



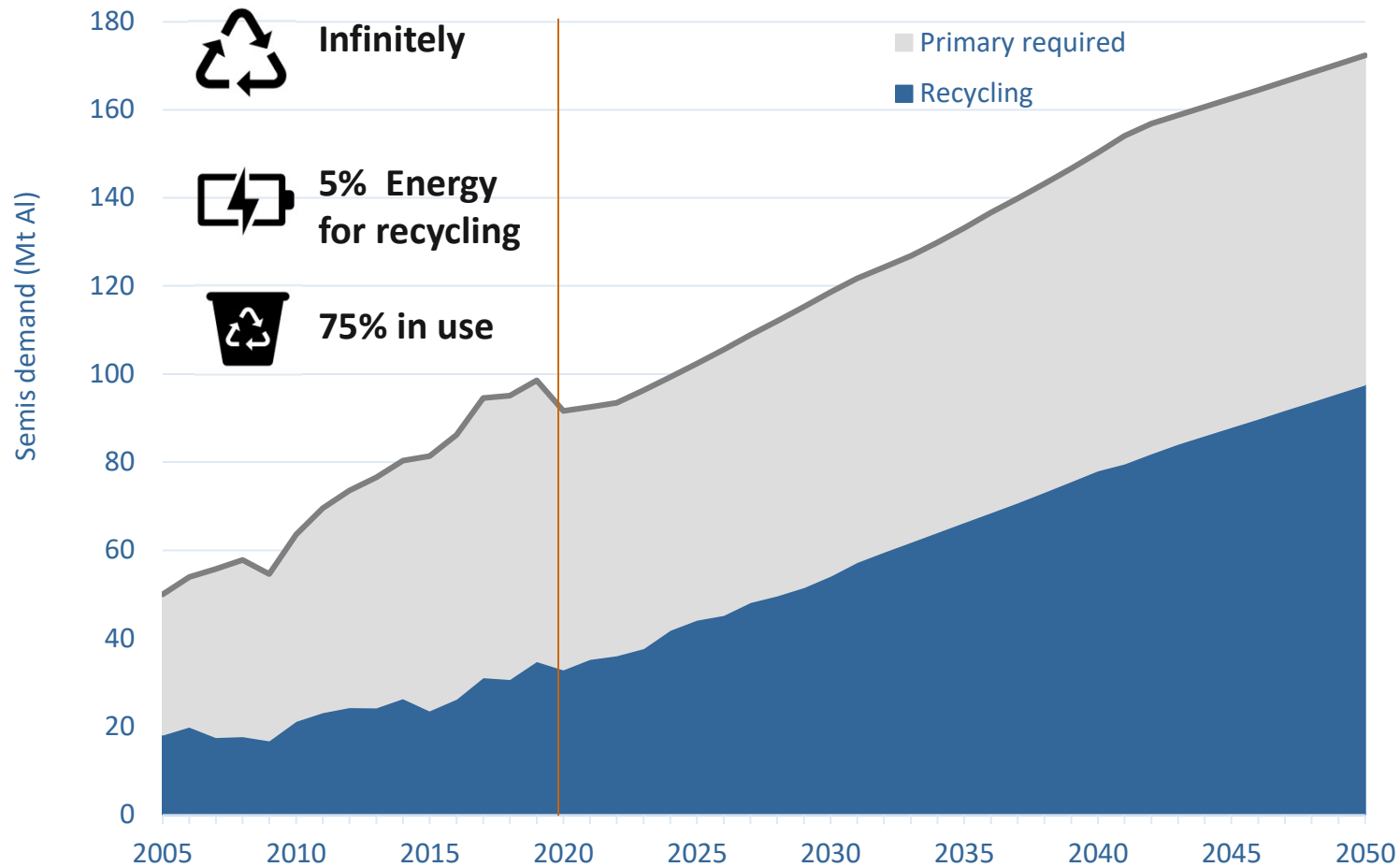
AUSTRALIA'S ALUMINIUM INDUSTRY

**Sustainably Value Adding to Australia's Resources
From Mine to Market**





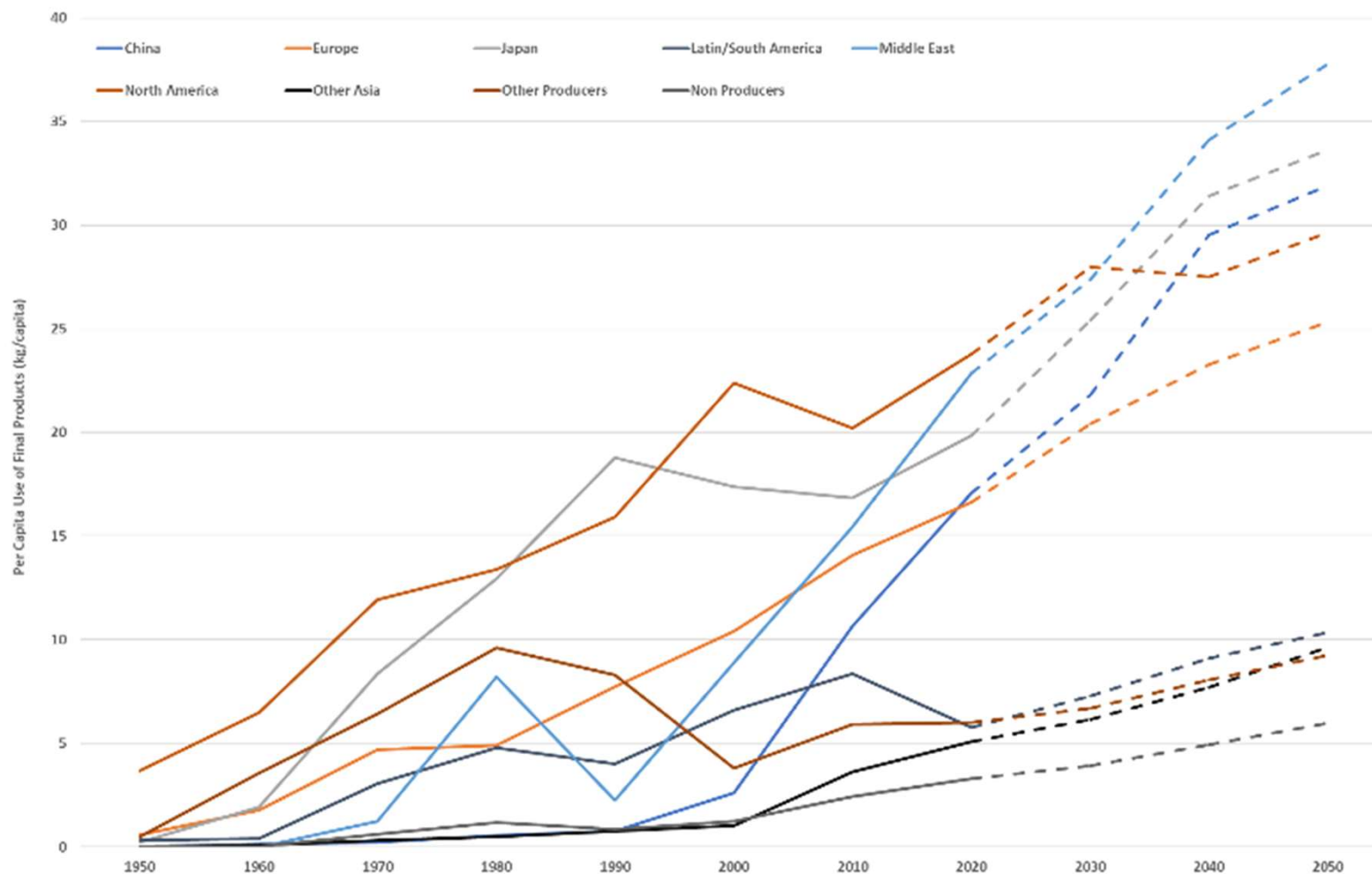
ALUMINIUM DEMAND IS GROWING



Source: IAI Alucycle (<https://alucycle.world-aluminium.org/>)



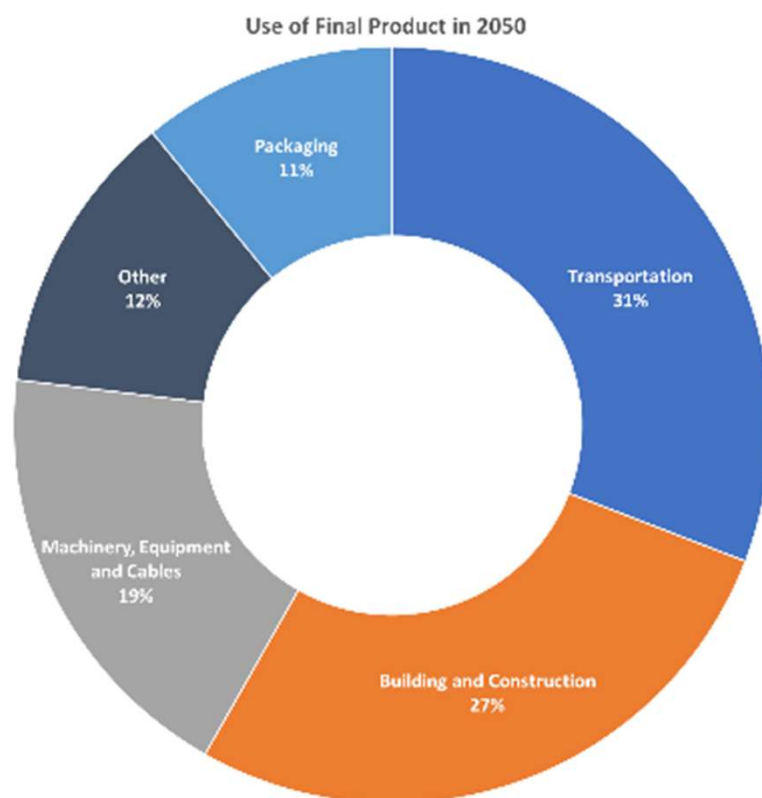
GLOBAL ALUMINIUM DEMAND PER CAPITA IS FORECAST TO INCREASE BY MORE THAN 50% BY 2050



Source: International Aluminium Institute (<https://www.world-aluminium.org/>)



USE OF FINAL PRODUCT IN 2050



Aluminium is lightweight and strong, enabling the aviation, aerospace, shipping and rail industries.



2kg of steel in a car can be replaced by 1kg of aluminium.

Aluminium use in cars will increase to about 250kg per car by 2025.

Every 100kg used in a car* can save ~2t CO₂-e over the life of a vehicle.



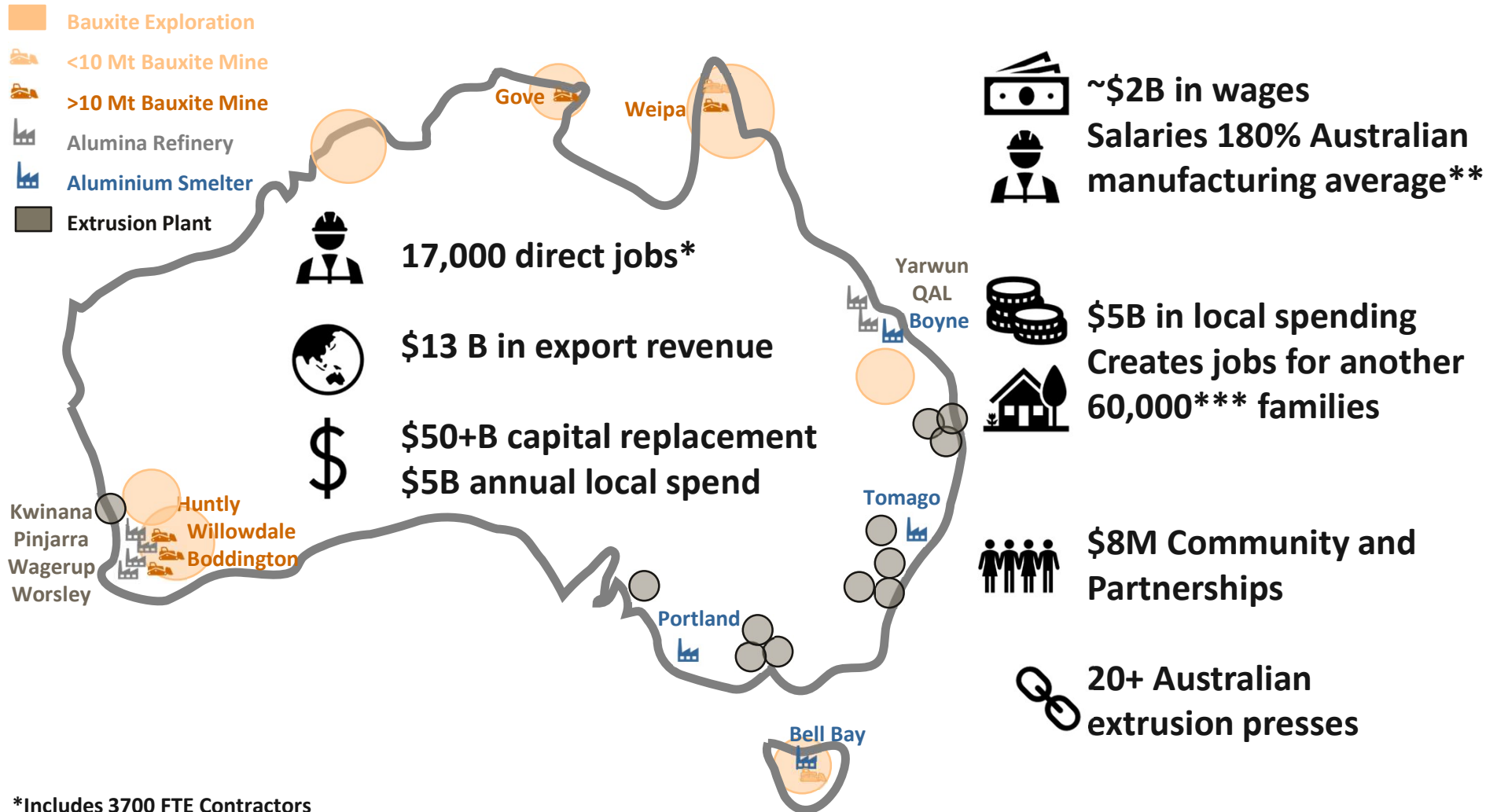
Interior aluminium has an infinite life. Aluminium is used in cables and wires because of its conductivity and lightweight (overhead).

*Average family petrol car. Higher for commercial / high use vehicles

Source: International Aluminium Institute (<https://www.world-aluminium.org/>)



A REGIONAL CONTRIBUTOR AND ENABLER



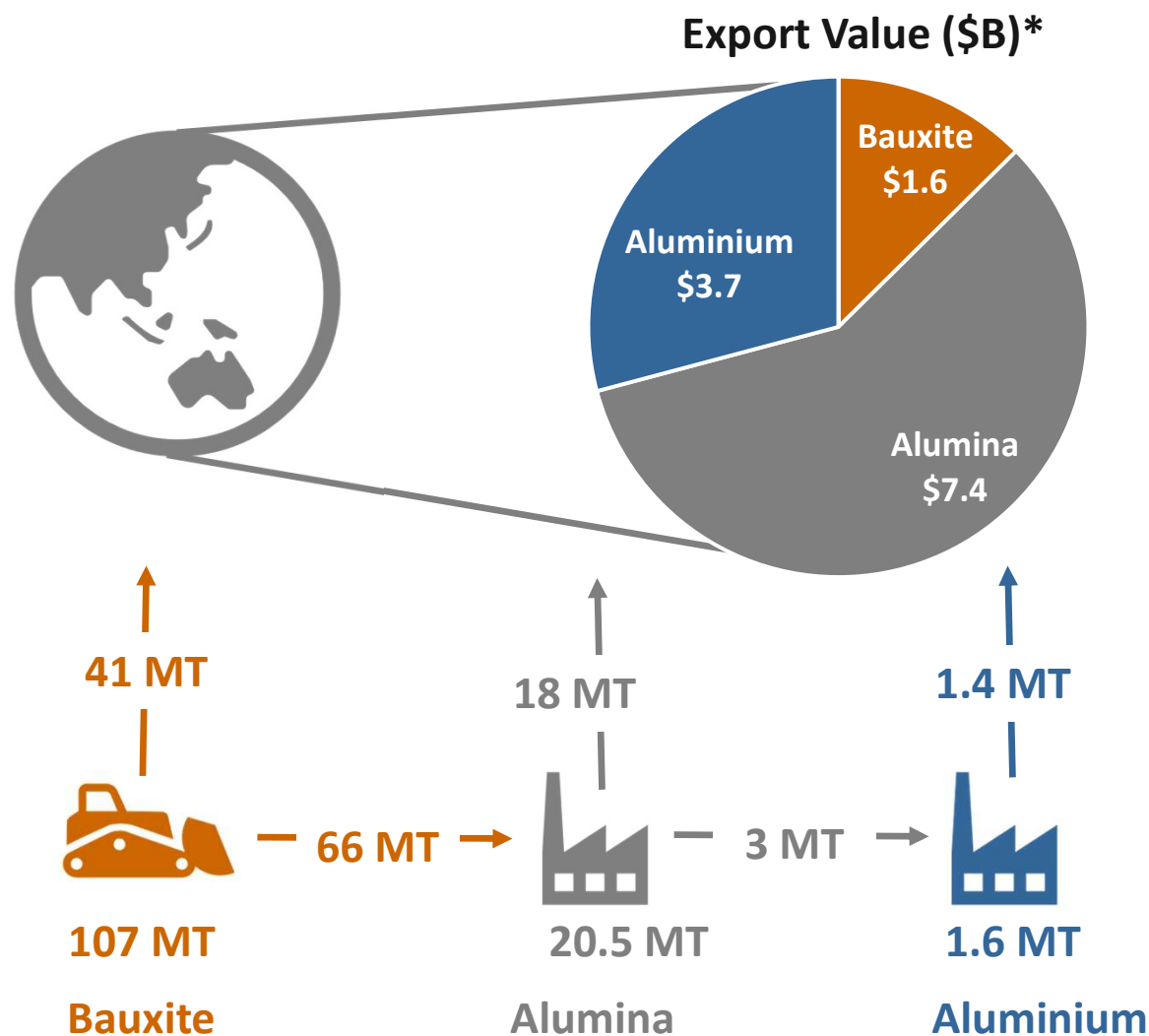
*Includes 3700 FTE Contractors

** <https://www.abs.gov.au/statistics/labour/earnings-and-work-hours/average-weekly-earnings-australia/latest-release#industry-earnings>

*** Industry multiplier of 4.6 extrapolated from QRC data for Flynn, 2020



VERTICALLY INTEGRATED AND VALUE ADDING



Australia is the world's:

- Largest producer of bauxite
- 2nd largest producer of alumina
- Largest exporter of alumina
- 6th largest producer of aluminium

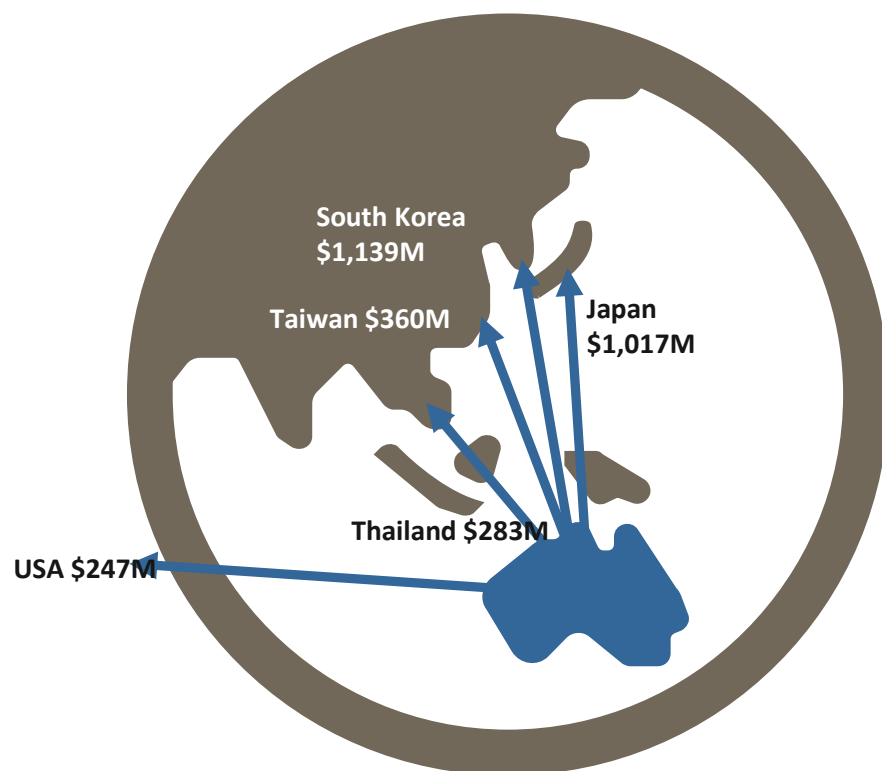
*Source: 2019-2020 Data

<https://publications.industry.gov.au/publications/resources-and-energy-quarterly-december2020/documents/Resources-and-Energy-Quarterly-Dec-2020.pdf>

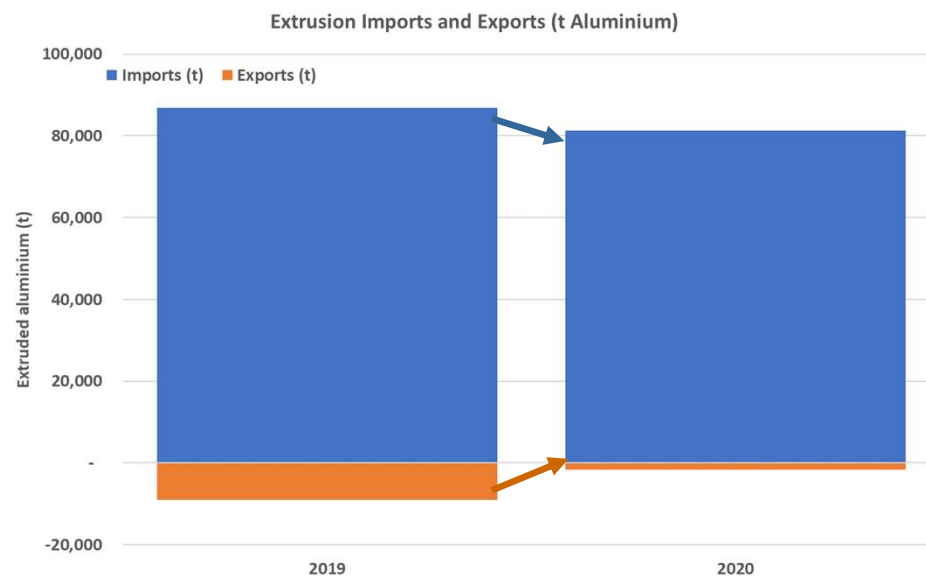


AUSTRALIA'S HIGHEST EARNING MANUFACTURING EXPORT*

AUSTRALIA'S PRIMARY ALUMINIUM EXPORT EARNINGS BY DESTINATION 2019-2020**



DEMAND FOR AUSTRALIAN EXTRUSIONS INCREASED BY ESTIMATED 10% IN 2020



- ~13 kt *** increase from 2019 valued at \$47 m
- Additional local jobs to meet demand

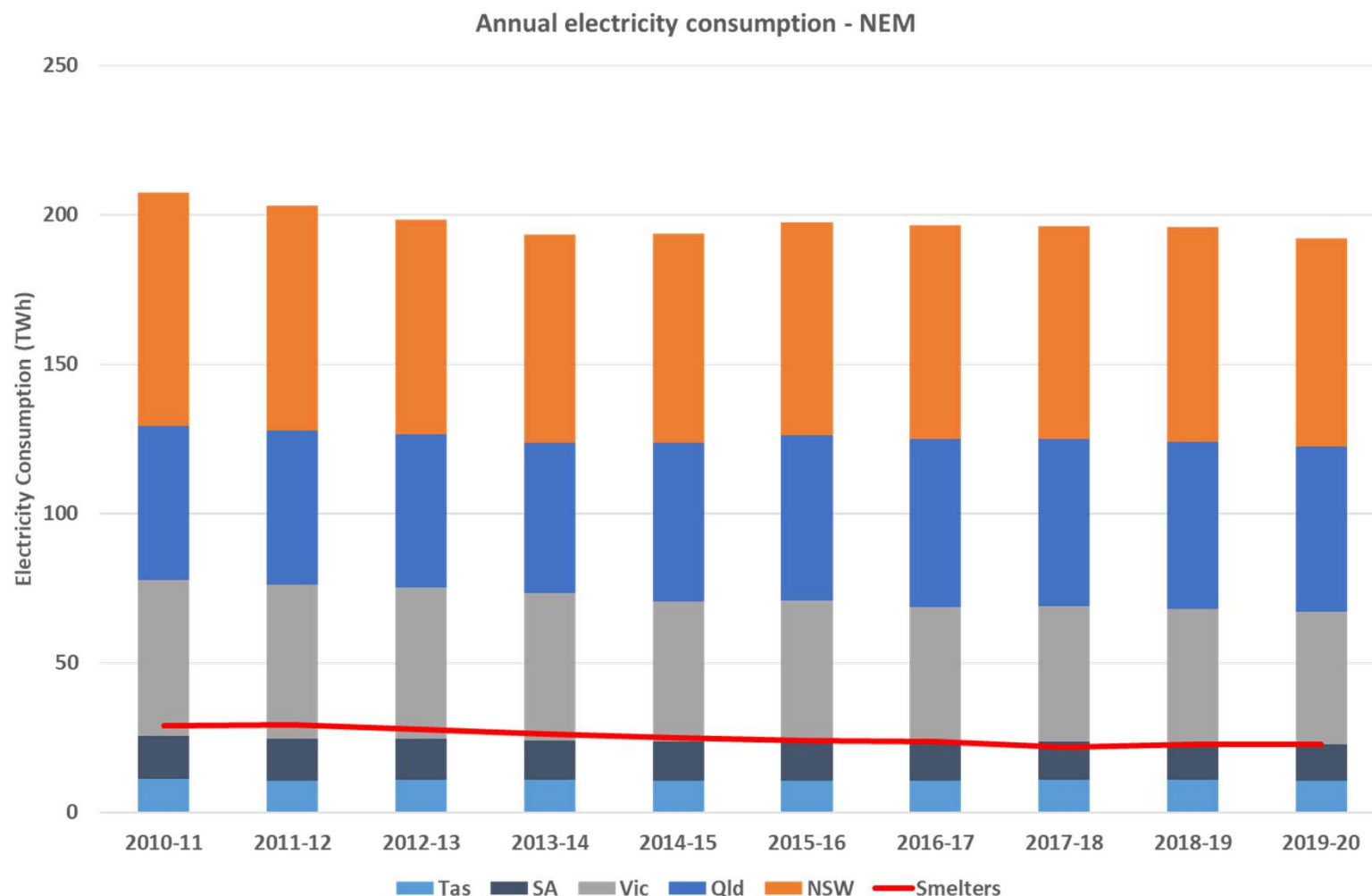
*Trade Investment at a Glance 2020, Department of Foreign Affairs and Trade

** Resources and Energy Quarterly, September 2020, Department of Industry Science Energy and Resources

*** Data extrapolated from Australian Bureau of Statistics and published by Australian Aluminium Council



ALUMINIUM SMELTERS CONSUME AS MUCH ELECTRICITY AS SOUTH AUSTRALIA AND TASMANIA COMBINED*



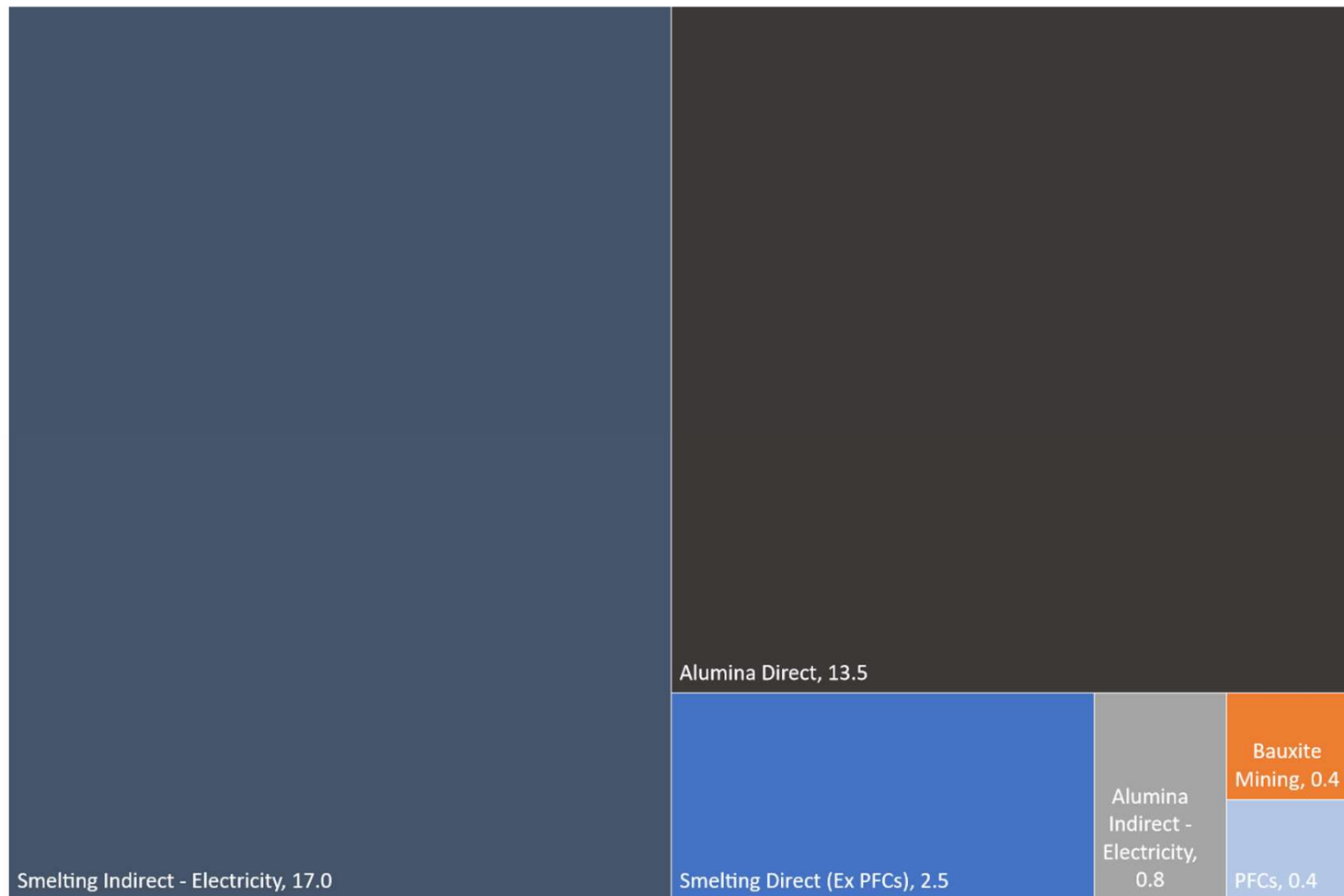
*Australian Energy Regulator, Wholesale Market Statistics, Annual electricity consumption – NEM

** Smelter energy use <https://aluminium.org.au/sustainability/>



AUSTRALIA'S ALUMINUM INDUSTRY TOTAL EMISSIONS

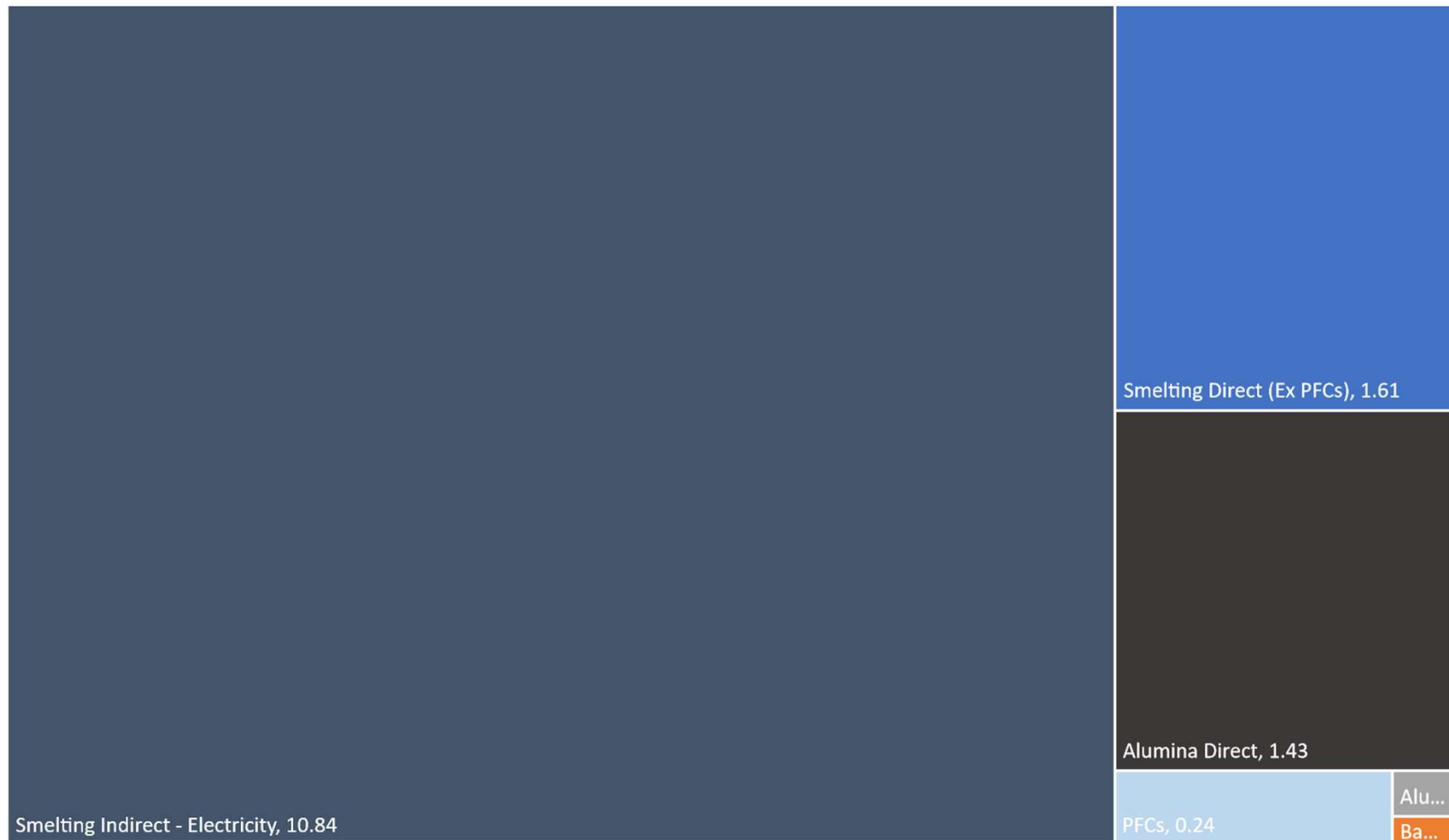
Emissions (Mt CO₂-e)





MINE TO METAL EMISSIONS

Emissions (Mt CO₂-e / t Aluminium - Mine to Metal)





FUTURE OPPORTUNITIES

