



**Global and China Aluminum Alloy Automotive
Sheet Industry Report, 2013-2016**

Mar. 2014

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

Aluminum alloy automotive sheet is a kind of light-weight auto sheet. Compared to steel auto body, aluminum auto body is around 40% lighter. Thus, it means massive reduction in fuel consumption in response to the call for energy conservation and emission reduction.

Catering to the tendency of light weight, energy saving and environmental protection in the automotive industry, aluminum alloy automotive sheet has been widely applied in high-end car models including Audi, Porsche, Benz, VW, BMW, Ferrari, Ford, GM, Honda and Jaguar (for car body, engine, hub, structural parts or even for all-aluminum car body).

In the meanwhile, a tidal wave of construction of aluminum alloy automotive sheet projects is under way across the globe. And the largest investors go to Novelis and ALCOA.

Novelis: it has established aluminum automotive sheet plants in Nachterstedt, Germany and Switzerland, and has agreed the Germany-based Goettingen plant to become its third base in Europe serving for the automotive market. In addition, new aluminum automotive sheet projects are also in progress in the US-based Oswego plant, Germany-based Nachterstedt plant and China-based Changzhou

plant. These projects are estimated to be completed by late 2015 with the targeted capacities hitting 900,000 tons.

ALCOA: it took the lead to lavish USD670 million to expand its aluminum automotive sheet capacities in Iowa-based Davenport plant, Tennessee-based aluminum rolling plant, and the rolling plant jointly invested by Saudi Arabia. By the end of 2013, the expansion of its Iowa-based Davenport plant, with the investment of USD300 million, had been completed; in Aug.2013, the Tennessee-based plant with the investment totaling USD275 million started construction, and is scheduled to be finished by mid-2015; in late 2014, its Saudi Arabia-based plant is to be put into production.

China aluminum alloy automotive sheet industry started late. Due to restraints in capital, technology and equipment, made-in-China aluminum alloy automotive sheets are mainly used for car hubs, doors, engines and other parts, but its application in car body market stays vacant. Although Southwest Aluminum (Group) has conducted R&D and trial production of car body aluminum alloy sheets since 2009, massive production still has not come true yet. The statistics show China's capacity of aluminum alloy automotive sheets was no more than 65,000 tons in 2013, far below Europe's and America's in this regard, but indicating huge market potential.

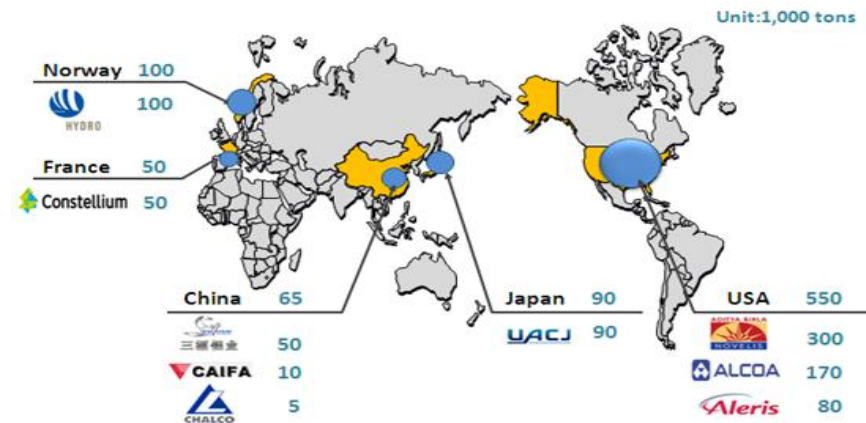
Upbeat about China's aluminum alloy automotive sheet market, world tycoons including Novelis, Kobe Steel, and Aleris have since 2013 built aluminum alloy automotive sheet production lines in China. In addition, domestic enterprises such as Weifang Sanyuan Aluminum, Southwest Aluminum (Group), Jiangsu CAIFA Aluminum, and China Zhongwang Holdings Limited exert persistent efforts to push forward the construction of aluminum alloy automotive sheet projects.

It is expected that, till 2016 China aluminum alloy automotive sheet industry will embrace tough competition from Novelis (China), Aleris (Zhenjiang), Kobe Steel (Tianjin), as well as home-grown rivals.

The report highlights the followings:

- . Capacity, demand, competition pattern and key projects of aluminum alloy worldwide;
- . Capacity, demand, competition pattern and key projects of aluminum alloy in China;
- . Business performance and aluminum alloy automotive sheet business of 7 producers worldwide including Novelis, ALCOA, and Constellium;
- . Business performance and aluminum alloy automotive sheet business of 6 Chinese producers including Weifang Sanyuan Aluminum, Northeast Light Alloy, and Southwest Aluminum(Group)

Capacity of Aluminum Alloy Automotive Sheet Worldwide by Enterprise,2013



Note: Statistics by corporate headquarters

Source: Global and China Aluminum Alloy Automotive Sheet Industry Report, 2013-2016; ResearchInChina

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