



Global and China Aluminum Profile Industry Report, 2012

Sept. 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 China Nonferrous Metals Industry Association, National Bureau of Statistics of China and China Customs etc.

Abstract

Aluminum profile is a kind of aluminum extrusion materials, seen from the product output structure, it accounts for nearly 50% of the aluminum processing materials. Currently, China is the world's largest aluminum profile producer and consumer. During the period 2001-2008, its aluminum profile production grew at a CAGR of 25.16%, towering over the national economic growth rate over the corresponding period. In 2011, the production and consumption severally reached around 11.5 million tons and 10.8 million tons, up 15.0% and 11.3% YoY respectively.

Although China is the world's largest aluminum profile producer, compared with counterparts in Europe and the United States, Chinese aluminum profile enterprises are generally of small size, with low industrial concentration. Major manufacturers include Aluminum Corporation of China (CHINALCO), China Zhongwang Holdings Limited, Shandong Nanshan Aluminum Co., Ltd., Zhejiang Dongliang New Material Co., Ltd., Guangdong Xingfa Aluminium Co., Ltd., Jiangsu Asia-Pacific Light Alloy Technology Co., Ltd., Jilin Liyuan Aluminium Group Co., Ltd, Suzhou Lopsking Aluminum Co., Ltd. and Fujian Minfa Aluminum INC.

CHINALCO: It's the only large-scale aluminum manufacturing enterprise that embraces the exploration and mining of bauxite, coal and iron ore resources, as well as the processing, production, sales, technology research and development of alumina, primary aluminum and aluminum in China aluminum industry.

China Zhongwang Holdings Limited: It's the world's third largest, Asia and China's largest developer and manufacturer of industrial aluminum profile committed to the lightweight-oriented development of the transportation field. In the first half of 2012, its sales volume of industrial profile and architectural profile reached 270,066 tons and 16,044 tons, respectively.

Zhejiang Dongliang New Material Co., Ltd.: Architectural profile is the company's leading product, with production capacity of 80,000 tons and 13 newly-built extrusion production lines; once the new capacity is put into production, the total capacity of architectural profiles will jump from 80,000 tons to 130,000 tons.

Guangdong Xingfa Aluminium Co., Ltd.: As China's largest supplier of conductive aluminum profile for subway locomotive, it sold 54,500 tons of architectural profiles and 20,200 tons of industrial profiles in the first half of 2012.

Revenue and Gross Margin of Major Aluminum Profile

Manufacturers in China

Manufacturer	Revenue in H1 2012 (RMB mln)	Gross Margin in 2011	
		Industrial Aluminum Profile	Architectural Aluminum Profile
China Zhongwang Holdings Limited	6,877	22.4%	9.5%
Zhejiang Dongliang New Material	5,504	-	11.8%
Guangdong Xingfa Aluminium	1,516	12.8%	10.3%
Jiangsu Asia-Pacific Light Alloy Technology	831	10.1%	-
Jilin Liyuan Aluminium Group	772	23.8%	21.9%

Source: China Zhongwang Holdings Limited, Zhejiang Dongliang New Material, Guangdong Xingfa Aluminium, Jiangsu Asia-Pacific Light Alloy Technology, Jilin Liyuan Aluminium Group, ResearchInChina <Global and China Aluminum Profile Industry Report, 2012>

Jiangsu Asia-Pacific Light Alloy Technology Co., Ltd.: As China's leading supplier of automobile aluminum extrusion materials, it chiefly provides products to Shanghai Automotive Air Conditioning Co., Ltd., Zhejiang Sanhua Auto Parts Co., Ltd., Shanghai Behr Thermal System Co Ltd (SBTS), Shanghai Delphi Automotive Air-conditioning System Co., Ltd., etc.

Jilin Liyuan Aluminium Group Co., Ltd: Being one of the large-size aluminum profile producers in the Northeast region, the company produced 19,000 tons of architectural profiles and 29,000 tons of industrial profiles in 2011.

With respect to the gross margin, in general, industrial aluminum profile performs better than architectural aluminum profile, therefore, aluminum profile manufacturers have successively expanded capacity of the former in recent years. Meanwhile, the consumption ratio of industrial aluminum profiles in domestic market has also seen year-over-year increase. In 2011, China's architectural aluminum profile consumption rose 9.7% YoY to 7.18 million tons, and industrial profile consumption attained to 3.62 million tons, up 14.9% YoY. Industrial profile grew much faster than architectural profile in terms of output.

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