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# Global and China Aluminum Heat Transfer Material Industry Report, 2013-2016

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## Abstracts

Aluminum heat transfer composites are mainly used in heat exchange systems of automobiles, home appliances, machinery and equipment as well as air-cooling systems of thermal power stations. In 2013, the global output of aluminum heat transfer composites reached about 1.34 million tons, representing a year-on-year increase of 7.2%. Affected by the global economic downturn and China's economic slowdown, the downstream demand for machinery, equipment, power stations, home appliances, etc. declined, resulting in the sluggish demand for aluminum heat transfer composites, with a growth rate of only 6.9% in 2013.

China is a major consumer of aluminum heat transfer composites in the world. In 2013, the rapid growth of Chinese automobile market effectively boosted the demand for aluminum heat transfer composites to 510,600 tons. Driven by Chinese automotive light-weighting, machinery and equipment, household appliances and other industries, China’s demand for aluminum heat transfer composites will continue to grow in the coming years.

The report focuses on the following aspects:

Market supply and demand, market competition and development trends of the global aluminum heat transfer composites industry;

Supply and demand, market competition patterns and development trends of China aluminum heat transfer composites industry;

Demand of major Chinese aluminum heat transfer composites downstream industries;

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Operation and Chinese business of 7 global aluminum heat transfer composites manufacturing enterprises;

Operation and development of 14 Chinese aluminum heat transfer composites manufacturing enterprises.

**Note:** The capacity of foreign-funded companies refers to the capacity of their subsidiaries in Chinese provinces.

On a global basis, the aluminum heat transfer composites market is monopolized by several large corporations from the United States, Europe, Japan, Canada, etc. With the rapid development of China automobile industry, foreign enterprises have set up factories in China. Subject to technical constraints and other reasons, Chinese companies started late, only a few companies such as Yinbang, Huafon Group and Northeast Light Alloy develop stably.

Sapa is the world's largest producer of aluminum profiles, and also one of major manufacturers of automotive aluminum heat transfer composites (sheets, strips, foils) in the world. Impacted by business mergers and acquisitions, Sapa established a wholly owned subsidiary - Gr?nges specializing in aluminum heat transfer composites. Thus, Sapa’s Chinese subsidiary was renamed Gr?nges Aluminum Heat Transfer (Shanghai) Co., Ltd. which is still engaged in the production of automotive heat transfer materials. In recent years, the subsidiary has continuously expanded its capacity; as of 2013, its capacity hit 120 kt/a.

Yinbang, as one of Chinese leaders in aluminum heat transfer composites, has increased investment in scientific research in recent years and successfully developed high-value-added products such as aluminum alloy composites and aluminum steel composite strips. In 2012, the company went public on A-share stock exchange and used the raised funds to build a laminated metal composites expansion project which is expected to go into operation in 2016 when the company’s total aluminum heat transfer composites capacity may hit 200 kt/a.

Huafon Nikkei Aluminium Corporation produces aluminum alloy heat transfer composites (sheets, strips, foils). The company was formerly know as Huafon Aluminum Co., Ltd whose shares were bought by Nippon Light Metal Co., Ltd. in November 2012. Currently, the company is constructing Civil Air Conditioner Aluminum Alloy Composites

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Project Phase II with annual capacity of 50,000 tons; upon completion, the company's aluminum heat transfer composites capacity will attain 130 kt/a.

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