



**China Aluminum Rolling Industry Report,  
2012-2015**

**Feb. 2013**

## 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 Company Reports, and National Bureau of Statistics of China etc.

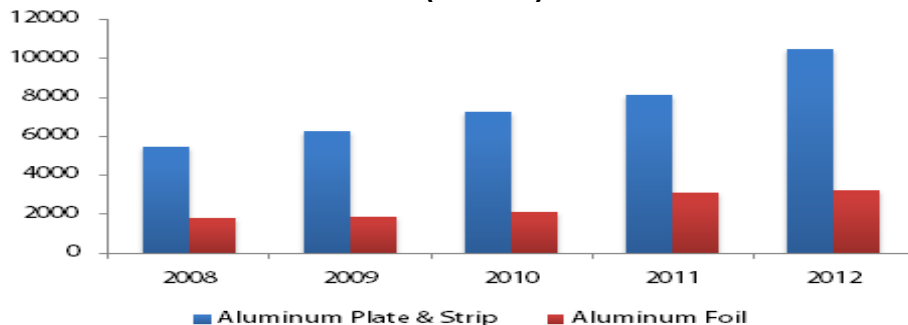
## Abstract

In 2011-2012, the investment in China aluminum rolling industry experienced the fastest growth. The investment concentrated in high precision aluminum sheets and strips, tank aluminum sheet, electronic foils, packaging foils and so forth. With the gradual realization of the above-mentioned investment projects, the proportion of high value-added products in the industry will rise significantly in the next few years.

In 2012, China's capacity of aluminum sheets and strips exceeded 10 million tons for the first time, and the annual output reached 7.8 million tons, with the capacity utilization rate of about 74.5%. The aluminum foil capacity hit 3.22 million tons/a, and the annual output amounted to 2.51 million tons, with the capacity utilization rate of roughly 78%.

### Capacity of Aluminum Sheets, Strips and Foils in China, 2008-2012

(Unit: kt)



Source: ALU, ResearchInChina *China Aluminum Rolling Industry Report, 2012-2015*

The report mainly analyzes the output, consumption, import and export volume of aluminum sheets, strips and foils in China, as well as upstream and downstream sectors. In addition, it highlights financial performance, product mix, investment and planning of 17 major players in the industry.

CHINALCO is the world's largest comprehensive aluminum processing enterprise. As of the end of 2012, its capacity of aluminum sheets, strips and foils had hit more than 1.5 million tons, which were operated by its seven subsidiaries. In 2012, due to the decreasing aluminum price worldwide and the rising aluminum price in China, the company suffered huge losses. However, the aluminum price is expected strongly to decline, so the losses will shrink in 2013, but the loss rate will still be high.

Nanshan Aluminium is one of major aluminum profile producers in China. In recent years, the company has increased investment in aluminum plates and strips. Now, cold-rolled aluminum products have become the company's third-largest business. In 2011, cold-rolled aluminum products generated the revenue of RMB5.173 billion. In 2012, the 400,000-ton aluminum cold rolled products project (mainly can materials) of the company was put into production; when the project is completely placed into production in 2014, the company's capacity of cold-rolled aluminum products will reach 600,000 tons/a.

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Dongyangguang Aluminum is one of major aluminum foil processing enterprises in China. It shows superiority in the fields of air-conditioning aluminum foils, electrode foils, electronic foils and other products. In recent years, the company has invested vigorously in the expansion of electrode capacity. In 2012, the company's etched foil capacity reached 27 million square meters, and the formed foil capacity equaled to about 38 million square meters. In 2013, with the completion of the projects under construction, the capacity of etched foils and formed foils will increase to 55 million square meters and 50 million square meters respectively.

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