

Global and China Alumina and Electrolytic Aluminum Industry Report, 2012-2013

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Abstracts

China's bauxite features poor quality and low self-sufficiency rate of high-quality bauxite. With the gradual release of new alumina capacity and expansion of downstream smelting capacity in China, China has rapidly increased the import of bauxite. China's imports of bauxite mainly come from Indonesia, Australia and India, among which, Indonesia accounts for more than 70%.

As the electricity cost in western region is lower than that in the eastern region of China, the electrolytic aluminum capacity of the western region has continued to expand, but in the meantime, the high energy-consuming and high-cost electrolytic aluminum capacity of the eastern region hasn't been reduced in large scale, leading to serious overcapacity in China's electrolytic aluminum industry in 2012.

Other countries also encountered with the problem of overcapacity as China did.

The rising bauxite and power costs as well as the sluggish LME prices have led to large-scale losses in the aluminum industry. In order to cope with the dual pressure from rising costs and sluggish prices, domestic and foreign enterprises have integrated upstream resources and expanded downstream products. In addition, giants like RUSAL have planned to cut the production moderately and eliminate backward production capacity.

Global and China Alumina and Electrolytic Aluminum Industry, 2012-2013 mainly analyzes the supply & demand and industry development trend of alumina and electrolytic aluminum in China and worldwide, and sheds light on the business performance and development planning of key enterprises in the global and Chinese aluminum industry.

As a giant in the global aluminum industry, RUSAL mainly produces primary aluminum, aluminum alloy, bauxite and alumina. RUSAL is a typical producer of upstream aluminum products with a relatively complete industry chain, and its own bauxite resources can meet 70% of its demand. Meanwhile, RUSAL continues to integrate upstream hydropower and thermal power resources. In 2012, RUSAL reduced the output of primary aluminum to 1.038 million tons, it also plans to eliminate 300 kilotons of primary aluminum capacity before 2013, and increase the output proportion of processed aluminum products to 39%.

In 2012, CHALCO increased the output of cost-competitive products, with the bauxite output of its own mines increased by 27.29% to 17.26 million tons and the alumina output by 8.08% to 11.9 million tons. To integrate upstream resources, CHALCO cooperated with an Indonesian company to exploit bauxite, and the project can achieve an annual capacity of 1.8 million tons upon completion. In January 2013, CHALCO cumulatively acquired 70.82% stake in Ningxia Electric Power Group, increasing another 16 million tons of coal production capacity per year.

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