
Leading industry speakers include:
- Timothy D. Reyes, President, Alcoa Global Primary Products, USA
- Yakov Itskov, Deputy of CEO, Director of Supplies and Logistics, Rusal, Russia
- Demian Reed, General Manager Commercial Bauxite & Alumina, Rio Tinto Alcan, Australia
- Dr Wanxing Li, CEO of Zhengzhou Research Institute, Chalco, China
- Thamarin Latuconsina, Director of Export of Industrial and Mining Products, Ministry of Trade of Indonesia, Indonesia
- Lyberis Polychronopoulou, Managing Director, Elmin, Greece
- Jethro Wookey, Senior Correspondent, Metal Bulletin, UK
- Graeme Sherlock, Managing Director, Cape Alumina, Australia
- Coy Roache, Managing Director, Batco, Jamaica
- Ian Roper, Commodities Strategist, CLSA Asia Pacific, Singapore
- Dr Ashok Nandi, Director, Mineral Information & Development Centre, India
- Martin Haller, Research Manager, Wood Mackenzie, UK
- Dr Michael Missalla, Vice President – Light Metals & Fluidized Beds, Outotec, USA
- Stefan Schlag, Senior Manager, IHS, Switzerland
- Alison Saxby, Senior Analyst, Roskill, UK
- Mike O’Driscoll, Global Head of Research, Industrial Minerals, UK
- Grégoire Leforestier, Deputy Head – Metals & Mining – EMEA, BNP Paribas, Guinea
- Jean-Marc Noe, Consultant, Aluminium & Raw Materials Trading Services Pte Ltd, Singapore

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Bauxite & Alumina markets are going through a major change. Constant demand from China and a decrease in bauxite imports from Indonesia mean that the industry has to step up its game and bring the supplies from elsewhere. However, with the current price tags for bauxite & alumina, junior miners are facing problems with subsidizing their explorations, not to mention issues with the mining codes and environmental regulations. As the market becomes more fragmented, fully integrated producers will have to rethink their strategies for the future and ask: is the real value in beneficiation or streamlining production?

The pricing mechanism is still the one to watch. With the system for alumina spot pricing widely accepted, the new force in the market is lobbying for further disintegration and introduction of the bauxite index pricing. Will bauxite become the new iron ore and what will be the response of bauxite’s big four.

With all those questions to answer and more dynamic market conditions than ever before the 19th International Bauxite & Alumina Conference is happening at a crucial time for the industry. Back by popular demand to the convenient hub of Miami, the conference will once again gather players from both the metallurgical and non-metallurgical bauxite and alumina industries, and all corners of the supply chain.

I believe the event is the right platform to break the old standards and also to have an outlook on new technologies.

Samir Patel, CEO, SLEMCO

Junior Miners Panel Discussion

A panel of up and coming bauxite producers will be assembled to discuss their future expansion projects and their place within the global supply chain. They will also offer insights into the bottlenecks they have faced and the strategies they have pursued in order to deal with them.

Last year’s attendees by company sector

Last year’s attendees by region

Source: MBR
Wednesday, 13 March 2013

16:00 Registration desk opens
18:00 Welcome drinks reception

Day One
Thursday, 14 March 2013

08:00 Registration desk opens
09:00 Chairman’s opening remarks

Keynote presentations:

09:15 Macroeconomics: how macro factors and aluminium demand impact the bauxite and alumina market
- What are the expectations for aluminium demand and how does that affect the raw materials market?
- What impact have curtailments and expansions had on the bauxite & alumina market? Atlantic vs Pacific perspective
- What can we expect to see in 2013 that’s different from 2012? What are future trends?
Timothy D. Reyes, President, Alcoa Global Primary Products, USA

09:45 The big picture: how will the global supply/demand balance shape the markets’ future?
- How has the change in the aluminium and alumina pricing relationship influenced growth strategy for fully integrated producers?
- How have bauxite & alumina markets responded to the falling aluminium price over the last year? Is the market bound to recover?
- Aluminium capacity closures and its impact on the supply/demand balance, are we heading towards oversupply?
- Aluminium industry restructuring, integration and acquisitions – how has this changed the raw materials/metal balance?
Yakov Itskov, Deputy of CEO, Director of Supplies and Logistics, Rusal, Russia

10:15 A market in transition: bauxite or alumina – where will the major investments be made in the future?
- Expansion projects on the horizon – where are the integrated producers focusing their investments?
- New investments in new market conditions – what were the drivers from both Pacific and Atlantic perspectives?
- New entrants on the bauxite mining front – is the industry becoming more fragmented? Is there a sustainable future for new greenfield projects?
- Update on the South of Embley and Yarwun alumina refinery project – when can we expect new capacity coming through?
- Will the future demand go in par with new increasing supply base?
Demian Reed, General Manager Commercial Bauxite & Alumina, Rio Tinto Alcan, Australia

10:45 Networking coffee break

Pricing – is the industry heading towards another shake up?

11:30 Review and outlook for aluminium raw material pricing mechanisms – are changes on the way?
- Market fundamentals affecting the development of new indices – what are the market trends and developments that will drive change?
- Is a bauxite price index feasible today?
- How would it work – what is the reasoning behind it and how would it write into existing alumina index?
- For & against – are all parties in? How would it change the current dynamics in the market?
Jethro Wookey, Senior Correspondent, Metal Bulletin, UK

12:00 Panel discussion: How has a change in market dynamics influenced the reassessment of the alumina pricing mechanism?
- Status quo: has the alumina price been permanently decoupled from the LME?
- Did the change in the alumina pricing mechanism modify trends in alumina trading? Have we seen volumes of alumina spot market increasing over time?
- Have smelters joined the ship yet? What affect did the falling prices of aluminium have on the end users standpoint
- China’s outlook on index pricing – is the market supportive of the change?
- Bauxite index – what are the challenges and can it really be reflective of the market?
Coy Roache, Managing Director, Batco, Jamaica
Jean-Marc Noe, Consultant, Aluminium & Raw Materials Trading Services Pte Ltd, Singapore
Graeme Sherlock, Managing Director, Cape Alumina, Australia

12:45 Lunch

China factor – does it still defy gravity?

14:15 Outlook on Chinese bauxite & alumina industry – what are the challenges?
- Domestic reserves – can China find alternative sources to its insufficient low grade bauxite resources?
- Outlook on refining capacity and cost – will more alumina output be put on stream and at what cost? Are alumina plants in China highly profitable?
- Prices – how have the prices of imported bauxite and alumina settled in the past year?
- Who is likely to supply China with bauxite? Foreign investments – is China looking to invest abroad?
- Has dependency on the external alumina supplies increased in the past year? Will that continue if prices are attractive vs bauxite premiums?
Dr Wanxing Li, CEO of Zhengzhou Research Institute, Chalco, China

14:45 Aluminium markets in China – how will it affect global bauxite and alumina markets?
- The latest on supply and demand rates in China – what impact are economic measures and the current five-year plan having?
- What are the current aluminium inventory levels in the country? Is the industry oversupplied? Will it continue to produce aluminium?
- Implications of raw materials demand – will Chinese appetite for bauxite and alumina keep increasing?
Ian Roper, Commodities Strategist, CLSA Asia Pacific, Singapore

15:15 Networking coffee break

Developments in the non-metallurgical bauxite supply base

15:45 Focus on Europe – how will the changes in non-met bauxite market affect worldwide supplies?
- Vertical integration – is the industry still looking to merge? What could be the possible impact on the worldwide supplies?
- Supply/demand balance – is the market tightening?
- New sources of supplies – does Europe still have ace up its sleeve?
Lyberis Polychronopoulos, Managing Director, Elmin, Greece

16:15 Focus on Asia – where are the opportunities for growth?
- Will more non-metallurgical grade of bauxite come out of Asia, where shall we look?
- Challenges and opportunities created by the beneficiation policy in Indonesia – will the industry in India follow the same pursuit?
- Update on the export policies for non-met bauxite, is China still holding on to its limitations?
Dr Ashok Nandi, Director, Mineral Information & Development Centre, India

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Developments in the Guinean mining code and its implication for the bauxite operations

- Update on the new mining code -- why is it being introduced and what opportunities does it create for the Guinean state?
- African mining vision -- is Guinea implementing the change?
- Attracting foreign investments -- how has the new mining code affected current and prospective bauxite exploration projects?
- Consolidation in the market - are merging efforts a sustainable future for this market?

Grégoire Leforestier, Deputy Head – Metals & Mining – EMEA, BNP Paribas, Guinea

Regional focus: bauxite and alumina market dynamics

Indonesia – how will the changes in the bauxite export laws impact the global market?

- Following the recent decision of the Indonesian Supreme Court to overturn a ban on export of unprocessed minerals and ores -- what will be the implications for bauxite?
- Improving beneficiation process in the country -- have investments started flowing in?
- Export levels of bauxite ore from Indonesia fell significantly last year -- will the trend continue this year?
- Problems with logistics and infrastructure -- can the dream of a fully integrated aluminium chain really become a reality?

Thamarin Latuconsina, Director of Export of Industrial and Mining Products, Ministry of Trade of Indonesia, Indonesia

14:30 Junior Miners Panel discussion: Explorations on the way and their impact on the global bauxite and alumina markets

- Financing new operations in tough economic times -- are new entrants facing bottlenecks in terms of capital?
- Impact of the current bauxite and alumina prices -- is the current level enough to sustain dynamic growth of new operations?
- Export bauxite or beneficiate in-house -- where will the trend go and how will it affect the worldwide balance?
- Managing political risks and environmental concerns -- are there hotspots investors should avoid?
- What are investors sentiments towards bauxite and alumina -- is the market closely watched?

Non-metallurgical alumina – new applications and market drivers

16:00 Developments in the calcined alumina industry and its future prospects

- Review of investments and changes in supply
- Overview of current consumption patterns -- where shall we look for growth?
- Trends in end user markets from high volume refractories to high value technical ceramics
- Future prospects for calcined alumina markets

Alison Saxby, Senior Analyst, Roskill, UK

17:00 Zeolites and sodium aluminate consumption – challenges and opportunities

- Demand from the catalysts market and other applications
- Impact of changing feedstock quality and increasingly severe environmental legislation
- How is the use of refining catalysts affected by a switch to shale gas in North America?
- Is the market in balance or can we expect a shortage of sodium aluminate to hit the market soon?

Stefan Schlag, Senior Manager, IHS, Switzerland

15:30 Networking coffee break

10:15 Networking coffee break

11:00 Australia – will the industry take advantage of bauxite shortages in Asia?

- What impact has the Indonesian unprocessed bauxite export ban had on the market in Australia -- have we seen a boom?
- New capacities in the Pacific region -- will Australia have to compete with other suppliers for access to the Chinese market?
- Ramping up capacity domestically - how much more input can we expect to emerge from Australia and what impact will it have on the global supply/demand balance?
- Issues with shipping -- what is the real impact of cargo traversing the Great Barrier Reef?

Graeme Sherlock, Managing Director, Cape Alumina, Australia

12:00 Lunch

11:30 Indian industry growth – what does it mean for the rest of the world?

- Recent developments in the domestic production of alumina
- Quality and accessibility of resources -- is there a sustainable future?
- Will it sustain growing domestic demand? Will India import bauxite in the future and put even more pressure on bauxite supplies?
- What implications will it have on the global trade balance

16:45 Comparison of alumina production costs -- who holds competitive advantage?

- Expanding alumina refineries – what are the main challenge and how do they translate into costs?
- Different refineries tailored for different bauxite resources -- can the process and costs be really streamlined according to the raw materials available?
- Shift in the market -- is it viable to benefit and who can take full advantage of any opportunities here?
- Cautious soda and energy costs and its impact on the bottom line

Martin Haller, Research Manager, Wood Mackenzie, UK

Day Two

Friday, 15 March 2013

16:45 Cost of production & logistics

17:15 Red mud management and expanding production -- how to keep on pace?

- Brownfield expansions -- will the dams just need to get bigger and bigger?
- Cost of expansion of the red mud management facilities, do the best practises really cost the most?
- Sustainability in the long run -- does investments in the waste management pay off?

Dr Michael Missalla, Vice President – Light Metals & Fluidized Beds, Outotec, USA

17:45 Trends in the bauxite and alumina shipping market

- Dry bulk freight market -- how did it perform in 2012 and what is the outlook for 2013?
- Impact of deteriorating bauxite exports to China on the freight rates
- Current prices of bauxite and alumina -- is it no longer viable to ship bauxite?

18:15 Chairman’s closing remarks

18:30 Networking drinks reception
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