



Global and China Alumina and Electrolytic Aluminum Industry Report, 2012-2013

Apr. 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.

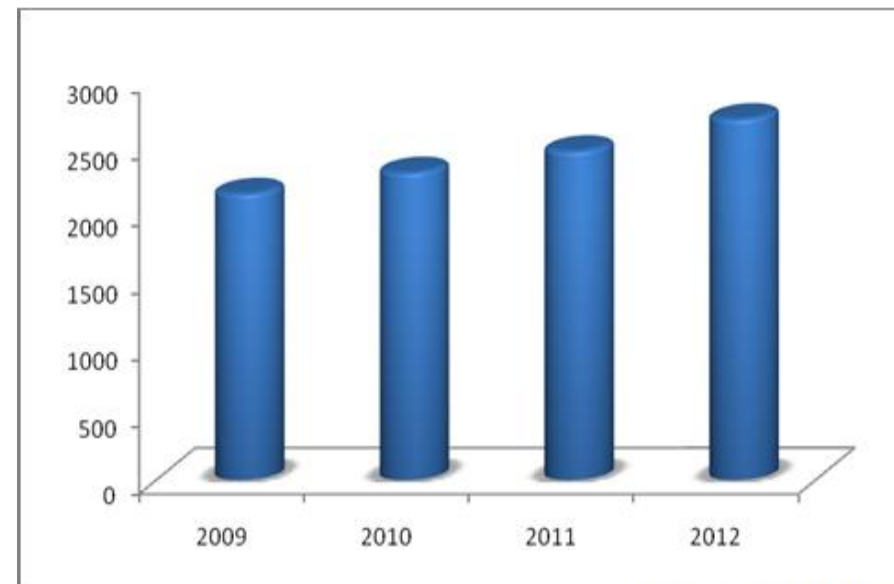
Abstract

China's bauxite features poor quality and low self-sufficiency rate of high-quality bauxite. With the gradual release of new alumina capacity and expansion of downstream smelting capacity in China, China has rapidly increased the import of bauxite. China's imports of bauxite mainly come from Indonesia, Australia and India, among which, Indonesia accounts for more than 70%.

As the electricity cost in western region is lower than that in the eastern region of China, the electrolytic aluminum capacity of the western region has continued to expand, but in the meantime, the high energy-consuming and high-cost electrolytic aluminum capacity of the eastern region hasn't been reduced in large scale, leading to serious overcapacity in China's electrolytic aluminum industry in 2012.

Other countries also encountered with the problem of overcapacity as China did.

China's Electrolytic Aluminum Capacity, 2009-2012 (Unit: Mt)



Source: ResearchInChina

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The rising bauxite and power costs as well as the sluggish LME prices have led to large-scale losses in the aluminum industry. In order to cope with the dual pressure from rising costs and sluggish prices, domestic and foreign enterprises have integrated upstream resources and expanded downstream products. In addition, giants like RUSAL have planned to cut the production moderately and eliminate backward production capacity.

Global and China Alumina and Electrolytic Aluminum Industry, 2012-2013 mainly analyzes the supply & demand and industry development trend of alumina and electrolytic aluminum in China and worldwide, and sheds light on the business performance and development planning of key enterprises in the global and Chinese aluminum industry.

As a giant in the global aluminum industry, RUSAL mainly produces primary aluminum, aluminum alloy, bauxite and alumina. RUSAL is a typical producer of upstream aluminum products with a relatively complete industry chain, and its own bauxite resources can meet 70% of its demand. Meanwhile, RUSAL continues to integrate upstream hydropower and thermal power resources. In 2012, RUSAL reduced the output of primary aluminum to 1.038 million tons, it also plans to eliminate 300 kilotons of primary aluminum capacity before 2013, and increase the output proportion of processed aluminum products to 39%.

In 2012, CHALCO increased the output of cost-competitive products, with the bauxite output of its own mines increased by 27.29% to 17.26 million tons and the alumina output by 8.08% to 11.9 million tons. To integrate upstream resources, CHALCO cooperated with an Indonesian company to exploit bauxite, and the project can achieve an annual capacity of 1.8 million tons upon completion. In January 2013, CHALCO cumulatively acquired 70.82% stake in Ningxia Electric Power Group, increasing another 16 million tons of coal production capacity per year.

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