



Global and China Aluminum Profile Industry Report, 2014-2017

Dec. 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

Since 2014, China aluminum profiles industry has been featured by the followings:

China's output and consumption of aluminum profiles kept growth but saw a slowdown in growth rate.

In 2014, China was still the world's largest producer and consumer of aluminum profiles, accounting for 64.8%, 64.0% and 63.2% of global capacity, output and consumption, respectively. It is expected that output and consumption of aluminum profile in China will reach 18.43 million tons and 15 million tons in the year, up 13.98% and 7.45% from a year earlier, respectively, compared with year-on-year growth rate of 15.50% and 11.15% in 2013. A slowdown in industry growth was largely attributed to overall declining trend of aluminum prices and sluggish downstream demand since the financial crisis.

Share of industrial aluminum profiles consumption in China increased year after year.

In 2013, China consumed 4.69 million tons of industrial aluminum profiles, only 33.6% of total aluminum profiles consumption in the country, while architectural aluminum profiles took up 66%.

However, driven by light weight trend of communications and transportation, industrial aluminum profiles consumption has increased steadily, with its proportion to total consumption rising from 24.1% in 2001 to 33.6% in 2013.

Major listed aluminum profiles companies performed differently in 2014.

China Zhongwang Holdings Limited, the world's third largest, Asia's and China's largest industrial aluminum profiles manufacturer focusing on light weight in communications and transportation field, ranked the first with revenue of RMB12.311 billion in the first three quarters of 2014, up 12.60% against the previous year.

Four of seven companies in the table underwent year-on-year decline in revenue, mainly due to a drop in domestic aluminum prices, increase in operating expenses owing to commissioning of some companies' new projects, and depressed export demand. Besides China Zhongwang, Jiangsu Asia-Pacific Light Alloy Technology Co., Ltd. and Fujian Minfa Aluminum Co., Ltd. also saw year-on-year revenue growth, of which China Zhongwang and Jiangsu Asia-Pacific Light Alloy Technology primarily manufacture industrial aluminum profiles.

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Global and China Aluminum Profiles Industry Report, 2014-2017 focuses on the following:

- Development of China aluminum profiles industry, covering policy climate, global capacity and output, China's capacity and output, consumption and structure, regional competition pattern and enterprises' competitive landscape, import and export.
- Market segments of China aluminum profiles industry, including architectural aluminum profiles consumption and main areas of consumption, industrial aluminum profiles consumption, consumption structure, main areas of consumption and projects under construction of major listed companies;
- 7 major global aluminum profiles companies, containing operation, aluminum profiles business, layout in China and development planning;
- 9 major listed Chinese aluminum profiles companies and 12 unlisted ones, including operation, revenue structure, aluminum profiles output and sales volume, development planning;
- Summary of the Chinese aluminum profiles market in 2014 and forecast for its development over the next three years.

Revenue, YoY Changes and Aluminum Profiles Capacities of Major Listed Chinese Aluminum Profiles Companies, Q1-Q3 2014

Company	Revenue (RMB mln)	YoY changes	Aluminum profile capacity (kt)
China Zhongwang Holdings Limited	12,311	12.60%	1,000
Nanshan Aluminum	10,333	-7.63%	350
Zhejiang Dongliang New Material	8,511	-0.46%	130
Jiangsu Asia-Pacific Light Alloy Technology	1,647	12.70%	88
Jilin Liyuan Aluminum	1,421	-2.94%	70
Minfa Aluminum	913	11.40%	76.5
Suzhou Lopsking Aluminum	785	-0.87%	100

Source: Above Companies, ResearchInChina

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Preface

1. Overview of Aluminum Profiles Industry

- 1.1 Aluminum Resources
- 1.2 Aluminum Profiles
 - 1.2.1 Definition
 - 1.2.2 Classification
 - 1.2.3 Industry Chain

2. Development of Chinese Aluminum Profiles Industry

- 2.1 Industry Policy
- 2.2 Capacity and Output
- 2.3 Consumption
 - 2.3.1 Volume
 - 2.3.2 Structure
- 2.4 Competition
 - 2.4.1 Regional Competition
 - 2.4.2 Competition among Manufacturers
- 2.5 Import and Export
 - 2.5.1 Export
 - 2.5.2 Import

3. Market Segments of China Aluminum Profiles Industry

- 3.1 Architectural Aluminum Profile
 - 3.1.1 Consumption
 - 3.1.2 Aluminum Profiles for Doors and Windows

- 3.1.3 Aluminum Profiles for Building Templates
- 3.2 Industrial Aluminum Profile
 - 3.1.2 Consumption
 - 3.1.2 Consumption Structure
 - 3.1.3 Automotive Aluminum Profile
 - 3.1.4 Aluminum Profile for Train and Urban Rail Transit
 - 3.1.5 Aluminum Profile for PV
 - 3.1.6 Aluminum Profile for LED
 - 3.1.7 Aluminum Profile for Consumer Electronics
 - 3.1.8 Projects

4. Key Companies Worldwide

- 4.1 Sapa AS
 - 4.1.1 Profile
 - 4.1.2 Development Course
 - 4.1.3 Aluminum Profiles
 - 4.1.4 Operation
 - 4.1.5 Development in China
 - 4.1.6 SapaChalco Aluminum Products
- 4.2 Alcoa
 - 4.2.1 Profile
 - 4.2.2 Aluminum Profiles
 - 4.2.3 Operation
 - 4.2.4 Development in China
- 4.3 Midas Holding Limited
 - 4.3.1 Profile
 - 4.3.2 Operation

- 4.3.3 Aluminum Profiles
- 4.3.4 Key Projects
- 4.3.5 Aluminum Profiles Orders
- 4.4 Aleris International Inc.
 - 4.4.1 Profile
 - 4.4.2 Aluminum Profiles
 - 4.4.3 Operation
 - 4.4.4 Revenue Structure
 - 4.4.5 Dynamics
 - 4.4.6 Development in China
- 4.5 YKK AP
 - 4.5.1 Profile
 - 4.5.2 Operation
 - 4.5.3 Development in China
- 4.6 Press Metal
 - 4.6.1 Profile
 - 4.6.2 Development Course
 - 4.6.3 Development in China
- 4.7 Nippon Light Metal
 - 4.7.1 Profile
 - 4.7.2 Development Course
 - 4.7.3 Dynamics
 - 4.7.4 Aluminum Profiles Business in China

5. Key Listed Companies in China

- 5.1 China Zhongwang
 - 5.1.1 Profile
 - 5.1.2 Development Course

- 5.1.3 Output and Sales Volume
- 5.1.4 Operation
- 5.1.5 Revenue Structure
- 5.1.6 Gross Margin
- 5.1.7 Projects
- 5.1.8 Strategy
- 5.1.9 Performance Forecast
- 5.2 Shandong Nanshan Aluminum
- 5.2.1 Profile
- 5.2.2 Output and Sales Volume
- 5.2.3 Operation
- 5.2.4 Revenue Structure
- 5.2.5 Gross Margin
- 5.2.6 Projects
- 5.2.7 Clients
- 5.2.8 Competitive Advantages
- 5.2.9 Performance Forecast
- 5.3 Asia-Pacific Light Alloy Technology
- 5.3.1 Profile
- 5.3.2 Output and Sales Volume
- 5.3.3 Operation
- 5.3.4 Revenue Structure
- 5.3.5 Gross Margin
- 5.3.6 Projects
- 5.3.7 Extention in Downstream Sectors
- 5.3.8 Performance Forecast
- 5.4 Jilin Liyuan Aluminum

- 5.4.1 Profile
- 5.4.2 Output and Sales Volume
- 5.4.3 Operation
- 5.4.4 Revenue Structure
- 5.4.5 Gross Margin
- 5.4.6 Projects
- 5.4.7 Competitive Advantages
- 5.4.8 Performance Forecast
- 5.5 Zhejiang Dongliang New Material
- 5.5.1 Profile
- 5.5.2 Output and Sales Volume
- 5.5.3 Operation
- 5.5.4 Revenue Structure
- 5.5.5 Gross Margin
- 5.5.6 Performance Forecast
- 5.6 Suzhou Lopsking Aluminum
- 5.6.1 Profile
- 5.6.2 Output and Sales Volume
- 5.6.3 Operation
- 5.6.4 Revenue Structure
- 5.6.5 Gross Margin
- 5.6.6 Projects
- 5.6.7 Performance Forecast
- 5.7 Guangdong XingfaAluminium
- 5.7.1 Profile
- 5.7.2 Output and Sales Volume
- 5.7.3 Operation

- 5.7.4 Revenue Structure
- 5.7.5 Gross Margin
- 5.7.6 Performance Forecast
- 5.8 Fujian Minfa Aluminium
- 5.8.1 Profile
- 5.8.2 Output and Sales Volume
- 5.8.3 Operation

6. Non-Listed Companies in China

- 6.1 GuangDong HaoMei Aluminium
- 6.2 Guangdong Fenglu Aluminium
- 6.3 Fujian NanpingAluminium
- 6.4 GuangyaAluminium
- 6.5 Guangdong JMA Aluminium Profile Factory (Group) Co., Ltd.
- 6.6 Guangdong Huachang Aluminum Factory
- 6.7 Shandong Conglin Aluminum
- 6.8 Guangdong Weiye Aluminum Factory
- 6.9 Changsha Zhensheng Group
- 6.10 Qinghai Guoxin Aluminum Industry
- 6.11 TaishanKamkiuAluminiumExtrusion
- 6.12 AsiaAlum Group

7 Market Review and Development Forecast

- 7.1 Market Review
- 7.2 Development Forecast
 - 7.2.1 Development Trend
 - 7.2.2 Forecast of Output and Consumption

Selected Charts

- Aluminum Applications
- Aluminum Consumption Structure Worldwide
- Available Bauxite Reserves Worldwide
- Classification of Aluminum Materials
- Aluminum Profile Processing Flow
- Applications of Aluminum Profiles
- Industrial Chain of Aluminum Profile
- Laws and Regulations on Aluminum Profile Industry in China, 2007-2013
- Policies on Aluminum Profile Industry in China, 2006-2014
- Capacity and Output of Aluminum Profiles in China and Worldwide, 2010-2014
- Aluminum Profile Output and YoY Change in China, 2001-2014
- Consumption of Aluminum Profiles in China and Worldwide, 2010-2012
- Aluminum Profile Consumption and YoY Change in China, 2001-2014
- Consumption Structure of Aluminum Profiles in China and North America in 2013
- Contrasts between Architectural Aluminum Profile and Industrial Aluminum Profile
- Consumption Structure of Aluminum Profiles in China, 2001-2014E
- Distribution of Aluminum Profile Manufacturers in China
- Comparison among Aluminum Profile Manufacturers in China (by Revenue and Production Advantages)
- Major Listed Aluminum Profile Companies' Revenue and YoY Change in China, Q1-Q3, 2014
- Aluminum Profile Capacities of Major Chinese Listed Companies
- Gross Margin Comparison among Alumina Profile Manufacturers (by Product), H1 2014
- Export Volume and YoY Change of Aluminum Profile in China, 2008-2014
- Export Value and YoY Change of Aluminum Profile in China, 2008-2014
- Import Volume and YoY Change of Aluminum Profile in China, 2008-2014
- Import Value and YoY Change of Aluminum Profile in China, 2008-2014

- 
- Consumption of Architectural Aluminum Profile in China, 2001-2014
 - Consumption of Industrial Aluminum Profile in China, 2001-2014
 - Consumption Structure of Industrial Aluminum Profile (by Applications) in China, Europe, North America, and Japan in 2013
 - Energy Saving Policies in Different Countries to Promote Aluminium Application in Automobile Industry
 - Quarterly Shipment of Apple Series Products, 2010-2014
 - Industrial Aluminum Profile Projects under Construction in China
 - Equity Structure of Sapa
 - Introduction to Sapa
 - Development Course of Sapa
 - Sapa's Business Distribution
 - Sapa Operations in Brief
 - Production Process of Sapa
 - Selected Operating Indicators of Sapa
 - Introduction of Sapa Profiles China
 - Revenue Structure of Alcoa in 2013
 - Main Operating Indicators of Alcoa, 2013-2014
 - Main Operating Indicators of Engineered Products and Solutions Division of Alcoa, 2013-2014
 - Operating Indicators of Alcoa in China in 2013
 - Structure of Midas Holdings Ltd
 - Main Operating Indicators of Midas, 2009-2014
 - Total Revenue and Revenue from Aluminum Alloy Extruded Products of Midas, 2010-2014
 - Revenue Structure of Aluminium Alloy Extruded Products of Midas (by Applications), 2008-2014
 - Gross Margin of Aluminium Alloy Extruded Products of Midas, 2006-2014
 - Major Customers and Competitors of Extrusions Division of Aleris
 - Extrusions Business Distribution of Aleris

Selected Charts

- Revenue and Net Income of Aleris, 2007-2014
- Revenue Structure of Aleris (by Business) in 2013
- Revenue Structure of Aleris (by End-use) in 2013
- Revenue Structure of Aleris (by Business) in 2014
- Sales Volume of Aleris, 2013-2014
- Introduction of YKK
- Business Distribution of YKK Worldwide
- Business Scope of YKK
- Introduction to Architectural Products Division of YKK
- Revenue and Operating Income of YKK, FY2011-FY2014
- Revenue and Operating Income of YKK (by Business), FY2011-FY2014
- Revenue Structure of YKK (by Regions), FY2014
- Introduction of YKK in China
- Development Course of YKK in China
- Development Course of Building Materials Business of YKK in China
- Business Distribution of Press Metal Worldwide
- Main Operating Indicators of Press Metal
- Development Course of Press Metal
- Introduction of Nippon Light Metal
- Production Bases of Nippon Light Metal in Japan
- Development Course of Nippon Light Metal
- Overview of Nippon Light Metal's Electrolytic Aluminum Smelting Business
- Aluminum Profile Business of Nippon Light Metal in China
- Development Course of Nonfemet International (China-Canada-Japan) Aluminium Co., Ltd
- Development Course of China Zhongwang
- Aluminum Profile Capacity of China Zhongwang, 1996-2013

Selected Charts

- Business Distribution of China Zhongwang
- Sales Volume of China Zhongwang (by Products), 2006-2014
- Average Price of Products of China Zhongwang, 2012-2014
- Revenue and Gross Profit of China Zhongwang, 2008-2014
- Revenue Structure of China Zhongwang (by Business), 2008-2014
- Revenue Structure of China Zhongwang (by Regions), 2009-2014
- Gross Margin of China Zhongwang (by Products), 2006-2014
- Revenue and Gross Profit of China Zhongwang, 2014E-2017E
- Introduction of Aluminum Extrusion and Surface Treatment Equipment of Shandong Nanshan Aluminum
- Revenue and Net Income of Shandong Nanshan Aluminum, 2009-2014
- Revenue Structure of Shandong Nanshan Aluminum (by Products), 2011-2014
- Revenue Structure of Shandong Nanshan Aluminum (by Regions), 2009-2014
- Gross Margin of Aluminium and Aluminum Profiles of Shandong Nanshan Aluminum, 2007-2014
- Projects of Nanshan Aluminum(as of June 2014)
- Shandong Nanshan Aluminum's Revenue from Top 5 Clients and % of Total Revenue, 2014H1
- Production Capacity of Shandong Nanshan Aluminum
- Revenue and Net Income of Shandong Nanshan Aluminum, 2014E-2017E
- Capacity and Output of Asia-Pacific Light Alloy Technology, 2009-2013
- Output, Sales Volume and Inventory of Asia-Pacific Light Alloy Technology, 2011-2014
- Product Applications of Asia-Pacific Light Alloy Technology
- Revenue and Net Income of Asia-Pacific Light Alloy Technology, 2007-2014
- Revenue Structure of Asia-Pacific Light Alloy Technology (by Products), 2009-2014
- Major Customers of Asia-Pacific Light Alloy Technology
- Revenue Structure of Asia-Pacific Light Alloy Technology (by Regions), 2007-2014
- Gross Margin of Asia-Pacific Light Alloy Technology, 2009-2014
- Main Projects of Asia-Pacific Light Alloy Technology

Selected Charts

- Revenue and Net Income of Asia-Pacific Light Alloy Technology, 2014E-2017E
- Output, Sales Volume and Inventory of Jilin Liyuan Aluminum, 2011-2012
- Revenue and Net Income of Jilin Liyuan Aluminum, 2007-2014
- Revenue Structure of Jilin Liyuan Aluminum (by Products), 2007-2014
- Revenue Structure of Jilin Liyuan Aluminum (by Regions), 2010-2014
- Gross Margin of Jilin Liyuan Aluminum (by Products), 2010-2014
- Projects of Liyuan Aluminum
- Construction Projects with Additional Stock Issuance of Jilin Liyuan Aluminum
- Sales Volume and Treatment Charge of Jilin Liyuan Aluminum, 2014E-2015E
- Revenue and Net Income of Jilin Liyuan Aluminum, 2014E-2017E
- Output, Sales Volume and Inventory of Zhejiang Dongliang New Material, 2011-2013
- Revenue and Net Income of Zhejiang Dongliang New Material, 2006-2014
- Revenue Structure of Zhejiang Dongliang New Material by Products, 2008-2014
- Gross Margin of Zhejiang Dongliang New Material by Products, 2009-2014
- Revenue and Net Income of Zhejiang Dongliang New Material, 2014E-2017E
- Output, Sales Volume and Inventory of Lopsking Aluminum, 2011-2013
- Revenue and Net Income of Lopsking Aluminum, 2006-2014
- Revenue Structure of Lopsking Aluminum (by Products), 2010-2014
- Domestic Revenue Structure of Lopsking Aluminum (by Regions), 2010-2013
- Revenue Structure of Lopsking Aluminum (by Regions), 2010-2014
- Gross Margin of Lopsking Aluminum (by Products), 2009-2014
- Projects of Lopsking Aluminum
- Revenue and Net Income of Lopsking Aluminum, 2014E-2017E
- Sales Volume of XingfaAluminium, 2007-2014
- Average Selling Price of Products of Guangdong XingfaAluminium, 2011-2013
- Revenue and Net Income of Guangdong XingfaAluminium, 2005-2014

Selected Charts

- Revenue Structure of Guangdong XingfaAluminium (by Products), 2009-2014
- Revenue Breakdown of Guangdong XingfaAluminium (by Regions), 2012-2013
- Gross Margin of Guangdong XingfaAluminium (by Products), 2006-2014
- Revenue and Net Income of Guangdong XingfaAluminium, 2014E-2017E
- Capacity of Fujian MinfaAluminium, 2011-2014
- Output, Sales Volume and Inventory of Fujian MinfaAluminium, 2011-2013
- Revenue and Net Income of Fujian MinfaAluminium, 2008-2014
- Revenue Breakdown of Fujian MinfaAluminium (by Products), 2011-2014
- Revenue structure of Fujian MinfaAluminium (by Regions), 2010-2014
- Gross Margin of Fujian MinfaAluminium (by Products), 2012-2014
- Revenue and Net Income of Fujian MinfaAluminium, 2014E-2017E
- Production Process of GuangDongHaoMeiAluminium
- Global Marketing Network of Guangdong HaoMeiAluminium
- Development Course of Fujian NanpingAluminium
- Aluminum Profile Production Bases of Jianmei
- Sales Networking of Guangdong JianmeiAluminium Profile Factory
- Branch Companies and Capacities of Guangdong Huachang Aluminum Factory
- Development Course of Guangdong Huachang Aluminum Factory
- Production Lines of Guangdong Weiye Aluminum Factory
- Main Operating Data in Aluminum Profile Industry, 2013-2014
- Urbanization Rates in China, 1949-2013
- Urbanization Rates Contrast in the World
- Demand Increase in Chinese Industrial Aluminum Profile Industry in 2014
- Aluminum Profile Output in China, 2015E-2017E
- Aluminum Profile Consumption in China, 2015E-2017E
- Consumption Structure of Aluminum Profile in China, 2014E-2017E

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