Global and China Automotive Magnesium Alloy Industry Report, 2012-2015

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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

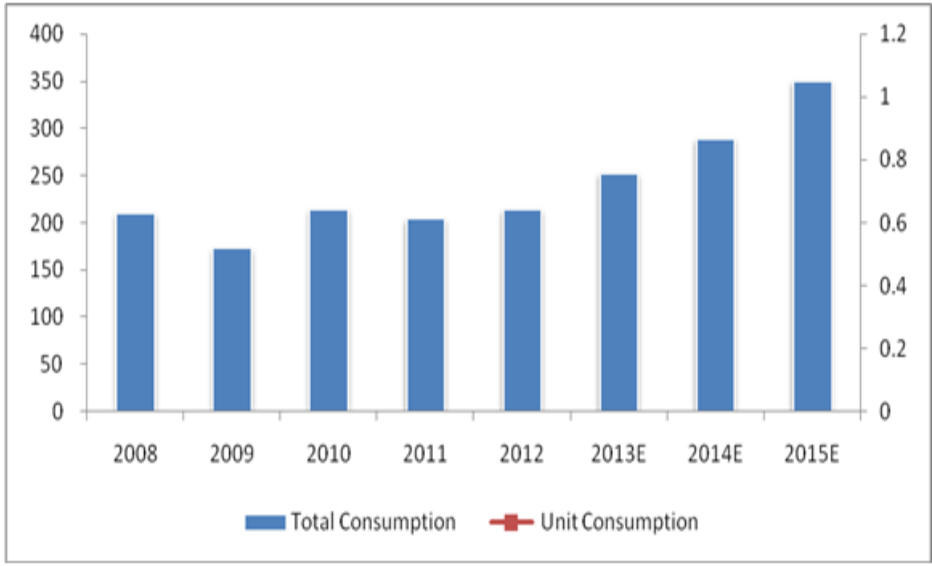
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Global automotive magnesium alloy industry in recent years is getting out of the shadow of the financial crisis and magnesium price skyrocketing, both production and consumption have been restored. Favorable factors such as the rapid recovery of American and Japanese automobile industry, the upgrading of product structure of China's automotive industry, international magnesium-aluminum price ratio back to less than 1.3, and the lightweight of vehicle all have provided impetus for the rebound of automotive magnesium alloy market. In 2012, the global automotive magnesium alloy consumption reached 214,000 tons, a year-on-year increase of 4.9%. During this period, China with rich magnesium resources and a huge automotive industry has become a hot spot for investments in the industry.

After 2008, affected by the increased tax rate of magnesium alloy exports as well as the rapid development of automobile industry, China's automotive magnesium alloy industry showed contrarian growth against the financial crisis worldwide, thus changing the previous situation that domestic magnesium alloy auto parts mainly relied on imports. In 2012 China's capacity of magnesium alloy auto parts reached 47,000 tons/a, and the demand over the corresponding period was 45,000 tons, a basic balance between supply and demand. However, as a great number of automotive magnesium alloy producers in China are the new entrants with weak technical reserves and products concentrated in the middle and low ends, high-end automotive magnesium alloys still depend on imports.

Global Automotive Magnesium Alloy Consumption, 2008-2015E (Unit: kt)



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

In China, following the structural upgrade of automobile industry, a step-by-step increase in the proportion of medium- and high-end cars, the clearer trend of automotive lightweight, the gradually improved production technology of automotive magnesium alloy, coupled with the effect of cancelling magnesium alloy export duties in January 2013 by China Customs, the demand for automotive magnesium alloy is expected to achieve sustained growth in future.

In addition to a detailed analysis on the development status of the global and China automotive magnesium alloy industry, this report also highlights the automotive magnesium alloy business of five multinational companies i.e. Meridian, STOLFIG, TAKATA, Autoliv and GF as well as 21 domestic companies e.g. Nanjing Yunhai Special Metals Co., Ltd., DongGuan EONTEC Co., Ltd. and Shanghai Meridian Magnesium Products Co., Ltd..

In response to the financial crisis, Meridian as the global automotive magnesium alloy industry leader has implemented strategic adjustment in industrial distribution since 2009, which has significantly improved capacity in key areas. In 2011, Meridian expanded operations in the UK and raised the capacity of local factories twice that of 2010. In May, 2012, the production capacity of Meridian's joint venture in Shanghai, China saw an increase of 20%; followed by another rise of 30% in early 2013.

Beijing Guangling Jinghua Science & Technology Co., Ltd. (also known as "Gonleer") is one of the major automotive magnesium alloy manufacturers in China. By 2004, the company has completed the whole industry chain layout from the upstream minerals to the downstream smelting and processing. In 2013, its products have covered five major areas i.e. magnesium and magnesium alloys, sacrificial anode, mechanical parts, sections and magnesium sheet, with annual capacity up to 50,000 tons, becoming a supplier of magnesium alloy auto parts for Volkswagen, Hyundai, Ford and other well-known carmakers.

Relying on its rich resources of magnesium and magnesium alloys, Nanjing Yunhai Special Metals Co., Ltd. has also achieved comprehensive coverage of the whole industry chain over the past few years. As a key supplier of magnesium alloy auto parts for Chery Automobile, the company reaches capacity of 3,000 tons/a automotive magnesium alloy in 2013.

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