



**Global and China Aluminum Heat Transfer
Material 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 heat transfer composites are mainly used in heat exchange systems of automobiles, home appliances, machinery and equipment as well as air-cooling systems of thermal power stations. In 2013, the global output of aluminum heat transfer composites reached about 1.34 million tons, representing a year-on-year increase of 7.2%. Affected by the global economic downturn and China's economic slowdown, the downstream demand for machinery, equipment, power stations, home appliances, etc. declined, resulting in the sluggish demand for aluminum heat transfer composites, with a growth rate of only 6.9% in 2013.

China is a major consumer of aluminum heat transfer composites in the world. In 2013, the rapid growth of Chinese automobile market effectively boosted the demand for aluminum heat transfer composites to 510,600 tons. Driven by Chinese automotive light-weighting, machinery and equipment, household appliances and other industries, China's demand for aluminum heat transfer composites will continue to grow in the coming years.

The report focuses on the following aspects:

- ✘ Market supply and demand, market competition and development trends of the global aluminum heat transfer composites industry;
- ✘ Supply and demand, market competition patterns and development trends of China aluminum heat transfer composites industry;
- ✘ Demand of major Chinese aluminum heat transfer composites downstream industries;

- ✘ Operation and Chinese business of 7 global aluminum heat transfer composites manufacturing enterprises;
- ✘ Operation and development of 14 Chinese aluminum heat transfer composites manufacturing enterprises.

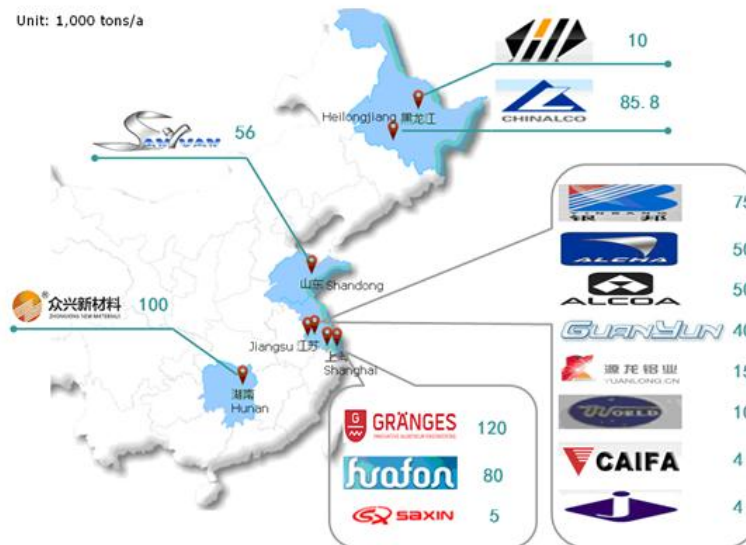
On a global basis, the aluminum heat transfer composites market is monopolized by several large corporations from the United States, Europe, Japan, Canada, etc. With the rapid development of China automobile industry, foreign enterprises have set up factories in China. Subject to technical constraints and other reasons, Chinese companies started late, only a few companies such as Yinbang, Huafon Group and Northeast Light Alloy develop stably.

Sapa is the world's largest producer of aluminum profiles, and also one of major manufacturers of automotive aluminum heat transfer composites (sheets, strips, foils) in the world. Impacted by business mergers and acquisitions, Sapa established a wholly owned subsidiary – Gr nges specializing in aluminum heat transfer composites. Thus, Sapa's Chinese subsidiary was renamed Gr nges Aluminum Heat Transfer (Shanghai) Co., Ltd. which is still engaged in the production of automotive heat transfer materials. In recent years, the subsidiary has continuously expanded its capacity; as of 2013, its capacity hit 120 kt/a.

Yinbang, as one of Chinese leaders in aluminum heat transfer composites, has increased investment in scientific research in recent years and successfully developed high-value-added products such as aluminum alloy composites and aluminum steel composite strips. In 2012, the company went public on A-share stock exchange and used the raised funds to build a laminated metal composites expansion project which is expected to go into operation in 2016 when the company's total aluminum heat transfer composites capacity may hit 200 kt/a.

Huafon Nikkei Aluminium Corporation produces aluminum alloy heat transfer composites (sheets, strips, foils). The company was formerly know as Huafon Aluminum Co., Ltd whose shares were bought by Nippon Light Metal Co., Ltd. in November 2012. Currently, the company is constructing Civil Air Conditioner Aluminum Alloy Composites Project Phase II with annual capacity of 50,000 tons; upon completion, the company's aluminum heat transfer composites capacity will attain 130 kt/a.

Capacity of Major Aluminum Heat Transfer Composites Enterprises in China, 2013



Source: Global and China Aluminum Heat Transfer Material Industry Report, 2013-2016, ResearchInChina

Note: The capacity of foreign-funded companies refers to the capacity of their subsidiaries in Chinese provinces.

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