

China Alumina Industry Report, 2009

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Abstracts

Currently, alumina is mainly produced in Asia, Oceania, Latin America and Europe. Since 2005, the output of alumina in Asia has ranked first in the world. In 2009, the output of alumina in Asia accounted for 36.9% of global alumina output. China has the most shares in Asian alumina market. In the first two quarters of 2009, the alumina produced by China accounted for 77.99% of Asian alumina output.

China alumina industry has developed rapidly since 2005. In 2005, the output of alumina increased by 1.84 million tons. As the new capacity of alumina was gradually put into operation, alumina output began to increase significantly in 2006. During the first quarter of 2006 to the third quarter of 2008, due to the concentration of alumina projects, China's alumina output continued to rise, increasing from 2.77 million tons in the first quarter of 2006 to 6.29 million tons in the third quarter of 2008. In the fourth quarter of 2008, the economic recession made the demand for alumina reduce and the output decline rapidly. The falling tendency lasted until the first quarter of 2009. Within the second quarter of 2009, China's economy recovered, and the alumina output increased to 5.7 million tons, up 16.1% quarter-on-quarter. The output in the second quarter of 2009 exceeded 6.29 million tons (the highest on record) of the third quarter of 2008. Therefore, alumina industry is promising.

Aluminum Corporation of China (CHALCO) is the world's second largest alumina producer and China's largest alumina and primary aluminum operator. CHALCO is only second to Alcoa in alumina output. During January to June of 2009, CHALCO's alumina output reached 3.2 million tons, decreasing by 31.6% from the first half of 2008. In the first half of 2009, alumina business accounted for 29% of CHALCO's main business, but the proportion declined with a loss of RMB1.44 billion. However, as the most important business of CHALCO, alumina business occupies a pivotal position in China alumina industry. Additionally, CHALCO makes use of bauxite from its own mines to produce alumina, so it has more advantages in cost than other domestic companies. In August

2009, the operating rate of CHALCO's alumina capacity rose. It is expected the deficit will turn the tables by the end of 2009.

The report makes an in-depth study of alumina industry in terms of external environment, national policies, related industries, and other aspects. The report also makes a detailed description on the development, trends as well as strategic planning of 16 enterprises that have alumina business, including Aluminum Corporation of China, Yunnan Aluminum Co., Ltd., Nanshan Aluminum Co., Ltd. The report aims at finding out the development process of the industry and grasping the future market trends through analyzing the status quo of alumina industry.

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