



**Global and China Aluminum Heat
Transfer Composites Industry Report,
2012-2015**

Nov. 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 Association of Automobile Manufacturers, and National Bureau of Statistics of China etc.

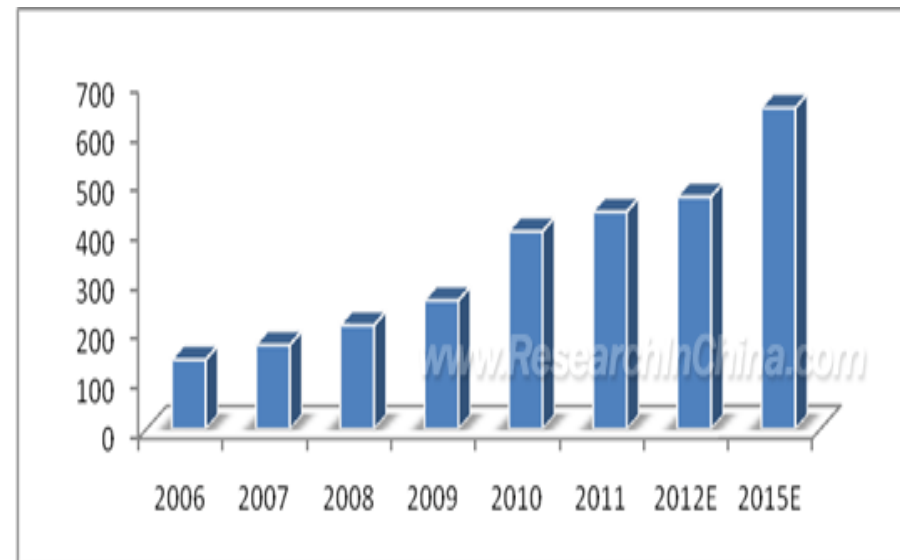
Abstract

Aluminum heat transfer composites are mainly used in automobiles, home appliances, heat exchange systems of machinery and equipment, and air-cooling systems of thermal power station. On a global basis, the aluminum heat transfer composites industry has been mature, and several large corporations from the United States, Europe, Japan, Canada and other countries have monopolized the global market, which maintains a balance between supply and demand. To further expand their growth room, these giants have carried out cross-border investments successively. China has become an investment hotspot with huge development potentials and a tremendous market size.

In recent years, with the fast-growing downstream sectors, the demand for aluminum heat transfer composites in China has kept increasing, some local firms has in succession tapped into such business, and foreign players have also taken the opportunity to expand capacity aggressively. As of 2011, the annual capacity of aluminum heat transfer composites in China reached 440,000 tons. In China, aluminum heat transfer composites find application chiefly in automotive heat exchangers, and low-end products account for a larger proportion with overcapacity as yet, while the capacity of

aluminum steel composite strips and other high-end products is limited with a huge supply gap. On the whole, Chinese aluminum heat transfer composites market is characterized by a structural imbalance.

Capacity of Aluminum Heat Transfer Composites in China, 2006-2015E
(Unit: kt/a)



Source: Shanghai Aluminum Trade Association;

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At present, China's aluminum rate of heat exchange systems of sedans and light-duty trucks reaches about 95%, and the market of aluminum heat transfer composites herein has been saturated. Whereas, the aluminum rate of heat exchange systems of heavy-duty trucks, new energy vehicles and construction machinery is still rather low; aluminum radiators have not been popular in the field of household appliances such as air conditioners, water heaters and refrigerators, showing huge potential demand for aluminum heat transfer composites. In the future, under the backdrop of energy conservation and emission reduction in China, aluminum heat transfer composites will be popularized in the above-mentioned fields, the demand for aluminum composite materials used in heavy-duty trucks, new energy automotive heat exchangers, HVAC, cooling radiators of thermal power stations will be jumbo, and these products will become investment hotspots.

This report not only expounds the development of global and China aluminum heat transfer composites industry but also highlights the aluminum heat transfer composites business of 7 foreign companies (Sapa, ALCOA, Wickedder, Norsk Hydro, Aleris, Novelis, Kobe Steel) and 16 Chinese peers (like Yinbang, Huaфон Aluminum, Sanyuan Aluminum).

Sapa is the world's largest producer of aluminum profiles, and also one of major manufacturers of automotive aluminum heat transfer composites (sheets, strips, foils) in the world. Sapa's Chinese subsidiary Sapa Heat Transfer (Shanghai) Ltd. mainly produces automotive heat transfer materials. In recent years, Sapa Shanghai has continuously expanded its production capacity; as of 2011, the company's capacity had hit 100,000 t/a.

Wickedder is the first European company that conducts the production of composite metals, as one of the world's largest steel strip suppliers. The company's EMS Division can produce a variety of composite metal materials. Currently, it is the world's largest producer of aluminum steel composite strips used in power stations, holding over 50% share in the global market.

Yinbang, as one of Chinese leaders in aluminum heat transfer composites, has in recent years continued to increase investment in scientific research and has successfully developed such high-value-added products as aluminum alloy composites and aluminum steel composite strips. In 2011, the total capacity of the company's all products amounted to 75,000 t/a.

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1 Overview of Aluminum Heat Transfer Composites

- 1.1 Introduction
- 1.2 Classification and Application
- 1.3 Industry Chain
- 1.4 Production Process

2 Status Quo of Global Aluminum Heat Transfer Composites Industry

- 2.1 Overview
- 2.2 Production
- 2.3 Demand
- 2.4 Market Competition
- Summary

3 Status Quo of China Aluminum Heat Transfer Composites Industry

- 3.1 Development Environment
 - 3.1.1 Policy Climate
 - 3.1.2 Industrial Environment
- 3.2 Production
- 3.3 Demand
 - 3.3.1 Automobile Industry
 - 3.3.2 Machinery and Equipment Industry
 - 3.3.3 Power Station Air-cooling System Industry
 - 3.3.4 Household Appliance Industry
- 3.4 Market Competition
- Summary

4 Global Major Companies

- 4.1 ALCOA
 - 4.1.1 Profile
 - 4.1.2 Operation
 - 4.1.3 Business of Aluminum Heat Transfer Composites
- 4.2 Wickedder
 - 4.2.1 Profile
 - 4.2.2 Business of Aluminum Heat Transfer Composites
 - 4.2.3 Business in China
- 4.3 Sapa Group
 - 4.3.1 Profile
 - 4.3.2 Operation
 - 4.3.3 Business of Aluminum Heat Transfer Composites
- 4.4 Norsk Hydro
 - 4.4.1 Profile
 - 4.4.2 Operation
 - 4.4.3 Business of Aluminum Heat Transfer Composites
- 4.5 Aleris
 - 4.5.1 Profile
 - 4.5.2 Operation
 - 4.5.3 Business of Aluminum Heat Transfer Composites
- 4.6 Novelis
 - 4.6.1 Profile
 - 4.6.2 Operation

- 4.6.3 Business of Aluminum Heat Transfer Composites
- 4.7 Kobe Steel
 - 4.7.1 Profile
 - 4.7.2 Operation
 - 4.7.3 Business of Aluminum Heat Transfer Composites
- Summary

5 Key Chinese Enterprises

- 5.1 Yinbang Clad Material Co.,Ltd.
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Gross Margin
 - 5.1.3 Production and Marketing
 - 5.1.4 Key Projects
- 5.2 Sapa Heat Transfer (Shanghai) Ltd
- 5.3 Alcoa Kunshan Aluminum Products Co., Ltd
- 5.4 Huaфон Aluminum Co.,Ltd
- 5.5 Weifang Sanyuan Aluminum Co.,Ltd
- 5.6 Nantong Hengxiu Aluminum Heat Transfer Material Co., Ltd
- 5.7 Jiangsu ALCHA Aluminium Co.,Ltd
- 5.8 Nantong Hua Te Aluminum Heat Transfer Co.,Ltd
- 5.9 Northeast Light Alloy Co., Ltd
- 5.10 Harbin Song Run Metal Products Co.,Ltd
- 5.11 Others
- Summary

- Structure and Properties of Aluminum Alloy Composites
- Structure of Aluminum-based Multi-metal Composites
- Industrial Chain of Aluminum-based Layered Metal Composites
- Global Output of Aluminum Heat Transfer Composites, 2006-2015E
- Global Demand for Aluminum Heat Transfer Composites, 2006-2015E
- Global Demand Structure of Aluminum Heat Transfer Composites (by Field) , 2006-2015E
- Revenue of World's Major Manufacturers of Aluminum Heat Transfer Composites, 2011
- Global Output of and Demand for Aluminum Heat Transfer Composites, 2006-2015E
- Policies on Aluminum Heat Transfer Composites Industry in China, 2006-2012
- China's Aluminum Output, 2006-2015E
- China's Output of Aluminum Rolled Materials (by Product), 2006-2015E
- China's Capacity of Aluminum Heat Transfer Composites, 2006-2015E
- China's Capacity Structure of Aluminum Heat Transfer Composites (by Product), 2006-2015E
- China's Demand for Aluminum Heat Transfer Composites, 2006-2015E
- China's Demand Structure of Aluminum Heat Transfer Composites, 2006-2015E
- Quantity of Aluminum Heat Transfer Composites Used in Automotive Parts
- Automobile Output & Ownership and Demand for Aluminum Alloy Composites in China, 2001-2015E
- Machinery & Equipment Output and Demand for Aluminum Heat Transfer Composites in China, 2010-2015E
- Newly Installed Capacity and Demand of Chinese Thermal Power Stations for Aluminum Heat Transfer Composites, 2011-2015E
- China's Air-conditioner Output and Demand for Aluminum Heat Transfer Composites, 2011-2015E
- Capacity of Top 10 Companies in China Aluminum Heat Transfer Composites Industry, 2012
- China's Capacity of and Demand for Aluminum Heat Transfer Composites, 2006-2015E
- Alcoa's Revenue and Net Income, 2008-2015E
- Alcoa's Revenue by Product and Region, 2011
- Wickedder's Subsidiaries and Businesses, 2012
- Maior Products and Applications of Wickedder's EMS Division. 2012

- Sapa's Sales Volume of Aluminum Products, 2007-2012
- Sapa's Revenue and EBIT, 2007-2011
- Business Distribution of Sapa's Heat Transfer Companies, 2012
- Hydro's Revenue and Net Income, 2008-2015E
- Hydro's Major Clients in Aluminum Heat Transfer Composites, 2012
- Aleris' Revenue and Net Income, 2008-2012
- Aleris' Major Clients and Competitors in Aluminum Heat Transfer Composites, 2012
- Novelis' Revenue and Net Income, FY2008-FY2013
- Revenue and Recurring Profit of Kobe Steel, FY2002-FY2011
- Revenue and Main Products of Major Global Manufacturers of Aluminum Heat Transfer Composites, 2011
- Yinbang's Revenue and Net Income, 2009-2015E
- Yinbang's Revenue (by Product), 2009-2011
- Yinbang's Revenue (by Region), 2009-2011
- Yinbang's Product Gross Margin, 2009-2011
- Output and Sales Volume of Yinbang's Main Products, 2009-2011
- Average Price of Yinbang's Main Products, 2008-2011
- Yinbang's Key Projects, 2012-2016
- Yinbang's R&D Costs and % of Total Revenue, 2009-2011
- Yinbang's R&D and Products, 2012
- Yinbang's Revenue from Top 5 Clients and % of Total Revenue, 2009-2011
- Yinbang's Procurement from Top 5 Suppliers and % of Total Procurement, 2009-2011
- Sapa's Capacity of Aluminum Heat Exchanger Materials, 1999-2013E
- Key Aluminum Heat Transfer Materials Projects of Huafon Aluminum, 2010-2012
- Sanyuan's Key Aluminum Projects, 2011-2013E
- Major Clients of Nantong Hengxiu, 2012
- ALCHA's Revenue and Net Income. 2008-2015E

- ALCHA's Revenue (by Product), 2008-2012
- ALCHA's Revenue (by Product), 2008-2012
- ALCHA's Product Gross Margin, 2008-2012
- ALCHA's Sales Volume of Aluminum Alloy Foils, 2010-2012
- Capacity of Aluminum Heat Transfer Composites of Nantong Hua Te, 2005-2013E
- Subsidiaries and Their Businesses of Northeast Light Alloy, 2012
- Capacity of Aluminum Alloy Composites of Zhongxing Aluminum, 2009-2015E
- Major Products and Applications of Guanyun Aluminum, 2012
- Capacity of Aluminum Heat Transfer Products of Yuanlong Aluminum, 2012
- Capacity and Products of Major Enterprises in China Aluminum Heat Transfer Composites Industry, 2012

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