Global and China Aluminum Alloy Automotive Sheet Industry Report, 2014-2017

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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

In recent years, driven by energy conservation and emissions reduction and improvement of fuel efficiency, auto industry has been required to develop towards an increasingly lightweight trend. A great upsurge in substitution of aluminum alloy automotive sheet for the traditional sheet materials like steel products has been gradually on the rise.

At present, automotive covering parts including engine hood and luggage-boot lid mostly adopt aluminum sheets. Meanwhile, more and more auto markers developed all-aluminum car bodies and applied then in, say, Audi A2 / A8 R8, Range Rover, BMW Z8, Jaguar XJ/XK/XE, Tesla Model S, Ford F-150, Honda NSX, etc.

To meet the increasing market demand, some international aluminum giants such as Novelis, Kobe Steel, Constellium, Aleris, and ALCOA have expanded the production of aluminum alloy automotive sheet and are involved in auto markers' development of aluminum alloy car body.

By contrast, restricted by high threshold in technological development, China has presented a gap in production of aluminum alloy automotive sheet, especially that for car body. At the end of 2009, however, Southwest Aluminum constructed the first car body aluminum alloy sheet production line in China, and achieved small-batch trial production. Nevertheless, no domestic company can systematically grasp the technologies for mass producing aluminum alloy automotive sheet, let alone the application in car body with the independent brands.

China, though the world's largest car producer, has a substantial gap with international markets in aluminum alloy automotive sheet, a situation that reflects that the country has a great market potential. In addition, China required that by 2020 the average fuel consumption will fall to 5.0 liters / 100 km, which will further stimulate the growth of its aluminum alloy automotive sheet market. It is projected that China's growth in the demand for aluminum alloy automotive sheet will stand at over 20% in 2015-2020.

The report highlights the followings:

➢Market supply & demand and enterprise pattern of global aluminum alloy automotive sheet as well as the development of Japan, the United States, and Europe.

➢Policies, market supply & demand, enterprise pattern, key projects, etc. of aluminum alloy automotive sheet in China;

➢Operation, aluminum alloy automotive sheet business, key projects, etc. of 7 global and 7 Chinese enterprises.

Capacity and Expansion Plan of Major Global Aluminum Alloy Automotive Sheet Manufacturers, 2014

Manufacturer	Capacity (kt)	Expansion plan
Novelis	50	In December 2013, the company invested USD205 million to further expand its global automotive aluminum capacity to 900,000 tons per year.
Alcoa	22	In January 2014, Alcoa invested USD300 million on expansion at its Davenport, Iowa facility dedicated to supplying aluminum sheet products to the automotive industry. Besides, Alcoa added automotive aluminum capacity in Tennessee plant, which was to be completed in mid-2015.
Aleris	11	In September 2014,the company announced to invest USD350 million to upgrade capabilities at its aluminum rolling mill in Lewisport, Kentucky. When the project is completed, it will provide North America with automotive aluminum sheet for the first time.
UACJ	10	In May 2014, the company, together with Constellium, jointly invested USD150 million to establish a joint venture in North America. It will have an initial capacity of 100,000 tons per year in an effort to meet the capacity of automotive body aluminum sheet in North America.
Constellium	9	In January 2014, Constellium invested EUR200 million in BIW capacity in Europe. In October, the company announced its planned investment of $750 million by 2022 to create more than half-a-billion pounds of new auto sheet capacity.
Hydro	5	In February 2014, the company invested EUR130 million to add a new production line in a rolling plant in Germany to raise car body aluminum production capacity to 200,000 tons per year.
Kobelco		In December 2013, the company invested RMB1.36 billion to establish Kobelco Automotive Aluminum Rolled Products (China) Co., Ltd. With a 100,000 tons/a design capacity, the company is expected to go into operation in 2016; in May 2014, the company announced that it would, together with Toyota Tsusho, establish a automobile aluminum plate joint venture in the United States.

Source: *Global and China Aluminum Alloy Automotive Sheet Report, 2014-2017* complied by ResearchInChina

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