

22<sup>nd</sup>

CRU

# World Aluminium Conference 2017

3-5 May 2017, Marriott London Hotel Grosvenor Square  
London, UK

Sustainability: Exploring the interaction of environmental and economic strategies

## EVENT HIGHLIGHTS

### ALUMINIUM PRICE RISK MANAGEMENT WORKSHOP



### CAST-HOUSE WORKSHOP

- Cast-house shapes costs and optimising smelter product mix
- Ingot premiums – is the only way up?
- Valued added shapes – will billet up-charges remain under pressure; what lies in store for other shapes up-charges?



### Key topics include:

Can large markets in low carbon and high recycled material content be created beyond castings and cans?

Would a premium for green aluminium be achievable or does the benefit lie in market creation?

Is China on a path to rolled products dominance?

Barriers to Chinese exports: Will the WTO case re-shape global aluminium trade?

How will 'Industry 4.0' and the 'Internet of things' drive efficiency and create new opportunities for aluminium?

Can the US cope with being the largest importer of aluminium in the world – where next for the Mid-West premium?

“ *The CRU conference is the most important in my annual conference agenda. The content of presentations and the seniority and variety of speakers is high. Taking the conference to different regions takes the discussion to the heart of the matter* ”

Will Savage, CEO, Aluminium Federation (ALFED)

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#CRUaluminium

## We are delighted to announce that **CRU's 22nd World Aluminium Conference** will take place on the 3-5 May 2017, at the **Marriott London Hotel Grosvenor Square, London, UK.**

The 2017 conference will address the issue of sustainability in the aluminium sector, focusing on how environmental and economic strategies interact, the disruptive potential of these interactions, and who the winners and losers will be.

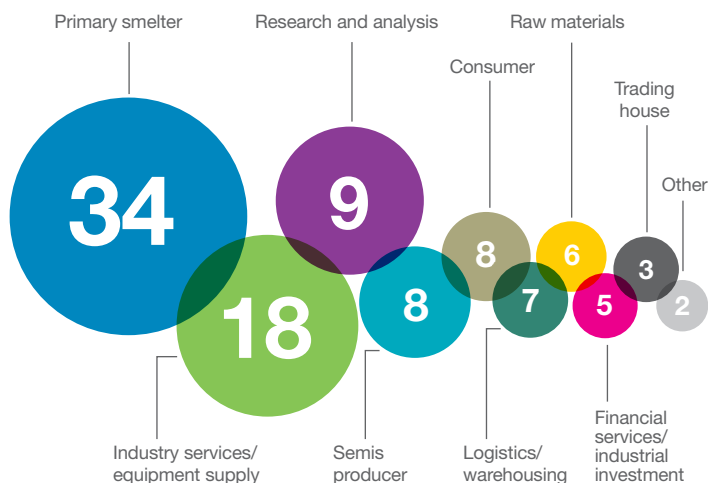
In spite of excellent demand fundamentals, recent years have been characterised by low prices and massive changes to the supply side of the industry. There have been a variety of reasons behind this.

Market reforms, regulatory regimes and a huge expansion of the Chinese aluminium sector have been chief amongst them. This gruelling environment has brought the issue of sustainability to the fore; the sustainability of the current status quo and how sustainability as an environmental concept can be used to create differentiation and growth.

**For in-depth debate on the issue of sustainability, markets, prices and premiums attend CRU's World Aluminium Conference 2017.**

### Who attends?

#### Typical breakdown of attendees (%)



### Sponsorship & exhibition opportunities

#### Raise your company's profile with key decision-makers at CRU's World Aluminium Conference

Choose from a range of exclusive sponsorship packages, designed to raise your profile and brand awareness with your target audience. Opportunities include: refreshment breaks / hotel room keys / lanyards / and more.

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**To discuss your marketing objectives, please contact Paul Terry:**

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### Programme

#### Wednesday, 3 May

08:30 **Registration opens**

09:00 **Cast-house workshop**

- Cast-house shapes costs and optimising smelter product mix
- Ingot premiums – is the only way up?
- Valued added shapes – will billet upcharges remain under pressure; what lies in store for other shapes upcharges?

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

**Kelly Driscoll**, Managing Consultant, **CRU**

**Eoin Dinsmore**, Principal Consultant, Aluminium, **CRU**

14:00 **Aluminium price risk management workshop**

18:00 **Welcome Reception**

#### Thursday, 4 May

08:00 **Registration opens**

08:00 **Exhibition opens**

09:00 **Keynote session – Sustainability: Driving value creation**

**Chairman: Ron Knapp**, Secretary General, **International Aluminium Institute**

- Examining the growth potential for certified sustainable aluminium products – which new product lines can they gain market share in?
- Will customers pay a premium for such products? Or does the value truly lie in market creation?
- Can China hit its CO<sub>2</sub> emissions targets under the Paris Agreement? Will environmental policy and public opinion cap Chinese expansion?
- Environmental stewardship in the smelting, refining and mining sectors – what are the corporate and stakeholder advantages that leadership brings?
- Industry 4.0 – analysing technological and digital advances and their impact on the aluminium sector.

**Senior Executive, Norsk Hydro ASA**

**Tolga Egrilmez**, Vice President, Sales and Marketing, **Rio**

**Tinto Aluminium**

**Further speakers to be announced**

10:35 **Questions and answers**

10:40 **Networking break**

## Programme

Thursday, 4 May (continued)

### Session 1: Economic and trade developments

**Facilitator: Paul Williams, Head of Aluminium, CRU**

11:10 **Panel discussion: Barriers to Chinese exports: Will the WTO case re-shape global aluminium trade?**

**Michael A. Bless, President, Chief Executive Officer and Director, Century Aluminum**

**Alan Price, Partner, Wiley Rein**

**Further panelists to be announced**

11:55 **How will geo-political uncertainty impact the economic outlook?**

- Are we heading for a sharp downturn in China?
- What is the likelihood of a renminbi devaluation?
- Will Trump cause the dollar to strengthen?
- How much should we fear American protectionism?
- What are the prospects for EMs?
- Is the oil market rebalancing?

**Andrew Kenningham, Global Chief Economist, Capital Economics**

### Session 2: Advanced recycling

12:20 **Panel discussion: Opening the market to more post-consumer scrap – examining developments in collection, sorting and processing**

**Facilitator: Will Savage, Chief Executive, ALFED**

**Further panelists to be announced**

13:00 **Lunch**

14:15 **Design for recycling**

- Key challenges and opportunities in aluminium recycling
- Exploring advancement in product design and recycling efficiency

**Erika Ahlqvist, Executive Vice President, Communication & CSR, SAPA**

**Susanne Rothstein, Vice President, Communication & CSR, SAPA**

14:40 **Are we entering a period of oversupply in the bauxite market?**

- Outlining the key supplier risks in the bauxite sector
- What is the long-term outlook for freight rates – how susceptible are Chinese alumina refineries to price increases?

**Anthony Everiss, Senior Consultant, CRU**

15:05 **The outlook for carbon prices and policy**

- Is current tightness in the carbon markets here to stay?
- What is the outlook for green petroleum coke and coal tar prices?
- The outlook for calcined coke and coal tar pitch.

15:30 **Question and answers**

15:35 **Refreshment break**

### Session 3: Energy and power

16:05 **Thermal coal – is the era of Chinese cost-deflation over?**

- Forecasting the outlook for thermal coal prices.
- Chinese policy and its impact on thermal coal production.
- Why does the thermal coal price matter to the Chinese aluminum sector?

**Yan Chen Wang, Senior Consultant, CRU**

16:30 **The Paris agreement - what is really going to happen?**

- The 2015 Paris Climate Change Agreement: the framework, the politics, and the dynamics of implementation 2017-2025.
- Implications for energy-intensive sectors, such as aluminium – especially on competitiveness between regions, and between materials.

**Christopher Beauman, Senior Adviser, European Bank for Reconstruction and Development**

### Session 3: Energy and power (cont)

16:55 **Global power tariff review**

- Analysing the competitive cost position of major aluminium producers.
- Does the effect of carbon pricing bring differentiated burdens?

18:00 **Drinks Reception**

Friday, 5 May

08:00 **Registration opens**

08:00 **Exhibition opens**

### Session 4: Prices and premium

**Facilitator: Paul Williams, Head of Aluminium, CRU**

09:00 **Panel discussion: Prices and premiums outlook**

- Are we reaching an inflection point and will aluminium prices fall?
- Can the US cope with being the largest importer of aluminium – where next for the US premium?
- What do US import requirements and the poor economics of holding metal, mean for LME spreads?
- SHFE the new benchmark? Will the SHFE price have a greater role in global pricing?

**David Wilson, Director, Metals Research and Strategy, Citi Research**

**Max Layton, Managing Director, Commodities Research, Global Investment Research, Goldman Sachs**

**Marco Georgiou, Managing Consultant, Aluminium, CRU**

**Vivienne Lloyd, Base Metals Analyst, Macquarie**

10:30 **Refreshment break**

### Session 5: Rolled products and China through the supply chain

**Facilitator: Jean-Baptiste Lucas, Industry Consultant**

11:00 **SMOG – Will environmentally led cuts put China into deficit?**

**Wan Ling, Assistant Chief Representative China Office & Head of Asia, Aluminum, CRU**

11:30 **China's rolled aluminium industry and its impact on the global market**

- Development of the Chinese rolled aluminium industry.
- Future trends and possible development scenarios.
- Gränges position as a global rolled aluminium actor.
- How Gränges strategically position its China business.

**Torbjorn Sternsjo, Senior Vice President Technology & Business Development, Gränges AB**

11:50 **The influence of Chinese rollers on competition in Europe and Turkey**

- China as seen from the perspective of European rolling sector.
- Customer's perspective.
- How can we compete? Assan Alüminyum as a case study.
- How can trade defense help? (both sides)

12:10 **Topic to be announced**

**Christopher Robert Smith, President, Ma'aden Rolling Company**

12:30 **Introducing the Chinese 'scrap cap'**

- Which factors will limit scrap's share of total metal required in China?
- Why recycled aluminium's share of non-castings demand is falling?
- What are the implications?

**Eoin Dinsmore, Principal Consultant, Aluminium, CRU**

12:50 **Steady as she goes or all change? Prospects for China's economy and aluminium consuming sectors**

**Grant Colquhoun, Group Economist, CRU**

13:00 **Questions and answers**

13:30 **Lunch**

14:30 **Close of conference**



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[www.worldaluminiumconference.com](http://www.worldaluminiumconference.com)

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|---|---------------------------|
| <input type="checkbox"/> Until 5 March 2017     | £995 (+£199 VAT) = £1194  |
| <input type="checkbox"/> 6 March - 5 April 2017 | £1195 (+£239 VAT) = £1434 |
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#### CONFERENCE INFORMATION

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##### Hotel Details

On receipt of your booking we will send you details on the CRU preferential rates available at the Marriott London Hotel Grosvenor Square, London, UK.

##### Terms of Booking

###### Payment Policy

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