



AUSTRALIAN
ALUMINIUM
COUNCIL LTD

Australia's Aluminium Industry

Trade and Competitiveness

Australia's Keys to Competitiveness

Primary Aluminium

- Australia is the **7th** largest global producer.
- Electricity accounts for **30-40%** of smelters cost base and is a key driver of competitiveness.

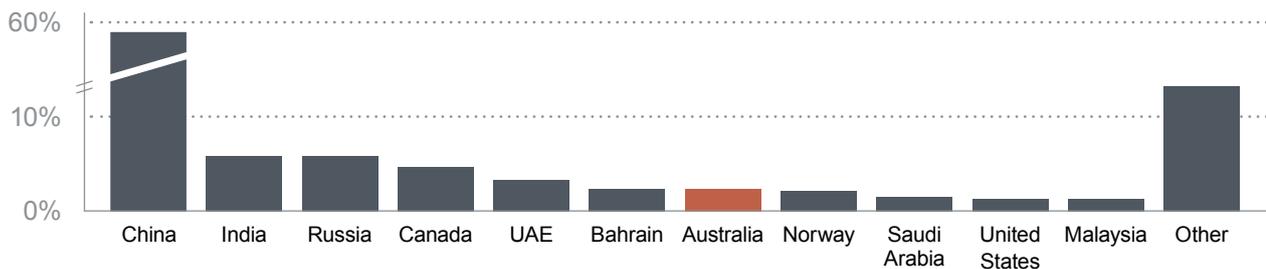
Alumina

- Australia is the **2nd** largest global producer.
- Energy accounts for **30-40%** of refineries cost base and is a key driver of competitiveness.
- Proximity to bauxite is a key driver, although bauxite is now increasingly mobile and access to green energy is of increasing comparative importance.

Bauxite

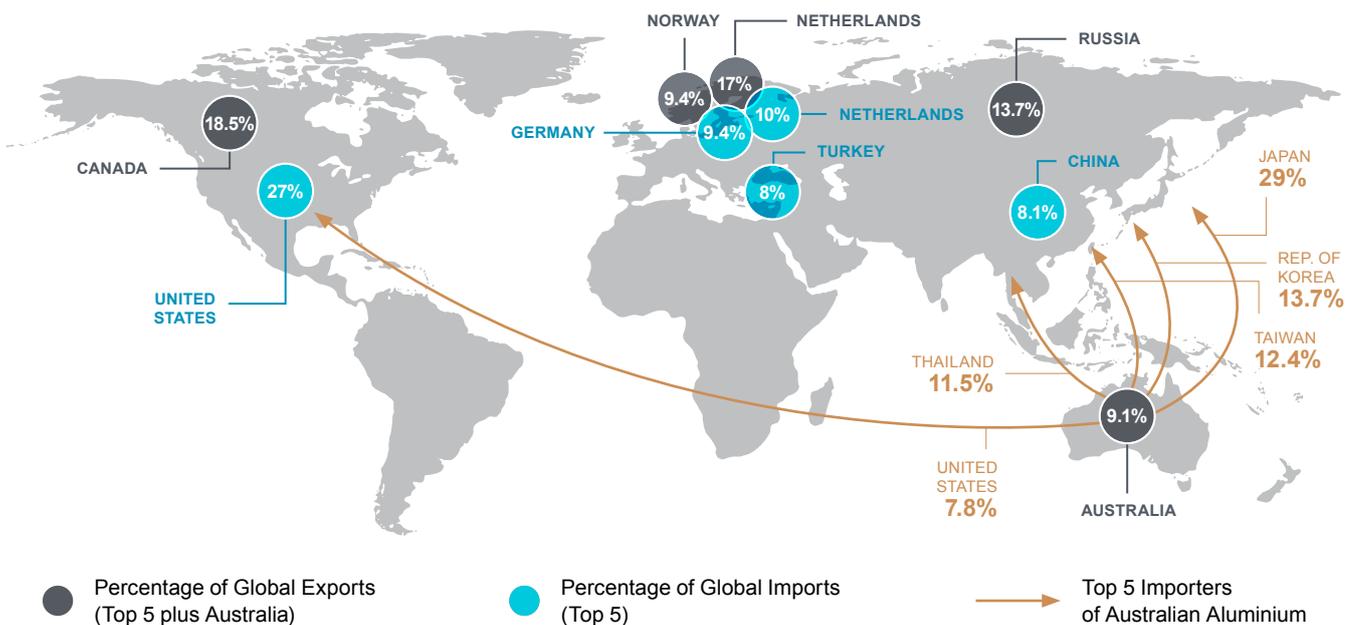
- Australia is the **largest** global producer.
- Australia is the **2nd** largest exporter.
- Australian bauxite mining is regarded as having some of the highest sustainability standards in the world, particularly for rehabilitation.
- Guinea is the world's largest exporter, principally to China, including some captive bauxite mines.

Global Aluminium Production Rankings



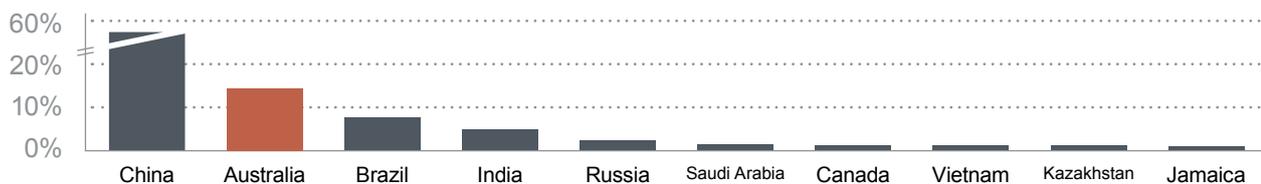
Source: Department of Industry, Science and Resources Figures

Primary Aluminium Trade Flows



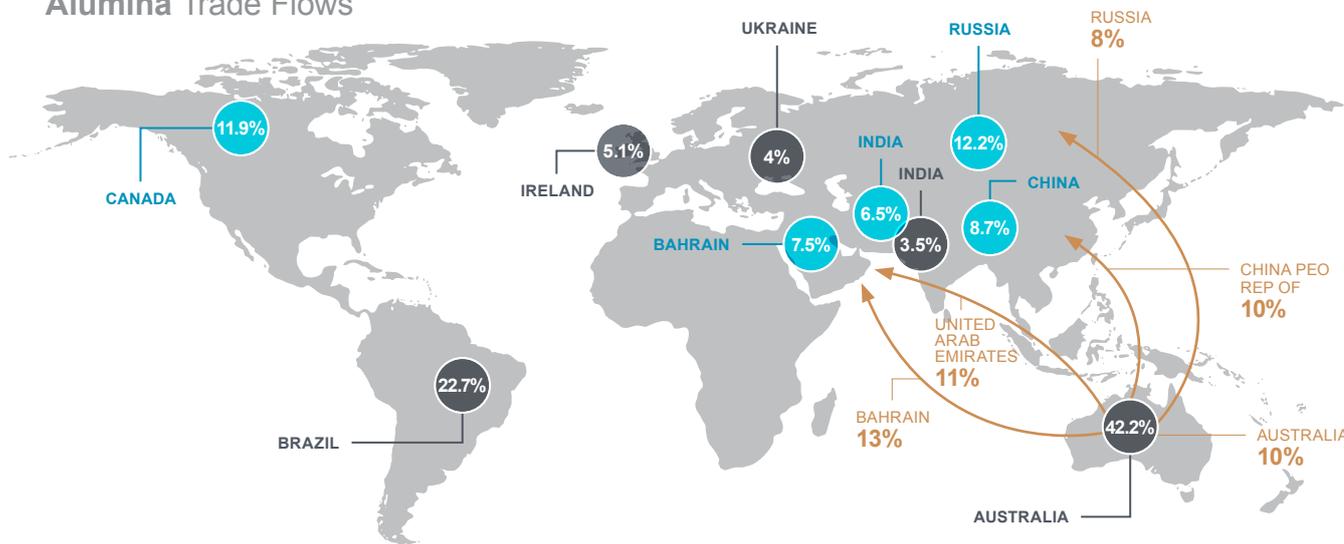
Source: Department of Industry, Science and Resources Figures

Global Alumina Production Rankings



Source: Department of Industry, Science and Resources Figures

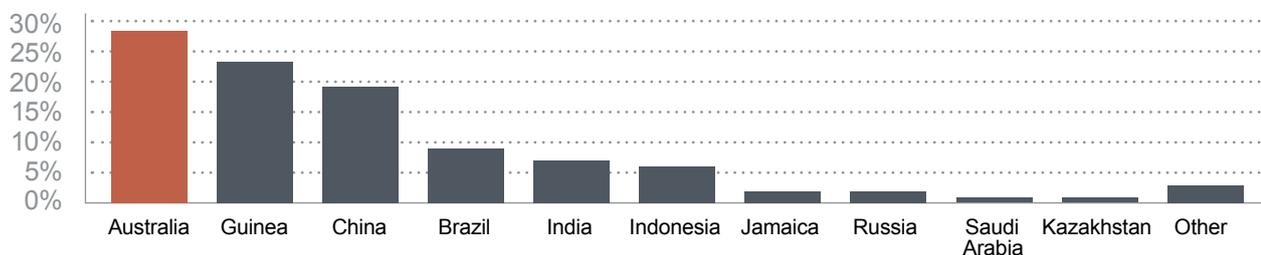
Alumina Trade Flows



- Percentage of Global Exports¹ (Top 5)
- Percentage of Global Imports² [Note % Value] (Top 5)
- ➔ Top 5 Importers of Australian Alumina³

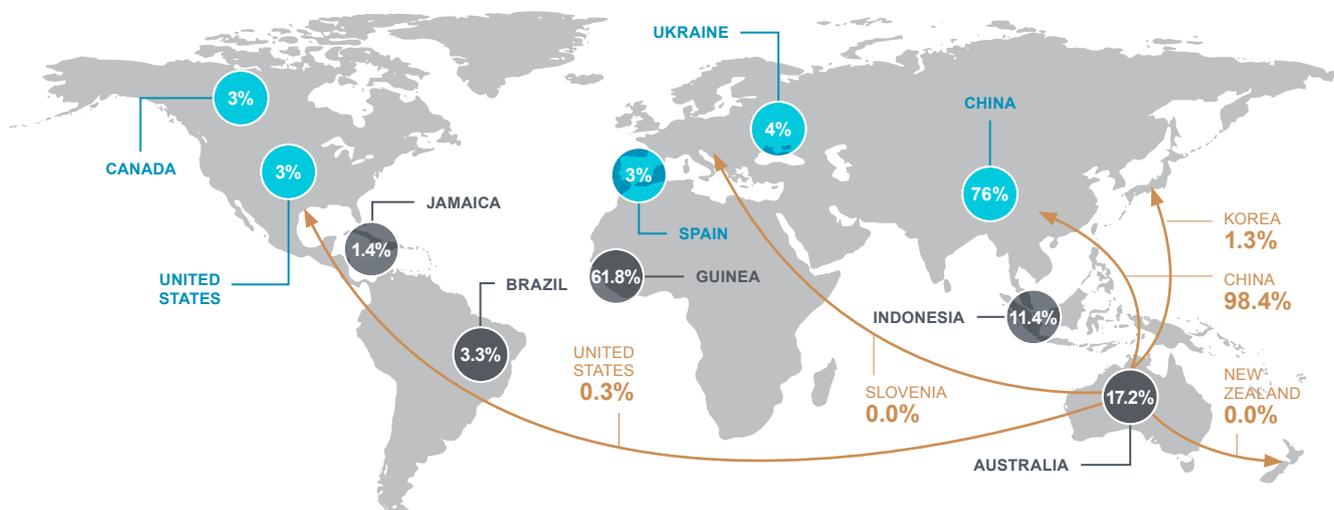
Source: Department of Industry, Science and Resources Figures, Australian Shipping Data

Global Bauxite Production Rankings



Source: Supplied by International Aluminum Institute (from WMBS)

Bauxite Trade Flows



- Percentage of Global Exports (Top 5)
- Percentage of Global Imports (Top 5)
- ➔ Top Importer of Australian Bauxite

Source: Department of Industry, Science and Resources Figures