

Low-Carbon Aluminum Market - A Global and Regional Analysis: Focus on Source of Production, Product, End User, and Region - Analysis and Forecast, 2022-2031

<https://marketpublishers.com/r/L35603DEFEC3EN.html>

Date: May 2023

Pages: 257

Price: US\$ 5,500.00 (Single User License)

ID: L35603DEFEC3EN

Abstracts

Low-Carbon Aluminum Market: Industry Overview

The global low-carbon aluminum market is projected to reach \$119.97 billion by 2031 from \$81.89 billion in 2022, growing at a CAGR of 4.3% during the forecast period 2022-2031.

The use of low-carbon aluminum is becoming more common in several industries, including transportation, building and construction, electrical engineering, foil and packaging, and others. The market is anticipated to benefit from the growing preference for lightweight materials over heavy metals, as this would enable weight reduction and foster market growth. In the automobile industry, the demand for low-carbon aluminum is rising due to the increasing number of electric vehicles that are made from lightweight materials. Amongst all industries, the automotive industry has been majorly focusing on decarbonization and has been witnessing high adoption of low-carbon aluminum. Government securities are also pushing the adoption of low-carbon aluminum. It helps in the weight reduction of vehicles, which contributes significantly to vehicles' fuel efficiency. Further, the use of low-carbon aluminum helps reduce CO2 emission, which is an environment-friendly aspect of applications of low-carbon aluminum in the automobile industry. There is a growing trend in the aluminum industry toward investing in low-carbon aluminum production. This is driven by several factors, including increasing pressure from consumers and investors to reduce carbon emissions, as well as regulatory initiatives aimed at curbing greenhouse gas emissions.

Market Lifecycle Stage

The low-carbon aluminum market has been in its growth stage, and much has been attributed to the increasing need for carbon reduction in commodity products such as aluminum. The ecosystem of the low-carbon aluminum market comprises primary aluminum manufacturers, aluminum recyclers, aluminum value-added product manufacturers, OEMs, and end users. The market is still developing, with Europe at the forefront, followed by other regions such as North America, the Middle East and Africa, Asia-Pacific, China, and South America.

Industrial Impact

The major advantages of low-carbon aluminum include its ability to reduce greenhouse gas emissions, increase energy efficiency, and improve the sustainability of the aluminum industry, among others. Additionally, low-carbon aluminum also offers improved properties compared to traditional aluminum, such as increased purity and strength. This offers a significant reason for the players to move toward low-carbon aluminum, reduce carbon dioxide emissions, and utilize the existing market infrastructure. Low-carbon aluminum has a high adoption rate in transportation, among other applications owing to the increased initiatives by automakers to decarbonize the industry.

The major regions anticipated to use low-carbon aluminum are Europe and North America. Globally, there have been numerous partnerships between the manufacturers, suppliers, and end users of low-carbon aluminum, which has led to significant growth in the market.

Impact of COVID-19

The COVID-19 pandemic has had an adverse impact on most of the sectors globally, owing to countrywide lockdown, temporary shutdown of production facilities, and the slowdown of the global economy. The pandemic has shown a severe impact on transportation, building and construction, electrical, machinery, and equipment, among other industries. However, applications such as foil and packaging, consumer goods, and others saw slight to considerable positive growth trends in FY2020. The industry saw a severe adverse impact in H1FY2020, along with some recovery in H2FY2020. Furthermore, the COVID-19 epidemic-related global lockdown led to production halts and disruptions in supply chains, manufacturing, and deployment activity, all of which had a detrimental effect on the market for low-carbon aluminum in 2020.

Market Segmentation:

Segmentation 1: by End User

Transportation

Building and Construction

Electrical Industry

Consumer Goods

Foil and Packaging

Machinery and Equipment

Others

Based on end users, the low-carbon aluminum market is estimated to be led by the transportation segment during the forecast period 2022-2031.

Segmentation 2: by Source of Production

Solar Energy

Wind Energy

Hydro Energy

Recycling

Carbon Capture and Storage (CCS)

Others

Based on the source of production, the low-carbon aluminum market is estimated to be

led by the recycling segment during the forecast period 2022-2031.

Segmentation 3: by Product

Flat-Rolled

Castings

Extrusion

Forgings

Rod and Bar

Others

Based on product, the low-carbon aluminum market is estimated to be led by the flat-rolled segment during the forecast period 2022-2031.

Segmentation 4: by Region

North America - U.S., Canada, and Mexico

Europe - Germany, France, Italy, Spain, Russia, and Rest-of-Europe

China

U.K.

Asia-Pacific and Japan - Japan, India, South Korea, ASEAN, and Rest-of-Asia-Pacific and Japan

Rest-of-the-World - Middle East and Africa and South America

In the global low-carbon aluminum market, Europe and North America are anticipated to gain traction in terms of low-carbon aluminum production, owing to the presence of the world's largest manufacturers in those regions.

Recent Developments in Low-Carbon Aluminum Market

In April 2021, En+ Group announced that it had produced the world's lowest carbon aluminum, in a major breakthrough for the industry. En+ Group Metals segment has successfully produced aluminum with the industry's lowest carbon footprint - less than 0.01 tons of CO₂ equivalent per ton of metal.

In January 2023, Emirates Global Aluminium PJSC and leading beverage producer, can-maker, and waste management company, together announced the launch of Aluminium Recycling Coalition, which aims to drive a step-change in aluminum recycling in the U.A.E. Coalescing members include EGA, Abu Dhabi Waste Management Company (Tadweer), Aujan Coca-Cola Beverages Company, Coca-Cola Al Ahlia Beverages Company, BEEAH Tandeef, Pepsi-bottler Dubai Refreshment, CANPACK, Crown Bevcan EMEA, DULSCO Group, and Veolia.

In August 2021, Vedanta Aluminium Business was India's largest green power purchaser on the Green Market at the Indian Energy Exchange Limited (IEX) platform as of Q1 FY2021 and FY2022. Vedanta procured 354 million units of solar and non-solar renewable energy primarily from Green Term-Ahead Market (GTAM) at IEX for its largest integrated aluminum production facility at Jharsuguda, Odisha.

In November 2021, Nordural Grundartangi ehf, a wholly owned subsidiary of Century Aluminum Company, commenced the construction of a new low-carbon billet casthouse at its Grundartangi, Iceland smelter. The new value-added casthouse would have a capacity of 150,000 tons of billet production and is expected to start production in the first quarter of 2024.

In December 2022, Hydro and Mercedes-Benz collaborated on a joint technology roadmap aiming to develop aluminum solutions from 2023 to 2030 approved for automotive applications with a CO₂ footprint below 3.0 kgCO₂/kgAl.

Demand - Drivers and Limitations

The following are the demand drivers for low-carbon aluminum market:

Increasing Attention of Governments toward Decarbonization of Core
Contributing Commodities

Growing Research and Development Activities to Achieve Near Zero Emissions

The market is expected to face some limitations due to the following challenges:

Lower Recycling Rates for Aluminum in Various Industries

Volatile Low-Carbon Aluminum Prices

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different sources of production and products involved in the low-carbon aluminum market. The source of production segment has been segmented into solar energy, wind energy, hydro energy, recycling, carbon capture and storage (CCS), and others. The product segment has been segmented into flat-rolled, castings, extrusion, forgings, rod and bar, and others. Moreover, the study provides the reader with a detailed understanding of the low-carbon aluminum market based on end users, including transportation, building and construction, the electrical industry, consumer goods, foil and packaging, machinery and equipment, and others. The increasing adoption of low-carbon aluminum in manufacturing components in sustainable technologies is expected to fuel the growth of the market.

Growth/Marketing Strategy: The low-carbon aluminum market has seen major development by key players operating in the market, such as business expansions, partnerships, collaborations, mergers and acquisitions, and joint ventures. The favored strategy for the companies has been business expansions to strengthen their position in the low-carbon aluminum market. For instance, in February 2022, Emirates Global Aluminium PJSC announced its plan to build a 150,000 tons per year aluminum recycling facility, the company's first and set to be the largest in the U.A.E. The company intends to market recycled aluminum under the brand name EternAL.

Competitive Strategy: Key players in the low-carbon aluminum market analyzed and profiled in the study involve low-carbon aluminum producers and the overall ecosystem. Moreover, a detailed competitive benchmarking of the players operating in the low-

carbon aluminum market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, acquisitions, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Key Market Players and Competition Synopsis

Aluminum that has greenhouse gas (GHG) emission intensity below 4 tons of CO₂ equivalent per ton of aluminum manufactured has been considered as low-carbon aluminum. To achieve this, renewable energy source is used in the manufacturing of primary aluminum. Furthermore, recycling aluminum further reduces energy consumption and CO₂ emissions and can be considered low-carbon aluminum. Among product segmentations, the flat-rolled segment dominated the low-carbon aluminum market in 2021 and is the largest segment owing to growing demand from end-use industries such as transportation, building and construction, and others. Flat-rolled products have high strength-to-weight ratios, are corrosion-resistant, durable, and can be recycled multiple times, which further reduces their environmental impact.

Some of the prominent producers of low-carbon aluminum are:

Company Type 1 (by Source of Production): Solar Energy

Vedanta Aluminum and Power

Emirates Global Aluminium PJSC

Capral Limited

Rio Tinto

China Hongqiao Group Limited

Company Type 2 (by Source of Production): Hydro Energy

EN+ Group

Century Aluminum Company

Norsk Hydro ASA

Alcoa Corporation

China Hongqiao Group Limited

South32

PT Indonesia Asahan Aluminium

Company Type 3 (by Source of Production): Recycling

EN+ Group

Century Aluminum Company

Emirates Global Aluminium PJSC

Norsk Hydro ASA

Constellium SE

Company Type 4 (by Source of Production): Carbon Capture and Storage (CCS) (Planned)

Aluminium Dunkerque

Norsk Hydro ASA

Various players are involved in the market, which has been covered in different sections of the report.

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