

**Global and China Aluminum Alloy
Automotive Sheet Industry Report,
2012-2015**

Dec. 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.

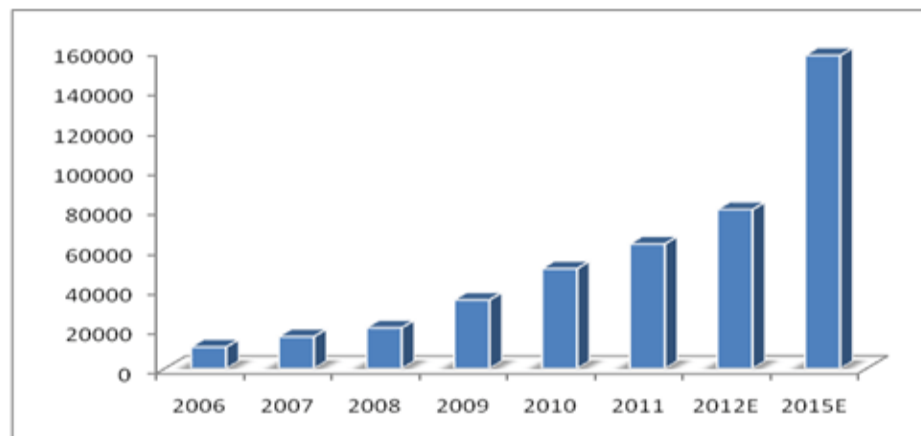
Abstract

Since the end of the 20th century, following the increasing requirements of all countries on vehicle energy saving and environment-friendly performance, a wave of vehicle lightweight has been staged around the globe. In terms of automotive materials, aluminum alloy, by virtue of its low density, corrosion resistance, high strength and other advantages, has become the first choice to replace traditional iron and steel materials. At present, among numerous automotive aluminum alloy products, aluminum alloy automotive sheet has emerged as an investment hotspot for global aluminum processing enterprises because of its huge growth potentials, and China with an enormous automobile market has turned into a hot investment area.

Aluminum alloy automotive sheet industry started late in China, plus being impeded by high-tech and capital barriers, the domestic capacity grows slowly. Over the same period, with the accelerated upgrading of automotive product structure as well as the rising proportion of medium- and high-end cars, the demand for aluminum alloy automotive sheets has embraced a significant increase and the market supply tends to be increasingly tight.

Currently, aluminum alloy automotive sheet products used in China's

Demand for Aluminum Alloy Automotive Sheet in China, 2006-2015 (Unit: ton)



Source: ResearchInChina *Global and China Aluminum Alloy Automotive Sheet Industry Report, 2012-2015*

automotive industry chiefly rely on imports; sheet materials used in Japanese cars are primarily imported from Japan; while for American and German cars, European and American companies like ALCOA, Norsk Hydro and Novelis act as the suppliers. Chinese aluminum alloy automotive sheet manufacturers, due to small yield, unstable quality, etc., are incapable of providing large-scale joint ventures with plate materials, but they serve local carmakers.

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This report not only sheds light on current development of global and China automotive aluminum alloy sheet industries, but also highlights the aluminum alloy automotive sheet business of eight foreign companies, i.e., ALCOA, Norsk Hydro, Aleris, Novelis, Kobe Steel, Constellium, Sumitomo Light Metal and Furukawa-sky as well as five Chinese peers e.g. Southwest Aluminum (Group) Co., Ltd, Weifang Sanyuan Aluminium Industry Co., Ltd, Northeast Light Alloy Co., Ltd..

As the world's largest manufacturer of aluminum alloy automotive sheet, Novelis is in possession of production bases in the United States, Canada, Germany, Switzerland and other countries. Having a bright prospect of the aluminum alloy automotive sheet market, the company has invested US\$600 million in reorganization and expansion of bases in New York, Korea, Malaysia since 2010, and the project is expected to be completed in 2013.

ALCOA is not only one of the world's largest aluminum product enterprises, but also one of the most important suppliers of aluminum alloy automotive sheet in North America, mainly catering to large automakers like GM and Ford. To expand capacity of aluminum alloy automotive sheet, the company has invested US\$300 million in reorganization and expansion of Davenport Works since 2010, which is

planned to be finished in 2013.

Being one of China's major producers of aluminum alloy automotive sheet, Xuzhou Caifa Aluminum Heat Transfer Co., Ltd. cooperated with China Automotive Engineering Research Institute Co. Ltd. (CAERI) in successful development of 6XXX series aluminum alloy automotive sheet in 2010. Through several years of improvement, the company's capacity of aluminum alloy automotive sheet has risen up to 10,000 tons/a, thus realizing bulk supply to domestic automotive companies.

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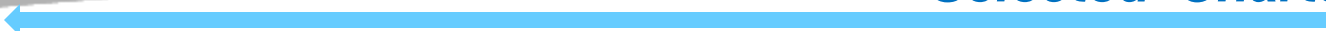
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