

Global and China Aluminum Rolling (Aluminum Sheets, Strips and Foils)Industry Report, 2016-2020

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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 costeffective 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.

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### Abstract

Aluminum rolled products are primarily used in packaging, transportation and construction sectors. Global consumption of aluminum rolled products amounted to 23.8 million tons in 2015, up 5.1% from a year ago and a 1.5 percentage points slowdown from 2014. Packaging industry took the largest proportion of aluminum rolled products consumption (41%), followed by the transportation sector (23%).

It is projected that global consumption of aluminum rolled products will hit 30 million tons in 2020 at a CAGR of around 5% with the transportation likely surpassing packaging to become the largest application market of aluminum rolling.

China, as the world's most important aluminum processing & consumption base, produced 10.70 million tons of aluminum sheets & strips and 2.665 million tons of aluminum foils in 2015, a year-on-year rise of 8.5% and 0.6%, respectively. The output of aluminum sheets & strips and foils is expected to maintain a pace of about 7% and 5% during 2016-2020, separately.

Packaging and transportation are the largest two sectors for aluminum rolled products in China, making up 17% and 15% in 2015, respectively. Thanks to rapid growth in demand from automobile, MU (Multiple Units), urban rail subway, and airplane markets, the transportation will generate the largest demand for aluminum rolled products over the next four years with its share increasing to 21%.

The world's major producers of aluminum rolled products are Novelis, Alcoa, Furuk/SLM/TAA, Hydro, Aleris and Constellium, holding a combined market share of 40% (by sales volume) in 2015, of which Novelis occupied the largest proportion (14%), followed by Alcoa.

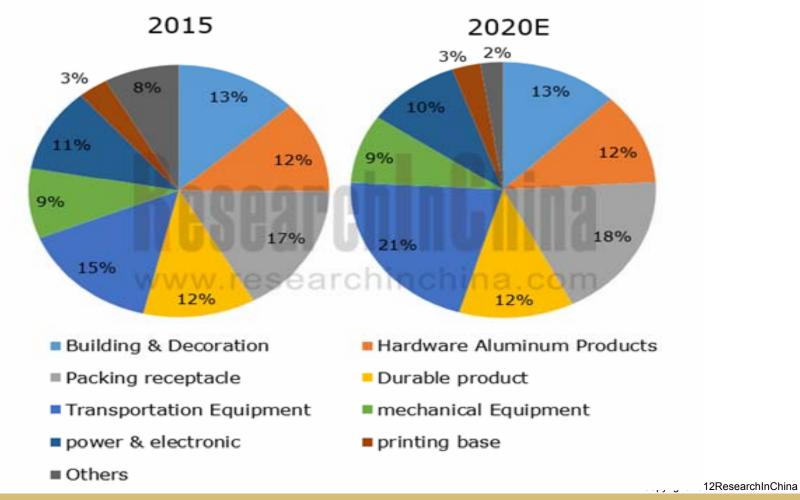
Due to technical constraints, Chinese producers of aluminum rolled products focus mainly on blank and mid- to lower range products markets, compared with predominance of foreign players in high-end aluminum sheets/strips market. Domestic enterprises, including Shandong Nanshan Aluminium Co., Ltd., Jiangsu Dingsheng New Energy Materials, Zhejiang Dongliang New Material, Henan Mingtai Al. Industrial, Shandong Weiqiao Aluminum & Electricity, and Tianjin Zhongwang Aluminium Industry, have strengthened their presence in high-end aluminum sheets & strips and foils like automotive aluminum sheets and aerospace aluminum sheet in recent years.

**Novelis:** the world's largest producer of aluminum rolled products; production bases across 11 countries; the first factory put into production in 2014 in China has annual capacity of 120,000 t/a automotive aluminum sheets.

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#### Downstream Consumption Pattern of Aluminum Rolling in China, 2015&2020





Aleris: the world's third largest producer of aluminum rolled products with a market share of roughly 4% in 2015. Phase I of Zhenjiang-based production base in China went into operation in 2013 with capacity of 25,000 t/a aerospace aluminum sheets, and Phase II being built with annual capacity of 100,000-ton high-end automotive aluminum alloy sheet (including 80,000-ton automotive body sheets) is expected to start production in early 2017.

**Shandong Nanshan Aluminum:** a core producer of aluminum rolled products in China with a market share of around 9.6% (by sales volume). The projects under construction include 200,000 t/a ultra-large high-performance specialty aluminum alloy production line (mainly aerospace and automotive aluminum sheets) and 40,000 t/a high-precision and multi-purpose aluminum foil production line.

**Jiangsu Dingsheng New Energy Materials:** a key aluminum foil enterprise in China with production capacity of 1.185 million t/a. The company has 7 aluminum sheet/strip/foil projects under construction in 2016, and will add capacity of 1.85 million t/a when all these projects go into operation.

Global and China Aluminum Rolling (Aluminum Sheets, Strips and Foils) Industry Report, 2016-2020 highlights the followings:

- > Global and China's primary aluminum and aluminum processing industries (market supply & demand, prices, import & export, etc.);
- > Global aluminum rolling (market demand, product structure, regional structure, etc.);
- > Aluminum sheets/strips and foils in China (policies, production lines, market supply & demand, import & export, competitive landscape, etc.);
- > Demand from key downstream sectors including construction, packaging, automobile, high-speed rail, subway, electric power, etc.;
- > 8 global aluminum rolling enterprises (operation, development in China, etc.);
- > 20 key Chinese aluminum rolling enterprises (operation, development strategy, etc.);
- > Aluminum rolling business in the world and China during 2016-2020.

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