

## NEWS ON

MARKET DEVELOPMENTS  
EAA SAFETY WORKSHOP  
ALUMATTER INTER@CTIVE SYMPOSIUM  
GERMANY - WORLD YOUTH DAY

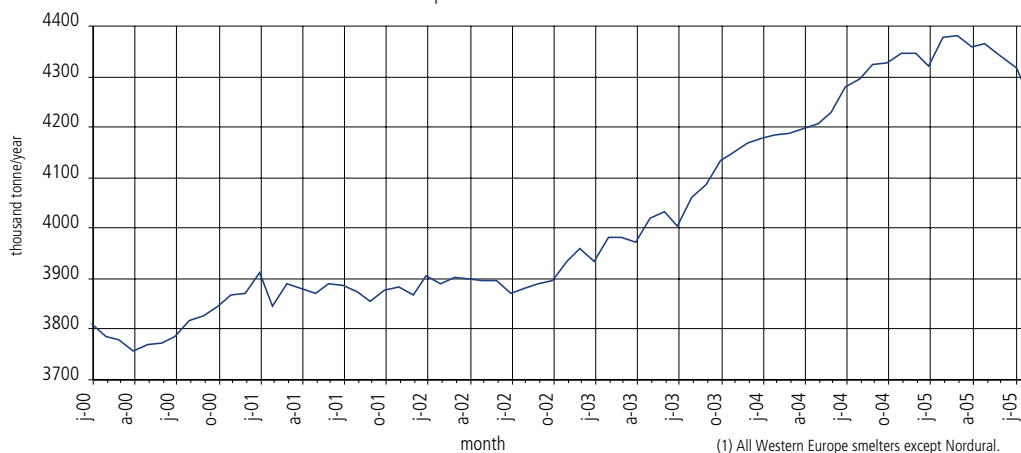
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## MARKET DEVELOPMENTS

### SUMMARY

Although the European annualised primary production rate peaked in March 2005, it has shown a declining trend since then. Primary stocks increased over summer. Wrought production stagnated in 1Q 2005, following high production levels in 2004. In August 2005, new orders data showed an improvement in demand for semis.

West European Aluminium Production<sup>1</sup>

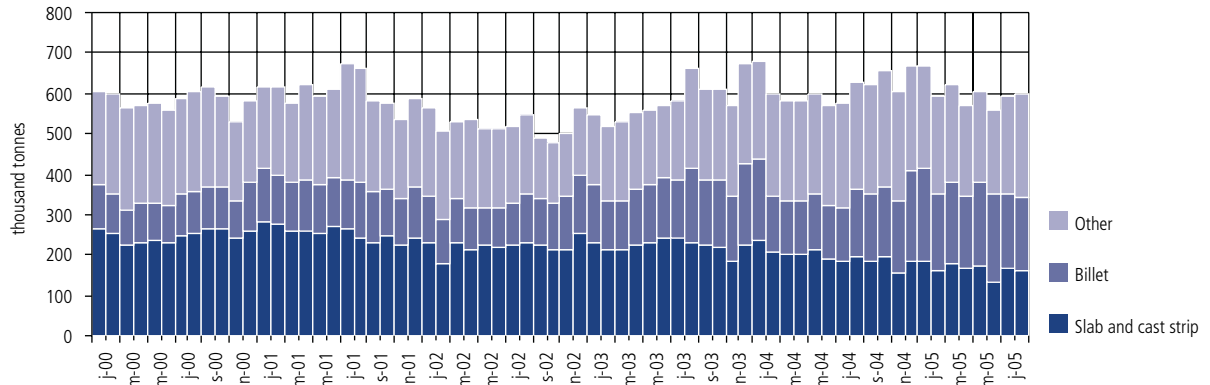


### PRIMARY PRODUCTION:

Year-to date production up 2.5%

In August 2005, total primary aluminium production in Western Europe decreased 0.6%, to 362 457 tonnes, compared to the same month last year. This is equivalent to an annualised production rate of 4.27 million tonnes. Since March, the annualised monthly has shown a downward trend. In August, the year-to-date production went up by 2.5% compared to previous year.

### European Aluminium Stocks by Type



STOCKS: 30.4 thousand tonne increase in August

Primary aluminium stocks held by European smelters and integrated fabricating plants increased 30.4 thousand tonnes in August, to 596 thousand tonnes.

By location, 68% of these stocks are at smelters and 27% of stocks are slabs and cast strip, 32% are billets.

SEMIS PRODUCTION: 0.4% decrease in Q1 2005

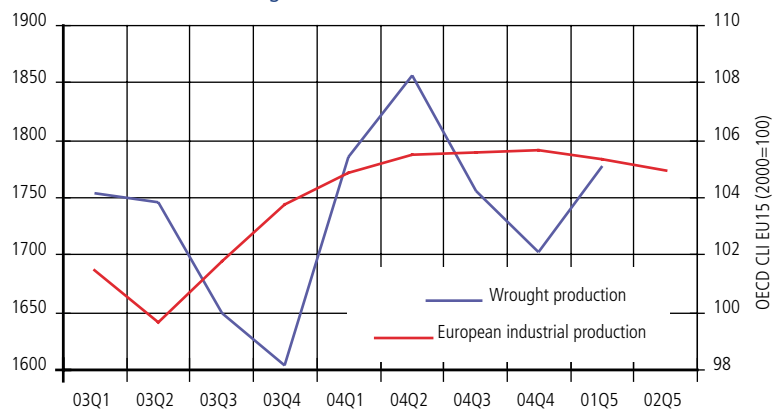
The growth of the OECD leading indicator in the EU15 worsened slightly in the first half of this year, reflecting the struggling economic activity in Europe.

Wrought aluminium production in Western Europe increased again in 1Q 2005, mainly due to the seasonal pattern, reaching 1.778 million tonnes. This is however 0.4% below 1Q 2004 production.

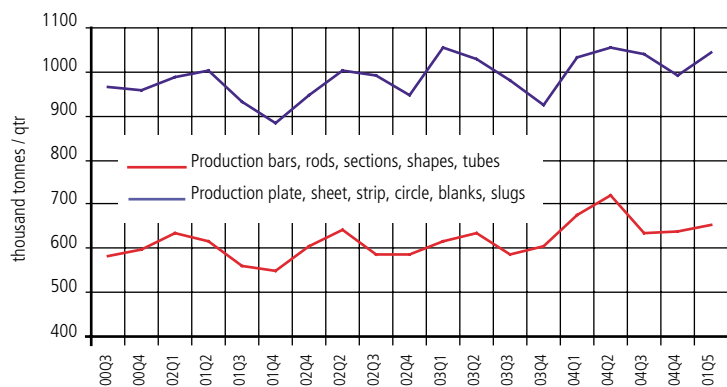
The production of rolled products in 1Q 2005 grew 1.2% compared to the same quarter in 2004. Total Western European rolled production (slugs included) reached 1.044 million tonnes in 1Q 2005.

The extruded products market continues to suffer. Production in the first quarter of this year declined 3.3% compared to 1Q 2004, amounting to 0.653 million tonnes for Western Europe.

### Wrought Aluminium Production<sup>1</sup>



### Rolled and Extruded Production<sup>1</sup>



(1) EU15 + Norway, Switzerland, Turkey. No figures for Portugal available

SEMIS ORDER INTAKES :

H1: Registered an upturn in August

In the first 8 months of this year, Western European order intakes for extrusions decreased 4.3%. Year on year the growth rate for July was still negative (-7.9%), although August order intakes rose year on year with 6.9%.

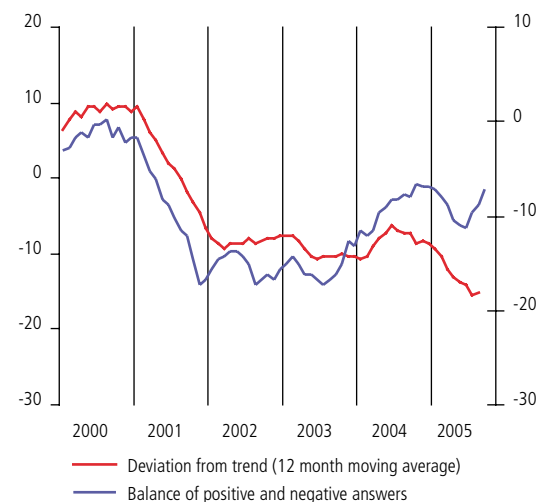
The extrusion confidence indicator, calculated as half the industrial confidence indicator and half the construction confidence indicator, showed there was a relatively strong upswing over the last three months. This suggests that market conditions for extruded products will improve in the coming months. We have already seen a first confirmation in August order intake results.

In August, rolled order intakes in Western Europe increased 2.3% y-o-y.

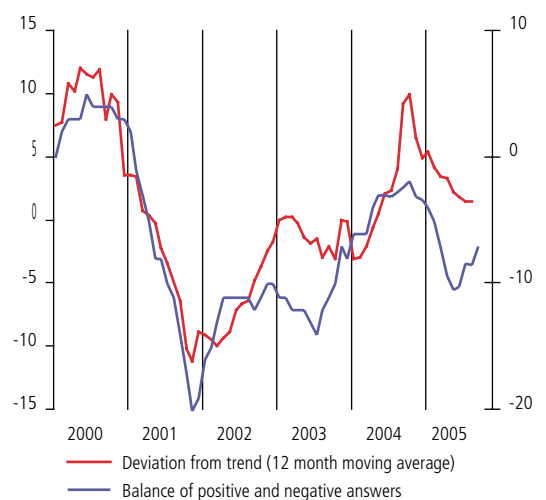
Year to date figures show however that rolled order intakes declined 0.1%. In 2005, rolled orders are no longer above trend level.

The Eurostat industrial confidence indicator is highly correlated with the rolled orders and has pointed upwards since June. Orders are also expected to improve.

Extruded orders (lhs) and "extrusion confidence" (rhs)



Rolled orders (lhs) and industrial confidence (rhs)



Monthly data on European Aluminium<sup>1</sup>

	Primary production	Primary aluminium stocks					
		Total	Location		Type		
			Smelters	Fabricating plants	Slab and cast strip	Billet	Other
j-01	332	618	311	307	280	133	204
f-01	295	614	301	313	275	124	215
m-01	330	578	269	309	261	117	200
a-01	319	622	306	316	260	125	237
m-01	328	591	283	308	254	121	216
j-01	319	608	300	307	272	118	217
j-01	330	673	319	353	262	126	285
a-01	329	661	332	329	240	138	283
s-01	316	579	302	277	231	126	223
o-01	329	573	297	277	247	116	211
n-01	319	537	267	270	223	115	199
d-01	328	585	327	258	243	126	216
j-02	331	565	291	274	231	117	217
f-02	298	506	278	228	178	108	220
m-02	331	531	268	263	230	110	191
a-02	320	537	273	264	214	103	220
m-02	331	512	240	272	223	96	193
j-02	320	511	245	266	220	99	192
j-02	328	517	248	269	225	101	191
a-02	329	545	276	269	232	119	195
s-02	320	490	237	253	224	116	149
o-02	331	480	221	259	214	116	149
n-02	323	503	237	266	214	132	157
d-02	336	564	318	246	251	149	165
j-03	334	546	298	248	231	145	170
f-03	305	518	241	277	214	119	185
m-03	338	527	248	279	215	120	191
a-03	326	552	268	284	223	142	186
m-03	341	560	271	289	230	143	186
j-03	331	572	286	286	242	147	182
j-03	340	583	302	281	240	149	195
a-03	345	660	372	287	232	184	244
s-03	336	613	354	259	222	167	225
o-03	351	611	349	263	218	168	226
n-03	341	571	352	219	182	162	227
d-03	354	675	446	229	223	202	250
j-04	355	679	433	246	234	201	244
f-04	332	597	354	242	209	139	249
m-04	355	584	338	246	202	132	249
a-04	345	580	329	250	203	133	243
m-04	357	601	350	251	212	139	250
j-04	347	567	326	241	193	127	248
j-04	363	577	341	236	184	132	261
a-04	365	629	380	250	195	170	264
s-04	355	622	371	251	187	166	270
o-04	367	657	396	261	194	172	291
n-04	357	603	392	211	158	173	272
d-04	369	666	456	209	185	223	257
j-05	367	665	474	191	185	230	251
f-05	336	593	407	186	164	185	244
m-05	372	621	415	207	178	204	240
a-05	358	567	375	192	166	178	224
m-05	370	604	397	207	175	203	225
j-05	357	581	350	210	136	224	221
j-05	368	591	369	197	165	189	238
a-05	362	596	406	190	159	188	249

1. All Western Europe smelters except Nordural.

Quarterly data on European Aluminium<sup>1</sup>

Countries(1)	Total wrought production(2)	Rolled production	Extruded production(2)	Other production(2)	Wrought total exports(3)
1999Q1	1.564	898	572	94	819
1999Q2	1.628	925	595	107	877
1999Q3	1.580	917	563	100	841
1999Q4	1.617	934	588	95	836
2000Q1	1.695	969	629	96	980
2000Q2	1.707	982	630	95	1.063
2000Q3	1.637	965	583	88	1.036
2000Q4	1.644	960	598	86	1.023
2001Q1	1.708	990	636	83	946
2001Q2	1.698	1.002	614	82	912
2001Q3	1.571	933	560	78	876
2001Q4	1.514	885	550	79	854
2002Q1	1.634	946	606	82	855
2002Q2	1.733	1.003	642	87	977
2002Q3	1.658	991	585	83	929
2002Q4	1.614	948	587	78	952
2003Q1	1.753	1.056	617	81	1.014
2003Q2	1.746	1.030	636	80	1.019
2003Q3	1.649	983	587	79	983
2003Q4	1.604	925	606	73	970
2004Q1	1.785	1.032	675	78	1.058
2004Q2	1.857	1.057	720	81	1.141
2004Q3	1.757	1.041	636	79	1.078
2004Q4	1.703	990	638	75	1.061
2005Q1	1.778	1.044	653	81	1.115

1. EC15 + Iceland, Norway, Switzerland, Turkey / 2. No figures for Portugal available / 3. Including intra-European trade.

## SAFETY EDUCATION AND EXCHANGE OF EXPERIENCES

The EAA is organising its annual Safety Workshop in Brussels on 9&10 November 2005.

This workshop provides participants with the ideal opportunity to update their knowledge, learn from some of the experts in the field and above all to have a chance to meet and discuss their concerns and issues with other safety people. The presentations are given by experts from the aluminium industry, who are there to share some of their knowledge and experience. The programme provides ample time for questions and discussions related to the issues presented. There will also be the opportunity to exchange views with colleagues from other plants and companies.

The first day's morning session will be on serious accident/fatality prevention, while the afternoon session will cover Leadership and employee engagement.



The second day has 2 parallel sessions on Molten Metal/PPE and Man-machine interface.

#### PARTICIPATION

The workshop is intended for all who are involved in safety issues at plant or corporate level, including line managers, technical and maintenance personal, EHS managers, safety professionals, supervisors and employee safety representatives.

#### REGISTRATION DETAILS

The workshop will take place at the RADISSON SAS Hotel, Rue du Fossé-aux-Loups, 47 – BE1000 BRUSSELS, on Wednesday 9 and Thursday 10 November 2005.

For further information and registration details please contact [marthoud@eea.be](mailto:marthoud@eea.be)

## ALUMATTER INTER@CTIVE SYMPOSIUM, 24-25 NOV 2005 “When aluminium technologies become cre@tive ”



On 24 & 25 November 2005, the EAA, in collaboration with “Vrije Universiteit Brussel” and Aluminium Center Belgium, is organising a symposium to highlight the achievements of the aluMATTER project, demonstrating the quality and interactivity of this innovative website. aluMATTER provides interactive e-learning resources on aluminium metallurgy and technologies, which are freely accessible on Internet through: [www.alumatter.info](http://www.alumatter.info)

In the last 3 years, aluMATTER was developed as a project partly funded by the Leonardo da Vinci programme of the European Commission. Twenty partners from industry, academics, technical centres and aluminium associations were involved and have contributed to the website development and translation (Dutch, French, German and English).

On the 24 Nov., the aluMATTER contributors will highlight the achievements of the project, demonstrating the high quality, the interactivity and the pedagogic soundness of this innovative e-learning tool. The session will include participation from the audience through individual voting boxes in order to respond to multiple-choice questions raised by speakers. In addition, some external speakers will stress the importance of e-learning in material science education and in industrial training programs. On the morning of 25 November, participants will be invited to use the website to “solve” on-line case studies related to automotive applications.

This will be a great opportunity to meet the aluminium industry. The electronic leaflet including the draft programme and registration form is attached. Further information can be found at:

[www.aluminium.org/home.jsp?content=education/symposium.htm](http://www.aluminium.org/home.jsp?content=education/symposium.htm)

## WHEN RTD COLLABORATION MAKES SENSE

On 23 November 2005, the European Aluminium Association is holding the launch event of the European Aluminium Technology Platform (EATP). This technology platform will be the instrument to mobilise and maximise the impact of research &

technological development (RTD) investments of joint interest to the aluminium value chain.

For further information please visit the EAA website: [www.aluminium.org](http://www.aluminium.org) or contact [leroy@eea.be](mailto:leroy@eea.be)

## SUSTAINED HIGH LEVEL OF ALUFOIL DEMAND

Figures compiled by the European Aluminium Foil Association (EAFA) for the first semester of 2005, indicate that aluminium foil shipments have maintained the healthy level set in the first quarter. The sales of the first six months increased slightly from 429,300 tonnes by 0.3% to 430,600 tonnes. With a strong growth of 13% the sales were driven by exports to countries outside the EAFA region\*, while shipments inside this region decreased slightly by 2%.

\* EAFA region covers EU15, Armenia, Bulgaria, Czech Republic, Hungary, Norway, Russia, Slovenia, Switzerland and Turkey

For further information: EAFA - Phone: +49 (0)211 47 96 150, enquiries@alufoil.org - [www.alufoil.org](http://www.alufoil.org)

## GERMANY – WORLD YOUTH DAY ALUMINIUM CROSS SHINES OUT ABOVE CAMP

Young people from all over the world came together at the world Youth Day in August in Düsseldorf and a Christian youth organisation (the German Scout Association Saint Georges) and the aluminium industry represented by the German Aluminium Association agreed to cooperate.

Within this co-operation an interesting construction was visible: a 10 meters high, 4.6 meters wide aluminium cross weighing 1.3 tonnes shone out above the scout camp. Trimet employees worked for four weeks welding aluminium profiles together to make the cross - Padre Abraham Fischer from an Abbey in Meschede designed the cross. The Benedictine monk is a metal designer who often works with aluminium. After the World Youth Day the cross was transferred to the German Scout's National Centre in the Westerwald region, where it has found its permanent place.



The cross has been erected under supervision of trimet employees and Padre Abraham Fischer

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