



2023

MIND THE GAP



Ljubljana, Slovenia

Grand Hotel Union EuroStars

June 4 – 6, 2023

**49th Annual Meeting & International Conference
on Nuclear Fuel**

The nuclear fuel market for most of the past decade was consumed with oversupply and lower nuclear growth projections. Conferences included themes like “restructuring for a better future”, with suppliers and utilities often advising the next set of reductions and shutdowns. Yet, in a relatively short period of time, nuclear fuel market participants are finding themselves navigating through an intense period of change.

At the macro level, the benefits of nuclear energy have come into focus in a way not previously seen, driven by the accountability created by net-zero carbon targets being set by countries and companies around the world, set against the backdrop of an energy crisis being experienced in some parts of the world. This has amplified concerns about energy security and highlighted the role of energy policy.

The last two years have been fraught with geopolitical uncertainty, starting with the swiftly resolved political unrest in Kazakhstan, followed by the Russian invasion of Ukraine. The latter has highlighted the need for robust and diversified supply chains and challenged traditional logistics. The potential for sanctions simmers in the background and some buyers are choosing to self-sanction even in the absence of formal market restrictions. Utilities have also been evaluating fuel supply and demand with significant changes to consider, such as the return of financial funds to the market, early closure of reactors being reversed, reactor life extensions and accelerated new build under consideration. Inflation and high interest rates also have real cost impacts to all participants.

All these factors are rapidly influencing the supply and demand profile for all components in the nuclear fuel cycle. How will the market respond?

Sunday, June 4

Agenda

9:00 – 11:30 a.m. CET **City Tour with Ljubljana Tourism**

Gather in Grand Hotel Union EuroStars Lobby at 8:40 a.m. for 9:00 a.m. departure.

Please be advised to wear comfortable shoes as most of the tour is a walking tour.



In the company of your guide, you will take a walking tour of the historical city centre during which you will be immersed in the history and stories behind Ljubljana's major sights. From the Prešernov trg square, dominated by the Franciscan Church and connected to the Triple Bridge, you will head towards Plečnik's Market and the Cathedral, continue to the Town Hall and the Robba Fountain, cross the Cobblers' Bridge, pass the National and University Library to reach the Križanke Summer Theatre, and continue towards the Kongresni trg square.

In the heart of the city, you will embark on a tourist boat that will take you along the Ljubljanica River, whose interesting bridges and picturesque embankments give Ljubljana its distinctive appearance.

\$50 USD per person. Prior registration required.

5:00 – 6:30 p.m. CET **Welcome Reception | Sponsored by Orano**

Grand Hotel Union EuroStars

Garden Hall & Hotel Garden

Dress is Business Casual

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Monday, June 5

Agenda

8:30 – 8:45 a.m. CET

Welcome & Opening Remarks

Mr. Mark Whitwill *Board of Governors Chairman | WNFM;*
Senior Advisor | Kernkraftwerk Gösgen-Däniken AG

- **Board Election Announcements & Voting**

8:45 – 9:05 a.m. CET

Keynote Speakers:

Dr. Igor Vuković, *Executive Director, Procurement | Nuklearna elektrarna Krško*

9:05 – 9:10 a.m. CET

Session I: Choose the Platform

Session Chair: Ms. Lisa Aitken *Board of Governors | WNFM;*
Managing Director, Marketing | Cameco Corporation

- **Introduction & Polling**

How will utilities and suppliers navigate this changing landscape? In this session, we will review the front end of the fuel cycle with the perspectives of two key industry presenters and then move into a panel that will highlight considerations from both a utility and supplier perspective.

- **Reviewing Supply & Demand: Perspectives on Uranium, Conversion, and Enrichment**

9:10 – 9:30 a.m. CET

Mr. Clark Beyer, *Principal | Global Fuel Solutions, LLC*

9:30 – 9:50 a.m. CET

Ms. Treva Klingbiel, *President & Principal | TradeTech, LLC*

9:50 – 10:10 a.m. CET

Session I: Q & A

10:10 – 10:40 a.m. CET

----- **Break | Sponsored by enCore Energy Corp.** -----

10:40 – 12:10 p.m. CET

PANEL:

The Current Landscape & Where We're Headed

Mr. Jonathan Hinze, Moderator

President | UxC, LLC

PANELISTS:

Mr. Malcolm Critchley, President & CEO | ConverDyn

Mr. Laurent Odeh, Chief Commercial Officer | Urenco Enrichment Company

Ms. Karen Radosevich, Sr. Manager, Nuclear Fuel Supply | Entergy Services, LLC.

Mr. Tuomas Rantala, Head of Fuel Unit | Teollisuuden Voima Oyj

Mr. Seitzhan Zhanybekov, Managing Director for Marketing and Strategy |

Kazatomprom National Atomic Company

After 12:10 p.m.
CET

----- **Lunch on your Own** -----

Free time for individual and company networking meetings.

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Tuesday, June 6**Agenda**

8:30 – 8:45 a.m. CET

Welcome & Business Items**Mr. Mark Whitwill** *Board of Governors Chairman | WNFM;*
Senior Advisor | Kernkraftwerk Gösgen-Däniken AG

- **Board Election Announcement**
- **Review of 2022 Annual Report**

8:45 – 8:50 a.m. CET

Session II: Don't Miss the Train**Session Chair: Mr. Mandeep Ludu** *Board of Governors | WNFM;*
Head of Nuclear Fuel | WMC Energy

All aboard!! As we've explored the many challenges in the market, we'll now spend time focusing on what strategies are being developed and/or put in place to meet these challenges head on. Where is the focus? What is the thinking process? Find out from a distinguished group of speakers that cover the globe.

8:50 – 9:10 a.m. CET

• Strategies Going Forward**Mr. Victor Li**, *Deputy Director | CNNC Overseas Limited*

9:10 – 9:30 a.m. CET

• EDF Direction Going Forward**Mr. Julien Garrel**, *Deputy Director of the Nuclear Fuel Division | Electricite de France*

9:30 – 9:50 a.m. CET

• Dealing with New Realities**Mr. Tony Williams**, *Senior Advisor | Axpo AG Kernenergie*

9:50 – 10:05 a.m. CET

Session II: Q & A

10:05 – 10:35 a.m. CET

----- **Break | Sponsored by Marubeni Corporation** -----

10:35 – 10:55 a.m. CET • **Filling the Gap in Uranium Supply**
Mr. Grant Isaac, *Executive Vice President & Chief Financial Officer* | **Cameco Corporation**

10:55 – 11:15 a.m. CET • **Addressing East European Fabrication Market**
Mr. Tarik Choho, *President of Nuclear Fuel* | **Westinghouse Electric Company**

11:15 – 11:30 a.m. CET **Session II: Q & A**

11:30 – 2:00 p.m. CET ----- **Lunch on your Own** -----

2:00 – 2:05 p.m. CET **Session III: Moving Forward**
Session Chair: Mr. Rob Szollosy *Board of Governors* | **WNFM**;
Nuclear Fuel Supply Manager | **Southern Nuclear Operating Company**

To ensure a healthy and sustainable marketplace for the future, it is prudent to look at what is unfolding right in front of us. We'll explore the spot and near-term market and how buyers and sellers might be changing behaviors to solve problems and adapt to new terrain in the journey. We'll examine trade policy initiatives and the potential impact to the front end of the fuel cycle.

Finally, through a diverse panel of industry experts, we'll explore what actions are needed to evolve and "move forward" amidst this gap and ever-changing landscape.

2:05 – 2:25 p.m. CET • **Changing Behavior/Near Term Market Activity**
Mr. Hyder Ramatala, *Director, Nuclear Fuel & Business Development* | **WMC Energy**

2:25 – 2:45 p.m. CET • **Trade Policy and Government Actions**
Ms. Elina Teplinski, *Partner* | **Pillsbury Winthrop Shaw Pittman LLP**

2:45 – 3:00 p.m. CET **Session III: Q & A**

3:00 – 3:15 p.m. CET ----- **Break | Sponsored by WMC Energy** -----

3:15 – 4:45 p.m. CET

PANEL:

Staying on Track

Mr. Joe McCourt, *Moderator*

President | **New York Nuclear Corporation**

PANELISTS:

Mr. Bahi Sivalingam, *Principal & Director* | **Fuel Link Ltd.**

Ms. Sarah Riedel, *Vice President, Marketing & Sales* | **Urenco Enrichment Company**

Mr. John Cash, *CEO* | **UR-Energy Inc.**

Mr. Michael Culpepper, *Director, Sales & Uranium Trading* | **Centrus Energy Corp.**

Mr. Nima Ashkeboussi, *Senior Director, Fuel Cycle & Radiation Safety Program*
| **Nuclear Energy Institute**

4:45 – 5:00 p.m. CET

Closing Remarks

Mr. Mark Whitwill *Board of Governors Chairman* | **WNFM**;

Senior Advisor | **Kernkraftwerk Gösgen-Däniken AG**

6:30 – 9:30 p.m. CET

Farewell Dinner – Sponsored by Westinghouse Electric Company

Dress is Business Casual – Meet in Lobby for 6:00 p.m. departure

Wednesday, June 7

Agenda

7:15 a.m. – 3:00 p.m. CET

Tour of Nuklearna elektrarna Krško Nuclear Power Plant



As a part of the 2023 Annual Meeting & International Conference, WNFM – in partnership with Nuklearna elektrarna Krško (NEK) – is pleased to offer a technical tour of the NEK facilities in Krško, Slovenia.

Attendees of the tour will get to visit the facility buildings that contain the condenser, turbines, and generator – assuming no training is taking place, the group will also be able to see a full-scope simulator for operating personnel training. The tour will not visit building facilities that cover the technological process (radiologically controlled area with reactor, LILRW storage, or spent fuel storage).

Dress Code Requirements: Long pants are required, no skirts, capris or shorts. Flat closed-in shoes or safety shoes are required, no open toes, heels, high heels, or sandals. **All attendees must bring a valid passport / photo ID for entry into the plant.**

For scheduling purposes, please be aware that the group will depart from the Grand Hotel Union EuroStars by bus at 7:15 a.m. CET on Wednesday, June 7. The tour will last about four or 4.5 hours and lunch will be provided on site. Departure from the NEK facility is anticipated to be around 1:00-1:30, arriving back in Ljubljana around 3:00/3:30 p.m. CST.

\$50 USD per person (to cover transportation fees). Prior registration required. Tour is limited to 20 attendees.