Global and China Aluminum Alloy Automotive Sheet Industry Report, 2019-2025

Sep. 2019

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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

Global automobile sales reach at least 90 million units annually as people live a better life over recent years. A combination of factors like environment pollution, fuel economy and longer new energy vehicle range leads to a trend that automobiles are bound to be lightweight, which directly fuels demand for lightweight materials, especially aluminum alloy automotive sheets.

Global demand for aluminum alloy automotive sheet was on the rise between 2010 and 2018, at a CAGR of 16.6%. Europe, Americas and Japan, the major producers and consumers of aluminum alloy automotive sheets in the world, collectively occupied more than 50% of the global total demand. In this case, aluminum alloy automotive sheet companies worldwide raced to lavish more in capacity expansion to answer the downstream needs. By the end of 2018, global aluminum alloy automotive sheet capacity had surged by 24.1% on an annualized basis to 3.4 million tons a year, and will continue to grow in the forthcoming years, expectedly hitting 5.3 million tons in 2025.

As a fast-growing market of aluminum alloy automotive sheet across the globe, China has seen a higher share and a faster speed in its application of the material, which was driven by automotive lightweight trend, a result of both required reduction in fuel consumption and emission, and longer electric vehicle range. Using aluminum alloy sheets is a boon for automobile sales, which invigorates need for automotive aluminum materials.

The huge market potential is an enticement to Novelis, Kobelco, and Aleris and their kind to invest aluminum alloy automotive sheet projects in China. Chinese companies including Shandong Nanshan Aluminium Co., Ltd., Tianjin Zhongwang Aluminium Co., Ltd., Alnan Aluminium Co., Ltd., Weifang Sanyuan Aluminum Industry Co., Ltd., Southwest Aluminum (Group) Co., Ltd. and Henan Mingtai Aluminum Industry Co., Ltd., spend more on research and development of aluminum automotive sheets as well in the race. It is predicted that China's aluminum alloy automotive sheet capacity will be up to 1.5 million tons a year in 2025.

Key Aluminum Alloy Automotive Sheet Projects in China, as of Aug 2019

Company	Time	Project Overview
Novelis	May 2018	Novelis announced investment of $180 million to double its automotive aluminum body sheet capacity at its Changzhou facility in China to 220,000 tons per year.
Shandong Nanshan Aluminium	Aug 2019	The company announced to construct an automotive lightweight aluminum sheets/strips production line technology renovation project, with total investment of RMB1,564 million, including RMB1,460 million for construction and RMB104 million as liquidity. The project will add automotive lightweight aluminum sheets/strips capacity of 100,000 tons a year, after 24-month construction.
Loften Group	Jul 2018	Loften Group kicked off its "200,000 tons/year aluminum automotive sheets project" in Xining (National) Economic and Technological Development Zone. The project with planned investment of RMB1.6 billion in total, involves introducing two sets of air cushion type heat treatment machines and constructing two 200,000 tons/year automotive sheets production lines.
Fujian Xiangxin Shares	Nov 2018	The company's civil-military integration automotive specialty lightweight aluminum alloy project broke ground. The project with total investment of RMB7.0 billion, is constructed to manufacture battery trays, module end plates, truck crossbars, lightweight bodies and other components for new energy vehicles. The project's RMB3.5 billion invested Phase I covering an area of 200 mu (about 133,000 m²) started construction in November 2018, and is due to become operational in 2019, with a designed annual capacity of 1.28 million battery trays and 75 million battery end plates for new energy vehicles.

Source: ResearchInChina

Global and China Aluminum Alloy Automotive Sheet Industry Report, 2019-2025 highlights the following:

- Global aluminum alloy automotive sheet market (status, supply and demand, and development of key markets, e.g., Europe, Americas and Japan);
- China aluminum alloy automotive sheet market (policy, supply and demand, and competitive pattern);
- Global and China automobile markets and automotive aluminum markets;
- 8 global and 10 Chinese companies (operation, and aluminum alloy automotive sheet business).

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