



**China Aluminum Rolling 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.

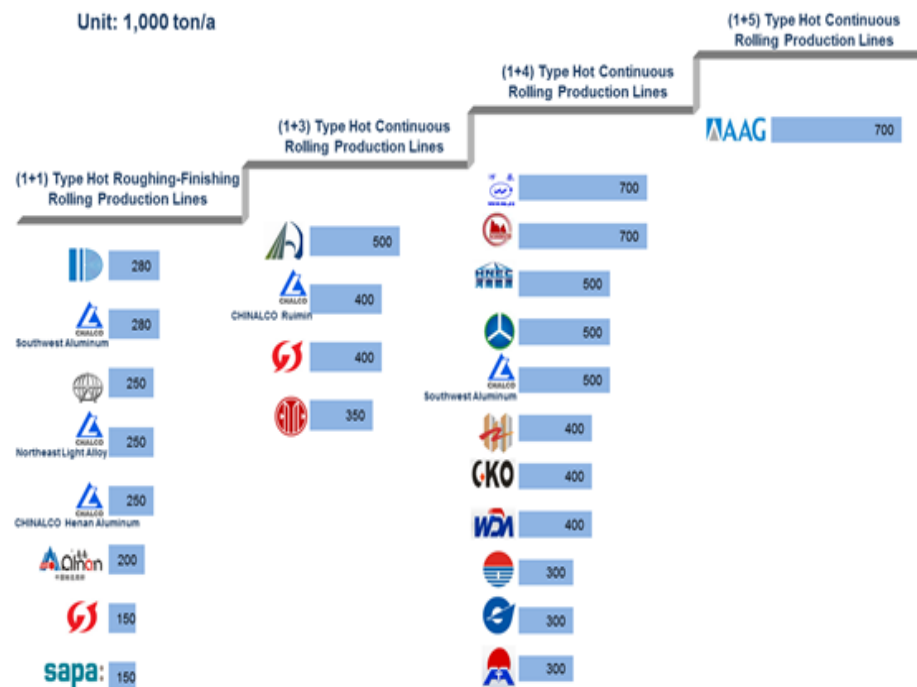
Abstract

As of late 2013, the capacity of aluminum foil in China, as the world's largest producer of aluminum sheets, strips and foils, hit 3.4 million tons/a; the capacity of aluminum cold rolling sheet/strip and aluminum hot rolling strip both reached 12.5 million tons/a. In particular, "1+4" hot continuous rolling played a large part of hot rolling strip production line, making up 43.6% of the total hot rolling capacity.

China also boasts the largest net exporter of aluminum rolling products in the world. In 2013, China's net export of aluminum sheet/strip and aluminum foil realized 1.214 million tons and 699,000 tons. Due to technical shortcomings, most of China's imports are high-precision aluminum sheet/strip products.

Driven by robust demand from downstream sectors like automobile, packaging and printing, China is seeing a rising demand for aluminum sheet/strip/foil. In 2013, China's apparent consumption of aluminum sheet/strip and aluminum foil grew by 8.4% and 4.9% from a year earlier, respectively. In 2014-2016, it is expected that the CAGRs of aluminum sheet/strip and aluminum foil will claim roughly 11.0% and 9.0%, respectively. The high-end aluminum sheet/strip/foil products such as aerospace-grade thick aluminum sheet, auto body aluminum sheet/strip, and high-voltage anode electron foil are projected to be a major driving force of the growth.

Capacity of Aluminum Hot Rolled Ingot Production Line in China, 2013



Source: ResearchInChina; China Aluminum Rolling Industry Report, 2013-2016

Confident about future aluminum sheet/strip/foil market, leading domestic aluminum rolling enterprises including Southwest Aluminum (Group) Co., Ltd, Shandong Nanshan Aluminum, Yunnan Aluminum, Loften Environmental Technology Co., Ltd., and Guangdong Dongyangguang Aluminum have poured more investment in expanding the capacity of aluminum rolling products.

Shandong Nanshan Aluminum is one of the industrial players involving in the whole industry chain relating to aluminum processing. In recent years, the company has stepped up efforts to expand the capacity of aluminum products. In 2011, it rolled out the 200,000 tons/a oversized high-performance special aluminum alloy material production project; in 2013, the company launched new 120,000 tons/a aluminum alloy castings and 14,000 tons/a large-scale high-precision die forging projects. These two projects are scheduled to be put into production in 2015, by when, the company's aluminum rolling capacity is expected to hit 2.22 million tons/a.

Guangdong Dongyangguang Aluminum is a major producer in China high-and mid-pressure formed foil, electron aluminum foil, hydrophilic foil markets and other market breakdown. In 2013, the company raised funds through no-public issuing A-share to build high-and mid-pressure formed foil production line project and high specific volume etched foil production line project. After being put into production, the company will see an increase in annual capacity of 21 million sq meters of formed foil and 35 million sq meters of etched foil.

The report highlights the following:

- ✘ Supply & demand and Prices in China aluminum smelting industry;
- ✘ Development strategy, production line distribution, supply and demand, import and export, competition pattern and development tendency of aluminum sheet/strip/foil in China aluminum rolling industry;
- ✘ Demand for aluminum sheet/strip/foil products in the downstream of building, packaging, printing, and electricity;
- ✘ Operation, aluminum rolling business and development strategy of 17 aluminum rolling key enterprises in China;

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