



# Building back better

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# 1 / Our members

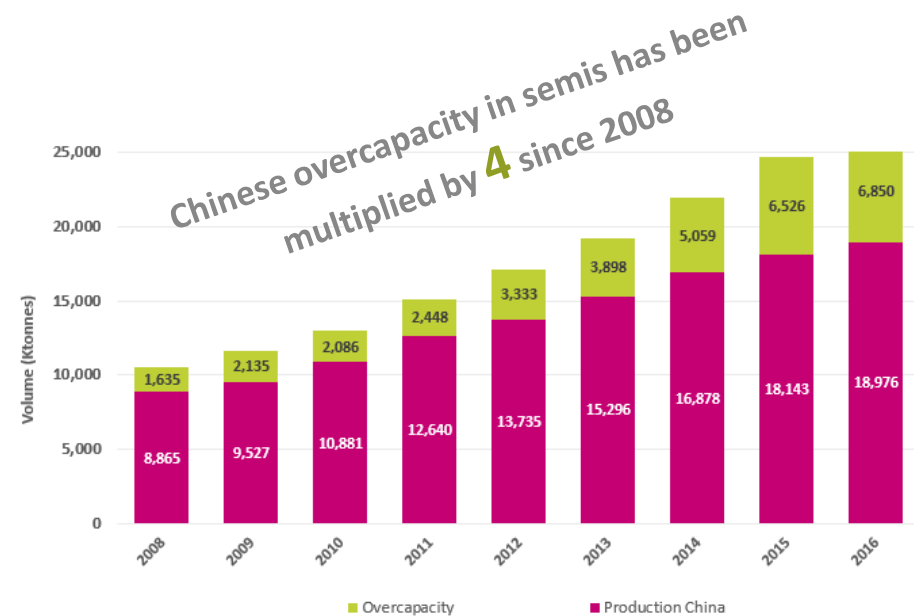
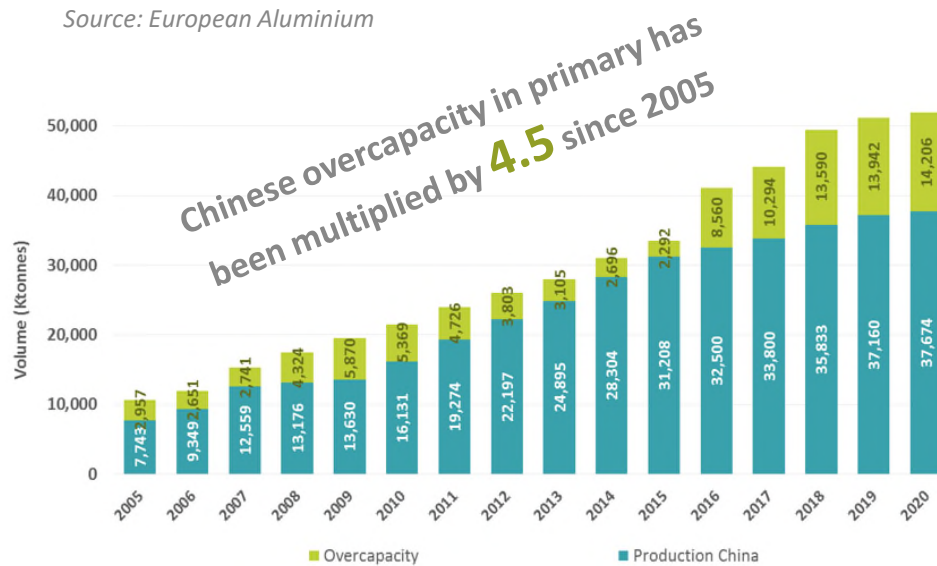


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## 2 / Exposure to global unfair competition

- In 15 years, **China's primary production increased from 11% to 57%** of worldwide production
- **Chinese overcapacity in primary is 14 M t, i.e. 5 times bigger than EU production**
- In the past 5 years, **China exports to the EU has more doubled** and in particular for flat rolled products (semis)
- A [2019 report by the OECD](#) shows that 85% of global documented subsidies went to just 5 Chinese firms

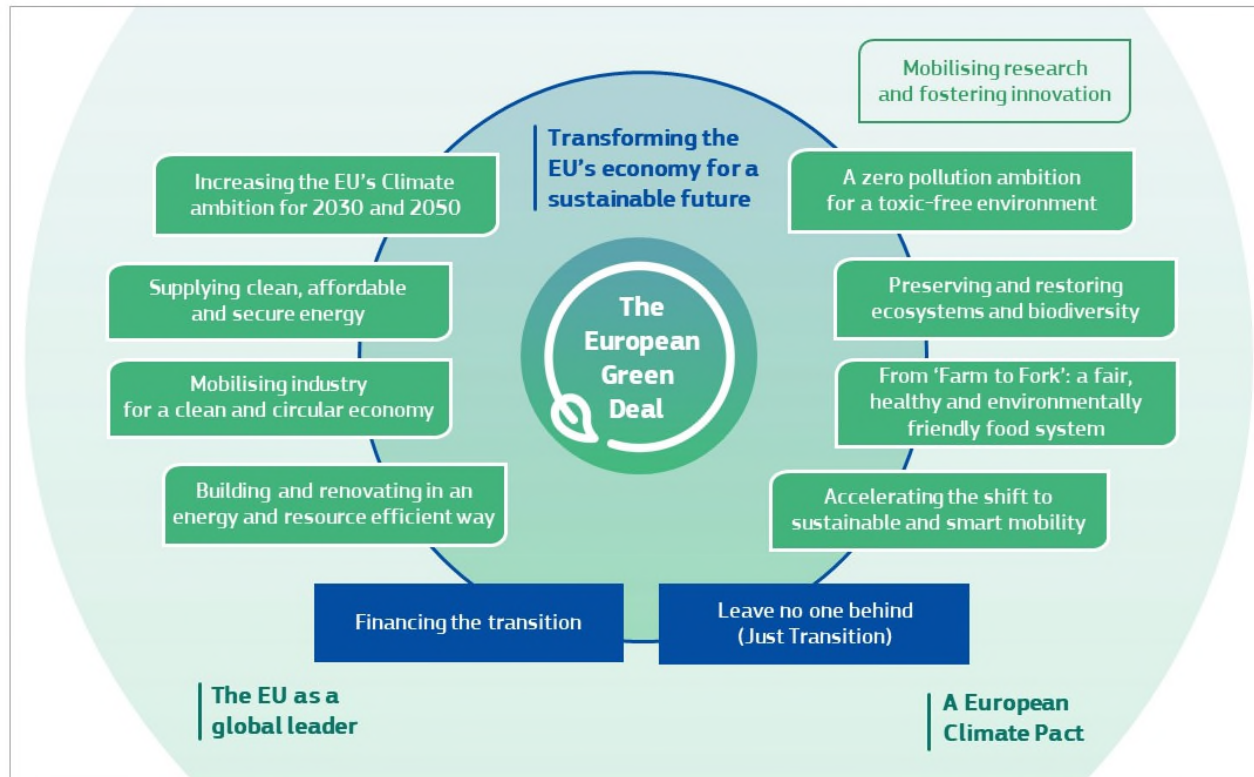
Source: European Aluminium



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### 3 / The European Green Deal: An EU policy game-changer



## 4 / Sustainability: an opportunity to differentiate

Turning our sustainability credentials in competitive advantage

1

Beat single-sided pledges with a wide sustainability scope:

- Decarbonisation
- Circularity
- Sustainable Society
- Responsible Production
- Sustainable Products

2

Build on our existing sustainability efforts to develop a tangible, sustainability-focused narrative:

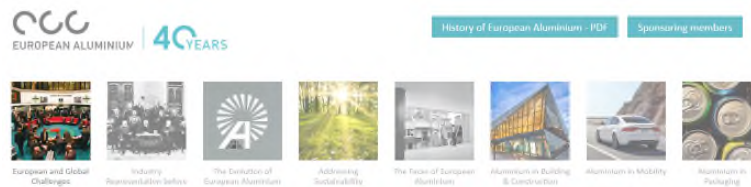
- Sustainability Roadmap
- Vision 2050
- Circular Aluminium Action Plan
- Sustainable aluminium definition

3

Build up credibility, constantly nurture the sustainability narrative:

- Demonstrate thought-leadership
- Engage with NGOs: use critical NGOs to help differentiate European from other aluminium

# 5 / Celebrating our 40<sup>th</sup> anniversary



## EUROPEAN AND GLOBAL CHALLENGES

### 1978 Aluminium on the London Market Exchange

In 1978, aluminium was listed on the LME, which became the price reference for the global market. It was a critical change for the integrated primary producers: they lost the control over market prices which they had maintained historically stable in the former decades. From the 80s, aluminium prices became as unstable as those of other commodities.





/ Questions? Contact us!

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