



**Global and China Aluminum Alloy
Automotive Sheet Industry Report,
2016-2020**

Mar. 2016

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, emission reduction and improvement of fuel efficiency, the automobile industry has been required to develop towards an increasingly lightweight trend. Automakers prefer to replace steel with aluminum.

Currently, aluminum sheet is mainly used in car doors, hoods, trunk lids and other parts. Meanwhile, a growing number of carmakers have been involved in the development and application of aluminum for car body over recent years, like the most typical Ford F-150.

In the world's major automotive aluminum sheet production and consumption markets -- Europe, the United States and Japan, the demand for automotive aluminum sheet exceeded 1 million tons in 2015, and is expected to hit about 1.7 million tons by 2020.

To seize the market, international aluminum giants Novelis, Kobe Steel, Constellium, Aleris, ALCOA, etc. have increased investment and newly built/expanded aluminum alloy automotive sheet projects in North America, Europe, China and other regions, wherein Novelis performs strikingly. By the end of 2015, Novelis had boasted worldwide capacity of automotive aluminum sheet up to 900,000 tons, including 400,000 tons in North America, 350,000 tons in Europe and 120,000 tons in China.

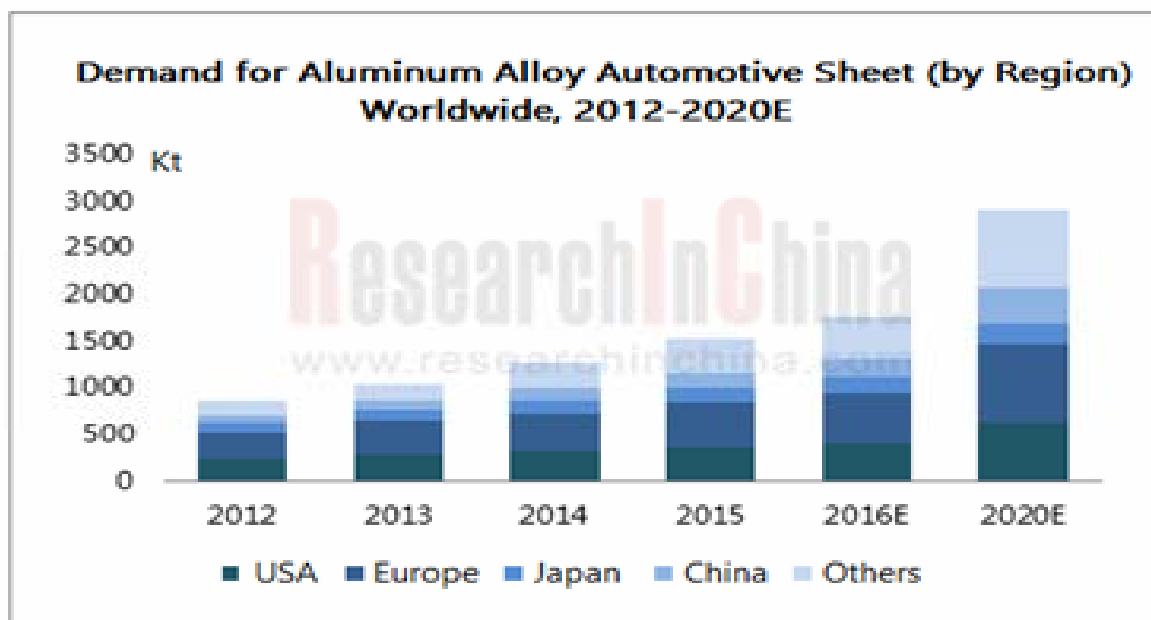
In addition, American Specialty Alloys also plans to invest USD12 billion in building the world's largest automotive aluminum sheet factory in the United States with the planned capacity of 600,000 tons/a. The first phase will be completed in late 2016, and the production goal will be fulfilled in 2017.

Subject to technical restrictions, China has been unable to conduct mass production of aluminum alloy automotive sheet, especially the one used for car body. In order to meet China's huge demand, local producers represented by Southwest Aluminum and Nanshan Aluminum have enhanced R & D and production of automotive aluminum sheet.

Southwest Aluminum succeeded in the trial production of aluminum alloy sheet -- 6016 aluminum alloy sheet suitable for automotive cover outer plate in August 2015. Mass production will be accomplished in 2016.

Nanshan Aluminum completed R & D of 5182-O automotive inner plate and 6016-T4P automotive outer plate in July 2015. Its 200,000 tons/a super-size high-performance special aluminum alloy production line (including 80kt / a medium and heavy plate and 120kt / a thin plate and strip) went into operation in 2015.

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The report highlights the followings:

- Supply & demand and enterprise pattern of global aluminum alloy automotive sheet market as well as the development in Japan, the United States, and Europe.
- Policies, supply & demand, enterprise pattern, key projects, etc. of aluminum alloy automotive sheet market in China;
- Global and Chinese automotive markets and use of aluminum;
- Operation, aluminum alloy automotive sheet business, key projects, etc. of 8 global and 10 Chinese companies.

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