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%.

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.
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.
1. Overview of Aluminum Rolling Industry
   1.1 Definition
   1.2 Industry Chain

2. Development of China Aluminum Smelting Industry
   2.1 Supply & Demand
   2.2 Market Price Trend

3. Development of China Aluminum Rolling Industry
   3.1 Policy Environment
   3.2 Industrial Characteristics
     3.2.1 Profit Model
     3.2.2 Entry Barrier
     3.2.3 Technique and Equipment Level
   3.3 Supply
     3.3.1 Aluminum Plate & Strip
     3.3.2 Aluminum Foil
   3.4 Import & Export
     3.4.1 Aluminum Plate & Strip
     3.4.2 Aluminum Foil
   3.5 Demand
     3.5.1 Consumption
     3.5.2 Consumption Pattern

4. Applications of Aluminum Plate, Strip & Foil in China
   4.1 Applications of Aluminum Plate & Strip
     4.1.1 Architecture
     4.1.2 Packaging
     4.1.3 Transportation
     4.1.4 Printing
   4.2 Applications of Aluminum Foil
     4.2.1 Heat Transfer
     4.2.2 Packaging
     4.2.3 Power Electronics

5. Key Aluminum Rolling Companies in China
   5.1 Aluminum Corporation of China Limited (CHALCO)
     5.1.1 Profile
     5.1.2 Major Equipments
     5.1.3 Operation
     5.1.4 Business Performance Prediction
   5.2 Southwest Aluminum (Group) Co., Ltd
     5.2.1 Profile
     5.2.2 Operation
   5.3 Henan Mingtai Al. Industrial Co., Ltd
     5.3.1 Profile
     5.3.2 Operation
     5.3.3 Revenue Structure
     5.3.4 Gross Margin
     5.3.5 Business Performance Prediction
   5.4 Asia Aluminum Group

5.4.1 Profile
5.4.2 Major Equipments
5.5 Zhejiang Dongliang New Material Co., Ltd
5.5.1 Profile
5.5.2 Operation
5.5.3 Revenue Structure
5.5.4 Gross Margin
5.5.5 Business Performance Prediction
5.6 Shandong Nanshan Aluminum Co., Ltd
5.6.1 Profile
5.6.2 Operation
5.6.3 Revenue Structure
5.6.4 Gross Margin
5.6.5 Business Performance Prediction
5.7 Yunnan Aluminum Co., Ltd
5.8 China Zhongwang Holdings Limited
5.9 Guangdong Dongyangguang Aluminum Co., Ltd
5.10 Zhenjiang Dingsheng Aluminum Stock Co., Ltd
5.11 Xiashun Holdings Limited
5.12 Jiangsu Alcha Aluminum Co., Ltd
5.13 Shandong Loften Aluminium Foil Co., Ltd
5.14 Xinjiang Joinworld Co., Ltd
5.15 Jiangsu United Technology Co., Ltd
5.16 Nantong South Light Electronic Material Co., Ltd
5.17 Guangxi Hezhou Guidong Electronic Technology Co., Ltd
• Model Products of Aluminum Rolling Industry
• Aluminum Rolling Industry Chain
• Output & YoY Growth Rate of Electrolytic Aluminum in China, 2008-2012
• Apparent Consumption & YoY Growth Rate of Electrolytic Aluminum in China, 2008-2012
• Spot Market Price of LME Aluminum, 2008-2013
• Spot Market Price of SHFE Aluminum in China, 2008-2013
• Major Industrial Policies on China Aluminum Rolling Industry
• (1+1) Type Hot Roughing-Finishing Rolling Production Lines Built and under Construction in China, 2012
• (1+3) Type Hot Continuous Rolling Production Lines Built in China, 2012
• (1+4) Type Hot Continuous Rolling Production Lines Built in China, 2012
• Aluminum Plate & Strip Capacity in China, 2008-2015E
• Aluminum Plate & Strip Output in China, 2008-2012
• Major Aluminum Sheet & Strip Cold Rolling Investment Projects(Capacity over 100,000 tons) in China, 2012
• Capacity of Aluminum Foil in China, 2008-2012
• Output of Aluminum Foil in China, 2008-2012
• Export Volume of Aluminum Plate & Strip in China, 2008-2012
• Import Volume of Aluminum Plate & Strip in China, 2008-2012
• Export Volume of Aluminum Foil in China, 2008-2012
• Import Volume of Aluminum Foil in China, 2008-2012
• Aluminum Plate & Strip Apparent Consumption in China, 2008-2012
• Aluminum Foil Apparent Consumption in China, 2008-2012
• Consumption Pattern of Aluminum Plate & Strip in China, 2010
• Consumption Pattern of Aluminum Foil in China, 2010
• Aluminum Plate & Strip Demand in China Building Industry, 2008-2015E
• Aluminum Plate & Strip Demand in China Packaging Industry, 2008-2015E
• Aluminum Plate & Strip Demand in China Transportation Industry, 2008-2015E
• Aluminum Plate & Strip Demand in China Printing Industry, 2008-2015E
• Aluminum Foil Demand in China Air-conditioner Industry, 2008-2015E
• Aluminum Foil Demand in China Packaging Industry, 2008-2015E
• Aluminum Foil Demand in China Power Electronics Industry, 2008-2015E
• Main Aluminum Fabrication Subsidiary Companies of CHALCO
• Revenue & Net Income of CHALCO, 2008-2012
• Revenue & Gross Margin of Aluminum Fabrication Business of CHALCO, 2008-2012
• Revenue and Net Income of CHALCO, 2012-2014
• Revenue of Southwest Aluminum (Group), 2009-2015E
• Revenue & Net Income of Henan Mingtai Al. Industrial Co., Ltd, 2008-2012
• Revenue of Henan Mingtai Al. Industrial Co., Ltd by Product, 2010-2012
• Revenue of Henan Mingtai Al. Industrial Co., Ltd by Region, 2010-2012
• Gross Margin of Henan Mingtai Al. Industrial Co., Ltd by Product, 2010-2012
• Revenue and Net Income of Henan Mingtai Al. Industrial Co., Ltd, 2012-2014E
• Revenue & Net Income of Zhejiang Dongliang New Material Co., Ltd., 2008-2012
• Revenue of Zhejiang Dongliang New Material Co., Ltd by Product, 2010-2012
• Revenue of Zhejiang Dongliang New Material Co., Ltd by Region, 2010-2012
• Gross Margin of Zhejiang Dongliang New Material Co., Ltd by Product, 2010-2012
• Revenue and Net Income of Zhejiang Dongliang New Material Co., Ltd, 2012-2014E
• Capacity of Main Products of Zhejiang Dongliang New Material, 2012
• Revenue & Net Income of Zhejiang Dongliang New Material Co., Ltd., 2008-2012
• Revenue of Shandong Nanshan Aluminum Co., Ltd by Product, 2011-2012
• Revenue of China Zhongwang Holdings Limited by Region, 2010-2012
• Gross Margin of China Zhongwang Holdings Limited by Product, 2011-2012
- Main Projects of Zhejiang Dongliang New Material Co., Ltd., 2012-2015E
- Revenue and Net Income of China Zhongwang Holdings Limited, 2012-2014E
- Capacity of Aluminum Products of Yunnan Aluminum Co. Ltd., 2012
- Revenue & Net Income of Yunnan Aluminum Co. Ltd., 2008-2012
- Revenue of Yunnan Aluminum Co., Ltd by Product, 2010-2012
- Revenue of Yunnan Aluminum Co., Ltd by Region, 2010-2012
- Gross Margin of Yunnan Aluminum Co., Ltd by Product, 2010-2012
- Ongoing Investment Projects of Yunnan Aluminum Co., Ltd., 2012
- Revenue and Net Income of Yunnan Aluminum Co., Ltd, 2012-2014E
- Sales Volume and ASP of Main Products of China Zhongwang Holdings Limited, 2010-2012
- Revenue of China Zhongwang Holdings Limited by Product, 2010-2012
- Revenue of China Zhongwang Holdings Limited by Region, 2010-2012
- Industry Chain of Dongyangguang Aluminum
- Revenue of Guangdong Dongyangguang Aluminum Co., Ltd by Product, 2010-2012
- Revenue of Guangdong Dongyangguang Aluminum Co., Ltd by Region, 2010-2012
- Gross Margin of Guangdong Dongyangguang Aluminum Co., Ltd by Product, 2010-2012
- Revenue and Net Income of Guangdong Dongyangguang Aluminum Co., Ltd, 2012-2014E
- Capacities of Major Production Subsidiaries of Zhenjiang Dingsheng Aluminum Stock Co., Ltd, 2012
- Performance Indicators of Thin Aluminum Foil Products of Xiashun Holdings Limited
- Performance Indicators of Aluminum Sheet & Strip of Xiashun Holdings Limited
- Revenue & Net Income of Jiangsu Alcha Aluminum, 2008-2012
- Revenue of Jiangsu Alcha Aluminum by Product, 2010-2012
- Revenue of Jiangsu Alcha Aluminum by Region, 2010-2012
• Gross Margin of Jiangsu Alcha Aluminum by Product, 2010-2012
• Revenue and Net Income of Jiangsu Alcha Aluminum, 2012-2014E
• Revenue & Net Income of Shandong LOFTEN Aluminum Foil Co., Ltd., 2008-2012
• Revenue of Shandong LOFTEN Aluminum Foil Co., Ltd by Product, 2010-2012
• Revenue of Shandong LOFTEN Aluminum Foil Co., Ltd by Region, 2010-2012
• Revenue and Net Income of Shandong LOFTEN Aluminum Foil Co., Ltd, 2012-2014E
• Industry Chain of Xinjiang Joinworld
• Revenue and Net Income of Xinjiang Joinworld, 2008-2012
• Revenue of Xinjiang Joinworld by Product, 2010-2012
• Revenue of Xinjiang Joinworld by Region, 2010-2012
• Gross Margin of Xinjiang Joinworld by Product, 2010-2012
• Electrode Foil Capacity and Output of Xinjiang Joinworld, 2011-2012
• Revenue and Net Income of Xinjiang Joinworld, 2012-2014E
• Subsidiaries of United Technology
• Operating Revenue of United Technology, 2008-2011
• Export Value of United Technology, 2008-2011
• Sales of Nantong South Light, 2008-2012
• Medium- and High-voltage Aluminum Foil Output of Guangxi Hezhou Guidong Electronic Technology Co., Ltd., 2005-2011
• Revenue and Gross Margin of Guangxi Hezhou Guidong Electronic Technology Co., Ltd, 2008-2012
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