



# 1st Automotive Business Forum 2021

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**ELVALHALCOR**

HELLENIC COPPER AND ALUMINIUM INDUSTRY S.A.



# ElvalHalcor at a Glance. **Facts.**

ElvalHalcor is a Greek-based leading global player in the non-ferrous metals industry.

We are a **leading global manufacturer** of aluminium and copper products, formed in December 2017 via the merger of Elval and Halcor

More than **80 years of experience**

**Among the biggest** global non-ferrous metal processing companies

Commercial export orientation with well-balanced international presence across **more than 100 countries**

Powered by a **solid client base** comprising blue chip, sector leading companies

Operating a strong production base across **17 industrial units** in Greece, Bulgaria, Turkey and the Netherlands

**A New Investment program of EUR 100m** following a EUR 150 one in Aluminium segment

Listed on Athens Stock Exchange



# ElvalHalcor at a Glance. **Figures.**



**2.0**  
EUR billion  
revenue



**1.8**  
EUR billion  
total exports



**136**  
EUR million  
adj. EBITDA



**475**  
Thousand tons  
volume of sales



**Largest**  
Copper tubes  
producer in Europe



European  
**leading  
positions**  
in aluminium products



**100**  
Countries  
products are  
shipped



**17**  
State of the art  
production  
plants



**>600** EUR  
million investments  
during the  
last 10 years



# Mega trends. Enablers.



## Clean, circular economy

- Low carbon and recyclable products
- Products with high recycled content
- **Sustainable packaging**
- **Plastic replacement**



## Transition to climate neutrality

- **Electrification**
- Power storage
- **E-mobility**
- RES growth



## Urbanization

- Sustainable buildings
- **Energy efficiency in buildings**
- Smart buildings
- Digitalization
- Health & wellbeing

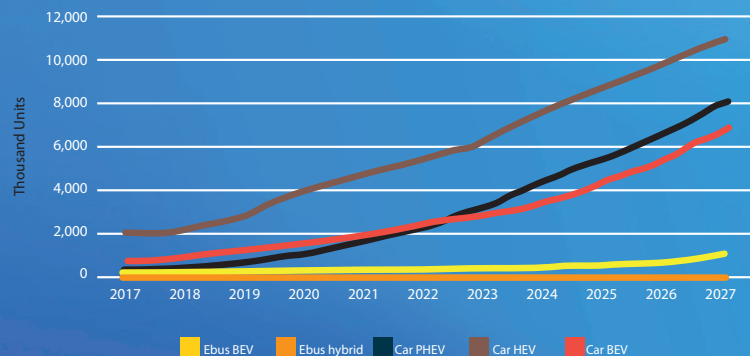


# e-mobility. Cu-Al.

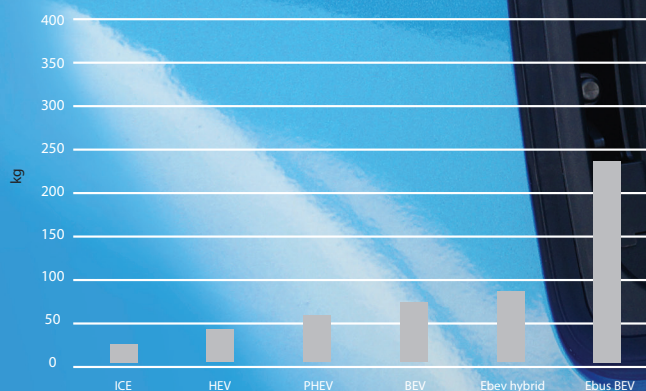


Copper and aluminium demand will be substantially impacted by the growing market for electric vehicles (EVs) over the next decade. Copper is used in electric motors, batteries, inverters, wiring and in charging stations. Battery boxes are strong drivers for aluminium.

Electric Vehicle Forecast



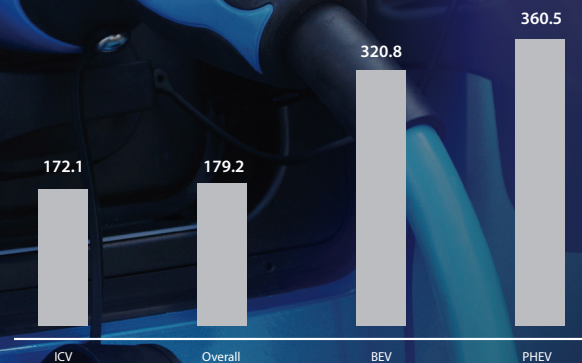
Copper content in kg by type of electric vehicle



The demand for copper due to electric vehicles is expected to increase by 1,700 kilotons by 2027. In addition, each EV charger will add 0.7 kg of copper. Fast chargers can add up to 8 kg of copper each.

Average Aluminium Content per Vehicle

Comparison by Powertrain Variant (2019, Net Weight in Kg)



Electrification components will be the main growth area of aluminium in cars by 2025. Alone Battery Boxes account for nearly 2/3 of the aluminium content increase.



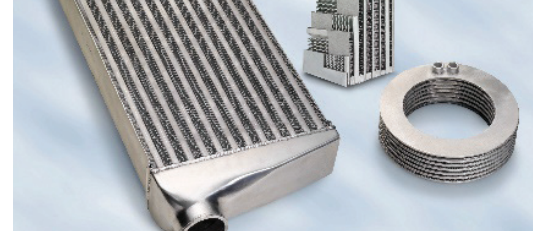
# Aluminium - Rolled Products/Markets.



## Automotive



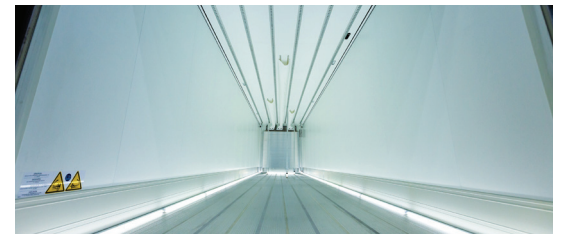
- Internal parts
- Heat exchangers
- Air pressure vessels/ Fuel tanks
- Suspension & brake systems
- Aluminium coils for automotive components (heat shields, brake covers and separation frames)
- Pre-painted aluminium sheets and strips for automotive applications
- Aluminium composite panels for special automotive applications



## Commercial Transportation



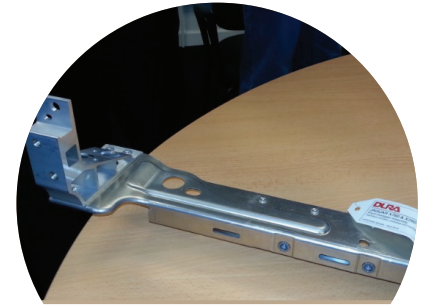
- Tipper trucks
- Road silos
- Refrigerator trucks
- Cargo wagons



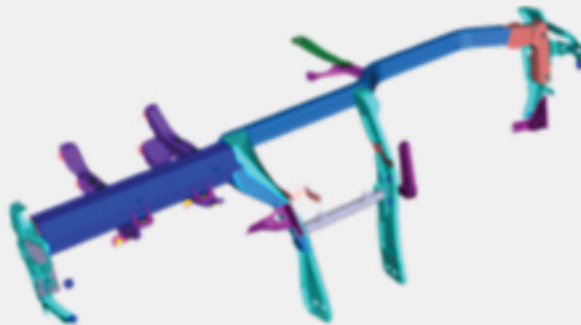


# Etem Gestamp

- One of the few automotive released European companies for almost all categories of Crash Relevant products.
- Main focus on demanding applications like chassis, Crash management systems, and lately Battery boxes of both Hybrid and fully electric vehicles that will be on the road in the next years.
- Customer Portfolio OEM like : BMW, VW Group, Mercedes, Jaguar Land Rover



**BMW**  
chassis parts series 1, 3, 5 and 7



**AUDI B9/ Q7**  
Crosscarbeam MLA Platform Left-hand  
& Right-hand driving



**Jaguar X260 / X760**  
Front Head light system



# Copper Products & Main Applications.

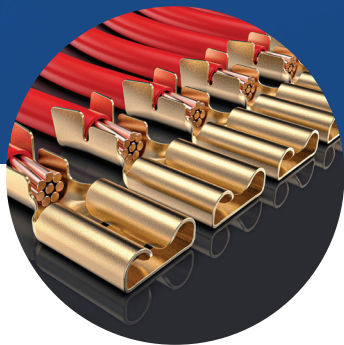
Automotive Commercial transportation

**SOFIA MED**

**HALCOR**  
HELLENIC COPPER INDUSTRY

**CABLEL WIRES**  
HELLENIC WIRES INDUSTRY SINGLE MEMBER SOCIETE ANONYME

- Connectors
- Battery terminals
- Power distribution bus bars
- Relays
- Switches
- Fuses



- Connectors
- Special alloys brass rods for automotive valves

- Electrical components of vehicles such as door and window openers, ABS brakes, start/stop system, power mirrors, starters, to alternators and solenoids



Our world  
is rapidly changing...

**Forward, Faster.**



[www.elvalhalcor.com](http://www.elvalhalcor.com)