

Argentina's aluminum industry **indicators**

statistical yearbook **2018**

definitive edition - may 2019



Talampaya Canyon - La Rioja Province

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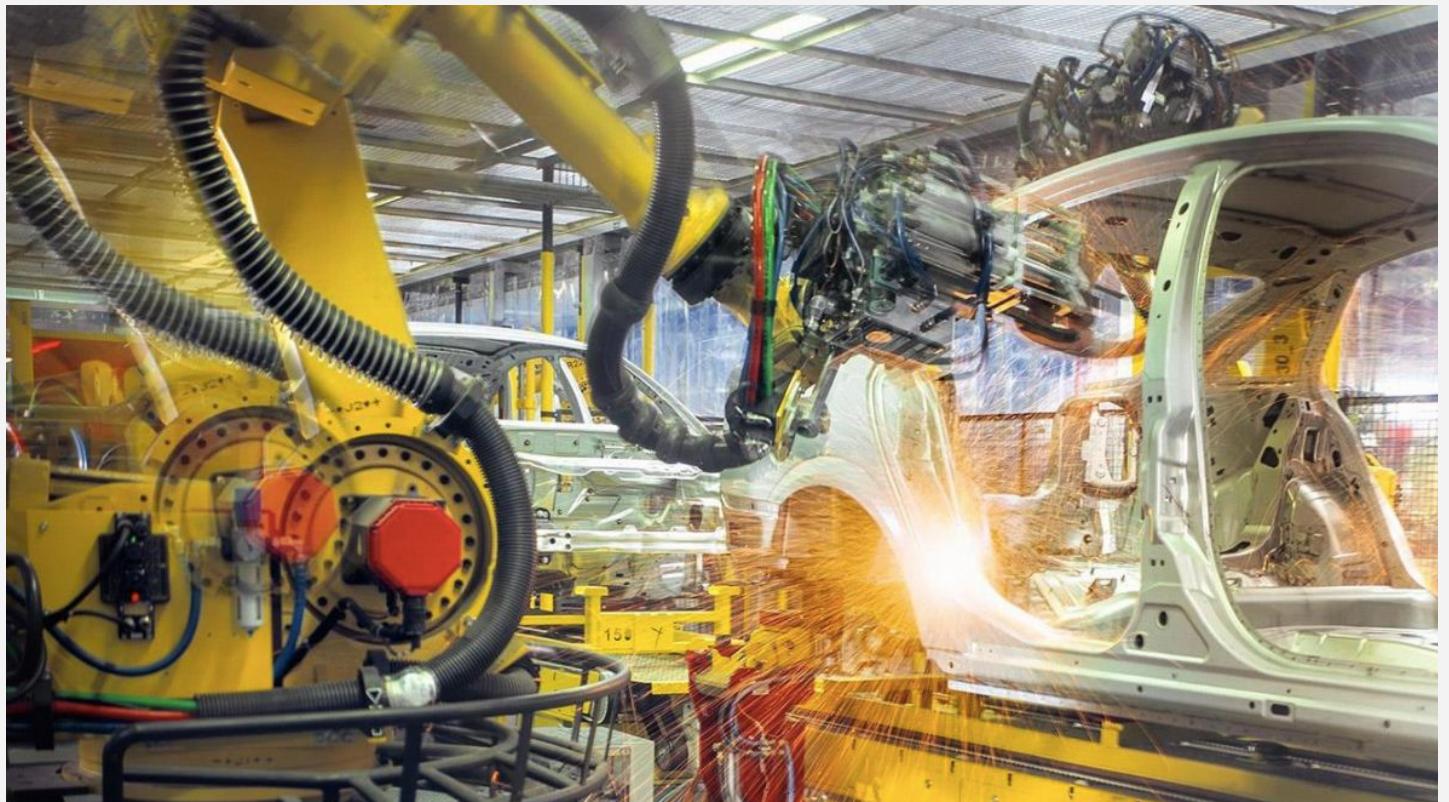
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A 2018 of mixed results

This 2018 has been a year of mixed results, both in terms of the evolution of the aluminum market in Argentina, and in terms of statistical data and the Yearbook.

Regarding the domestic market, consumption reached values similar to those of 2017, with a consumption of semielaborated products just below last year's figures. Semielaborated consumption is the one that is used worldwide as a reference and that is the basis of the "per capita consumption" index. Even so, if the evolution of each different product is observed, the situation differs substantially. For example, the consumption of Semielaborated products for the production of aerosols fell significantly, but this fall was offset by an abrupt increase in the consumption of semielaborated products for the production of beverage cans.

Regarding the trade balance, the historical trend of the industry continues, where the balance is broadly favorable in the case of primary aluminum, which has a favorable balance of just over 700 million dollars. On the contrary, the trade balance of semi-processed and processed products registered a negative balance of just over 200 million of the US currency. Anyway, and in the same way as in recent years, the aluminum industry generates a total positive balance, with a net income of 475 million dollars.

Finally, we must make a reference to the data sources. This year we have made some modifications to the extruded data, thanks to an intense work together with the Extrusion Branch. We also have to indicate that the INDEC has stopped publishing export data, and that therefore the indicated values are based on the Chamber's own estimates.

To conclude, we invite all those interested in the aluminum industry in Argentina to bring their concerns closer, in order to be able to contribute to the industry and society as a whole the data that allow us to make decisions to continue developing this industry.

Eng. Gustavo Zini - Statistics Subcommission

comparison 2018 vs 2017 (variations)

| | | | |
|--|----------------|-------|---|
| ingot domestic production [ton] | 490.696 | 2,5% | ▲ |
| ingot imports [ton] | 9.506 | 1,1% | ▲ |
| ingot exports [ton] | 330.431 | 0,7% | ▲ |
| <hr/> | | | |
| ingot consumption | | | |
| =semielaborated products domestic production [ton] | 177.374 | -3,4% | ▼ |
| semielaborated products imports [ton] | 67.283 | 12,9% | ▲ |
| semielaborated products exports [ton] | 40.347 | 6,9% | ▲ |
| <hr/> | | | |
| semielaborated products domestic consumption [ton] | 204.310 | -0,6% | ▼ |
| <hr/> | | | |
| per capita domestic consumption [kg/inhab.year] | 4,6 | -2,1% | ▼ |
| <hr/> | | | |
| foreign trade balance [ton] | 291.480 | -1,2% | ▼ |
| foreign trade balance [million dollars] | 475 | 4,1% | ▲ |



comparison 2018 vs 2017 (variation)

consumption of semielaborated products from group I (exposed to imported competition*)

| | | | |
|---|---------------|--------|---|
| standard sheet & strip of domestic origin [ton] | 5.717 | -7,9% | ▼ |
| imported standard sheet & strip [ton] | 2.080 | -41,9% | ▼ |
| aerosol slugs of domestic origin [ton] | 11.170 | -26,0% | ▼ |
| imported aerosol slugs [ton] | 346 | -69,5% | ▼ |
| collapsible-tubes slugs of domestic origin [ton] | 619 | 16,2% | ▲ |
| imported collapsible-tubes slugs [ton] | 366 | -12,8% | ▼ |
| standard foil of domestic origin [ton] | 5.160 | -14,4% | ▼ |
| imported standard foil [ton] | 5.454 | -19,2% | ▼ |
| building profiles of domestic origin [ton] | 46.192 | -1,4% | ▼ |
| imported building profiles [ton] | 1.529 | 14,8% | ▲ |
| industrial profiles of domestic origin [ton] | 9.644 | 0,9% | ▲ |
| imported industrial profiles [ton] | 7.466 | -14,5% | ▼ |
| rod & wire for cables of domestic origin [ton] | 15.635 | -9,5% | ▼ |
| imported rod & wire for cables [ton] | 1.597 | -43,8% | ▼ |
| total group I semielaborated products of domestic origin [ton] | 94.138 | -7,3% | ▼ |
| total group I imported semielaborated products [ton] | 19.300 | -24,6% | ▼ |

* semielaborated products manufactured by a domestic producer that compete with similar imports.

comparison 2018 vs 2017 (variation)

consumption of semielaborated products from group II (products with no domestic producers*)

| | | | |
|--|---------------|-------|---|
| imported can stock [ton] | 28.292 | 77,7% | ▲ |
| imported non-standard sheet & strip [ton] | 4.165 | 9,6% | ▲ |
| imported non-standard foil [ton] | 5.618 | 23,3% | ▲ |
| total group II imported semielaborated products [ton] | 38.075 | 56,8% | ▲ |

consumption of semielaborated products from group II (not subjected to analysis**)

| | | | |
|--|---------------|--------|---|
| imported special tubes [ton] | 462 | -44,2% | ▼ |
| rod & wire for steelwork of domestic origin [ton] | 1.280 | 6,8% | ▲ |
| castings for casted parts of domestic origin [ton] | 36.780 | 3,3% | ▲ |
| castings for steelwork of domestic origin [ton] | 4.829 | -35,5% | ▼ |
| imported cookware [ton] | 3.229 | -13,2% | ▼ |
| imported other aluminum parts [ton] | 1.015 | 37,1% | ▲ |
| imported other subproducts [ton] | 5.665 | 7,8% | ▲ |
| total group III semielaborated products [ton] | 52.798 | -2,3% | ▼ |

domestic ingot consumption

| | | | |
|---|----------------|-------|---|
| primary ingots of domestic origin [ton] | 113.009 | -8,8% | ▼ |
| secondary ingots of domestic origin [ton] | 54.859 | 9,1% | ▲ |
| imported primary + secondary ingots [ton] | 9.506 | 1,1% | ▲ |

* semielaborated products that are being imported as there is no domestic alternative to satisfy their demand.

** semielaborated products with no significant imports or whose market share is measured with products from Chapters other than 76.

domestic consumption indicators



per capita domestic consumption - page 9

product/sector consumption matrix - page 10

consumption by product and subproduct - pages 11/17

consumption by economic sector - page 18

per capita domestic consumption evolution [ton*]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|---|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| + primary ingot domestic production (electrolysis) | 406.700 | 410.947 | 415.799 | 406.996 | 436.181 | 441.703 | 428.206 | 424.785 | 428.238 | 435.837 |
| + ingot imports | 10.420 | 7.877 | 16.693 | 15.274 | 15.548 | 21.801 | 19.686 | 18.253 | 9.407 | 9.506 |
| - ingot exports | 289.388 | 279.404 | 255.159 | 249.374 | 268.103 | 220.600 | 213.794 | 298.438 | 328.086 | 330.431 |
| = semielaborated products domestic production | 174.610 | 203.726 | 223.381 | 211.035 | 214.519 | 224.271 | 226.225 | 182.586 | 183.611 | 177.374 |
| + semielaborated products imports (consumption) | 35.816 | 49.095 | 50.939 | 47.165 | 49.790 | 47.939 | 41.482 | 42.424 | 57.338 | 65.019 |
| + semielaborated products imports (temporary admission) | 2.264 | 2.264 | 2.264 | 2.264 | 2.264 | 2.264 | 2.264 | 2.264 | 2.264 | 2.264 |
| - semielaborated products exports | 32.015 | 39.347 | 44.928 | 47.385 | 46.794 | 41.286 | 34.520 | 44.677 | 37.740 | 40.347 |
| = semielaborated products domestic consumption | 180.674 | 215.738 | 231.655 | 213.079 | 219.779 | 233.188 | 235.451 | 182.597 | 205.473 | 204.310 |
| → population [millions] | 40,0 | 40,8 | 41,3 | 41,7 | 42,2 | 42,7 | 43,1 | 43,6 | 44,0 | 44,5 |
| per capita domestic consumption [kg/inhab.year] | 4,5 | 5,3 | 5,6 | 5,1 | 5,2 | 5,5 | 5,5 | 4,2 | 4,7 | 4,6 |

per capita domestic consumption historical series

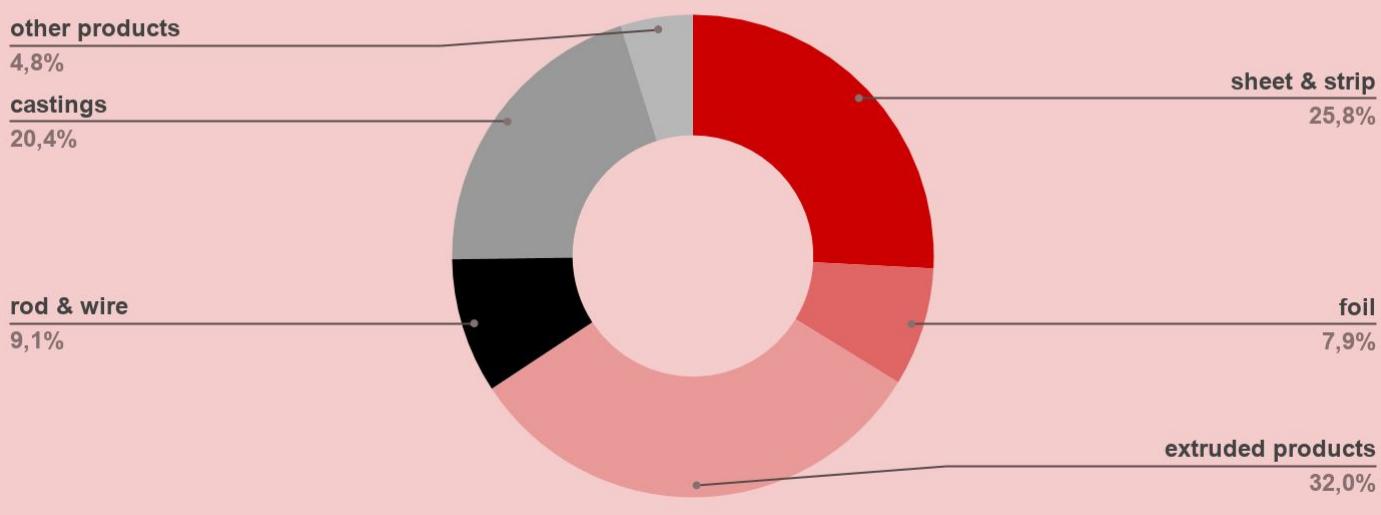


* except where indicated.

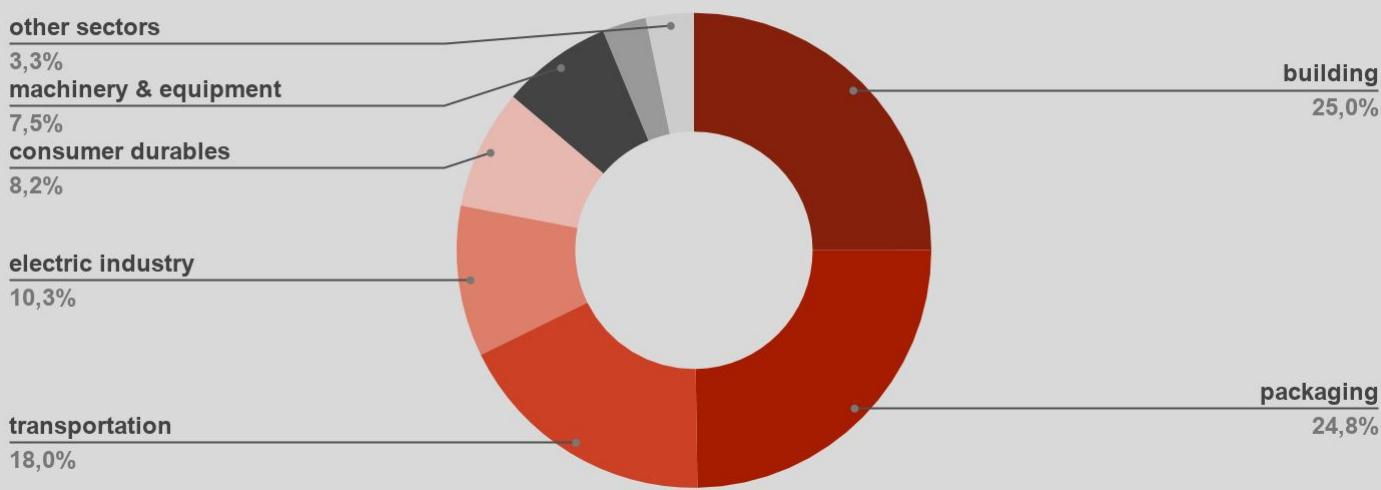
product/sector consumption matrix 2018 [ton]

| product/sector | building | packaging | transport. | electric industry | consumer durables | machinery & equip. | steelwork | other sectors | total product |
|-------------------|----------|-----------|------------|-------------------|-------------------|--------------------|-----------|---------------|---------------|
| sheet & strip | 1.196 | 41.392 | 4.032 | 208 | 2.964 | 2.964 | 0 | 0 | 52.755 |
| foil | 2.123 | 9.240 | 3.246 | 0 | 0 | 1.623 | 0 | 0 | 16.232 |
| extruded products | 47.721 | 0 | 5.549 | 1.711 | 6.844 | 3.468 | 0 | 0 | 65.293 |
| rod & wire | 0 | 0 | 0 | 17.232 | 0 | 0 | 1.280 | 0 | 18.512 |
| castings | 0 | 0 | 23.907 | 1.839 | 3.678 | 7.356 | 4.829 | 0 | 41.609 |
| other products | 0 | 0 | 0 | 0 | 3.229 | 0 | 0 | 6.680 | 9.909 |
| total sector | 51.040 | 50.631 | 36.734 | 20.990 | 16.715 | 15.411 | 6.109 | 6.680 | 204.310 |

2018 - domestic consumption - product share



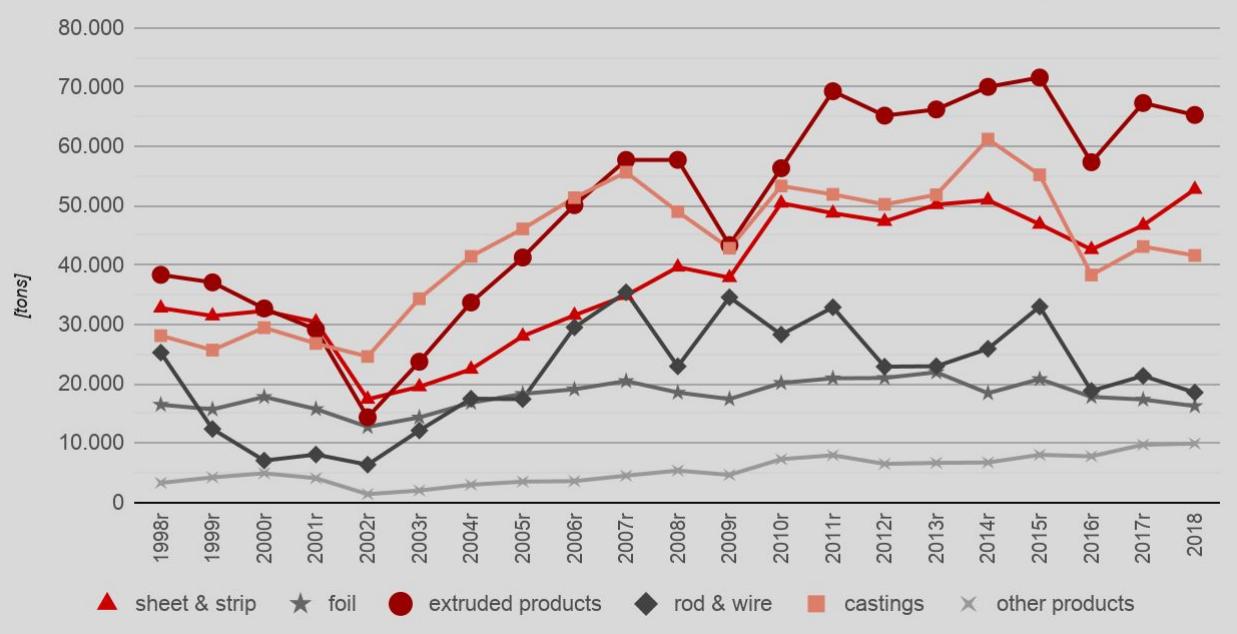
2018 - domestic consumption - economic sector share



semielaborated products consumption evolution [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|--------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| sheet & strip | 37.876 | 50.429 | 48.738 | 47.364 | 50.190 | 50.941 | 46.874 | 42.616 | 46.697 | 52.755 |
| annual variation | -4,5% | 33,1% | -3,4% | -2,8% | 6,0% | 1,5% | -8,0% | -9,1% | 9,6% | 13,0% |
| foil | 17.413 | 20.123 | 20.905 | 20.967 | 21.923 | 18.399 | 20.777 | 17.778 | 17.331 | 16.232 |
| annual variation | -5,9% | 15,6% | 3,9% | 0,3% | 4,6% | -16,1% | 12,9% | -14,4% | -2,5% | -6,3% |
| extruded products | 43.360 | 56.316 | 69.291 | 65.180 | 66.227 | 70.028 | 71.601 | 57.330 | 67.307 | 65.293 |
| annual variation | -24,9% | 29,9% | 23,0% | -5,9% | 1,6% | 5,7% | 2,2% | -19,9% | 17,4% | -3,0% |
| rod & wire | 34.566 | 28.274 | 32.874 | 22.870 | 22.943 | 25.887 | 32.990 | 18.793 | 21.318 | 18.512 |
| annual variation | 50,8% | -18,2% | 16,3% | -30,4% | 0,3% | 12,8% | 27,4% | -43,0% | 13,4% | -13,2% |
| castings | 42.827 | 53.319 | 51.902 | 50.219 | 51.839 | 61.212 | 55.197 | 38.317 | 43.107 | 41.609 |
| annual variation | -12,6% | 24,5% | -2,7% | -3,2% | 3,2% | 18,1% | -9,8% | -30,6% | 12,5% | -3,5% |
| other products | 4.632 | 7.276 | 7.945 | 6.479 | 6.657 | 6.721 | 8.013 | 7.763 | 9.714 | 9.909 |
| annual variation | -13,6% | 57,1% | 9,2% | -18,5% | 2,7% | 1,0% | 19,2% | -3,1% | 25,1% | 2,0% |
| total consumption | 180.674 | 215.738 | 231.655 | 213.079 | 219.779 | 233.188 | 235.451 | 182.597 | 205.473 | 204.310 |
| annual variation | -6,5% | 19,4% | 7,4% | -8,0% | 3,1% | 6,1% | 1,0% | -22,4% | 12,5% | -0,6% |

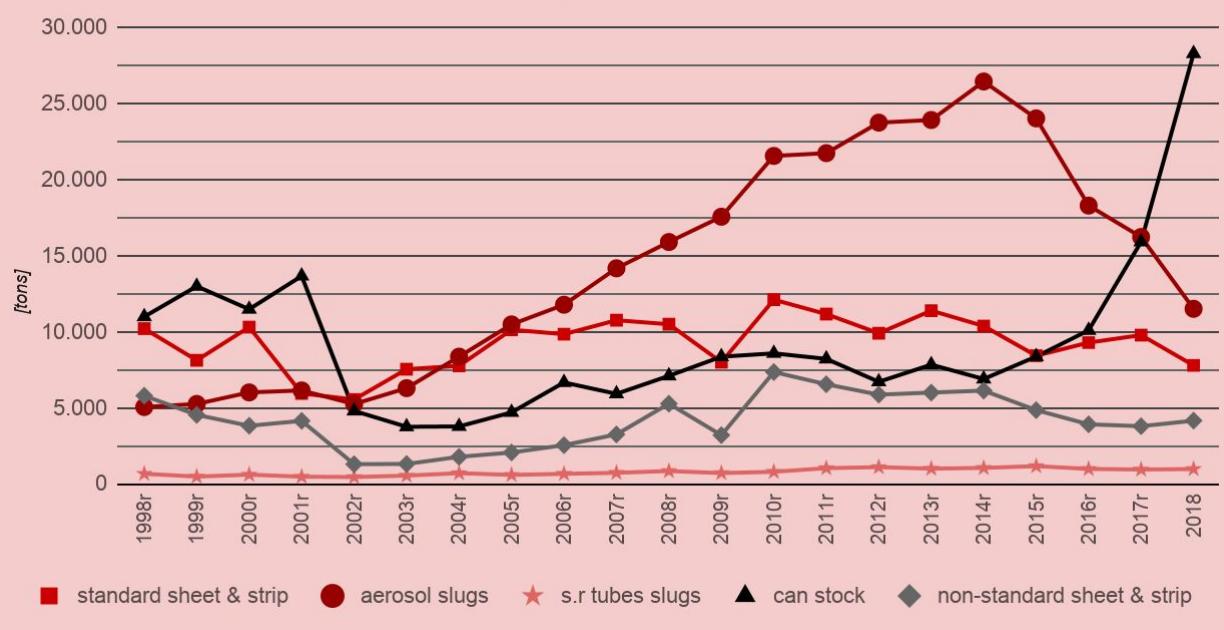
historical series of the domestic consumption of semielaborated products by product



evolution of the consumption of subproducts of sheet & strip [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|---------------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| standard sheet & strip | 8.006 | 12.115 | 11.167 | 9.909 | 11.396 | 10.383 | 8.432 | 9.295 | 9.787 | 7.797 |
| annual variation | -23,8% | 51,3% | -7,8% | -11,3% | 15,0% | -8,9% | -18,8% | 10,2% | 5,3% | -20,3% |
| aerosol slugs | 17.567 | 21.564 | 21.747 | 23.752 | 23.925 | 26.456 | 24.032 | 18.300 | 16.236 | 11.516 |
| annual variation | 10,4% | 22,7% | 0,8% | 9,2% | 0,7% | 10,6% | -9,2% | -23,9% | -11,3% | -29,1% |
| collapsible-tubes slugs | 721 | 804 | 1.043 | 1.110 | 1.012 | 1.059 | 1.176 | 995 | 953 | 986 |
| annual variation | -15,6% | 11,5% | 29,7% | 6,5% | -8,9% | 4,7% | 11,0% | -15,4% | -4,2% | 3,4% |
| can stock | 8.370 | 8.589 | 8.225 | 6.719 | 7.844 | 6.904 | 8.377 | 10.102 | 15.919 | 28.292 |
| annual variation | 17,7% | 2,6% | -4,2% | -18,3% | 16,7% | -12,0% | 21,3% | 20,6% | 57,6% | 77,7% |
| non-standard sheet & strip | 3.211 | 7.358 | 6.557 | 5.873 | 6.013 | 6.139 | 4.856 | 3.925 | 3.801 | 4.165 |
| annual variation | -39,2% | 129,1% | -10,9% | -10,4% | 2,4% | 2,1% | -20,9% | -19,2% | -3,2% | 9,6% |

historic series of the consumption of subproducts of sheet & strip



evolution of the consumption of subproducts of foil [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|--------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| standard foil | 12.710 | 13.649 | 13.225 | 14.004 | 14.200 | 12.610 | 15.513 | 12.088 | 12.774 | 10.614 |
| annual variation | -4,1% | 7,4% | -3,1% | 5,9% | 1,4% | -11,2% | 23,0% | -22,1% | 5,7% | -16,9% |
| non-standard foil | 4.703 | 6.474 | 7.680 | 6.963 | 7.723 | 5.789 | 5.263 | 5.690 | 4.556 | 5.618 |
| annual variation | -10,5% | 37,7% | 18,6% | -9,3% | 10,9% | -25,0% | -9,1% | 8,1% | -19,9% | 23,3% |

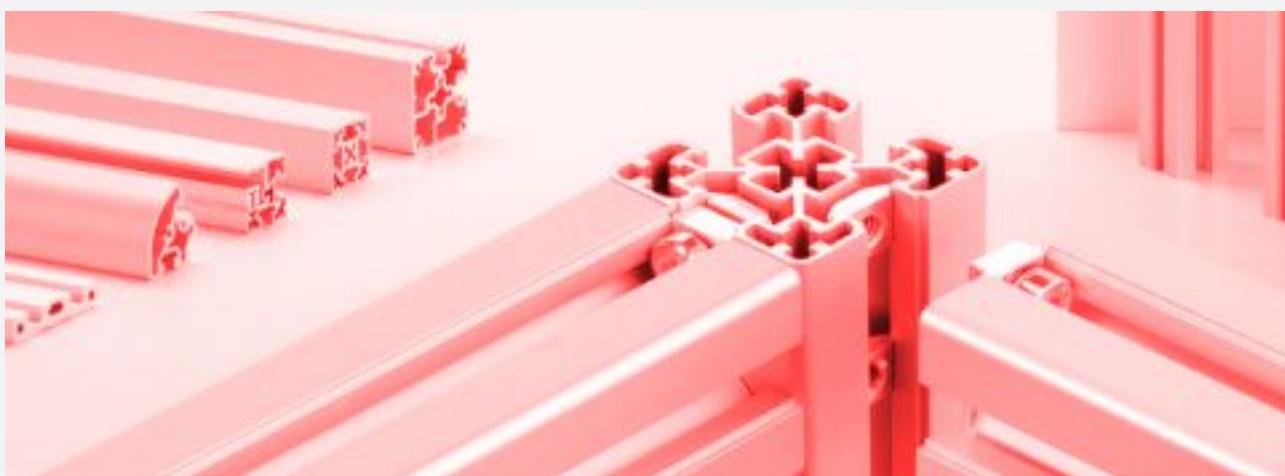
historic series of the consumption of subproducts of foil



evolution of the consumption of subproducts of extruded products [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|----------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| building profiles | 32.751 | 41.813 | 51.259 | 47.564 | 48.523 | 52.815 | 52.894 | 41.486 | 48.193 | 47.721 |
| annual variation | -24,6% | 27,7% | 22,6% | -7,2% | 2,0% | 8,8% | 0,1% | -21,6% | 16,2% | -1,0% |
| industrial profiles | 10.218 | 13.896 | 17.290 | 16.833 | 16.964 | 16.719 | 17.878 | 15.318 | 18.287 | 17.110 |
| annual variation | -26,1% | 36,0% | 24,4% | -2,6% | 0,8% | -1,4% | 6,9% | -14,3% | 19,4% | -6,4% |
| special tubes | 392 | 608 | 742 | 783 | 739 | 494 | 830 | 526 | 827 | 462 |
| annual variation | -12,2% | 55,1% | 22,1% | 5,6% | -5,6% | -33,2% | 68,1% | -36,6% | 57,1% | -44,2% |

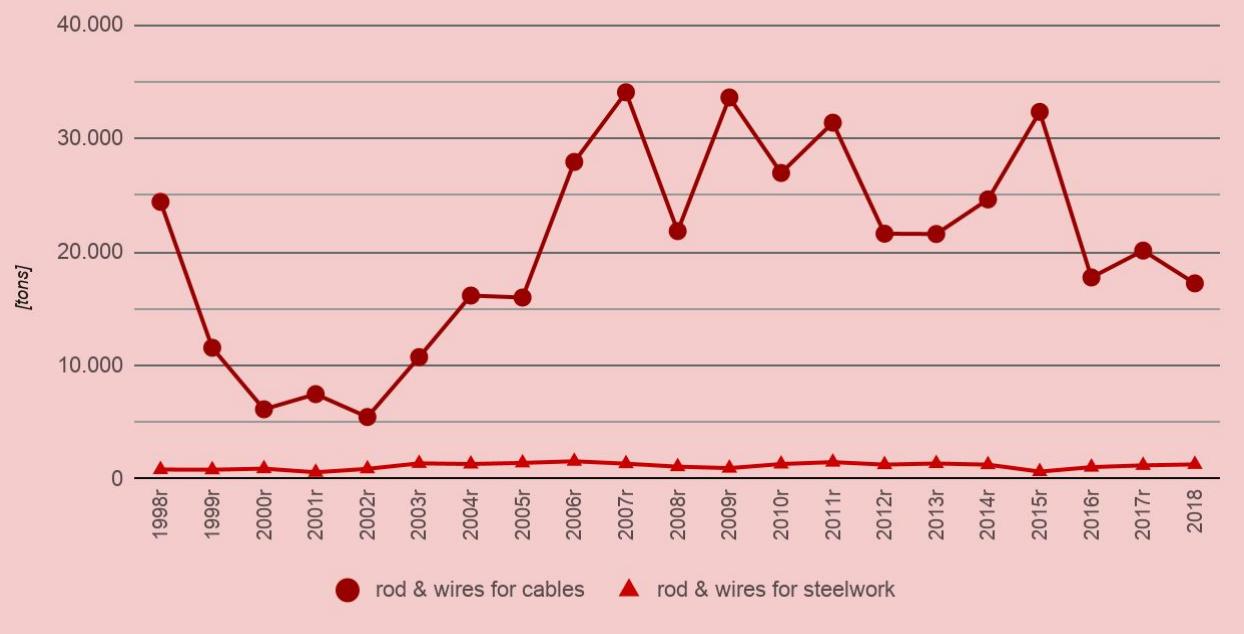
historic series of the consumption of subproducts of extruded products



evolution of the consumption of subproducts of rod & wire [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|--------------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| rod & wires for cables | 33.614 | 26.961 | 31.392 | 21.609 | 21.583 | 24.629 | 32.344 | 17.754 | 20.120 | 17.232 |
| annual variation | 53,9% | -19,8% | 16,4% | -31,2% | -0,1% | 14,1% | 31,3% | -45,1% | 13,3% | -14,4% |
| rod & wires for steelwork | 952 | 1.313 | 1.482 | 1.261 | 1.360 | 1.258 | 646 | 1.039 | 1.198 | 1.280 |
| annual variation | -12,0% | 37,9% | 12,9% | -14,9% | 7,9% | -7,5% | -48,6% | 60,8% | 15,3% | 6,8% |

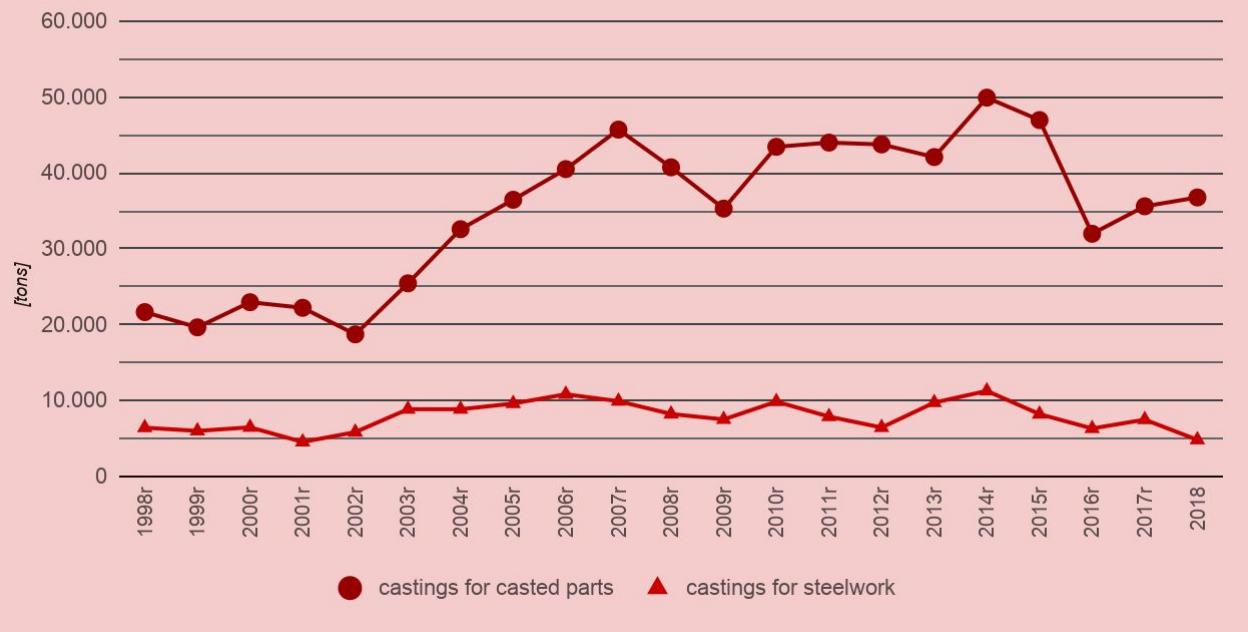
historic series of the consumption of subproducts of rod & wire



evolution of the consumption of subproducts of castings [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|----------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| castings for casted parts | 35.308 | 43.453 | 44.009 | 43.766 | 42.103 | 49.932 | 46.977 | 31.993 | 35.615 | 36.780 |
| annual variation | -13,4% | 23,1% | 1,3% | -0,6% | -3,8% | 18,6% | -5,9% | -31,9% | 11,3% | 3,3% |
| castings for steelwork | 7.519 | 9.867 | 7.893 | 6.453 | 9.737 | 11.280 | 8.219 | 6.324 | 7.492 | 4.829 |
| annual variation | -8,7% | 31,2% | -20,0% | -18,2% | 50,9% | 15,8% | -27,1% | -23,1% | 18,5% | -35,5% |

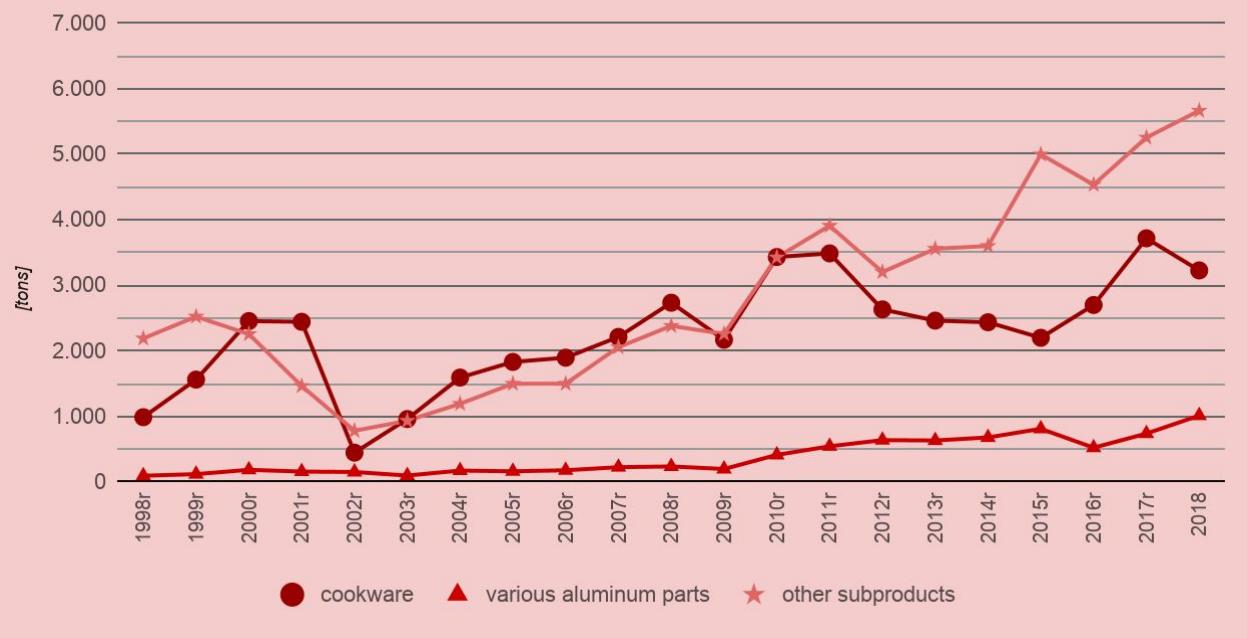
historic series of the consumption of subproducts of castings



evolution of the consumption of subproducts of other products [ton]

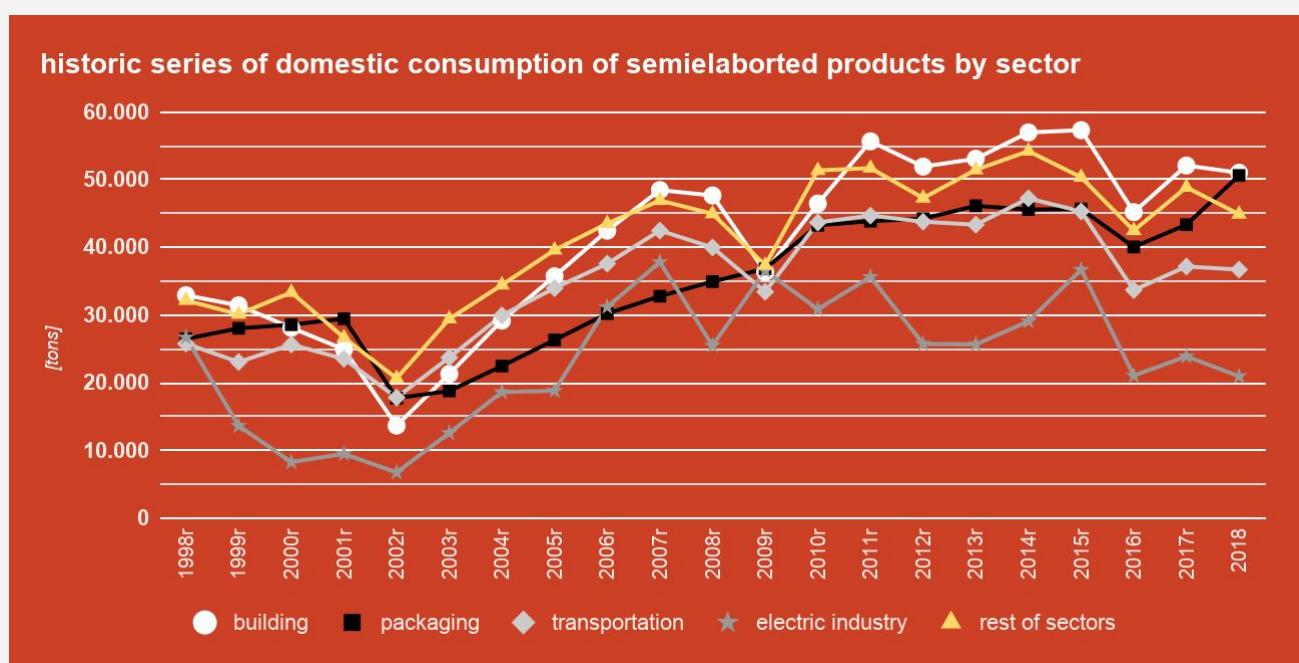
| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|-------------------------------|--------|--------|-------|--------|-------|-------|-------|--------|-------|---------------|
| cookware | 2.172 | 3.433 | 3.488 | 2.634 | 2.463 | 2.438 | 2.201 | 2.701 | 3.718 | 3.229 |
| annual variation | -20,6% | 58,1% | 1,6% | -24,5% | -6,5% | -1,0% | -9,7% | 22,7% | 37,6% | -13,2% |
| various aluminum parts | 200 | 415 | 546 | 640 | 635 | 681 | 813 | 525 | 741 | 1.015 |
| annual variation | -16,2% | 107,5% | 31,5% | 17,2% | -0,8% | 7,3% | 19,4% | -35,4% | 41,1% | 37,1% |
| other subproducts | 2.260 | 3.427 | 3.910 | 3.204 | 3.559 | 3.602 | 4.998 | 4.536 | 5.255 | 5.665 |
| annual variation | -5,2% | 51,6% | 14,1% | -18,0% | 11,1% | 1,2% | 38,8% | -9,2% | 15,8% | 7,8% |

historic series of the consumption of subproducts of other products



evolution of the consumption of semielaborated products by economic sector [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|----------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| building | 36.415 | 46.490 | 55.677 | 51.943 | 53.104 | 56.989 | 57.325 | 45.226 | 52.106 | 51.040 |
| annual variation | -23,6% | 27,7% | 19,8% | -6,7% | 2,2% | 7,3% | 0,6% | -21,1% | 15,2% | -2,0% |
| packaging | 36.867 | 43.287 | 43.889 | 44.247 | 46.158 | 45.602 | 45.691 | 40.084 | 43.364 | 50.631 |
| annual variation | 5,4% | 17,4% | 1,4% | 0,8% | 4,3% | -1,2% | 0,2% | -12,3% | 8,2% | 16,8% |
| transportation | 33.458 | 43.692 | 44.712 | 43.810 | 43.361 | 47.261 | 45.337 | 33.706 | 37.194 | 36.734 |
| annual variation | -16,4% | 30,6% | 2,3% | -2,0% | -1,0% | 9,0% | -4,1% | -25,7% | 10,3% | -1,2% |
| electric industry | 36.561 | 30.891 | 35.649 | 25.775 | 25.685 | 29.104 | 36.724 | 21.082 | 23.919 | 20.990 |
| annual variation | 43,3% | -15,5% | 15,4% | -27,7% | -0,3% | 13,3% | 26,2% | -42,6% | 13,5% | -12,2% |
| consumer durables | 12.673 | 18.075 | 19.139 | 17.598 | 17.780 | 18.155 | 17.308 | 15.405 | 18.101 | 16.715 |
| annual variation | -22,2% | 42,6% | 5,9% | -8,1% | 1,0% | 2,1% | -4,7% | -11,0% | 17,5% | -7,7% |
| machinery & equipment | 13.769 | 18.281 | 18.758 | 18.149 | 18.400 | 19.255 | 18.390 | 14.670 | 16.103 | 15.411 |
| annual variation | -17,8% | 32,8% | 2,6% | -3,2% | 1,4% | 4,6% | -4,5% | -20,2% | 9,8% | -4,3% |
| steelwork | 8.471 | 11.180 | 9.375 | 7.714 | 11.097 | 12.538 | 8.865 | 7.363 | 8.690 | 6.109 |
| annual variation | -9,1% | 32,0% | -16,1% | -17,7% | 43,8% | 13,0% | -29,3% | -16,9% | 18,0% | -29,7% |
| other sectors | 2.460 | 3.843 | 4.457 | 3.845 | 4.194 | 4.283 | 5.811 | 5.061 | 5.995 | 6.680 |
| annual variation | -6,2% | 56,2% | 16,0% | -13,7% | 9,1% | 2,1% | 35,7% | -12,9% | 18,5% | 11,4% |
| total consumption | 180.674 | 215.738 | 231.655 | 213.079 | 219.779 | 233.188 | 235.451 | 182.597 | 205.473 | 204.310 |
| annual variation | -6,5% | 19,4% | 7,4% | -8,0% | 3,1% | 6,1% | 1,0% | -22,4% | 12,5% | -0,6% |



domestic production indicators



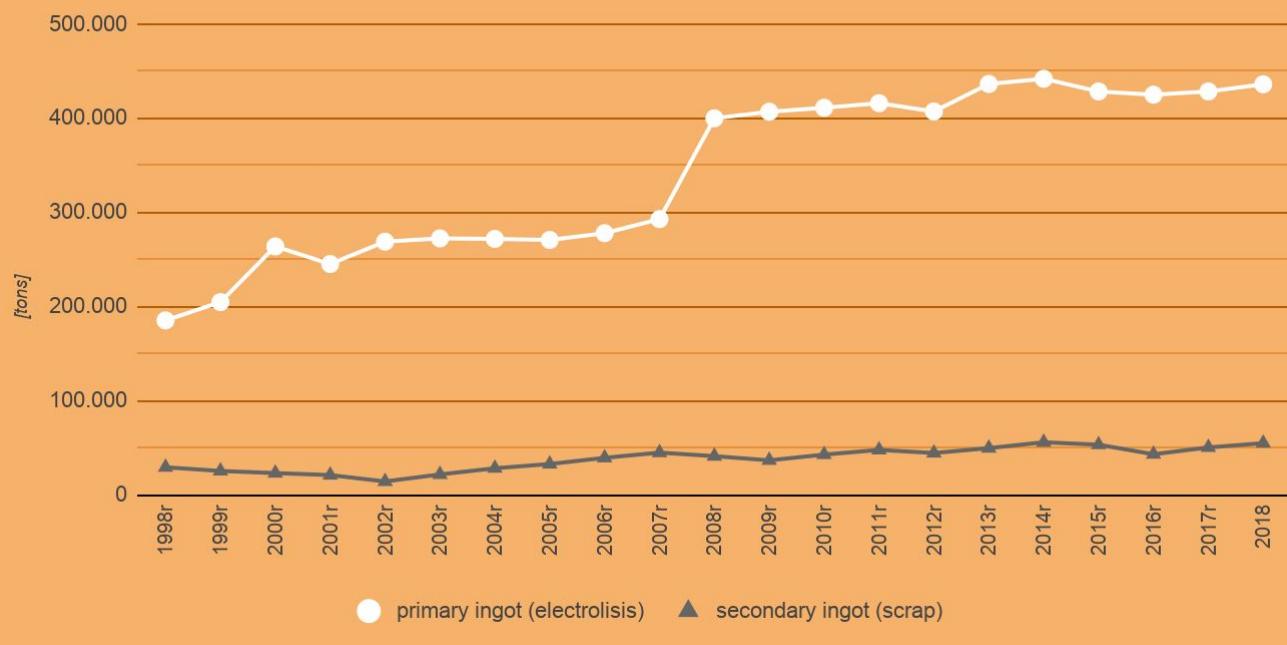
ingot domestic production - page 20

production of **semielaborated products** by **product and subproduct** - pages 21/24

evolution of the domestic production of ingot [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|-------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| primary ingot (electrolysis) | 406.700 | 410.947 | 415.799 | 406.996 | 436.181 | 441.703 | 428.206 | 424.785 | 428.238 | 435.837 |
| annual variation | 1,7% | 1,0% | 1,2% | -2,1% | 7,2% | 1,3% | -3,1% | -0,8% | 0,8% | 1,8% |
| secondary ingot (scrap) | 36.593 | 42.704 | 47.680 | 44.380 | 49.567 | 55.802 | 53.189 | 43.074 | 50.278 | 54.859 |
| annual variation | -10,9% | 16,7% | 11,7% | -6,9% | 11,7% | 12,6% | -4,7% | -19,0% | 16,7% | 9,1% |
| total ingot | 443.293 | 453.651 | 463.479 | 451.376 | 485.748 | 497.505 | 481.395 | 467.859 | 478.516 | 490.696 |
| annual variation | 0,6% | 2,3% | 2,2% | -2,6% | 7,6% | 2,4% | -3,2% | -2,8% | 2,3% | 2,5% |

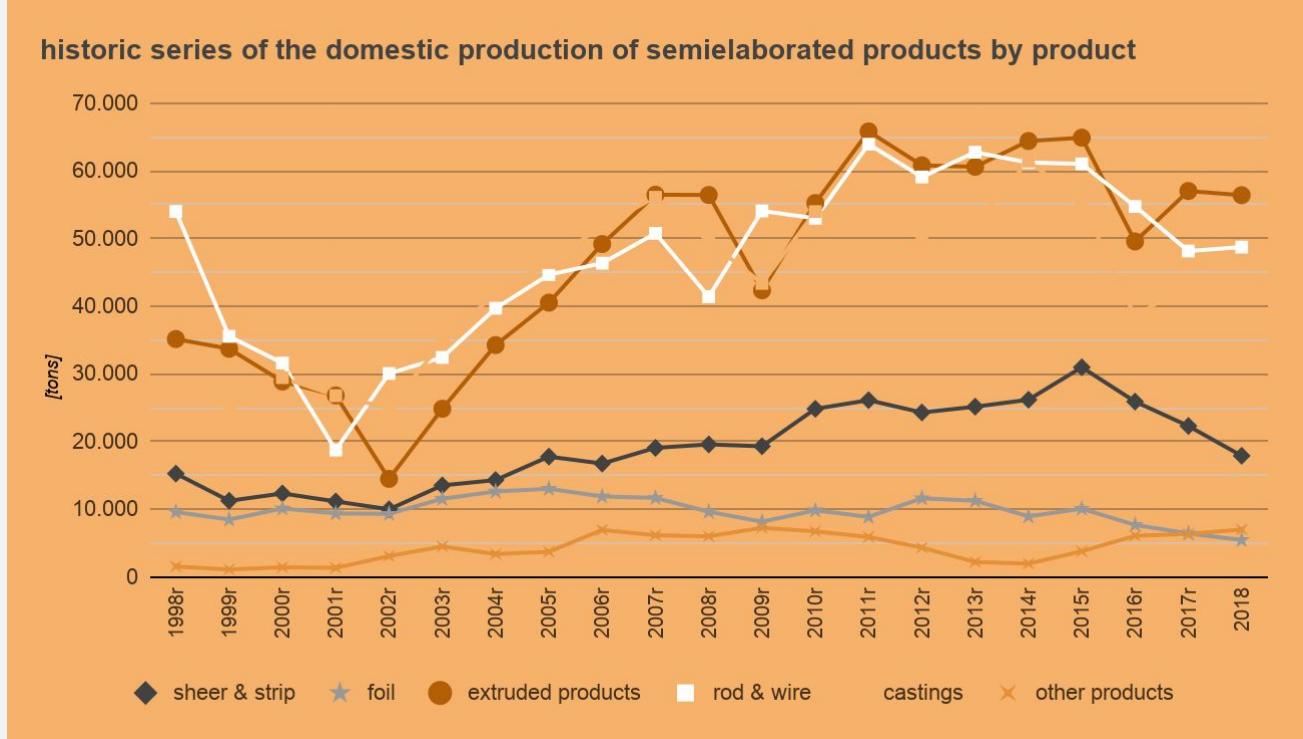
historic series of the domestic production of ingot



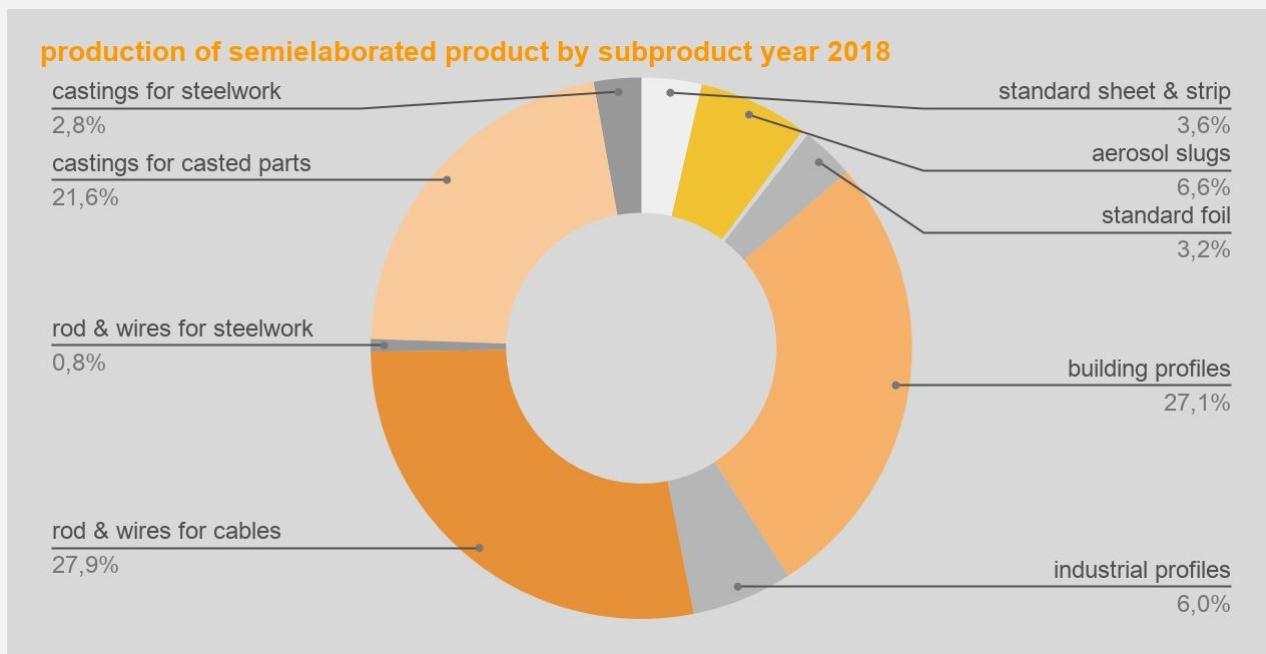
evolution of the domestic production of semielaborated products by product [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|-----------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| sheet & strip | 18.008 | 22.933 | 24.039 | 22.889 | 24.025 | 25.096 | 30.558 | 25.544 | 21.840 | 17.507 |
| annual variation | 0,3% | 27,3% | 4,8% | -4,8% | 5,0% | 4,5% | 21,8% | -16,4% | -14,5% | -19,8% |
| foil | 7.431 | 9.836 | 8.880 | 11.628 | 11.261 | 8.946 | 10.084 | 7.687 | 6.419 | 5.460 |
| annual variation | -15,7% | 17,6% | -14,1% | 35,5% | -1,5% | -19,6% | 19,0% | -23,8% | -17,5% | -14,4% |
| extruded products | 39.771 | 55.275 | 65.862 | 60.847 | 60.634 | 64.445 | 64.934 | 49.595 | 57.053 | 56.436 |
| annual variation | -25,1% | 28,7% | 21,4% | -7,3% | 2,3% | 7,8% | 1,0% | -23,7% | 15,2% | -1,0% |
| rod & wire | 34.557 | 53.013 | 63.970 | 59.127 | 62.782 | 61.255 | 61.063 | 54.774 | 48.175 | 48.762 |
| annual variation | 50,8% | -18,4% | 16,5% | -30,8% | 0,6% | 9,7% | 28,2% | -44,7% | 3,9% | -8,4% |
| castings | 42.827 | 54.017 | 52.640 | 50.792 | 52.470 | 61.466 | 55.366 | 38.531 | 43.289 | 41.809 |
| annual variation | -12,6% | 24,5% | -2,7% | -3,2% | 3,2% | 18,1% | -9,8% | -30,6% | 12,5% | -3,5% |
| other products | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| annual variation | - | - | - | - | - | - | - | - | - | - |
| total semielaborated prod. | 142.594 | 195.074 | 215.390 | 205.282 | 211.172 | 221.209 | 222.005 | 176.130 | 176.776 | 169.974 |
| annual variation | -4,4% | 16,7% | 9,6% | -5,5% | 1,7% | 4,5% | 0,9% | -19,3% | 0,6% | -3,4% |

historic series of the domestic production of semielaborated products by product



share of each domestically produced subproduct considering total domestic production



evolution of the domestic production of subproducts of sheet & strip [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|-----------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| standard sheet & strip | 7.936 | 11.422 | 11.565 | 9.967 | 10.248 | 7.651 | 7.198 | 7.056 | 6.683 | 6.117 |
| annual variation | -19,6% | 43,9% | 1,3% | -13,8% | 2,8% | -25,3% | -5,9% | -2,0% | -5,3% | -8,5% |
| aerosol slugs | 10.717 | 12.744 | 13.795 | 13.621 | 14.281 | 17.934 | 23.143 | 18.270 | 15.100 | 11.170 |
| annual variation | 18,6% | 18,9% | 8,2% | -1,3% | 4,8% | 25,6% | 29,0% | -21,1% | -17,3% | -26,0% |
| collapsible-tubes slugs | 661 | 683 | 768 | 718 | 638 | 611 | 649 | 596 | 533 | 619 |
| annual variation | -3,5% | 3,3% | 12,5% | -6,6% | -11,1% | -4,3% | 6,3% | -8,2% | -10,5% | 16,2% |



evolution of the domestic production of subproducts of foil [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|----------------------|--------|-------|-------|--------|--------|--------|--------|--------|--------|---------------|
| standard foil | 8.163 | 9.836 | 8.880 | 11.628 | 11.261 | 8.946 | 10.084 | 7.687 | 6.419 | 5.460 |
| annual variation | -15,3% | 20,5% | -9,7% | 30,9% | -3,2% | -20,5% | 12,7% | -23,8% | -16,5% | -14,9% |



evolution of the domestic production of subproducts of extruded products [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|----------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| building profiles | 31.816 | 40.935 | 49.806 | 46.359 | 47.563 | 51.765 | 52.416 | 40.243 | 46.862 | 46.192 |
| annual variation | -25,0% | 28,7% | 21,7% | -6,9% | 2,6% | 8,8% | 1,3% | -23,2% | 16,4% | -1,4% |
| industrial profiles | 10.550 | 14.340 | 16.055 | 14.488 | 13.071 | 12.680 | 12.518 | 9.351 | 10.191 | 10.244 |
| annual variation | -24,8% | 35,9% | 12,0% | -9,8% | -9,8% | -3,0% | -1,3% | -25,3% | 9,0% | 0,5% |



evolution of the domestic production of subproducts of rod & wire [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| alambrón para cables | 53.153 | 51.700 | 62.488 | 57.866 | 61.422 | 59.997 | 60.417 | 53.735 | 46.977 | 47.482 |
| variación anual | 31,8% | -2,7% | 20,9% | -7,4% | 6,1% | -2,3% | 0,7% | -11,1% | -12,6% | 1,1% |
| alambrón para acerías | 952 | 1.313 | 1.482 | 1.261 | 1.360 | 1.258 | 646 | 1.039 | 1.198 | 1.280 |
| variación anual | -12,0% | 37,9% | 12,9% | -14,9% | 7,9% | -7,5% | -48,6% | 60,8% | 15,3% | 6,8% |



evolution of the domestic production of subproducts of castings [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|----------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| castings for casted parts | 35.308 | 43.453 | 44.009 | 43.766 | 42.103 | 49.932 | 46.977 | 31.993 | 35.615 | 36.780 |
| annual variation | -13,4% | 23,1% | 1,3% | -0,6% | -3,8% | 18,6% | -5,9% | -31,9% | 11,3% | 3,3% |
| castings for steelwork | 7.519 | 9.867 | 7.893 | 6.453 | 9.737 | 11.280 | 8.219 | 6.324 | 7.492 | 4.829 |
| annual variation | -8,7% | 31,2% | -20,0% | -18,2% | 50,9% | 15,8% | -27,1% | -23,1% | 18,5% | -35,5% |



imports monitoring



domestic consumption segmented according to **imports exposure** - page 26

share of the domestic production exposed to imported competition - pages 27/34

segmentación de subproductos según exposición a competencia externa

Group I : semielaborated products manufactured by a domestic producer that compete with similar imports.

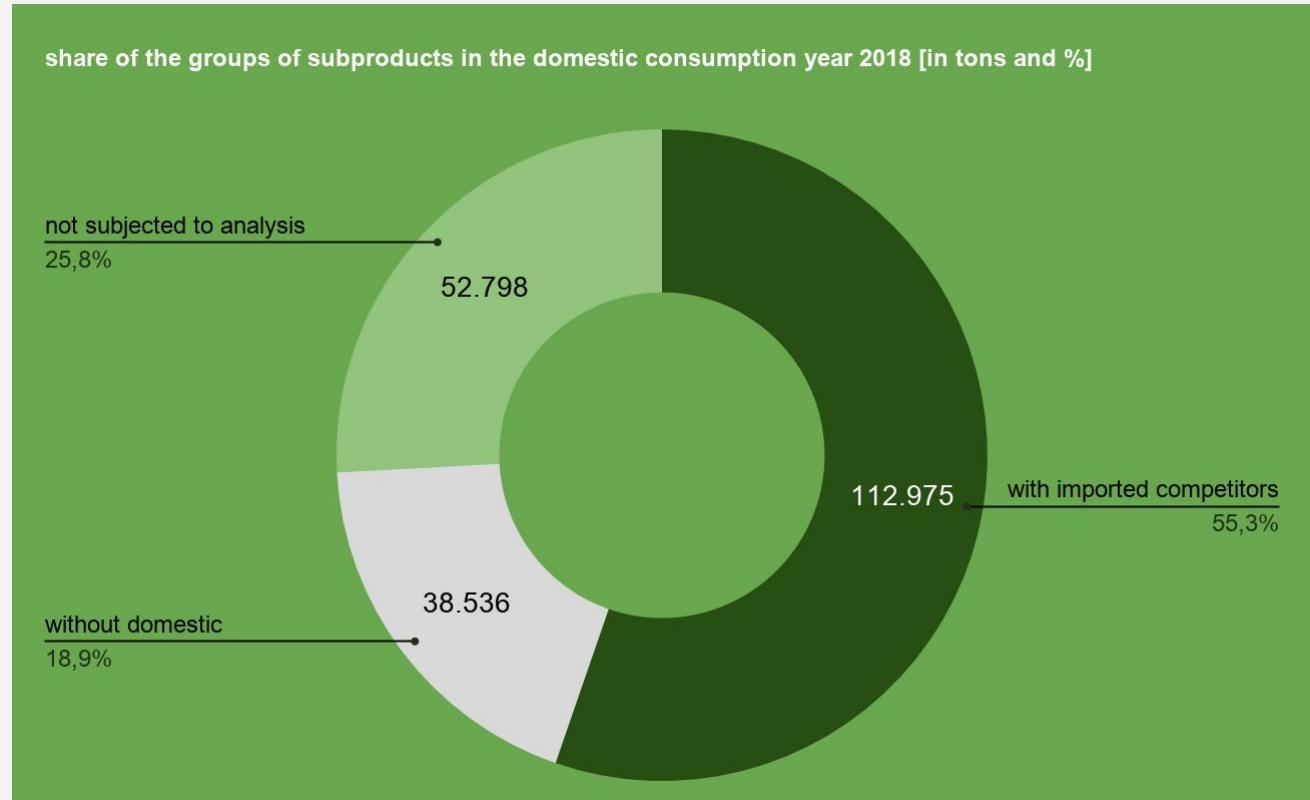
| | |
|--------------------------|--|
| standard sheet & strip* | 7606.11; 7606.12; 7606.91; 7606.92 |
| aerosol slugs* | 7612.90; 7616.10; 7616.99 |
| collapsible-tubes slugs* | 7606.91; 7612.10 |
| standard foil* | 7607.11; 7607.19; 7607.20 |
| building profiles* | 7604.10; 7604.21; 7604.29; 7610.10; 7610.90 |
| industrial profiles* | 7604.10; 7604.21; 7604.29; 7608.10; 7608.20 |
| rod & wire for cable | 7605.11; 7605.19; 7605.21; 7605.29; 7614.10; 7614.90 |

Group II : semielaborated products that are being imported as there is no domestic alternative to satisfy their demand.

| | |
|-----------------------------|------------------------------------|
| can stock* | 7606.12; 7612.90 |
| non-standard sheet & strip* | 7606.11; 7606.12; 7606.91; 7606.92 |
| standard foil* | 7607.11; 7607.19; 7607.20 |
| special tubes* | 7608.10 |

Group III : semielaborated products with no significant imports or whose market share is measured with products from Chapters other than 76.

| | |
|---------------------------|--|
| rod & wire for steelwork | - |
| castings for casted parts | - |
| castings for steelwork | - |
| cookware | 7615.10; 7615.20 |
| various aluminum parts | 7603.10; 7603.20; 7609.00 |
| other subproducts | 7611.00; 7612.90; 7613.00; 7616.10; 7616.91; 7616.99 |

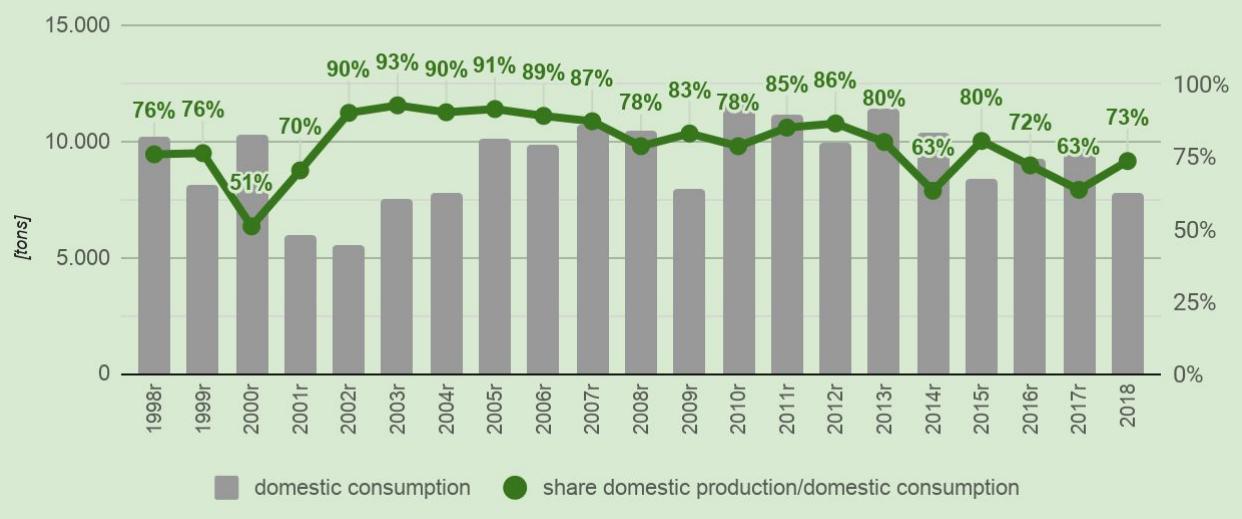


* CAIAMA performs an origin and prices analysis to determine the volume for each subproduct

domestic consumption of standard sheet & strip [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|---------------------------|-------|--------|--------|-------|--------|--------|-------|-------|-------|--------------|
| total consumption | 8.006 | 12.115 | 11.167 | 9.909 | 11.396 | 10.383 | 8.432 | 9.295 | 9.787 | 7.797 |
| of domestic origin | 6.630 | 9.506 | 9.475 | 8.550 | 9.106 | 6.551 | 6.767 | 6.678 | 6.207 | 5.717 |
| of imported origin | 1.376 | 2.609 | 1.692 | 1.359 | 2.290 | 3.832 | 1.666 | 2.618 | 3.581 | 2.080 |
| domestic production share | 83% | 78% | 85% | 86% | 80% | 63% | 80% | 72% | 63% | 73% |

evolution of the share of the domestic production of standard sheet & strip



domestic consumption of aerosol slugs [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|---------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| total consumption | 17.567 | 21.564 | 21.747 | 23.752 | 23.925 | 26.456 | 24.032 | 18.300 | 16.236 | 11.516 |
| of domestic origin | 10.717 | 12.744 | 13.795 | 13.621 | 14.281 | 17.934 | 23.143 | 18.270 | 15.100 | 11.170 |
| of imported origin | 6.850 | 8.820 | 7.952 | 10.131 | 9.644 | 8.522 | 889 | 30 | 1.136 | 346 |
| domestic production share | 61% | 59% | 63% | 57% | 60% | 68% | 96% | 100% | 93% | 97% |

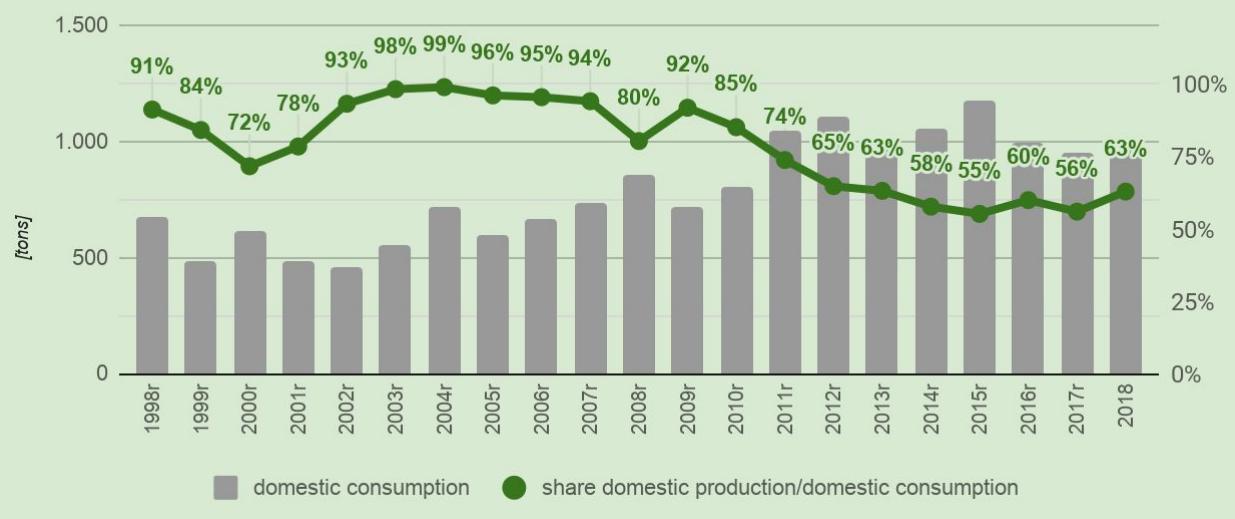
evolution of the share of the domestic production of aerosol slugs



domestic consumption of collapsible-tubes slugs [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|---------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|------------|
| total consumption | 721 | 804 | 1.043 | 1.110 | 1.012 | 1.059 | 1.176 | 995 | 953 | 986 |
| of domestic origin | 661 | 683 | 768 | 718 | 638 | 611 | 649 | 596 | 533 | 619 |
| of imported origin | 60 | 121 | 274 | 392 | 374 | 449 | 528 | 399 | 420 | 366 |
| domestic production share | 92% | 85% | 74% | 65% | 63% | 58% | 55% | 60% | 56% | 63% |

evolution of the share of the domestic production of collapsible-tubes slugs



domestic consumption of standard foil [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|---------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| total consumption | 12.710 | 13.649 | 13.225 | 14.004 | 14.200 | 12.610 | 15.513 | 12.088 | 12.774 | 10.614 |
| of domestic origin | 7.431 | 8.740 | 7.512 | 10.182 | 10.026 | 8.060 | 9.590 | 7.309 | 6.027 | 5.160 |
| of imported origin | 5.279 | 4.908 | 5.713 | 3.822 | 4.174 | 4.550 | 5.923 | 4.779 | 6.747 | 5.454 |
| domestic production share | 58% | 64% | 57% | 73% | 71% | 64% | 62% | 60% | 47% | 49% |

evolution of the share of the domestic production of standard foil



domestic consumption of building profiles [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|---------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| total consumption | 32.751 | 41.813 | 51.259 | 47.564 | 48.523 | 52.815 | 52.894 | 41.486 | 48.193 | 47.721 |
| of domestic origin | 31.816 | 40.935 | 49.806 | 46.359 | 47.563 | 51.765 | 52.416 | 40.243 | 46.862 | 46.192 |
| of imported origin | 935 | 878 | 1.453 | 1.204 | 960 | 1.050 | 478 | 1.243 | 1.331 | 1.529 |
| domestic production share | 97% | 98% | 97% | 97% | 98% | 98% | 99% | 97% | 97% | 97% |

evolution of the share of the domestic production of building profiles



domestic consumption of industrial profiles [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|---------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| total consumption | 10.218 | 13.896 | 17.290 | 16.833 | 16.964 | 16.719 | 17.878 | 15.318 | 18.287 | 17.110 |
| of domestic origin | 7.954 | 10.265 | 12.345 | 11.266 | 11.393 | 11.764 | 11.780 | 8.719 | 9.559 | 9.644 |
| of imported origin | 2.263 | 3.631 | 4.945 | 5.567 | 5.571 | 4.955 | 6.097 | 6.599 | 8.729 | 7.466 |
| domestic production share | 78% | 74% | 71% | 67% | 67% | 70% | 66% | 57% | 52% | 56% |

evolution of the share of the domestic production of industrial profiles



domestic consumption of rod & wire for cables [ton]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|---------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------|
| total consumption | 33.614 | 26.961 | 31.392 | 21.609 | 21.583 | 24.629 | 32.344 | 17.754 | 20.120 | 17.232 |
| of domestic origin | 33.605 | 26.873 | 31.366 | 21.473 | 21.518 | 23.830 | 31.518 | 16.738 | 17.278 | 15.635 |
| of imported origin | 9 | 88 | 26 | 136 | 65 | 799 | 826 | 1.016 | 2.842 | 1.597 |
| domestic production share | 100% | 100% | 100% | 99% | 100% | 97% | 97% | 94% | 86% | 91% |

evolution of the share of the domestic production of rod & wire for cables



foreign trade



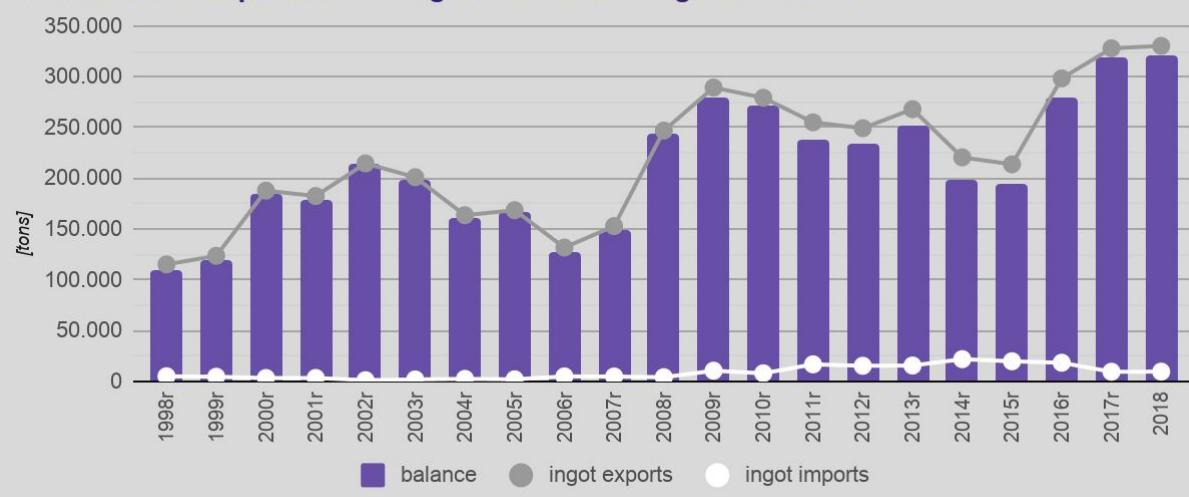
foreign trade **balance** - pages 35/36

*the volumes correspond to the ones indicated by the INDEC, and are the total of imports of Chapter 76 without any discount of other materials such as cardboard or glass which has been discounted on the imports monitoring.

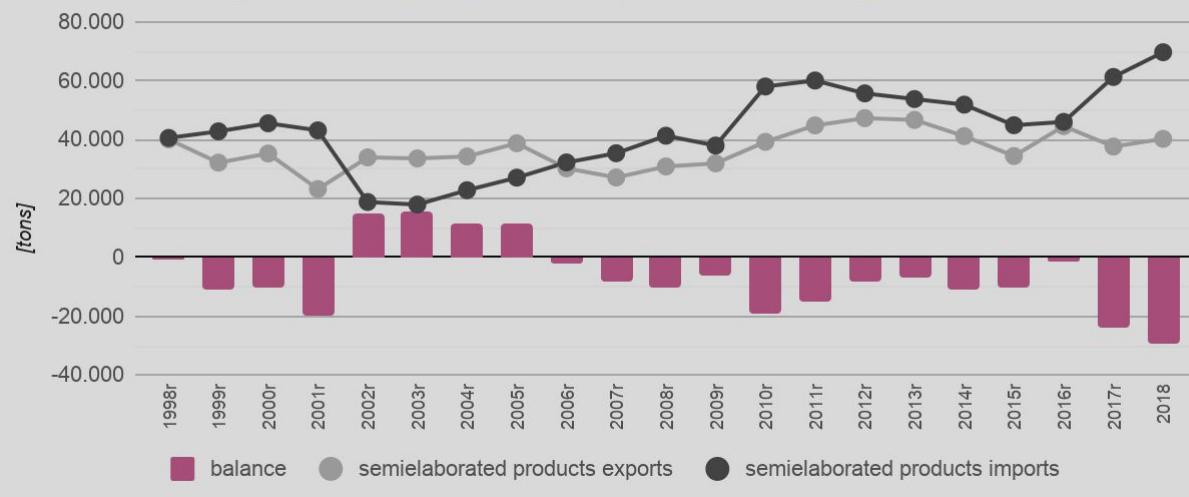
evolution of quantities exported and imported [tons]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|-------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| exports | | | | | | | | | | |
| ingot | 289.388 | 279.404 | 255.159 | 249.374 | 268.103 | 220.600 | 213.794 | 298.438 | 328.086 | 330.431 |
| semielaborated products | 32.015 | 39.347 | 44.928 | 47.385 | 46.794 | 41.286 | 34.520 | 44.677 | 37.740 | 40.347 |
| imports | | | | | | | | | | |
| ingot | 10.420 | 7.877 | 16.693 | 15.274 | 15.548 | 21.801 | 19.716 | 18.273 | 9.407 | 9.506 |
| semielaborated products | 38.080 | 58.149 | 60.183 | 55.811 | 53.881 | 51.987 | 44.990 | 46.118 | 61.380 | 69.792 |
| foreign trade balance | | | | | | | | | | |
| ingot | 278.969 | 271.527 | 238.466 | 234.099 | 252.555 | 198.800 | 194.077 | 280.166 | 318.679 | 320.925 |
| semielaborated products | -6.064 | -18.802 | -15.255 | -8.426 | -7.087 | -10.701 | -10.470 | -1.441 | -23.640 | -29.445 |

evolution of the quantities of ingot in the foreign trade balance



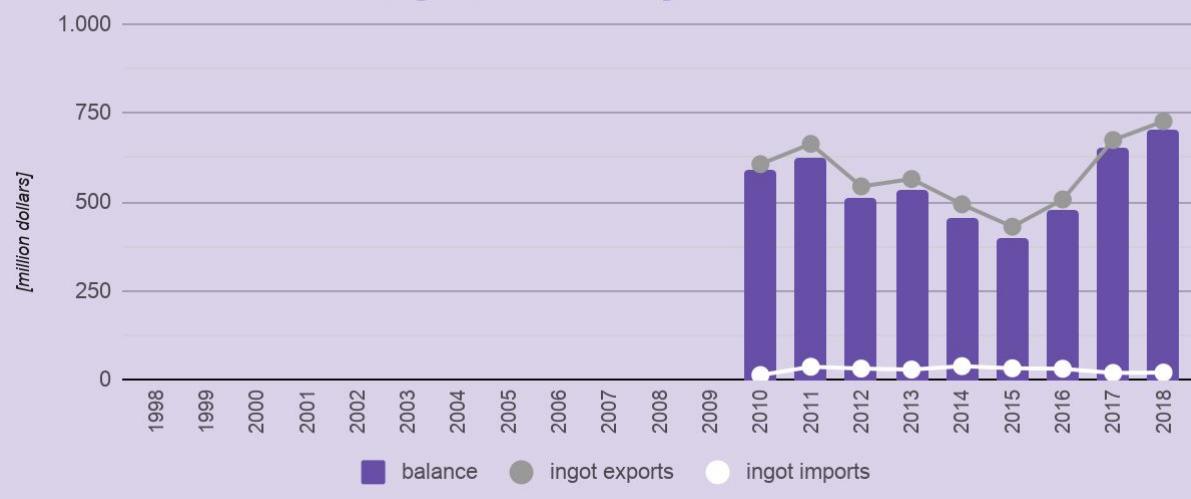
evolution of the quantities of semielaborated products the foreign trade balance



evolution of amounts exported and imported [million dollars]

| | 2009r | 2010r | 2011r | 2012r | 2013r | 2014r | 2015r | 2016r | 2017r | 2018 |
|------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|------|
| exports | | | | | | | | | | |
| ingot | 471 | 606 | 663 | 544 | 565 | 494 | 431 | 507 | 674 | 727 |
| semielaborated products | 113 | 156 | 196 | 180 | 164 | 137 | 104 | 110 | 114 | 129 |
| imports | | | | | | | | | | |
| ingot | n/d | 14 | 37 | 32 | 29 | 39 | 33 | 32 | 20 | 21 |
| semielaborated products | n/d | 273 | 312 | 273 | 283 | 281 | 254 | 231 | 312 | 360 |
| foreign trade balance | | | | | | | | | | |
| ingot | n/d | 593 | 626 | 512 | 535 | 455 | 398 | 476 | 654 | 706 |
| semielaborated products | n/d | -117 | -116 | -93 | -118 | -144 | -150 | -121 | -198 | -231 |

evolution of the amounts of ingot in the foreign trade balance



evolution of the amounts of semielaborated products the foreign trade balance



CAIAMA institutional



Chamber organization - page 38

criteria for classification of products - pages 39/41

board

| | | |
|-----------------------------------|---|--|
| President | Acc. Jorge L. Fernández | Metales del Talar |
| Vicepresident 1 | Grad. Héctor Cañete | Tubaplas |
| Vicepresident 2 | Eng. Evando Figallo | Aluar Aluminio Argentino |
| Vicepresident 3 | Mr. Rogelio Ceresato | Alcemar |
| Vicepresident 4 | Eng. Eduardo Juliá | Sapa Aluminium Argentina |
| Secretary | Acc. Norberto Fedele | Laminación Paulista Argentina |
| Vice secretary | Mr. Manuel Carbone | Aluminium Manufacturers Express |
| Treasurer | Dr. Jorge Horacio Losa | Aluminium |
| Vice treasurer | Mr. Antonio Bacero | Sicamar Metales |
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| Alternate members | Mr. Luciano Principi Mr. Vicente Labate Mr. Darío La Greca Eng. Alberto Forcato | Madexa Mont Pat La Greca Home Forcato Tecnología |
| Titular account reviewers | | |
| Alternate account reviewers | | |

associates's branches

| | | |
|--------------------------------|---------------------|----------------------|
| Packaging | Grad. Héctor Cañete | Tubaplas |
| Extruded products | Grad. Diego Gómez | Metales del Talar |
| Coverings | Dr. Daniel Volpe | Anodizado California |
| Secondary-ingot smelters | Mr. Antonio Bacero | Sicamar Metales |
| Accessories | Mr. Vicente Labate | Mont Pat |

subcomissions

| | | |
|------------------|------------------------|--------|
| Statistics | Eng. Gustavo Zini | CAIAMA |
| Technical..... | Eng. Roberto Natta | CAIAMA |
| | Eng. Norberto González | CAIAMA |

advisory

| | | |
|-----------------------------------|----------------------------|--------|
| Laboral | Dr. Carlos Echezarreta | CAIAMA |
| Accounting and tax | Dr. Fernando Piovano | CAIAMA |
| Legal | Dr. Carlos Echezarreta | CAIAMA |
| | Dr. Rodolfo Sánchez Moreno | CAIAMA |
| Institutional relationships | Grad. Marcelo Maffei | CAIAMA |

representatives

| | | |
|--|---------------------|--------------------------|
| UIA (Titular delegate before the General Council) | Grad. Héctor Cañete | Tubaplas |
| IRAM (Titular member before the Directive Council) | Eng. Evando Figallo | Aluar Aluminio Argentino |

management

| | | |
|-----------------------|---------------------|--------|
| Chamber Manager | Grad. Claudia Frigo | CAIAMA |
|-----------------------|---------------------|--------|

sheet & strip

building & construction

strip for ceilings; corrugated sheet; sheet for sidings; architectural-use strips; anti-slip plates; composite panels.

packaging

aerosol slugs, collapsible-tube slugs; can stock; pilfer-proof caps strip.

transportation

plates for trailers and semis; sheets for road signs; strip for radiators and heat exchangers.

electric industry

strip for electric transformers, strips for luminary.

consumer durables

strips for refrigerators and other household appliances; plates for cookware; sheet for satellite dish; strip for eyelets.

machinery & equipment

flejes para tubos de riego; flejes para intercambiadores de calor; chapas para tanques de almacenamiento; chapas para calderería; chapas para bandejas para pescado y panaderías.

steelwork

(there are no products in this segment).

other sectors

strip for patent plates; every product not included above.



foil

building & construction

foil for roofing asphaltic membrane.

packaging

foil for packaging.

transportation

foil for automotive radiators and heat exchangers.

electric industry

foil for capacitors

consumer durables

foil for disposable trays, foil for cooking.

machinery & equipment

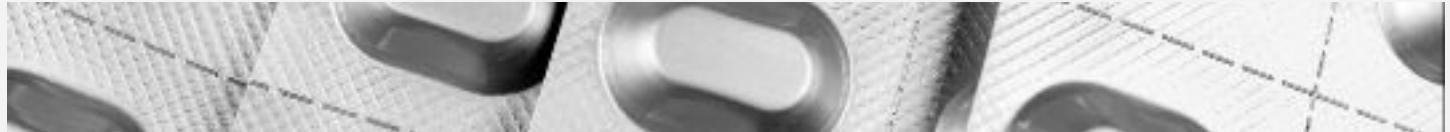
foil for industrial radiators and heat exchangers.

steelwork

(there are no products in this segment).

other sectors

every product not included above.



extruídos

building & construction

door and windows profiles, architectural application profiles; profiles for ceilings.

packaging

(there are no products in this segment).

transportation

tubes for radiators; profiles for doors and windows of buses and trains; profiles for truck floors

electric industry

profiles for electric engines, tubes for "bus bars"; profiles for luminary.

consumer durables

tube for refrigerators; profiles for boat masts; tubes for bicycles; profiles for furniture; profiles for ladders.

machinery & equipment

irrigation tubes; profiles for machinery & equipment (automatization, robotics, etc.).

steelwork

(there are no products in this segment).

other sectors

bars for turning; tubes for fast rivets; every product not included above.



alambrón

building & construction

(there are no products in this segment).

packaging

(there are no products in this segment).

transportation

(there are no products in this segment).

electric industry

electric cables.

consumer durables

(there are no products in this segment).

machinery & equipment

(there are no products in this segment).

steelwork

alambrón para calmado de acero.

other sectors

(there are no products in this segment).



fundidos

building & construction

ingot for aluminized sheet; casted parts for radiators.

packaging

(there are no products in this segment).

transportation

automotive casted rims; engine pistons, blocks and covers; other automotive casted parts.

electric industry

casted parts for electric cable connectors.

consumer durables

casted tables and chairs; casted cookware; casted decoration parts.

machinery & equipment

industrial machinery casted parts; casted moulds.

steelwork

lingots used in steel making.

other sectors

every product not included above.



other products

building & construction

every product not included above.

packaging

every product not included above.

transportation

every product not included above.

electric industry

every product not included above.

consumer durables

cookware; taps; todo every product not included above.

machinery & equipment

every product not included above.

steelwork

every product not included above.

other sectors

welding filler, aluminum dusts; every product not included above.



2018 Statistical yearbook



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