	*Head of Division* *STI/SPD*
Ms. Jane KORINEK	*Trade policy analyst* *TAD/PTA*
Mr. Hokuto OTSUKA	*Staff on loan* *STI/SPD/STEEL*
Ms. Kateryna PEREPECHAY	*Temporary staff* *STI/SPD/STEEL*
Mr. Dirk PILAT	*Deputy Director* *STI*
M. Nicolas PINAUD	*Deputy Head of Unit* *SGE/SHPA*
Mr. Filipe SILVA	*Policy Analyst* *STI/SPD/STEEL*
Mr. Andrew WYCKOFF	*Director* *STI*