

# Annual Report 2007/2008



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Foreword

## Aluminium – shaping the future



Friedrich Brökelmann, Stefan Glimm and Christian Wellner

Aluminium – shaping the future. This applies to the metal, the aluminium companies and our trade association, GDA.

This annual report is intended to give an overview of the activities of the GDA Team. At the same time it mirrors all those topics related to aluminium that are important for the future of our industry.

Düsseldorf, September 2008

# Market situation 2007/2008



Karsten Zick, Andreas Postler and Stephan Beckers

The German aluminium industry can look back with satisfaction at 2007 and the first six months of 2008. It was able to increase production in all areas. Certain products reported double-digit growth. In addition, the development of demand was positive. There was only a slowing down in orders received. The impetus for growth came mainly from electrical engineering, mechanical engineering, the transport sector and packaging. The domestic market made a greater contribution. In addition to the generally good economic development of the user markets, the continuing growth in the use of aluminium as a material had a positive effect on the business situation. This development will no doubt also continue in the medium term, not least because of the use of the metal in the transport sector.

## Aluminium markets 2007/2008

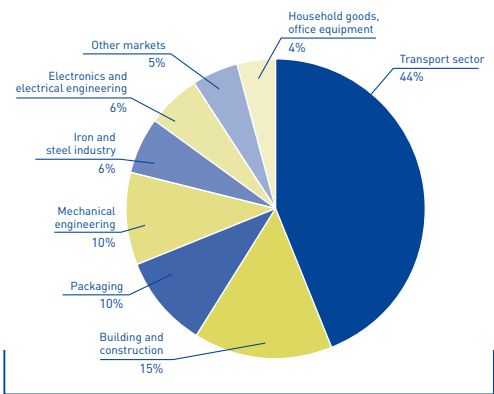
In 2007, total demand for aluminium in Germany rose by more than 5% to 3.56 million tonnes (t) (2006: 3.38m t). Turnover in 2007 was about 17.5bn euros, which corresponds to an

increase of 3%. This development was mainly attributable to increased physical demand for products made from aluminium. The price of primary aluminium on the London Metal Ex-

change only increased slightly. Whereas the average price for 2006 was just under 2,570 US dollars a tonne, the average price a year later was 2,640 US dollars. As a result of the energy supply problems at the beginning of the year and the increase in the price of energy recently, the average price for aluminium in the first half of 2008 had risen to 2,820 US dollars. Different signals came from the key markets for the aluminium industry. Throughout the whole of 2007, the traditionally strong export business was weaker than usual. There were also signs of weakness from the building and construction industry. The signals from the other markets were, if anything, positive. This was particularly

the case with electrical engineering, mechanical engineering and transport.

Main markets for aluminium in 2007 (in %)



## Outlook for 2008/2009

The economic dynamism of 2007 also continued in 2008 in large sections of the industry. Although there was a slowing down in orders received, the volume levelled off at a very high level. Thus, the whole of 2008 should be a similarly successful year for manufacturers in the aluminium industry even if there is a slight slowing down in the second half of 2008.

According to the estimates of most institutions, there will be slightly less dynamic growth in the

global economy next year. So far there are no indications that there will be a stronger downturn. Developments in the different regions and sectors will vary. Following strong growth in the European building sector in the last two years, a significant weakening is expected, which may continue into 2009. This would indicate that the dynamism of the aluminium industry – especially in the semi-finished products field – will decline slightly in 2009.

Economic data for the German aluminium industry

Production	2005 in t	2006 in t	2007 in t	H1/2008 in t	H1/2008 vs. H1/2007 in %
Primary aluminium	647,900	515,500	551,100	308,900	+ 21.5
Secondary aluminium	718,300	795,700	857,600	412,300	- 6.1
Aluminium semi-finished products	2,312,000	2,509,300	2,520,800	1,296,700	+ 1.0
Rolled products	1,780,900	1,922,000	1,903,000	978,400	+ 1.0
Extruded and drawn products	527,900	583,500	614,900	316,900	+ 1.3
Conductor material	3,200	3,800	3,000	1,400	- 6.7
Aluminium mould casting	727,200	801,500	853,800	433,300	+ 6.9
Die-casting	400,300	439,900	452,500	232,400	+ 9.3
Permanent mould casting	269,300	279,800	310,000	150,200	+ 4.5
Sand casting	57,600	79,100	85,500	49,400	+ 5.6
Other casting processes	-	2,700	5,800	1,300	- 38.1
Aluminium processing	361,700	397,200	415,800	212,900	+ 0.8
Foil and thin strip	303,700	318,100	314,100	159,300	+ 0.4
Tubes, cans, impact extrusions	58,000	79,100	101,700	53,000	+ 1.9

Source: GDA-Gesamtverband der Aluminiumindustrie e.V.



## Specialist trade associations



Nicole Pruin, Christian Wellner and Gabriele Heinen

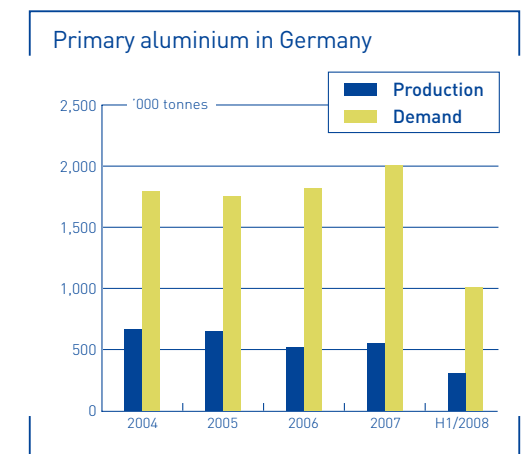
The product-related specialist trade associations of GDA offer the members of the association and their customers an important platform to exchange information among themselves and a solid basis for representation of the economic and political interests and for public relations on behalf of the individual product groups. Market information is also circulated within these bodies as are the newest trends in the technology and the latest environmental issues for the respective products. In close co-operation with other national and European trade associations, GDA also represents the interests of its member companies and the industry as a whole in an effective manner, even abroad.

### Primary Aluminium Trade Association

GDA's regular reports covering primary aluminium form an important part of its reporting in the working groups. They serve to reduce the planning uncertainty that is triggered by turbulence on the London Metal Exchange. GDA is a member of the Primary Division Statistics Committee (PDSC) of the

European Aluminium Association (EAA). The committee is an important source of information for analysing fundamental factors. In addition, the key regions for the production and use of primary aluminium are kept under observation and their development analysed. China in particular plays an important

role here. Among other things, the country's foreign trade in aluminium was continuously monitored. This enabled irregularities in China's Customs statistics to be uncovered. This analysis will remain a part of the work of GDA in future in order to support members in their rational expectation formation.



### Aluminium Semi-finished Products Trade Association



Georg Grumm, Andreas Postler, Heidi Holz and Christian Wellner

The Aluminium Semi-finished Products Trade Association is the most significant specialist trade association within GDA in terms of the number of member companies. The members are mainly the German plants of domestic and foreign companies but companies that do not have a production facility in Germany are now becoming increasingly involved. As the structure of the association becomes more and more international, so the perspective is changing from a German one to a European one. The work of the specialist trade association is organised into market- and topic-

related working groups that meet regularly. In addition, GDA offers members individual advice on technical questions or in analysing markets.

Market-related activity is a key task of the Aluminium Semi-finished Products Trade Association and the respective trade associations. This includes providing support, conceptual further development and collating of statistics for the sector as well as conducting an active dialogue with the trade associations of the most important user industries.

## Report on the working groups

In addition to market information, PR work for extruded products was also at the forefront of discussions within the TKA-L Working Group. The concept and fields of application of the communication campaign planned by GDA were presented and received much positive response.

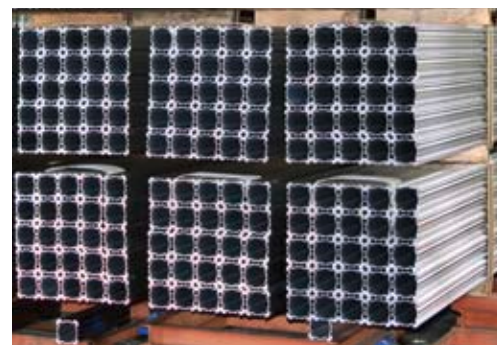
The sustainability of aluminium building products was also discussed intensively. Among other things, the functions of solar shading systems made from aluminium and of aluminium-glass façades were discussed. In this connection, environmental declarations for aluminium windows were also debated.

The Flat Rolled Products Working Group offers rolling companies that are active in Europe a platform where they can exchange their impressions of the market. The meetings of the working group, which has only existed for three years, are characterised by markedly constructive discussions. Suggestions from the working meeting are taken up by GDA and implemented promptly. The working group nominated an expert group which with the support of GDA will develop capacity statistics aimed at Europe. The working group also dealt in depth with the PR work for rolled products. Concrete suggestions were made and GDA will check their feasibility. A first measure is the article service covering aluminium in mould making planned for August 2008.

The Hard Alloyed Extrusions Working Group now meets regularly following its reactivation last year. The main aim here is the exchange of market information. However, as there is no statistical information base for hard alloys, the Aluminium Semi-finished Products Trade Association was assigned the task of generating statistics for shipments of difficult-to-extrude alloys grouped according to different product types and user industries. The concept it devel-

oped was accepted and since December 2007 the working group has been providing the participating companies with statistical data on a quarterly basis. A gap has thus been filled to a large extent because extruded products made from hard alloys are regularly supplied to different user industries than is the case for those made from soft alloys.

A meeting of the European Producers of Slugs Working Group was held for the first time in June 2008. The meeting was characterised by a constructive working atmosphere.



Extrusions will be the subject of a communication campaign in the second half of 2008

The primary aim of the group is to fill the existing gap in the market information. An exchange of market impressions was first carried out. It was decided to establish European statistics for shipments. GDA will prepare suggestions for this. There are already signs that the working group participants are interested in long-term co-operation under the GDA umbrella. A number of topics were raised; besides market-related activities, the work will also focus on ecological questions – keywords here, for example, are carbon footprint and REACH.

## National and international co-operation

The Aluminium Semi-finished Products Trade Association regularly participates at the conferences on the development of the German economy held by the Federation of German Industries (BDI) and the German Institute for Economic Research (DIW). The exchange of market impressions between the participating economy experts helps draw up a detailed picture of the current and future economic situation. The impressions from the user industries gained here help to better evaluate market trends. GDA thus helps people in positions of responsibility in their expectation formation and anticipation of trends in the medium term. The results of the meetings of the economy working groups appear in various publications and help enhance the perception of the aluminium industry – not least in the user industries. In addition, by actively participating in the expert groups, the trade association strengthens the immanently important networking concept.

GDA is the only national trade association that is a member of the EAA Short Term Panel on

Industry Trends. Here, forecasts are produced for the future development of the market volume for extruded and drawn products and for rolled products. GDA's role is not merely that of a reporter of the national situation. More importantly it reports on the development of the pan-European economy and makes detailed information on user markets in the individual countries available to the other participants. In doing so, GDA helps to significantly improve the quality of forecasts. The results are incorporated in various publications from GDA and EAA.

In various committees, GDA provides support to further develop the statistics for aluminium. It is a founding member of a working group that is involved in improving the European statistics in the area of extrusion and drawing. The Aluminium Semi-finished Products Trade Association is a welcome partner because it has a comprehensive reporting system and can contribute its experience in this field.

## Markets for semi-finished products

The German semi-finished products plants reported a new production record in 2007, at 2.52 million tonnes. The economic trend in 2008 is also expected to be good. Compared with the corresponding period a year earlier, the German semi-finished products producers reported a slight downturn in orders received in the first five months of 2008. However, this decline is interpreted as being a basis effect. The first few months of 2007 were exceptionally strong and orders were received that far exceeded existing capacity. The slight downturn now being observed is occurring at a level of demand that is still very high. For the time being, the overheating phase of the previous year has come to an end. Overall, however, utilisation of capacity is at a high

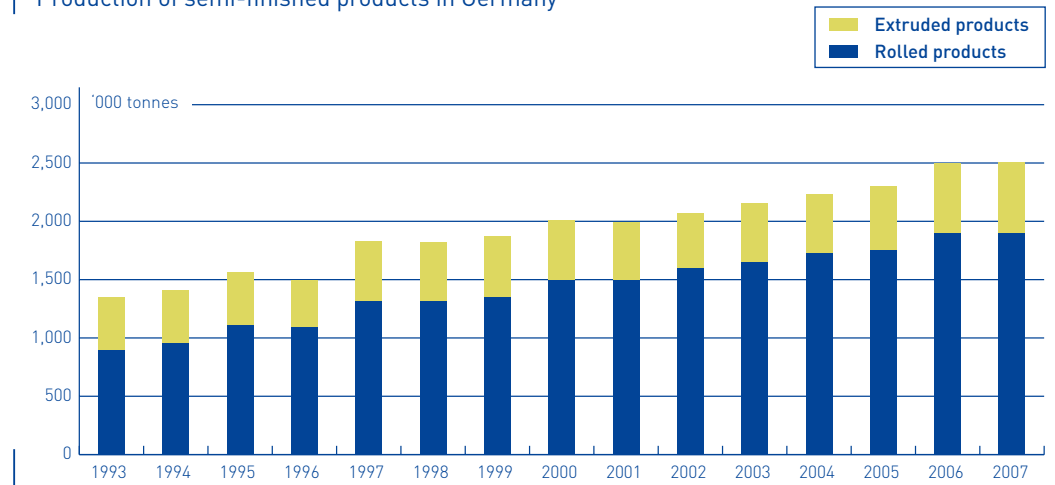
level. This is borne out by shipments, which have even increased slightly.

The major part of the production of aluminum semis was attributable to the rolling mills, which again had a successful year in 2007. Annual production was 1.903 million tonnes and only slightly below the existing record from 2006 (1.922 million tonnes). The German rolling mills thus accounted for more than a third of the total rolled aluminium production in Europe. The good demand for rolled aluminium products at the moment is also attributable to the good market situation domestically. For the first time for many years, orders received, which had shown strong growth in recent

years, showed slight signs of weakening in 2007, albeit compared with the excellent result of the previous year. Exports were down 11.9% year-on-year. By contrast, domestic orders received rose 1.7%. There has thus been growth in the importance of the domestic market for the German aluminium rolling industry. Developments in the different product groups were mixed in 2007. With plate, production rose 7.1% but sheet declined 7.6%. In the most important group in terms of quantity, strip, there was a slight decline of 0.6%. In the past ten years, sheet has grown on average by 3% a year, plate by 9% and strip

by 6%. The production of rolled aluminium semis in Germany has more than doubled in the past 15 years. For 2008, the producers of rolled aluminium semis are optimistic that they will be able to maintain the high level of production. Domestic demand stabilised at a good level in the first few months of the year and there has also been a firm development in export demand. The most important user industries, such as packaging and carmaking, are anticipating good sector growth in 2008. Overall, the producers of rolled aluminium semis are expecting a slight increase in demand in 2008.

Production of semi-finished products in Germany



2007 was again a good year for extrusion plants. The good economic situation also led to record quantities being produced by German aluminium extruders. The production of profiles, rod and bar, and tube rose 5.3 per cent to 600,400 tonnes (2006: 570,300 tonnes). This growth in production was attributable to good domestic demand as well as the good export situation for the manufacturing industry in Germany. According to GDA, total consumption of extruded products has increased continuously in recent years. In 2002 and 2003 it was 543,000 tonnes. In 2006, this figure had risen to some 718,000 tonnes and in 2007 to about 756,000 tonnes. In 2008 and 2009, GDA is expecting stabilisation at

this high level. In the first few months of the current year, domestic demand was steady and the export business was exceptionally strong. For 2008, the extrusion companies are again expecting a good year in quantity terms; momentum is coming particularly from markets such as mechanical and plant engineering, solar technology and the automotive industry.

## Trade associations for aluminium packaging Co-operation between three specialist trade associations



Dr. Christian Bauer, Guido Winsel, Annette Jordan, Astrid Albaum and Stefan Glimm

There are almost 40 manufacturers of aluminium packaging and packaging containing aluminium in the GDA specialist trade associations Aluminium Foil, Flexible Laminates, and Tubes, Cans and Impact Extrusions. The members are mostly medium-sized companies and their products are used mainly in the food, cosmetics and pharma industries. They use the specialist trade associations to represent their interests in the fields of politics, PR, statistics, standardisation, technology and food legislation. The industry undertakes extensive media activities to publicise its innovative capabilities and improve the image of aluminium packaging, and this also enables

the specialist trade associations to establish themselves as opinion leaders when it comes to European and international issues. In Germany, the specialists provide support for Wirtschaftsvereinigung Metalle (WVM) as part of its lobbying activities relating to the German Packaging Ordinance.

At the Spring Meeting of GDA's packaging trade associations, Richard Gaul, former head of corporate communications at BMW Group and currently an advisor to the BDI in the area of strategic communications, gave a presentation titled 'Wirtschaft in der öffentlichen Wahrnehmung' (The Public Perception of Industry).

### Seminars and workshops providing latest information

GDA supports its members in their day-to-day business with market-relevant topics and industry-related information at the various events and workshops organised by the specialist trade associations.

The Tubes, Cans and Impact Extrusions Trade Association produced the world's first life cycle assessment (LCA) of aluminium tubes and aerosol cans with the participation of several foreign

manufacturers who are members of etma and AEROBAL. In a second step, the LCA will be extended in 2008 to include a study on sustainable consumption.

The specialist trade association has also prepared a position paper on the requirements for EAN codes on packaging in order to counteract inappropriate client demands. The association





Heike Heckmann-Hardy and Gregor Spengler

is also closely following the standardisation project relating to Braille on packaging, in order to also avoid unreasonable demands being made on packaging manufacturers. The European network in the form of etma is also useful here.

The annual Sales Manager Seminar of the Aluminium Foil and Flexible Packaging trade associations was again well attended in 2007. Well-known speakers, including from the user side, made presentations that were well received.

As in previous years, GDA supported the 8th ECR Day, which attracted over 1500 decision makers from trade and industry to Hamburg in September 2007.

#### Active media work

In addition to the targeted placement of up-to-date examples of the use of aluminium in the packaging sector and customised press releases and specialist articles in the media for the packaging, food, cosmetic and pharmaceutical industries, GDA also supports the work of its specialist trade associations in other

In September 2007 the Tubes, Cans and Impact Extrusions Trade Association organised a lecture on the subject of digital printing on extruded packaging at a leading manufacturer of machines for the production of tubes and aerosol cans. The aim of the event was to show whether digital printing is a viable approach for the manufacturers of these products and to get to know the opportunities this technology offers, as well as its limitations.

In October 2008 the Technical Committee of the Tubes, Cans and Impact Extrusions Trade Association and the Impact Extrusion Working Group will be holding a joint event at the Stuttgart University Institute for Metal Forming Technology on the subject of alternative lubricants for the impact extrusion process and their optimisation.

media. Moreover, the German specialist trade associations benefit from the media work of the international and European packaging associations managed in a dual-role function by GDA (AEROBAL, EAFA, etma), as this also generates interest in the German media.

#### National and international competitions

The prize for the 'alu pack vision' design competition was again presented at interpack 2008. The competition is aimed at students of design

#### alu pack vision

Design competition 2008



with the aim of developing and designing innovative aluminium packaging. The focus was as much on communication between industry and colleges as it was on creativity and design using the lightweight metal aluminium.



alu pack vision 2008 – presentation of the prizes by Patricia Bumann-Kolb (second from left) and Wilhelm Niedergöcker (far right), Vice President and President of Messe Düsseldorf GmbH respectively



World Aluminium Aerosol Can Award 2007

The World Aluminium Aerosol Can Award organised by the International Organisation of Aluminium Aerosol Container Manufacturers (AEROBAL) was held again in 2007. For the second time, journalists from well-known international packaging publications awarded

prizes to aerosol cans that 'unfold magical, emotion-charged appeal and make the hearts of designers and consumers alike beat faster'.



Tube of the Year 2007

The Tube of the Year award, which is run by the European tube manufacturers association (etma) and for which entries are invited from all over Europe, is also an important industry barometer for the innovation and imaginativeness of the sector. Both the number of participants in the competitions and the coverage of the prize-winning packaging in the trade press are continually increasing.

range of applications – whether it be personal hygiene and health, fish products, hot drinks, pet food, anti-smoking aids or medical or technical applications. The choice of the winning entries was carried out under the chairmanship of Arne Russ, the purchasing director of August Storck.



The winners of the Alufoil Trophy 2008, which was again awarded by the European Aluminium Foil Association e.V. (EAFA), once more demonstrated the versatility of aluminium foil in a broad



Alufoil Trophy 2008

### Representing interests internationally

AEROBAL, EAFA and etma, which are all managed in a dual-role function by GDA personnel, represent their members' interests at both European and international level.

## AEROBAL – International Organisation of Aluminium Aerosol Container Manufacturers

AEROBAL has established itself as an internationally recognised organisation. It was able to welcome the leading Scandinavian manufacturer of aerosol cans as a new member in 2008. The organisation is actively trying to further expand its membership in the Asian region.

International statistics for aluminium aerosol cans are at the heart of the trade association's activities. This information base is to be extended to include analyses of the price trends for competitive materials.

AEROBAL is participating in the preparation of a position paper on the subject of carbon footprint and together with a number of leading European companies is participating in the GDA project on the life cycle assessment of aluminium aerosol cans. Moreover, the organisation is working on an inventory for coat-

ings of aluminium aerosol cans to prepare the sector for the pre-registration phase of the REACH Regulation.

In the autumn of 2007, AEROBAL organised an internal workshop on the subject of the use of powder technology in the production of aluminium aerosol cans together with a leading manufacturer of powder-application systems.

Since it was given advisor status by the United Nations in December 2006, the organisation has regularly attended meetings of the UN Sub-Committee on the Transport of Dangerous Goods. AEROBAL is currently working on an alternative to the water bath test for aluminium aerosol cans, which it intends to present to the UN Sub-Committee.

## EAFA – European Aluminium Foil Association e.V.

The campaign 'Use of Aluminium Trays in the Microwave', which was the first end-user campaign carried out by the aluminium industry worldwide and started in 2007, met with an overwhelming response. Over 75 million reader hits were generated throughout Europe; even the *New York Times* reported on the use of metal packaging in the microwave.

For the film about the production of aluminium kitchen foil that was broadcast on the VOX TV channel in Germany in the series Wissenshunger (thirst for knowledge), EAFA provided considerable support in the form of technical information and coordination of the shooting of the film at three aluminium companies. The programme was broadcast in December 2007 and was watched by over a million households. It can also be seen on the EAFA website.

At the beginning of 2008, EAFA initiated the first global meeting of aluminium foil rollers,



in Oman. There were over 60 participants from more than 20 countries and they represented over 75% of the worldwide production of foil. The topics discussed included sustainability and market development.

Sustainability is taking up ever more of EAFA's effort. Together with GDA, eco-balances were prepared for coffee and butter. In February 2008, 45 participants from member compa-



nies attended a workshop to discuss this subject. In April, EAFA appointed a new employee to deal with sustainability. In November 2007, EAFA and its member companies supported the PIRA Flexible Packaging Conference 2007 with three speakers.



The new EAFA Board elected in Krakau (from the left): Hans Hogeveen (Chairman Rewinder Group), Michael Cronin (Chairman FPE), Fred McDonogh (Chairman Roller Group, EAFA President) and Felix Steinbrecher (Chairman Container Group)

At the EAFA annual conference in Krakau in June 2008, the main focus was on raw materials markets and opportunities/developments in the Chinese market for flexible packaging. The integration of Flexible Packaging Europe into EAFA has been carried out successfully. There are international contacts with North America and China. During interpack 2008, 25 FPE representatives met a delegation with 21 participants from the Chinese flexible packaging industry.

In the EU FACET (Flavours, Additives and Contact Materials Exposure Task) project, which aims to estimate the exposure of consumers to substances, including those from packaging, FPE has played a leading role among the participating trade associations. FPE is the driving force in the process to prepare lists for groups of foodstuffs and the structures of packaging on the basis of which the data collection for the project should be conducted.

FPE also deals with many other lobbying topics which are important for flexible packaging – also on behalf of and in collaboration with national associations such as GDA.

FPE is currently preparing a roadmap for its member companies which is intended to act as a guideline for the implementation of REACH by the members. Furthermore it is involved in carrying out a research project on the 'family approach' in order to provide scientifically based input for future European legislation relating to food-contact materials. Joint testing carried out with the printing ink sector as part of the Packaging Ink Joint Industry Task Force showed that there were no health risks due to migration of substances associated with the flexible packaging tested.

Work is currently being carried out jointly with other trade associations in the plastics supply chain on the formulation of a comment on the revision of the Plastics Directive. The adaptation of the Good Manufacturing Practices (GMP) document on current changes in European packaging and foodstuffs legislation, which has industry-wide acceptance, was completed at the end of 2007. The document is regarded as the benchmark in the European packaging industry.

## etma – european tube manufacturers association

A Europe-wide communication campaign for aluminium tubes started in 2007 and is planned to go on until 2009. The main aspects of the campaign are a website for the manufacturers of aluminium tubes, press releases, placing of advertisements, preparation of a standard presentation tool for member companies and development of case studies with clients, which will be placed in the key print media. In addition, etma's general press activities will be intensified.

Standardisation work is used strategically to set industry standards. Thus, four new Euro-

pean standards for tubes have been approved, the revision of a further five European standards is almost complete, one standard is about to be circulated by the European Committee for Standardization and concepts for a further six European standardisation projects are in preparation.

In 2008, further performance figures will be added to the productivity comparison for aluminium tubes conducted within etma in order to improve the information value of the comparison.

### Latest news via the web

The websites [www.aerobal.org](http://www.aerobal.org), [www.alufoil.org](http://www.alufoil.org), [www.alufoil-cuisine.org](http://www.alufoil-cuisine.org), [www.etma-online.org](http://www.etma-online.org) and [www.flexpack-europe.org](http://www.flexpack-europe.org) contain information about all the activities and can be used as a means of communication with members as well as with the industry. The website [www.aluminium-tubes.org](http://www.aluminium-tubes.org), which went online in 2007 as part of etma's communication campaign for aluminium tubes, has also established itself and now has several thousand visitors a month.



## Metal Powder specialist trade association

Besides the main topics, market and statistics, chemical legislation has become more and more the centre of attention of the activities of the Metal Powder specialist trade association in recent years. Important here was 1 June 2007, the day that REACH, the European chemical legislation, came into force. Activities aimed at implementing REACH had already been started at an early stage. The aim in particular was, and still is, to utilise synergies in the metal powder industry to minimise costs and effort for the individual members and to position the sector effectively. The GDA's closely knit network

with national and European trade associations provides the basis for effective lobbying. At GDA, the European Metal Particulates Association was thus established within the Metal Powder specialist trade association, which has since shown brisk growth in new members. European chemical legislation will also be the centre of attention of the activities of the association and its members in future.

## Media work and PR activities



Anncathrin Wener and Kerstin Wollenberg

GDA's communication activities are based primarily on continual and up-to-date media work. Other key features of the media work and PR activities are exhibiting at leading trade fairs and professional support for continuing vocational education and training activities at the plants of different member companies. Thanks to these ongoing communication activities, GDA ensures that the metal, the companies in the industry and the trade association are well positioned in the various media of the trade and financial press.

### Soundly based media work

GDA uses topical media releases to keep journalists from the trade and financial press regularly informed about the latest happenings in the industry and the trade association. Trade fair appearances and other events are also accompanied by media work and are just as much a part of fostering good relationships with journalists from the

trade and financial press as visits to editorial offices, one-on-one interviews with the journalists and newsworthy specialist articles. Journalists have access to all press material online at [www.aluinfo.de](http://www.aluinfo.de).

## Technical papers and exclusive articles emphasise capabilities

GDA's specialists use interviews, guest editorials, authored articles and technical papers to present the industry's case and document their knowledge of the metal. In addition, the GDA's article service for the trade and financial press reports regularly on innovative applications, current technical advances as well

as market trends, and provides background information about the industry. Thanks to their authored articles and the article service, GDA's specialists and management team meet with an exceptionally good response from the trade and mainstream press.

## Highlights in 2008

The highlights so far in 2008 were the trade fairs didacta in Stuttgart and interpack in Düsseldorf. A further highlight will be ALUMINIUM 2008 in Essen in September.

### didacta in Stuttgart

At the didacta trade fair in Stuttgart in February this year, GDA presented its current range of products that provide information

about aluminium for teachers from all types of school. An additional folder for teachers at vocational schools and several metal-processing courses were presented as extensions to the existing 'Aluminium kompakt' practical teaching materials, which include folders for teachers, an aluminium teaching case and an up-to-date CD-ROM with information and video clips about aluminium.



Presentation of GDA teaching aids at the didacta in Stuttgart

The metal-processing courses for schools were just as popular in 2008 as the metal-processing courses for cross-occupational training and demand for them was just as brisk as for the cases and teaching folders. GDA has participated at the didacta trade for eight years without a break and has thus built up a long-term working relationship with teachers from all over the country.

### interpack 2008

Together with AEROBAL, EAFA and etma, GDA had its own stand at the world's largest packaging trade fair. GDA and the other trade associations exhibiting on the stand provided information about their services and the use of

aluminium in the packaging sector. Trade journalists from home and abroad and representatives of the member companies used the stand as a communication and meeting point.



For the first time, the attendance at the fair was financed jointly by the four associations; in addition, the drinks catering in particular was sponsored with aluminium packaging from member companies. The sponsors and other applications for aluminium and aluminium-containing packaging were presented in a film that was shown on a large screen throughout the trade show.



Public interest in the performances by TV celebrity chef Ralf Zacherl on the aluminium industry stand during the first two days of the show far exceeded all expectations. During his cookery demonstrations, Ralf Zacherl showed possible uses of aluminium, the universal household aid, to a very attentive audience of trade visitors. The media response was enormous;



TV celebrity chef Ralf Zacherl cooking on the GDA stand at interpack 2008

thanks to the event being publicised on the interpack homepage, aluminium was already attracting attention in the run-up to the trade fair. The winners of the EAFA Alufoil Trophies as well as the prizes for the GDA 'alu pack vision' design competition were presented on the aluminium industry stand. The winning entries for the competitions Alufoil Trophy 2008, World Aluminium Aerosol Can Award 2007 and Tube of the Year 2007 were displayed in an exclusive exhibition in the press lounge throughout the whole of the trade fair.



Exhibition in the press lounge during interpack 2008

In addition, GDA and etma supported a special exhibition, '50 Years of interpack', with exhibits and photos of hollow chocolate shapes and tubes.

Before and during interpack 2008, the appearance was accompanied by intensive media work, including press releases, the placing of specialist articles in the most important journals for foodstuffs and packaging as well as interviews with journalists individually, which all contributed to its success.

festivals and town festivals but thanks to media interest on television and in the press has advertised the lightweight metal. However, it is not only while on the ground participating in night glows that Luftikus has lived up

to his role as ambassador: he could and can still be seen in the service of aluminium in the skies over the Ruhr Area, the Rhineland and Munsterland; his mere presence is enough to grab people's attention.

## Renovation Award

The EAA presented the winners of the European Aluminium in Renovation Award 2007 at the BATIMAT in Paris in November 2007. The prizes were awarded for building-renovation projects in which aluminium was used in a sensible and innovative manner and which were carried out after 1 January 2004. Besides architects, principals or property owners, project developers and building-engineers could enter.



The 'Bibernest' (Beaver's Nest) – winner of the 'Non-residential' category in the regional leg of the Aluminium in Renovation Award

GDA organised the Aluminium in Renovation Award competition for Germany and Austria. The regional winners qualified automatically for the European competition and three of the entries from GDA's region were among the European winners: the Constance-based architectural practice Biehler Weith Associated Building Design Projects, the architectural practice Gärtner + Neururer ZT GmbH from Vöcklabruck, Austria, and Otto Valenta GmbH u. Co. KG with their partner eS21 engineering & structures.

## High + light

Since 2007, GDA has attracted considerable attention with a silver-coloured hot-air balloon carrying the aluminium recycling logo that has shown that when aluminium takes to the sky it feels like it is in heaven. The 28-metre high balloon, which can carry three

passengers besides the pilot, is available by prior arrangement for use by GDA member companies at company anniversaries, in-house exhibitions and other occasions. The balloon has not only participated at various events, such as Cologne Lights, aerodrome



'Haus am Hang' (House on a Hillside) – winner of the 'Residential' category in the regional leg of the Aluminium in Renovation Award

# Technical Marketing



Werner Mader and Wolfgang Heidrich

The focus of the technical marketing activities is provision of advice on specific application-related enquiries in all important user markets, such as transport, mechanical engineering, building and construction, and packaging. The solidly based technical capabilities of the GDA specialists is also in demand, however, in the fields of surface treatment, corrosion, standardisation and alloy designations. Continual monitoring of developments and market trends ensures that the information provided is always up to date, whether it be for the enquiries received daily, GDA's own seminars or the contributions made at external seminars and congresses.

## Searches in the library

Besides personal advice it is also possible to carry out literature searches in the GDA library. The most comprehensive collection of literature in German on the subject of aluminium is located in the same building as GDA and is open to anyone who is interested subject to prior appointment with the librarian, who will provide support.



Extensive research material on the subject of aluminium

## Material competence for the market

GDA is increasingly being expected to provide services as an independent advisor and expert and clients are making more and more use of them. Here are a few examples:

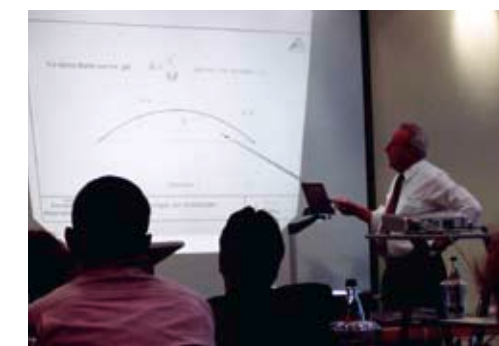
- Analysis of the manufacturing process for producing weight-reduced rolls for the printing industry: machining, surface treatment, joining, presence during commissioning and optimisation of the process stability.
- Provision of support during analysis of the cause of damage and development of a

concept for conducting repairs as a result of breakdowns caused by thermal expansion and contraction of heating and vulcanisation plates for conveyor belts.

- Analysis of the cause of damage and optimisation of a concept to prevent corrosive attack in the floor area underneath the floor covering inside railed vehicles.
- Round-robin test to evaluate the suitability and reproducibility of a new corrosion test for chassis parts specified by a car manufacturer.

## Specialist seminars for the industry

The GDA's seminar 'Joining of Aluminium Profiles and Sheet' has now become a well-established favourite alongside two other seminars, 'Surface Treatment of Aluminium' and 'Technology of Extruded Profiles'. This two-day seminar was held in March 2008 in co-operation with SLV-Duisburg and again attended by 29 participants. The two other seminars were held in the autumn of 2007 and attended by 36 (Surface Treatment) and 32 (Extrusion) participants.



Also always fully booked: the extrusion seminar

The three-day seminar 'Introduction to Aluminium Technology', which was held for the

second time in February 2008 in co-operation with RWTH Aachen and aec (Aluminium Engineering Center), was also a complete success. The seminar, which sold out within a matter of days (max. 30 participants) generated such a positive response among the participants that it will now be held annually. The success of this co-operation has led to further seminars being added. The one-day seminar 'Design and Lightweight Construction with Aluminium', which is aimed at participants who already have experience in working with aluminium, was held jointly in May 2008. With 11 participants, the response to this seminar was also satisfactory.



The traditional seminar: Surface Treatment of Aluminium



Hanover-based Giesel-Verlag, whose list of publications includes the journals *ALUMINIUM*, *METALL* and *ALUMINIUM PRAXIS*, also joined the list of co-operation partners. The one-day seminar 'Aluminium Made Understandable' was in such demand that two dates (April and June 2008) each with 40 participants were booked out within weeks. Plans are in hand to develop further joint seminar activities.



There is also increasing interest in seminars conducted in-house at company locations. In March a presentation under the title 'Aluminium – Light Metal, Hard to Process?' was made at the chamber of trade in Kaiserslautern to some 20 tradesmen involved in metal fabrication. A presentation on the light metal was also made in-house at Saueressig GmbH & Co. in Vreden. In May 2008, the GDA specialists' knowledge was in demand at



Presentation of GDA at the Conference on High Speed Forming in Dortmund

F. W. Brökelmann in Ense-Höingen and at ERCO Leuchten GmbH in Lüdenscheid. Further seminars are planned for September 2008.

Besides this, GDA's specialists regularly make presentations several times a year on the lightweight material at SLV Duisburg as part of its SFI and aluminium welding training courses.

building and construction fields and on events related to the different subject areas. The publication also includes information about new standards and brief news items about the industry.

## Topical information service

The *AluminiumTechnik* information service, which appears four times a year and is in good demand, provides intersectoral information on current technical developments in the automotive, transport, mechanical engineering, and

## International co-operation on commissions and in committees

GDA's Corrosion Chemistry and Roof and Wall working groups deal with basic technical matters. The results obtained are used to ensure that aluminium's inclusion in technical guidelines is appropriate for the material and to create or strengthen acceptance of the metal in the markets.

The Roof and Wall Working Group is currently changing national standards, approvals and codes into the European equivalents that will be valid in future and providing support for the users of the products so that they can put them into practice, thereby safeguarding markets. European standards covering implementation that do not exist as yet are currently being prepared at national level and will be given the status of a European standard later.

A current topic being dealt with by the Corrosion Chemistry Working Group is the corrosion behaviour of extruded profiles in carmaking. In a round-robin test involving the extrusion plants and research laboratories of the aluminium industry, test methods and parameters will be agreed upon in order to achieve uniform and comparable evaluation criteria with the customers.

GDA represents the interests of the aluminium industry by participating in a very broad range of national and international committees, commissions and trade associations. In the fields of surface treatment and corrosion, this includes the following associations:

- VOA Verband für Oberflächenbehandlung von Aluminium
- GSB international Gütegemeinschaft für die Stückbeschichtung von Aluminium
- Qualanod (EU) Quality Label for Anodic Oxide Coatings on Wrought Aluminium
- Qualanod (D) Gütegemeinschaft Anodisiertes Aluminium im VOA
- GRM Gütegemeinschaft für die Reinigung von Metallfassaden

- ESTAL Association for European Surface Treatment on Aluminium
- DIN und CEN – anodised aluminium
- DFO FA – surface treatment of aluminium
- GfKORR – Gesellschaft für Korrosionsschutz e.V.

Trade associations and standardisation for users:

- EFB Europäische Forschungsgesellschaft für Blechverarbeitung e.V.
- DSTV Deutscher Stahlbau-Verband Eurocode/ CE-Kennzeichnung Bau
- DIN NAS (welding)
- DIN/CEN Eurocode/CE labelling for the building industry
- DAST Deutscher Ausschuss Stahlbau
- DVS / SLV – welding/joining of aluminium
- VDG Verein Deutscher Gießereifachleute

At European level, the interests of the German aluminium industry are represented by GDA specialists in the following EAA committees and groups: ATC Automotive Technical Committee, ETC Education and Technical Committee, BTC Building Technical Committee, WG Structures, STC Standards Committee and in the GAG Global Advisory Group.

In addition, since April 2008 GDA has taken over the European Standards activities of EAA. As a centre of excellence, GDA now coordinates WG Structures (field: building) and the Standards Technical Committee directly. This guarantees that an exchange of ideas will continue to be possible within the European aluminium industry and that there will be a uniform position on standards projects, and it will also ensure that there is effective representation of interests in the international standards committees.

## Ecology



Jörg Schäfer and Bettina Tiesing

In view of the continuing discussion on climate change, questions relating to ecology are currently high on the agenda. It is noticeable here that there is a renaissance of ecological product evaluations. Whereas in the past the ecological debate was mainly driven by environmental groups and seized upon by legislators, it is now also stakeholders with business interests – for example the food trade, as well as branches of industry – that are conducting product evaluations in which they declare the so-called carbon footprint as the ecological yardstick and then also use this idea for competitive purposes.

Corresponding enquiries from the user industry aimed at GDA and its member companies have increased markedly. On the other hand, there has been a perceptible decrease in the number of experts in the industry in recent years. Against this background, the ecological positioning of aluminium and the products made from it is a key task of GDA in order to support the market success of its members in this way.

## A balanced view – new ideas

A strategic idea being pushed by GDA in the ecological debate – regardless of whether it be in the packaging, building or transport sector – is to stop comparing products and start comparing systems that take the whole life cycle of a product into account: from the extraction of the raw materials through to recycling and in doing so to include aspects relating to consumption, the use of the product and differing behaviour patterns. Not only does this idea emphasise how efficiently aluminium is used as a resource, it is also more appropriate for dealing with environmental issues.

This holistic approach was pursued in an exemplary manner by EAFA/FPE in 2007 using case studies from the packaging sector (for example the holistic approach to coffee packaging, which considered the whole chain from the planting of the coffee plant through to the brewing of the cup of coffee). GDA provided strategic assistance during the carrying out of the study and was actively involved in its concept.

## GDA – competence in eco matters

GDA's activities in relation to eco-balance related topics are broadly based and can be summarised as follows:

- GDA has actively supported its members in discussions on ecological topics with customers.
- In addition, GDA supported its sister associations AEROBAL, EAA, EAFA and etma at more than ten events with contributions on sustainable development, eco-balances and resource efficiency.
- Under the leadership of GDA, and coordinated by EAA, eco-balance datasets were collected for the fields of foil, tube and aerosol cans.
- On behalf of EAA, a comment was prepared concerning the British standards activities with respect to the determination of the carbon footprint. In addition, eco-balance projects on aluminium packaging in the Netherlands were supported.
- In Austria, GDA contributed to positioning aluminium as a sustainable material also when compared with other materials, using aluminium windows as an example.

■ At the Metallbautag in Graz in April last year, GDA made a presentation titled 'Bauprodukte im Spannungsfeld der Nachhaltigkeit' (Building Products between the Conflicting Priorities of Sustainability').

■ GDA was the silver sponsor of the international congress on sustainable building organised by Deutsche Gesellschaft für Nachhaltiges Bauen (DGNB, German Association for Sustainable Construction Works). At this congress, GDA had the opportunity to present its case for moving away from considering individual products to taking the whole building into consideration.

■ GDA's many years of involvement in the 'Nachhaltiges Bauen' (sustainable building) roundtable has contributed to the fact that the idea of considering systems as a whole – which is so important for aluminium – has also become established here.





- Standardisation plays an important role, for example, in the establishment of recycling credits for aluminium. GDA is represented in the standardisation activities of the CEN/TC 350 Sustainability of Construction Works in the working group 'Environmental Performance of Buildings'.

- At national level, GDA is actively involved in the DIN 'Nachhaltiges Bauen' (sustainable building) standards committee. Here, too, the maxim is to adopt a holistic and not a piecemeal approach.

- At the request of the industry and as part of the co-operation with EAA, GDA gave a presentation at the Incal 2007 congress and trade fair in November titled 'Environmental Product Declaration – an instrument for transparent communication: the EPD programme of the European Aluminium Association (EAA) on window frames'.

- At the Sustainable Consumption and Production Conference in Vilnius, Lithuania, in March this year, which was mainly attended by politicians and scientists, GDA gave a presentation on behalf of EAA titled: 'The way towards a sustainable development – quovadis aluminium industry'.

- GDA supports the International Aluminium Institute (IAI) in the implementation of its strategic studies, for example with the question: Where does aluminium stand in comparison to other materials?

- As part of its co-operation with EAA, GDA also gave a presentation at the general assembly of the IAI in April 2008 on the importance of eco-balances in the aluminium industry.

This list also demonstrates the internationality of GDA's activities: as a result of similar ecological debates taking place in neighbouring countries, the internationality of the aluminium industry and the network of co-operation between the different European aluminium associations, the ecological activities undertaken by GDA have now moved abroad. These 'foreign' activities are important inasmuch as in this way a European and global standard for the ecological positioning of aluminium will be demanded, which will also be beneficial for the export-oriented German aluminium industry. The existing transfer agreement with the EAA, which regulates the co-operation between GDA and EAA in the area of sustainability, enables GDA's capabilities to be adopted synergistically throughout Europe in the interests of the members.

## Stakeholder dialogue continued

In addition to the activities outlined, GDA has now been holding a dialogue with stakeholders from relevant groups of society in Germany for over ten years. The aim was, and still is, to conduct the debate on the environment in a factual manner and to achieve even greater acceptance for aluminium as a material.

Whereas in the beginning the focus of GDA's activities was on the political and scientific community for strategic reasons, it has moved increasingly in recent years to addressing more 'emotional' groups. Typical here are

the Ecumenical Church Congress (2003) and World Youth Day (2005).

In the last year GDA has incorporated trade unions and employees as stakeholders in its dialogue concept. The trade unions are a natural ally here. The common interest is to improve the ecological acceptability of aluminium and its products, and ecological acceptability contributes to job security.

The employees of the companies in the aluminium sector are also very important mul-

tipliers. What could be more obvious than to make them even more aware of the ecological benefits of aluminium products and thus turn them into 'ambassadors' for the metal?

The so-called 'Social Partnership for Sector Dialogue on the Resource Efficiency of Aluminium Products' was therefore initiated jointly by the IG Metall trade union and GDA.



Together with the Federal Ministry for the Environment (BMU) and with the support of the Federal Environmental Agency (UBA) and the Hans Böckler Foundation, IG Metall and GDA are working on cementing knowledge about the resource efficiency of aluminium products more firmly in the aluminium sector. Employees and management are being addressed here both as a part of the production chain and as consumers. At the request of BMU,

the project was integrated in the Resource Efficiency Network – an initiative of BMU which GDA had already joined as a founding member in March 2007.

The launch event for the Social Partnership for Sector Dialogue on the Resource Efficiency of Aluminium Products took place on 7 May 2007 as part of a workshop for representatives of company managements, works councils and experts from the industry with the participation of BMU.

At the request of BMU, the project was presented jointly by GDA and IG Metall on 17 June in Berlin during the Resource Efficiency Network's second conference. The conference was chaired by the State Secretary of BMU, Michael Müller, and was attended by a good 60 participants, mainly from non-governmental organisations, energy and material efficiency agencies and works councils/trade unions. The joint presentation led to an intensive and constructive discussion, in which GDA could position aluminium the metal and the aluminium industry as being a leader in the discussion on resource efficiency and being a social partner for sector dialogue.



## Library and Training / Further Education



Dr. Karsten Hein and Anncathrin Wener

The GDA library is the largest German library on the subject of aluminium. The library's archives contain one of the most comprehensive collections of information on aluminium – well documented and catalogued systematically.

### Search opportunities in the library or online

The GDA reference library holds 3,500 specialist books, 8,000 articles, numerous research reports and papers from congresses and conferences and 4,000 bound volumes of periodicals. The library is accessible to the public for research purposes.

The fields of knowledge are categorised into 25 main groups and over 100 sub-groups, starting with aluminium extraction and material properties and going through to the metal's various fields of application, and including processing and machining.

Some 90 national and international specialist publications covering the aluminium in-

dustry, the extraction of aluminium, material properties, metallurgy, materials testing, corrosion, processing, heat treatment, mould casting, chipless forming, machining, joining, design, surface treatment, uses, building and construction, chemical engineering, food, packaging, electrical engineering, transport and defence technology are evaluated continually and added to the database. This is continually updated and expanded.

Anyone who is interested – GDA members and non-members, and regardless of age or field of interest – can conduct searches in the library or arrange for the required material to be collated.

The library's inventory can be accessed online via a link on the GDA homepage. Access and searches are free of charge. The visitor can carry out unrestricted searches of titles and

abstracts or conduct systematic searches. For a fee, articles can be ordered directly via the internet.

### Teacher training courses

The training courses for teachers, which GDA offers together its members, meet with lively interest both from member companies and schools. Over ten training courses for teachers have now been conducted at company locations

throughout Germany, with an average of 20 teachers each time finding out more about the theoretical as well as practical opportunities for dealing with the subject of aluminium in the classroom.

### Comprehensive teaching material

The folders for teachers and the teaching case offered by GDA are increasingly being used as official teaching materials in schools. The materials are complemented by the 'Aluminium kompakt' information CD and the 'Pen-

guin Serviette-holder', 'Cube' and 'TV Tower' metalworking courses. The other metalworking courses offered, namely 'Tabletop Food Warmer' and 'Letterbox and Profile Console', are intended for extra-company training.

### Current programme of publications

GDA's comprehensive programme of documentation is continually kept up to date with ongoing revisions, additions and new editions. Besides the GDA Technical Informations, technical documentation and information brochures are also updated and reissued. In 2007, GDA reissued *Webers Taschenlexikon Aluminium* and there has been large demand, not only from companies. The English version, which was published under the title *Webers Aluminium Pocket Encyclopaedia* at the beginning of 2008, has also proven to be very popular.

The revised version of the design brochure *Gestalten mit Aluminium – Architektur und Design* (Designing with Aluminium – Architecture and Style) was published at the beginning of 2008 (in German only). After a brief journey through the 120-year history of the metal, the brochure provides information on the light metal's properties, and their influence on a decision to use the metal, as well



as on the metal's manufacture, processing and finishing. There is impressive coverage of the possible applications of aluminium using examples from different fields.

## Outlook 2008/09

Customer orientation, flexibility and service capability will continue to be GDA's yardstick and guideline in future. GDA's activities are dictated by market developments and its aim is to cement the acceptance and image of the metal in the different target groups. This involves being present at the leading trade fairs, a competent advisory service and continuous media activities.

### Training and further education

GDA will continue to pursue its activities relating to aluminium in the field of training and further education in future, too. Secondary schools, vocational schools and colleges are the main target group of these activities.

Training courses for teachers will be held at REXAM Beverage GmbH in Berlin in November 2008 and in 2009; in 2009, courses are also planned at Karl Höll GmbH & Co. KG and Linhardt GmbH & Co. KG Metallwarenfabrik.

A recruitment show organised jointly with RWTH Aachen is planned for the autumn of this year; companies will be able to exhibit for the day on the university campus and talk directly to students and postgraduates about careers.

### On-going media activities

In future, the aim of the PR and media work will continue to be the positioning of the metal, the industry and the trade association in the important publications of the financial, trade and popular press. Regular media

information complemented by specialist articles and briefings will provide the basis for positive and objective reporting. In 2009, EAFA is planning a communication campaign concerning the sustainability of foil, which will be aimed at packaging manufacturers, brand owners and the food trade in Europe.

In the semi-finished products field, GDA is planning an advertising campaign for rolled products and profiles to accompany its article service, aimed at pushing aluminium more emotionally into the focus of the converters.

### Trade fairs and events

In 2008/2009, GDA will again be presenting the information and other services it has to offer at trade fairs and other events, where it will also strive to hold a dialogue with fabrica-

tors and end-users of the light metal. Participating at the annual didacta trade fair, which will be held in Hanover in 2009, is an integral part of this communications plan.



In addition, GDA will have its own stand at ALUMINIUM 2008 in Essen and will exhibit in the German pavilion at ALUMINIUM Dubai 2009 and ALUMINIUM China 2009.

### Basic technical information about the metal

GDA's Technical Informations serve to provide detailed information on special topics for customers and users. *Technical Information 0 4 Anodisch oxidiertes Aluminium für dekorative Zwecke* (Anodised Aluminium for Decorative

Purposes) will be revised in 2008. A revision of *Technical Information A 8 Aluminium-Well-profile* (Aluminium with Corrugated Profile) is also being considered this year.

### Specialist seminars for the industry

The now traditional specialist seminars covering surface treatment of aluminium and the technology of extruded profiles will be held again this year, on 18-19 September 2008 and 9 October 2008 respectively. The cleaning seminar is planned for 26 November 2008 and the joining seminar will be held in March 2009. The seminars carried out in co-operation with RWTH Aachen and Giesel-Verlag will be held again in 2009.





# OUR KNOWLEDGE: KEY TO THE FUTURE

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