



China Alumina Industry Report, 2010-2011

Mar. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

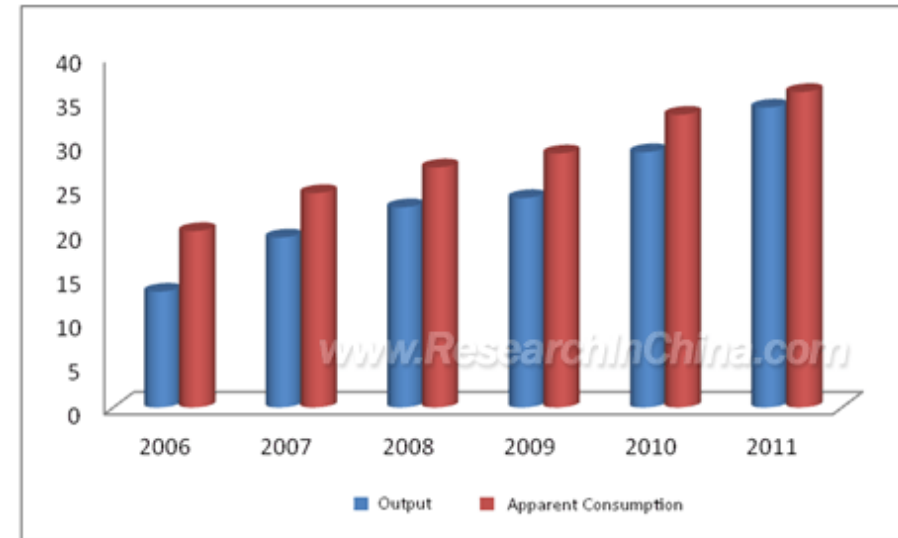
The primary information sources include NBS(National Bureau of Statistics of China), WIND and China Custom etc.

Abstract

Alumina, as the basic raw material in primary aluminum smelting, is chiefly used to produce metallic aluminum through electrolysis. With bettering profitability since 2011, the large aluminum corporations around the globe have sped up capacity resumption and expansion successively. In H1 2011, global output of alumina reached 45.92 million tons, up 8.55% YoY, among which the alumina output in China registered 17.45 million tons, rising 18.1% YoY, and a major engine for the rebounding of alumina output in the world.

The alumina is mainly consumed by downstream primary aluminum demands, i.e., the demand for metallurgical alumina. The market demand for metallurgical alumina globally has maintained steady growth as a whole in recent years except 2009 (a fall affected by financial crisis). In 2010, the apparent consumption of metallurgical alumina worldwide approximated 81.42 million tons, rising 8.2% from a year earlier, while in 2011, the figure increased by just 3.7% year-on-year to around 84.45 million tons under the backdrop of the recovering global capacity of primary aluminum as well as the growing demand for metallurgical alumina.

Output and Apparent Consumption of Alumina in China, 2006-2011 (Unit: mln ton)



Source: ResearchInChina 《China Alumina Industry Report, 2010-2011》

The alumina industry of characterizes the followings:

The industry features rather high regional and industrial concentration: in 2011, the total capacity of major electrolytic aluminum manufacturers shared more than 80% of overall capacity nationwide. The production of alumina in China mainly concentrates in Shandong, Henan, Guangxi, Shanxi, Guizhou, Chongqing, Inner Mongolia, etc., of which Shandong and Henan accounted for 33.9% and 25.7% respectively in 2011.

Oversupply will continue in the short term: the supply of alumina is still in excess presently, plus the electrolytic aluminum production reduction caused by power rationing, the demand for alumina will further decrease. Compared with electrolytic aluminum, alumina production requires less electricity, so the manufacturers producing both electrolytic aluminum and alumina prefer to shut down some electrolytic aluminum production lines but keep the production of alumina to the greatest extent. In this sense, the sharp fall in output of alumina is out of the question, and the decrease of supply will be limited.

The net import presents a downward tendency: China has been the net importer in the import & export trade of alumina in recent years, mainly due to the growing demand for alumina raw materials from electrolytic aluminum capacity expansion at home. Along with the continuous expansion of alumina capacity in China and drastic improvement of self-sufficiency in alumina market, the import demand of alumina has weakened obviously and the alumina import and export trade deficit in China has taken on a declining trend. In 2011, the import of alumina in China hit 1.88 million tons, down 56.38% from the previous year.

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