

Research Report on Electrolytic Aluminum Industry of China, 2018-2022

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Abstracts

China is the world's largest producer of electrolytic aluminum, making up over half of the global output. Its production has kept growing in recent years. In 2017, the production volume of electrolytic aluminum reached 32.27 million tons, with the CAGR of 10.1% from 2007 to 2017. During the same period, the output of electrolytic aluminum declined in other regions of the world. The terminal consumption of electrolytic aluminum in China is mainly concentrated in three areas: real estate, electronic power and transportation. Other important sectors in the downstream include machinery manufacturing and packaging materials.

As the Chinese government imposes a 15% tariff on the export of electrolytic aluminum, the export volume is in a small quantity. However, that of aluminum products is large. In 2017, the export volume of aluminum products reached 4.24 million tons. Considering that some export enterprises may misreport product types, the actual number may be even larger. The exported aluminum products of China are faced with a great number of international trade disputes. The U.S, Canada, Australia have all initiated anti-dumping and anti-subsidy investigations on China-made aluminum products. On Mar. 8, 2018, U.S. president Donald J. Trump signed a joint statement on steel and aluminum at the White House, announcing that since Mar. 23, a 25% tariff would be imposed on imported steel and a 10% tariff on imported aluminum products. In 2017, the export value of aluminum and its products to the U.S. was about USD 3.7 billion, accounting for nearly 30% of the total exports. Accordingly, this move of the U.S. is expected to have a detrimental effect on China's exports of aluminum products in 2018.

CRI report shows that the production costs of electrolytic aluminum mainly include raw materials, energy and manpower. The most important two are aluminum oxide and electricity, which account for 60 to 70% of the aggregate costs. China holds less than

5% of bauxite reserves in the world, while its production capacity of electrolytic aluminum reaches more than 50% of the globe. Therefore, China needs to import a large amount of bauxite each year. In 2017, it imported 68.55 million tons, with an increase of 32.6% YOY. China's largest exporter was Guinea in the year when it imported a total of 27.63 million tons of bauxite. The fluctuation of bauxite prices will seriously affect the production cost of electrolytic aluminum. Another cost source is electricity, taking up more than 30% of the total to produce electrolytic aluminum. In order to reduce costs, many electrolytic aluminum companies have built their own power plants, mainly fueled by coal. Consequently, environmental pollution follows.

By the beginning of May 2018, the annual production capacity of electrolytic aluminum in China was approximately 47 million tons. In 2017, in order to control the new capacity, China Development and Reform Commission, the Ministry of Industry and Information Technology, the Ministry of Land and Resources and the Ministry of Environmental Protection jointly launched a special campaign to rectify illegal activities in the electrolytic aluminum industry. All new illegal production capacity was shut down and the blind expansion was curbed, to reduce the risk of serious overcapacity. On Jan. 18, 2018, MIIT issued Notice on Capacity Displacement of Electrolytic Aluminum Enterprises through Merger, Acquisition and Reorganization, in which it set specific requirements in this regard. Subsequently, MIIT released an interpretation document for the Notice, which explains in detail the displacement of electrolytic aluminum and also states that it should be completed by the end of 2018.

CRI concludes that the industrial concentration is high in China. Electrolytic aluminum enterprises that possess annual capacity of over 1 million tons include Aluminum Corporation of China Limited, China Hongqiao Group, Xinfu Group Co., Ltd. , SPIC Aluminum & Power Investment Co., Ltd. , Xinjiang East Hope Non-ferrous Metal Co., Ltd. , Xinjiang East Hope Non-ferrous Metal Co., Ltd. , Gansu Dongxing Aluminum Co., Ltd. , Henan Shenhua Group Co., Ltd. , Hunan Zengshi Aluminum Group, Yunnan Aluminum Limited Liability Company, Hangzhou Jinjiang Group Co., Ltd. and Sichuan Qiya Aluminum Group. By the end of 2017, the aggregate capacity of above enterprises accounted for over 70% in the country.

CRI estimates that from 2018 to 2022, the development of the electrolytic aluminum industry will be enhanced considering that China's economy will maintain an annual growth rate of above 6% and that the urbanization will keep rising. Besides, the constant development of the real estate and the steady growth of electric power, transportation, packaging, electronics and daily consumer goods will also give a boost to the electrolytic aluminum industry.

Selling points:

Policies of Chinese Government on Electrolytic Aluminum Industry

Analysis on Supply and Demand of Electrolytic Aluminum in China

Imported Bauxite

Price Trend of Electrolytic Aluminum

Analysis on Competition of Electrolytic Aluminum Industry in China

Analysis on Electrolytic Aluminum Manufacturers in China

Export of China's Aluminum Products

Anti-dumping Investigation into China's Exported Aluminum Products

Market Opportunities and Driving Forces of China Electrolytic Aluminum Industry, 2018-2022

Threats and Challenges of China Electrolytic Aluminum Industry, 2018-2022

Analysis on Supply and Demand of China Electrolytic Aluminum Industry, 2018-2022

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