



**Global and China Aluminum Profile
Industry Report, 2013-2016**

Oct. 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

Since 2012, due to China's economic slowdown, global economic stagnation and trade protection measures taken by Europe, U.S. and other developed countries on some aluminum products from China, the fast-growing Chinese aluminum processing industry has been confronted with some pressure. However, given the increasingly wider range of applications of aluminum profiles and especially driven by the trend of lightweight transportation, production and sales of aluminum profiles are growing.

In 2012, China's output of aluminum profiles was about 13.11 million tons, up 14.0% from a year earlier. Seen from product mix, industrial aluminum profile industry is developing rapidly, and the full-year consumption in 2012 reached 4.024 million tons, occupying 33.6% of total consumption, up 11.22% year-on-year

As the demand for industrial aluminum profiles keeps rising, listed companies are expanding their existing production lines or setting up new production lines. Among the current aluminum profile projects

being constructed by listed companies, industrial aluminum profile projects accounted for over 80%, the majority of which will be put into production before 2015

Main Projects under Construction in China Industrial Aluminum Profile Industry

Company	Project	Investment (RMB mln)	Time to be Put Into Production
China Zhongwang	225MN ultra-large extruder	-	After 2014
Shandong Nanshan Aluminium	220,000-ton rail profile project	3,119	At the end of 2013
Jiangsu Asia-Pacific Light Alloy Technology	80,000-ton high performance lightweight aluminum extrusion project	600	Jun.30, 2018
Jilin Liyuan Aluminium	11,000 t/a automotive, electromechanical and special aluminum profile project	1,500	2015

Source: ResearchInChina Global and China Aluminum Profile Industry Report, 2013-2016

In terms of the performance of listed companies in the first half of 2013, only Shandong Nanshan Aluminum Co.,Ltd. and Suzhou Lopsking Aluminum Co., Ltd. showed a decline in revenue, in which Nanshan Aluminum's revenue fell 2.15% compared with the same period of last year; and Suzhou Lopsking dropped by 1.28% year-on-year. Liyuan Aluminum is the company that presents the fastest growth in performance. In H1 2013, its revenue surged by 29.71% year-on-year.

Considering gross margin by product, the industrial aluminum profiles of China Zhongwang are with the highest gross margin, which was 28.0% in the first half of 2013; Liyuan Aluminum enjoys the highest gross margin in construction aluminum profiles, 23.9% in H1 2013.

Global and China Aluminum Profile Industry Report, 2013-2016 covers the followings:

- ✘ Development environment of Chinese aluminum profile industry, including industry policies and the extrusion industry development;
- ✘ Global aluminum profile consumption, involving the structure of demand and demand analysis;
- ✘ Chinese aluminum profile production, demand, and competition landscape, etc.
- ✘ Analysis on Chinese aluminum profile market segments, including demands of construction and industrial aluminum profiles and factors affecting the demands;
- ✘ Introduction to 8 world's leading aluminum companies, including operating performance, aluminum profile business as well as their development in China;
- ✘ Analysis of 9 listed Chinese aluminum profile companies, including their operation, aluminum profile production and sales volume, revenue structure, gross margin, major projects, performance prediction and so on;
- ✘ Introduction to 12 Chinese non-listed companies, including their development and aluminum profile business;
- ✘ Prediction of China's aluminum profile industry in the next three years, including macroeconomic forecasts and production and sales projections.

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