

China Aluminum Rolling Industry Report, 2014-2017

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Abstracts

In 2014, the Chinese aluminum rolled product market grew steadily with the aluminum sheet / strip output of 10 million tons and the aluminum foil output of 3.08 million tons, representing the respective increase of 8.7% and 10.0%. By 2017, China's aluminum sheet / strip output and aluminum foil output are expected to reach 12.61 million tons and 3.91 million tons respectively.

China boasts the largest exporter of aluminum rolled products in the world. In 2014, China's net export volume of aluminum sheet/strip and aluminum foil reached 1,391kt and 808 kt respectively, with the respective year-on-year growth rate of 14.6% and 15.7%. Since May 1, 2015, China Customs has exerted zero-tariff policy on the export of aluminum processing materials and other products to further enhance China's export volume of aluminum rolled products.

Driven by the demand in transportation, packaging, household appliances and other traditional end consumer markets, the apparent consumption of aluminum sheet / strip and aluminum foil in China amounted to 8,609 kt and 2,272 kt in 2014 respectively. In future, aircraft aluminum slabs, automotive body aluminum sheet / strip and other fine aluminum sheet / strip / foil products will become the core driving forces which stimulate the demand to grow.

Amid the restructuring and upgrading of China's aluminum processing industry, Shandong Nanshan Aluminum, Mingtai Al. Industrial, Weiqiao Aluminum & Electricity and other major Chinese aluminum rolling enterprises have improved competitiveness through capacity expansion, layout of high-end aluminum sheet / strip products and other ways.

Shandong Nanshan Aluminum is one of major Chinese manufacturers of aluminum cold-rolled products with the annual capacity of up to 1,200 kt. In recent years, the company

has stepped up efforts to invest in the construction of high-end aluminum sheet / strip / foil projects: The 200 kt/a oversized high-performance special aluminum alloy material production project which commenced in 2012 will go into operation at the end of 2015; the 40 kt/a high-precision multi-purpose aluminum foil production line project which begins in 2015 will be put into operation in 2017.

Mingtai Al. Industrial is one of the largest aluminum suppliers in China. The company has been developing the transportation-use aluminum market vigorously in recent years. In May 2015, the company put its 200 kt/a high-precision transportation-use aluminum sheet / strip project into operation. Besides, the company will build a 20 kt/a transportation-use aluminum profile project in Zhengzhou in order to meet the demand of its joint venture --- Zhengzhou CSR Rail Transportation Equipment Co., Ltd. whose capacity hits 500 trains per year.

Weiqiao Aluminum & Electricity has an industry chain covering all aspects of China aluminum rolling industry. In 2014, the company was building a 760 kt/a aluminum sheet / strip project in its Zouping production base, and the project is expected to be put into operation in 2016; by then the company will have the aluminum sheet/strip/foil capacity of 790 kt/a.

The report highlights the following:

Supply & demand, price, etc. of China's aluminum smelting industry;

Development strategy, production line distribution, supply and demand of aluminum sheet/strip/foil, import and export, competition pattern, development tendency, etc. of China's aluminum rolling industry;

Demand for aluminum sheet/strip/foil products in building, packaging, printing, electricity, etc.;

Operation, aluminum rolling business and development strategy of 18 aluminum rolling enterprises in China.

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