

NON-FERROUS METAL WORKS of the WORLD

9th Edition

**Metal
Bulletin**



Non-Ferrous Metal Works of the World

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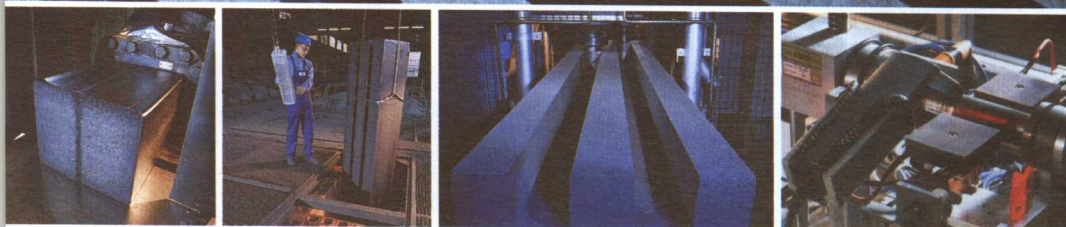
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Foreword

If I had to choose one single aspect that has characterised global business in recent years it would surely be the rapid growth in industry concentration. The metals' industries major consumers in the electronic, automotive, engineering and other downstream sectors have followed a path towards consolidation in a bid to provide their customers – the consuming public – with less expensive, high quality goods, supported by a global distribution and service network.

This trend has impacted back up through the supply chain to the makers of basic goods – metals included – who, responding to their need to produce high quality metals and metal items at increasingly lower cost, have in many instances sought economies of scale and more streamlined operations through merger and acquisition activity.

This process was already in train when we published our last Non-Ferrous Metal Works of the World, but there is no doubt that in the past two years or so it has rapidly gained momentum, leading to changes in ownership among some of the world's major established metals producers. At the same time, there have been new entrants to the metals producing arena such as investment funds seeking to pick up low-cost assets, or trading concerns looking to offset narrowing margins through involvement in production facilities.

Following on from the first wave of mergers two-three years ago, we have seen heightened M&A activity in the base metals sector: Grupo México and Asarco, Alcoa and Reynolds and Alcan and algroup, to name but a few. Even in countries like Russia conglomerates such as JSC Russian Aluminium have emerged.

All this has required a thorough overhaul of the Non-Ferrous Metal Works of the World database. The depth and breadth of the directory continues to grow and this ninth edition is no exception. Entries have been extensively updated and we are very grateful to all those companies that took the time and effort to respond directly to our requests for information.

The major industry mergers or take-overs are all at a different stage of integration at time of publication and, from an editorial standpoint, have been dealt with differently. Thus we see that the former Cyprus Amax is now listed as a part of Phelps Dodge, and the big Russian smelters such as Bratsk and Krasnoyarsk are to be found under the Russian Aluminium banner. Conversely, Alcoa and Reynolds are still – for this edition – listed separately, as are Billiton and Rio Algom.

Useful cross-references abound, however, and will point the reader in the appropriate direction, and the "additional information" section at the end of each entry will give an indication as to the status of any merger, acquisition or disposal activity, or indeed name change.

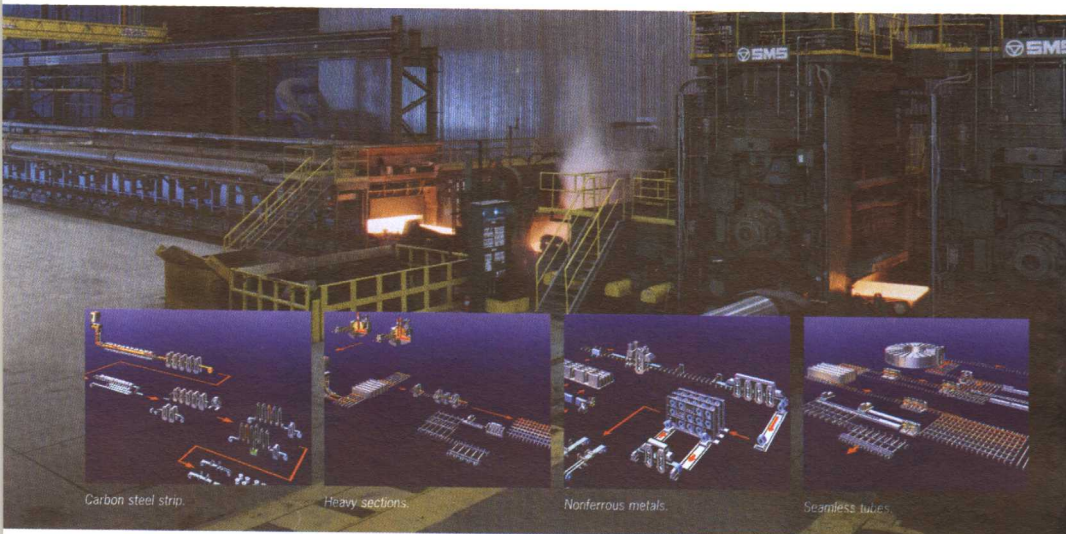
Reflecting the increased openness and move towards internationally accepted standards of corporate practice and governance, companies in areas such as the CIS and China have provided for this edition a greater depth of information than in the past – both on plant and product range as well as contact details. It would seem that today, even companies in the most remote parts of the world are contactable via email.

The metals industry is a global one – in this latest edition of the Non-Ferrous Metal Works of the World there are companies listed in some 100 different countries, and many are transnational in scope. Our front cover photo, for instance, was provided by an Asian company that has producing operations in no less than three continents of the world – Korea Zinc. We are very grateful to the company for providing us with the picture which shows a view of its zinc refining complex at Onsan in South Korea.

As always we would like to hear from readers if they have any supplementary information on their companies or know of new plants in their part of the world that have escaped our canvass.

Ann-Marie Moreno
Editor

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at the same time, fulfil the most exacting demands for high-quality products. These activities also result in innovative products for new applications with considerable market potential. Our integrated proposals are all based on the best technologies, extensive know-how and an unsurpassed number of existing installations.

Against the background of the massive changes in the manufacture and marketing of metallurgical products, innovative complete technologies are more important than ever for the growing requirements in the next century. You can reap the benefits of our complete technologies from one source, namely, the least amount of coordination, excellent process reliability and maximum efficiency.

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Contents

	Page
Foreword	5
Index to countries	9
Alphabetical index to companies	15
Editorial section	55
Index to Buyers' Guide	635
Buyers' Guide	645

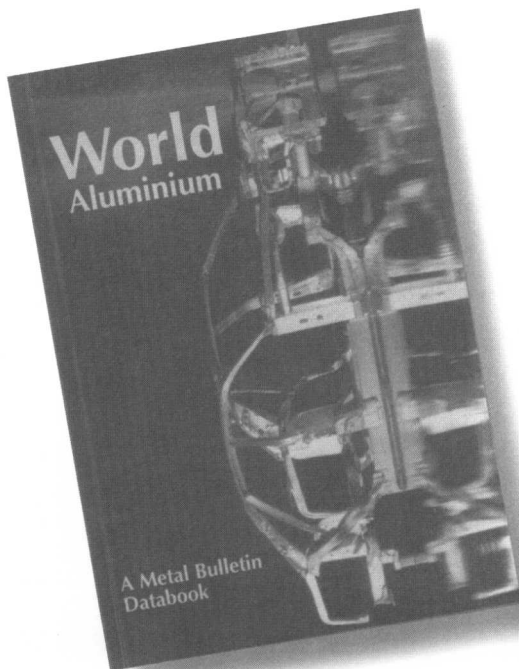
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Alphabetical Index to Countries

Albania	55
Algeria	55
Argentina	56
Armenia	58
Australia	58
Austria	78
Azerbaijan	84
Bahamas	85
Bahrain	85
Belgium	87
Bolivia	100
Bosnia Herzegovina	100
Botswana	101
Brazil	101
Bulgaria	114
Canada	117
Chile	140
China	148
Colombia	190
Congo (Democratic Republic)	191
Croatia	191
Cuba	192
Cyprus	193
Czech Republic	193
Denmark	196
Dominican Republic	197
Ecuador	197
Egypt	198
Estonia	200
Finland	200
France	204
Germany	225

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2000

Ghana	267
Greece	267
Republic of Guinea	271
Hungary	272
Iceland	274
India	274
Indonesia	293
Iran	298
Irish Republic	300
Israel	301
Italy	305
Jamaica	319
Japan	321
Jordan	348
Kazakhstan	349
Kenya	351
South Korea	352
Kuwait	357
Kyrgyzstan	358
Lithuania	359
Luxembourg	359
Republic of Macedonia	360
Malaysia	360
Mexico	365
Morocco	372
Mozambique	373
Nepal	373
Netherlands	373
New Zealand	381
Nigeria	383
Norway	384
Oman	389
Pakistan	391
Peru	393

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Innovation Know-How Reliability

Philippines	396
Poland	397
Portugal	404
Romania	407
Russia	409
Rwanda	427
Saudi Arabia	428
Singapore	429
Slovakia	429
Slovenia	431
South Africa	432
Spain	448
Sri Lanka	459
Surinam	460
Sweden	460
Switzerland	466
Syria	473
Taiwan	473
Tajikistan	476
Tanzania	477
Thailand	477
Turkey	482
Uganda	492
Ukraine	492
United Arab Emirates	494
United Kingdom	495
United States	543
Uruguay	624
Uzbekistan	624
Venezuela	624
Federal Republic of Yugoslavia	625
Zambia	627
Zimbabwe	630

Do you see environmental safety as a cost, or a sales benefit for your product?

Tightening environmental regulations and a growing customer preference on environmentally sound products and production methods are beginning to affect metals industry world-wide.

With this in mind, Outokumpu constantly strives to make sure that environmental soundness is an integral part of every metals technology product it markets. So you can rest assured that environmental risks leading to financial losses are minimized.

The cleanest smelter in the world

Joint efforts between Kennecott Utah Copper and Outokumpu lead to the development of a unique Kennecott-Outokumpu Flash Converting Process. The use of flash smelting and converting allows the company to recover 99.9 % of the sulfur.

Saving energy in ferrochrome production

Steel belt sintering technology offers substantial savings in the production of ferrochrome. The use of homogeneous sintered pellets reduces energy consumption by 20 % per produced ton, increases chrome recovery by 10 % and offers 15 % higher furnace productivity.

Process is closed, so the carbon monoxide generated in the furnaces is recovered and used to fuel other processes. Emissions and the need for external energy are therefore considerably lowered.

Filtration the natural way

The beauty of nature's own solution to solid-liquid separation lies in its sim-

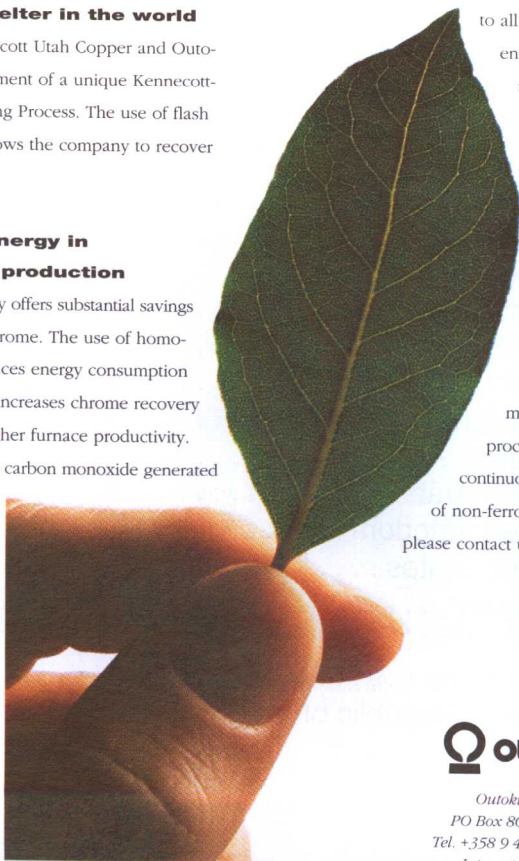
ilarity. Through capillary action only liquid follows through the ceramic filter media. The miniature pores allow no air or solids to penetrate. Filtrate is crystal clear, and energy savings of up to 90 % can be realized, as thermal drying and air blowing are eliminated. Also, these two phases might otherwise cause emission problems.

Technology proven in practice

Outokumpu technology is tested and perfected at company's own metal production facilities. Common denominators

to all Outokumpu technology are energy savings, lower capital investments or improved productivity, and often all three. Conformity with the environmental approach of using Best Available Technology is another value adding feature as well.

For more information about plants, special equipment and technology for mineral processing, extractive metallurgy, continuous casting and metal forming of non-ferrous metals and ferroalloys, please contact us.



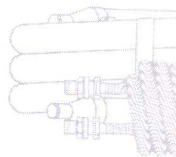
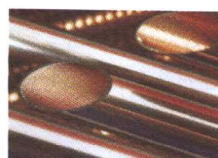
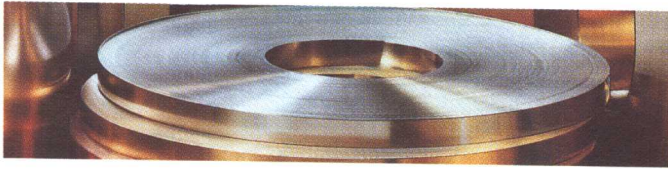
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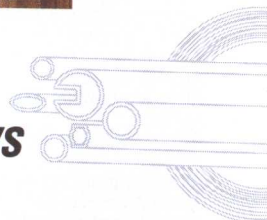
Alphabetical Index to Companies

5N Plus Inc	117
Abbey Metals Europe SL	448
Aboura Trading & Commission Co	348
Abram Alloys Ltd	495
Achinsk Alumina Refinery see JSC Russian Aluminium	409
Acomete Comercio de Metais Ltda	101
Affilips NV	87
Affimet	204
Africaine des Metaux et Alliages Blancs, Ste	372
African Zinc Mills (Pty) Ltd	432
Agrawal Metal Works Ltd	274
Ahresty Corp	321
Aichi Steel Corp	321
Ajka Alumina Co Ltd	272
Alba Aluminium Bahrain BSC (c)	85
Albaker Corp	55
Albex Aluminium Inc	543
Albras Aluminio Brasileiro SA	101
Alcan Aluminio do Brasil Ltda	102
Alcan Aluminium Ltd	117
Alcan Aluminium Corp	543
Alcan Chemicals	496
Alcan Deutschland GmbH	225
Alcan Europe	466
Alcan Jamaica Co	319
Alcan Nikkei Siam Ltd	477
Alcan Nikkei Thai Ltd	477
Alcan Recycling	496
Alcan Rolled Products UK	496
Alcan Smelting & Power UK	496
Alcan Taihan Aluminium Ltd	352
Alcatel Cable France	204
Alcatel Kabel AG & Co	226
Alcin Alüminyum Ticaret ve Sanayi AS	482
Alcoa	544
Alcoa Eastalco Works	547
Alcoa Mt Holly	547
Alcoa (Shanghai) Aluminium Products Co Ltd	148
Alcoa Aluminio SA	102
Alcoa Europe Building & Construction Systems (AE BCS)	88
Alcoa Europe Primary Aluminium	305
Alcoa Europe Extrusions & End Products	466
Alcoa Europe Holding BV	373
Alcoa Europe, Flat Rolled Products	448
Alcoa Extrusions	497
Alcoa Inespai SA	449
Alcoa Kerkraide Cast House	375
Alcoa Manufacturing (GB) Ltd	497
Alcoa of Australia Ltd see Alcoa World Alumina Australia	58
Alcoa Reormond Extrusions	375
Alcoa World Alumina Australia	58
Alcoa-Kofem Ltd	272
Alcomet plc	114
Alcop Aluminium Co of Pakistan Industries (Pvt) Ltd	391
Alcuiux SA, Gottschol	359
Alcupro as	429

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