



Metals
& Mining



FINAL
BROCHURE

19-20 May 2014, JW Marriot, Hong Kong

2014

The 19th International Annual

World Aluminium

The authoritative aluminium event

200+
delegates
expected

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Industry experts speaking include:

- **Bob Wilt**, President, Global Primary Products, **Alcoa**
- Speaker to be announced, **UACJ**
- **Yu Dehui**, Vice President, **China Power Investment Corporation**
- **Bruce Cox**, President & CEO, **Pacific Aluminium**
- **Oleg Mukhamedshin**, Deputy CEO, Director for Strategy and Business Development, **RUSAL**
- **Michael Lion**, Chairman and Director, **Sims Metal Management Asia Limited**.
- **Tolga Egrilmezer**, EVP Business Development, **Sapa Group**
- **Rebecca Brosnan**, Head of Asia Commodities, **Hong Kong Exchange**
- **Andrew Wood**, Group Executive Strategy & Development, **Alumina Ltd**
- **Wang Feihong**, Senior Analyst, **China Minmetals Non-Ferrous Metals Co LTD**

Plus contributions from CRU:

- **Paul Williams**, Research Manager, Aluminium, **CRU Analysis**
- **Michael Insulán**, Principal Consultant, Aluminium Raw Materials, **CRU Analysis**
- **Colin Pratt**, Managing Consultant, **CRU Consulting**
- **Wan Ling**, Head of Aluminium, Asia, **CRU Analysis**
- **Sola Adebisi**, Senior Consultant, **CRU Consulting**

Don't miss this year's workshops focusing on:

- China's growth across the value chain – what are the implications for the rest of the world?
- The future of scrap generation and consumption

For more information and to book your place:

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Introduction

CRU is delighted to announce details of the 19th World Aluminium Conference on the 19th and 20th of May in Hong Kong. The conference attracts over 200 of the industry's most important executives and is an excellent opportunity to do new business and to gain new insights.

Aluminium benefits from the best demand outlook of all industrial metals. Whilst Asia continues to be the driver of growth in the aluminium market, what really sets the metal apart amongst its peers are its substitution opportunities, especially for steel in automotive applications. Over the longer term, its demand prospects are also firmer than other metals, as the light metal will enjoy the benefits of China's diversification to consumer led growth due to its ubiquity in packaging and other consumer goods.

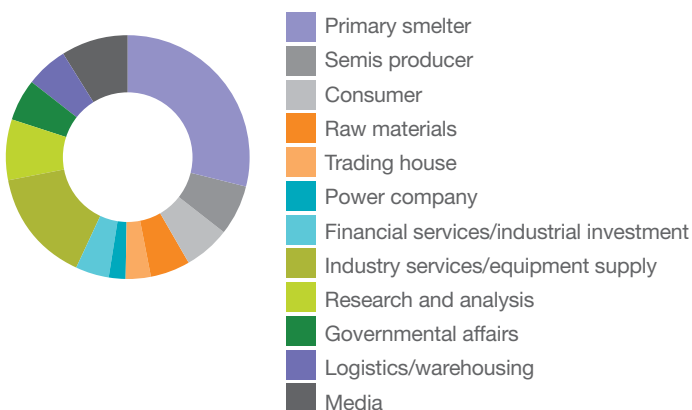
The demand outlook is undoubtedly excellent, so good in fact that without downstream investments in the next few years there will be scarcity. However, the immediate issue for the aluminium market is on the primary supply side. Overcapacity, warehousing practice and prevailing economic conditions favourable to inventory financing, have all added to the build up of inventories. This, together with deterioration in investor sentiment had a sobering affect on price. This situation has the potential to deteriorate further given China's continued capacity additions in the primary and downstream market. The one big unknown is the extent to which Indonesia's bauxite export ban can mitigate further primary expansions in China.

The market is clearly dependent on Asia but the question is; will Asia save or destroy the aluminium market?

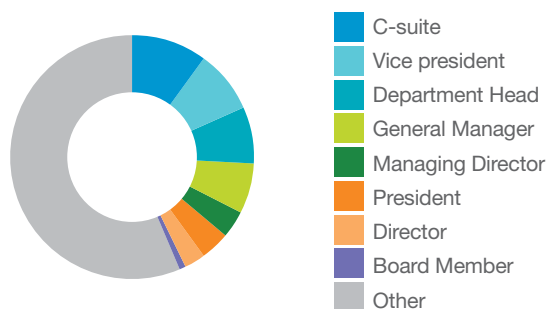
Don't miss CRU's conference for insight into the following topics:

- **Abundance to shortage** – how will the supply side evolve in relation to demand?
- **Divergence between price and premium** – what is the potential of new futures contracts?
- **Bauxite shortage** – What does the Indonesian bauxite export ban mean for primary metal balance?
- **Scrap demand** – what impact will the increased demand for recycled content be on availability and pricing relative to primary products?
- **Is can stock capacity sufficient given the switch to auto body sheet** - what impact will this have for can makers and the prices they pay?
- **CRU's views on the outlook for the alumina, bauxite, and aluminium markets and developments in operating costs.**

Breakdown by industry type - Who attends?



Breakdown by job level - Who attends?



Preliminary Programme

Auditorium sponsored by



Monday 19 May

08:00 Registration open

Registration desk
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09:00- Workshop 1: Asia through the aluminium value chain

Chair: Colin Pratt, Managing Consultant, **CRU Consulting**

- Assessing the importance of Asia to the aluminium industry, and its influences through the value chain.
- Assessing market growth in Asia over the next decade and what will be the drivers of demand?
- China's influence on the market in the next 10 years – is it likely to be positive or detrimental to producers outside of China?

Paul Williams, Head of Aluminium, **CRU Analysis**

How resource nationalism is influencing the Asian bauxite industry

- What is the landscape of the Asian bauxite industry? What will be the impact of the Indonesian bauxite ban on the market? Who will be the winners and the losers?

Sola Adebiji, Senior Consultant, **CRU Consulting**

Downstream: China and other Asia's move up the value chain

- How fast is demand growing in China and rest of Asia and where is that growth coming from?
- How fast are China and Asian downstream capacity growing, and in what products and markets is that capacity being developed?
- Is there a danger of significant over capacity being built?
- How big a risk to the rest of the world is the expansion downstream in Asia?

Wan Ling, Head of Aluminium, Asia, **CRU Analysis**

China: Good or bad for the aluminium industry this decade?

- How much demand has China taken from the rest of the world?
- Will China remain balanced in primary metal?
- Will China face a bauxite shortage?

Paul Williams, Head of Aluminium, **CRU Analysis**

Discussion and debate

Conclusions:

Colin Pratt, Managing Consultant, **CRU Consulting**

12:30 Lunch

14:00- Workshop 2: The future of scrap generation and consumption

- Overall global demand for aluminium in the next 15 years
- Drivers for this demand
- Amount of this demand to be met by Primary aluminium
- Amount to be met by recycled aluminium
- Markets and end uses for products made from scrap aluminium
- Origins, compositions, uses and limitations of scrap in production of aluminium alloys
- Trade floors for Aluminium
- Scrap collection/recycling rates
- Technological requirements for scrap collection and recycling

Contributors include:

Michael Lion, Chairman and Director, **Sims Metal Management Asia Limited**.

Tolga Egrilmezer, EVP Business Development, **Sapa Group**

Henry Dickinson, Managing Director, **Norton Aluminium Ltd**

Chris Bayliss, Deputy Secretary General, **International Aluminium Institute**

Will Savage, Chief Executive, **ALFED**

18:00 Cocktail Reception

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Tuesday 20 May

07:30 **Registration & exhibition open**

Keynote Session: Upstream and downstream perspectives and strategies

08:30 **Chairman's opening remarks**

08:35 **Exploring the primary aluminium supply demand balance**

Bob Wilt, President, Global Primary Products, **Alcoa**

08:55 **Growth prospects in Japan and South East Asia**

Speaker to be announced, **UACJ**

09:15 **CPI Sustainable Development and Practice in the Aluminum Industry**

Yu Dehui, Vice President, **China Power Investment Corporation**

09:35 **Driving profitability in challenging markets**

Bruce Cox, President & CEO, **Pacific Aluminium**

09:55 **Industry trends and the outlook for the global aluminium industry.**

Oleg Mukhamedshin, Deputy CEO, Director for Strategy and Business Development, **RUSAL**

10:15 **Questions and answers**

10:30 **Refreshment break**

Session 2: Focus on China

11:20 **Chinese supply, demand and trade outlook for primary aluminium, alumina and bauxite.**

Wang Feihong, Senior Analyst, **China Minmetals Non-Ferrous Metals Co LTD**

11:40 **Forecasting the potential for downstream demand**

John Zhu, Senior VP and General Manager, **Aleris Rolled Products Asia Pacific**

Session 3: Balancing the market

12:00 **From abundance to shortage - short term pain and long term challenge**

Paul Williams, Head of Aluminium, **CRU Analysis**

12:20 **Assessing the outlook for the automotive industry and the likely demand growth of aluminium**

Speaker to be announced

12:40 **Questions and answers**

12:45 **Lunch**

Session 4:

South East Asia – raw materials and growth potential

14:15 **What will the impact of the Indonesian bauxite ban be on the bauxite, alumina and Chinese primary sectors?**

Andrew Wood, Group Executive Strategy & Development, **Alumina Ltd**

14:35 **The coming age of turbulence for aluminium raw materials**

Michael Insulán, Principal Consultant, Aluminium Raw Materials, **CRU Analysis**

14:55 **Analysing the prospects for the aluminium industry in South East Asia**

Torstein Dale Sjøtveit, Chief Executive Officer, **Sarawak Energy Berhad**

15:15 **Questions and answers**

15:30 **Refreshment break**

Session 5: Market Outlook

16:00 **Panel discussion:**

- What will the impact of new regulation be on the warehousing landscape?
 - What new derivative products gain sufficient traction?
 - With increasing divergence between price and premiums, what is the future for exchange trading vs. OTC?
 - What is the outlook for price and premiums?
- Rebecca Brosnan**, Head of Asia Commodities, **Hong Kong Exchange**
- Colin Pratt**, Managing Consultant, **CRU Consulting**
- Speaker to be announced, **CME Group**

17:00 **Close of conference**



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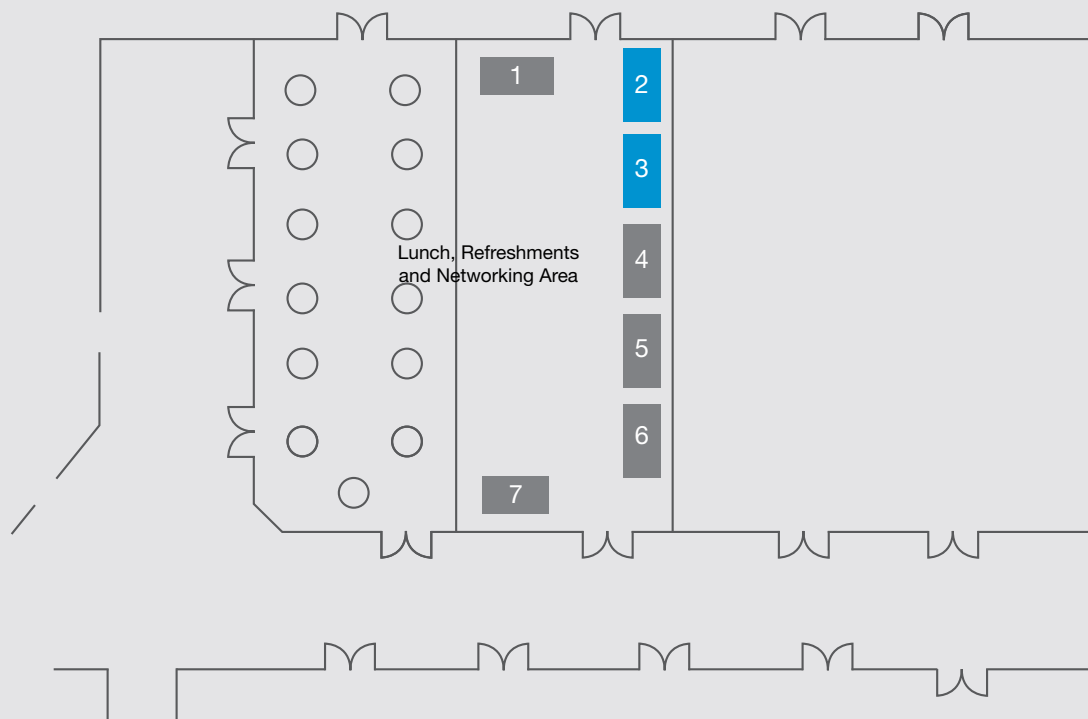
The conference will also be supported by an exhibition providing companies with an opportunity to display their products / services and maximise their networking during the event.



For more information on sponsorship and/or exhibition opportunities please contact **Paul Terry**

T: +44 20 7903 2131 | **E:** paul.terry@crugroup.com

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World Aluminium Conference 2014

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