



Global and China Aluminum Heat Transfer Composites Industry Report, 2014-2017

Mar. 2015

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.




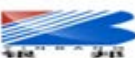




Abstract

Aluminum heat transfer composites (aluminum sheet, strip, and foil, etc.) are mainly used in heat exchange systems of automobiles, home appliances, and machinery and equipment as well as air-cooling systems of thermal power stations. Fuelled by the downstream sectors, the global output of aluminum heat transfer composites presented an AAGR of 6.1% during 2006-2014, and reached 1.38 million tons in 2014, up 4.5% year on year, a drop of 1.1 percentage points from 2013.

As one of the world's major consumers of aluminum heat transfer composites, China had a demand of approximately 591.9 kt in 2014, which was mainly attributed to the growth in demand from industries like automotive light weight as well as machinery and equipment. It is predicated that by 2017 China's demand for aluminum heat transfer composites will reach 850 kt.

At present, aluminum heat transfer composites manufacturers in China are mainly the foreign-funded companies or joint-ventures, which contributed more than 60% of the total capacity in China. By contrast, the Chinese enterprises, restricted by some factors like technology, have a small scale, thereby making them less competitive.

Aluminum Heat Transfer Production Capacity of Major Chinese Manufacturers, 2014

Company	Production Bases	Capacity(Kt/a)
 Haofo	Shanghai	130
 ARITYA BIRLA NOVELS	Changzhou	120
 GRANGES	Shanghai	120
	Wuxi	75
	Weifang	56
 CHINALCO Southwest Aluminum	Chongqing	50
 ALCOA	Kunshan	50
	Changshu	50

Source: Global and China Aluminum Heat Transfer Material Industry Report, 2014-2017; ResearchInChina

Gr?nges, Orkla's wholly-owned subsidiary that specializes in aluminum heat transfer composites business, now has achieved the capacity of 210 kt/a aluminum heat transfer composites. Gr?nges Aluminum Heat Transfer (Shanghai) Co., Ltd., a production base of Gr?nges in China, has the annual capacity of 120kt; in future, the company will plan to construct its second factory in China.

Novelis is a major aluminum heat transfer composites manufacturer in the United States. In October 2014, the company's first automotive aluminum heat treatment manufactory in China was completed and put into operation, with its capacity of 120 kt/a.

Huafon Nikkei, a Sino-Japanese joint venture, is so far the largest aluminum heat transfer composites manufacturer by capacity in China. In late 2014, the company's 50 kt/a civilair-conditioning aluminum alloy composites project (phase II) went into operation, which helped raise its total capacity of aluminum heat transfer composites to 130 kt/a.

As the largest aluminum-based multi-metal composites manufacturer in China, Yinbang boasts the capacity of 20 kt/a aluminum-based multi-metal composites. The company's 200 kt/a aluminum-based laminated metal composites expansion project will be put into production in September 2015, when its aluminum-based multi-metal composites capacity will amount to 50 kt/a.

The report is primarily concerned with the following:

- Market supply & demand and competitive landscape, etc. of the global aluminum heat transfer composites industry;
- Policies about development, supply and demand, competitive landscape, etc. of China aluminum heat transfer composites industry;
- Main downstream demand for China's aluminum heat transfer composites;
- Operation, aluminum heat transfer composites business, and development in China, etc. of 7 global aluminum heat transfer composites manufacturers;
- Operation, aluminum heat transfer composites business, and development, etc. of 14 Chinese aluminum heat transfer composites manufacturers;
- Development prospects, etc. of global and China aluminum heat transfer composites industry in 2015-2017.

1 Overview of Aluminum Heat Transfer Composites

- 1.1 Definition
- 1.2 Classification
- 1.3 Industry Chain
- 1.4 Production Technology

2 Status Quo of Global Aluminum Heat Transfer Composites Industry

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- 2.4 Competition among Companies

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