



China Aluminum Profile Industry Report, 2010-2011

August 2011

This report

- ◆ **Analyzes the aluminum profiles development in China**
- ◆ **Focuses on downstream of aluminum profiles**
- ◆ **Highlights the operation of key enterprises, including listed companies, non-listed companies and foreign companies**

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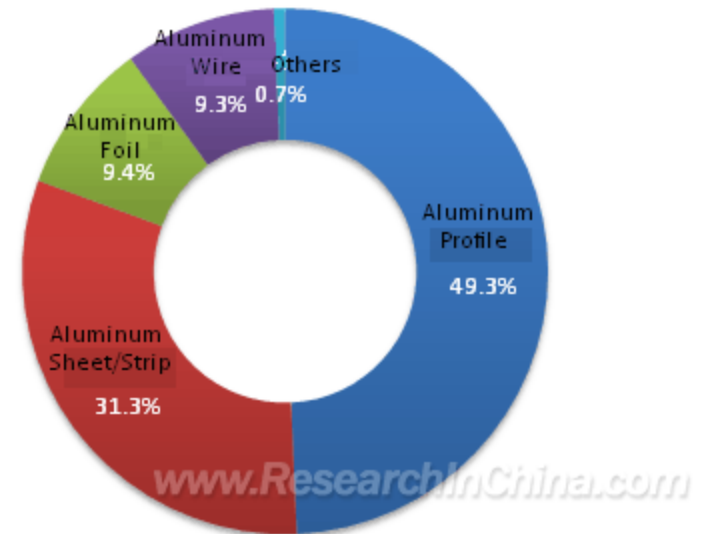
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Abstract

China is the world's largest consumer of aluminum, with aluminum consumption of more than 14 million tons per year, accounting for around 40% of the global consumption. However, aluminum consumption per capita in China still remains at a low level. As matters stand, aluminum consumption per capita is about 10 kg in China, while that in the United States, Japan and Germany has reached 35 kg, 33 kg and 32.5 kg respectively. So there is still great space for aluminum consumption growth in China in the long run.

The output of China's aluminum profile increased to 9.33 million tons in 2009 from less than 2 million tons in 2001, with a compound growth rate of approximately 25.16%, substantially higher than the average growth rate of the global market. As of early 2010, the output of China's aluminum extrusion profiles has accounted for 47% of the global output.

Output Ratio of Aluminum Processing Products in China, 2010



Source: ResearchInChina

There are a number of aluminum profile manufacturers in China, but most of them are small-scale enterprises, presenting a low degree of industrial concentration and obvious regionalization trend. Except Tibet and Hainan Province, the rest provinces all have aluminum profile producers, but the enterprises are mainly located in Guangdong, Jiangsu, Zhejiang, Shandong and Liaoning. South China is the largest net aluminum profile output area, while North China is the largest net input area.

In respect of application field, the construction industry is still the largest user of aluminum profiles, accounting for more than 63% of the total consumption in 2009. The transportation, equipment & mechanical equipment manufacturing and consumer durable industries accounted for approximately 10%, 10% and 12% of the aluminum profile application in China respectively.

With the enhancement of industrialization, industrial aluminum profile will witness growing consumption in China, and it's estimated that its proportion in the aluminum profile consumption will rise to around 35% in 2012 from about 32% currently.

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