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Industry information (<https://www.seccw.com/index.php/Document/index/category>)

<2023 China Aluminum Foil Industry Market Prospect and Investment Research

2023 China Aluminum Foil Industry Market Prospect and Investment Research Report (Simplified Version)

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Keyword:

aluminum foil (<https://www.seccw.com/index.php/Index/search/k/%E9%93%9D%E7%AE%94.html>)

China Business Intelligence Network News: China is a major producer and supplier of aluminum foil, and nearly one-third of aluminum foil production is oriented to the export market. In recent years, with the acceleration of high-end aluminum foil production capacity and the continuous improvement of aluminum foil product quality, China's aluminum foil industry has developed rapidly, and the industry has broad prospects.

1. Definition of aluminum foil

Aluminum foil is a kind of aluminum rolled material, aluminum foil is mainly for the thickness, the industry usually refers to the thickness of less than 0.2mm aluminum products called aluminum foil, usually the edge of the longitudinal cutting, and delivered in rolls. Aluminum foil is a soft metal film, which not only has the advantages of moisture-proof, airtight, shading, abrasion resistance, fragrance preservation, non-toxic and odorless, but also because it has an elegant silver-white luster, it is easy to process beautiful patterns and patterns of various colors. According to the thickness, aluminum foil can be divided into double zero foil, single zero foil and thick foil.

 深圳市电子商会 Shenzhen Electronic Chamber of Commerce 按厚度划分的铝箔种类 SIVEmail 电子信息 深圳市中小企业公共信息服务		
(/) 双零箔	厚度 $<0.01\text{mm}$	食品包装、香烟包装、电子光箔等
单零箔	$0.01\text{mm} \leq \text{厚度} < 0.1\text{mm}$	部分食品包装、药品包装、电子电路信号屏蔽、空调箔等
厚箔	$0.1\text{mm} \sim 0.2\text{mm}$	空调箔、容器箔、建筑装饰以及工业用途
制图：中商情报网WWW.ASKCI.COM		

Source: China Nonferrous Metals Network, China Business Industry Research Institute

Second, the development policy of the aluminum foil industry

In recent years, the National Development and Reform Commission, the Ministry of Industry and Information Technology and other industry authorities have successively promulgated a series of industrial policies, focusing on supporting China's aluminum processing industry to produce high-performance products to meet the needs of new energy vehicles, batteries and other fields, among which the main industry policy planning and content related to the aluminum foil industry are as follows:

 深圳市电子商务会 <small>Shenzhen Electronic Chamber of Commerce</small> SIVEmall 电子 发布单位 政策名称 主要内容			
(/)	工业和信息化部、科学技术部	《“十四五”原材料工业发展规划》	对氧化铝行业的要求主要在于赤泥高效综合利用、防止产能无序扩张以及在沿海地区有序布局；对电解铝行业的要求主要在于完善并严格落实产能置换政策，由“煤—电—铝”向“水电、风电等清洁能源—铝”转移，以及严格落实“双碳”政策；对再生铝行业的要求主要在于开发“城市矿山”资源，支持优势企业建立大型再生铝回收基地和产业集聚区。
2021年11月	国务院	《关于深入打好污染防治攻坚战的意见》	重点区域严禁新增电解铝、氧化铝产能；原则上不再新增自备燃煤机组，支持自备燃煤机组实施清洁能源替代，鼓励自备电厂转为公用电厂。
2021年11月	国务院	《2030年前碳达峰行动方案》	推动有色金属行业碳达峰。完善废弃有色金属资源回收、分选和加工网络，提高再生铝产量。
2021年8月	国家发展改革委	《关于完善电解铝行业阶梯电价政策的通知》	完善阶梯电价分档和加价标准、严禁对电解铝行业实施优惠电价政策。
2021年1月	国家发展改革委	《西部地区鼓励类产业目录（2020年本）》	将再生铝、铝加工、再生铝及铝的固废循环利用及处理列入西部地区鼓励类产业（《产业结构调整指导目录》限制类、淘汰类项目除外）。
2020年2月	工业和信息化部	《铝行业规范条件》	氧化铝、电解铝企业应按照国家有关规定经有关部门备案，氧化铝企业应落实铝土矿资源、赤泥堆存等外部条件；电解铝企业应落实氧化铝、电力、水资源长期稳定供应；鼓励再生铝企业靠近废铝资源聚集地区布局。
2018年12月	工业和信息化部	《产业发展与转移指导目录（2018年）》	在珠三角、长三角、环渤海等区域建设绿色化、规模化、高值化再生金属利用示范基地。
2018年6月	中共中央、国务院	《中共中央、国务院关于全面加强生态环境保护坚决打好污染防治攻坚战的意见》	严禁钢铁、水泥、电解铝、平板玻璃等行业新增产能，对确有必要新建的必须实施等量或减量置换。

制图：中商情报网WWW.ASKCI.COM

Source: Compiled by China Business Industry Research Institute

Third, the development status of the aluminum foil industry

1. Yield

In recent years, with the acceleration of high-end aluminum foil production capacity, China's aluminum foil industry has developed rapidly, product quality has been continuously improved, and the industry is in an important opportunity period for development. According to the "2024-2029 China Aluminum Foil Market Prospect and Future Investment Strategy Analysis Report" released by the China Business Industry Research Institute, China's aluminum foil output increased from 3.83 million tons in 2018 to 5.02 million tons in 2022, with an average annual compound growth rate of 7.00%, and the



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im foil output will reach 5.37 million tons in 2010.

country information (<https://www.secdatabase.com/Document/index>)

2018-2023年中国铝棒产量预测趋势图

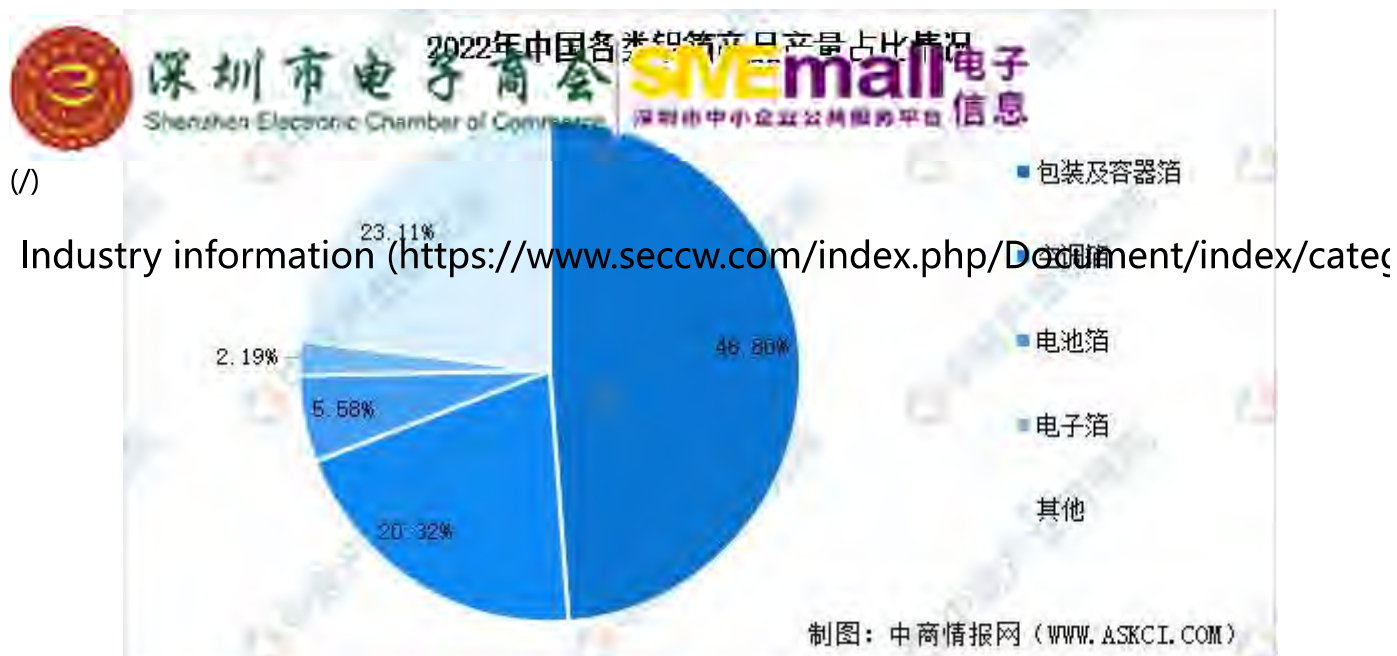
产量：万吨

年份	产量 (万吨)
2018	383
2019	400
2020	415
2021	455
2022	502
2023E	537

制图：中商情报网 (WWW.ASKCI.COM)

State of the World 2014: The Role of Private Enterprise

According to the classification of use, aluminum foil can be divided into packaging and container foil, air conditioning foil, battery foil, electronic foil, etc. From the perspective of output structure, the output of packaging and container foil in 2022 will be 2.45 million tons, a year-on-year increase of 4.3%, accounting for 48.80% of the total output; the output of air conditioning foil was 0.402 million tons, a year-on-year increase of 2%, accounting for 20.32% of the total output; the output of battery foil was 280,000 tons, a year-on-year increase of 100%, accounting for 5.58% of the total output; The output of electronic foil was 110,000 tons, accounting for 2.19% of the total output.



Data source: China Nonferrous Metals Processing Industry Association and China Commercial Industry Research Institute

3. Electronic aluminum foil

With the continuous acceleration of the development of the global electronic and electrical industry in recent years, the rapid development of downstream consumer electronics, industrial control, 5G communications, new energy vehicles, wind power and photovoltaics, aerospace and other fields, the scale of the electronic aluminum foil market has also grown. According to the "2022-2027 China Electronic Aluminum Foil Industry Prospect Forecast and Strategic Investment Opportunity Analysis Report" released by the China Business Industry Research Institute, the scale of China's electronic aluminum foil market has increased from 2.59 billion yuan in 2019 to 4.5 billion yuan in 2022, with an average annual compound growth rate of 20.2%. Analysts at the China Business Industry Research Institute predict that the scale of China's electronic aluminum foil market will increase to 5.09 billion yuan in 2023.



Data source: Information Center of China Electronic Components Industry Association and China Commercial Industry Research Institute

4. Electrode foil

Electrode foil is a key material for aluminum electrolytic capacitors, with high technical content. In modern production and life, aluminum electrolytic capacitors have a wide range of applications. With the growth of demand, the scale of China's electrode foil market is growing year by year. According to the "2023 China Electrode Foil Industry Research Report" released by the China Business Industry Research Institute, the scale of China's electrode foil market will increase from 10.12 billion yuan in 2019 to 15.93 billion yuan in 2022, with an average annual compound growth rate of 16.3%. Analysts from the China Business Industry Research Institute predict that the scale of China's electrode foil market will increase to 18.16 billion yuan in 2023.



Data source: Information Center of China Electronic Components Industry Association and China Commercial Industry Research Institute

Fourth, the key enterprises in the aluminum foil industry

1. Dingsheng New Materials

Jiangsu Dingsheng New Energy Materials Co., Ltd. has been engaged in the research and development, production and sales of aluminum plate, strip and foil, the main products are air conditioning foil, single zero foil, double zero foil, aluminum plate and strip, new energy battery foil, etc., the products are widely used in construction, household, packaging, home appliances, electronics, transportation, machinery manufacturing, hardware products, lithium batteries and other fields.

In the first half of 2023, the operating income will be 9.219 billion yuan, a year-on-year decrease of 19.45%; The net profit attributable to the parent company was 350 million yuan, a year-on-year decrease of 41.37%. In the first half of 2023, the main products include aluminum foil products and aluminum strips, accounting for 83.92% and 9.12% of the overall revenue, respectively.



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Data source: China Commercial Industry Research Institute



Data source: China Commercial Industry Research Institute

2.常铝股份

江苏常铝铝业集团股份有限公司的主营业务是工业热传递材料、热传递设备综合解决方案和医疗健康系统洁净技术与污染控制整体解决方案。常铝股份的主要产品是铝箔制品、医疗洁净。

2023年上半年实现营业收入33.68亿元，同比增长3.38%；实现归母净利润0.03亿元，同比下降3.36%。2023年上半年主营业务中，铝箔制品、医疗洁净，分别占整体营收的88.95%、11.05%。

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Industry information (<https://www.spcw.com.cn/Document/index/category>)



Data source: China Commercial Industry Research Institute



Data source: China Commercial Industry Research Institute

3. East Sunshine

The main business of Guangdong East Sunshine Technology Holding Co., Ltd. is electronic components, high-end aluminum foil, chemical materials, and energy materials. The main products are electrode foil for aluminum electrolytic capacitors (including corrosion foil and formation foil), laminated foil, aluminum electrolytic capacitors, hydrophilic foil, brazing foil, battery aluminum foil, chlor-alkali chemical products, new environmentally friendly refrigerants, lithium iron phosphate, ternary materials, etc.

In the first half of 2023, the operating income will be 5.314 billion yuan, a year-on-year decrease of 10.33%; The net profit loss attributable to the parent company was 139 million yuan. In the first half of 2023, the main products include high-end aluminum foil, electronic components, and new chemical materials, accounting for 40.35%, 28.16%, and 21.01% of the overall revenue, respectively.

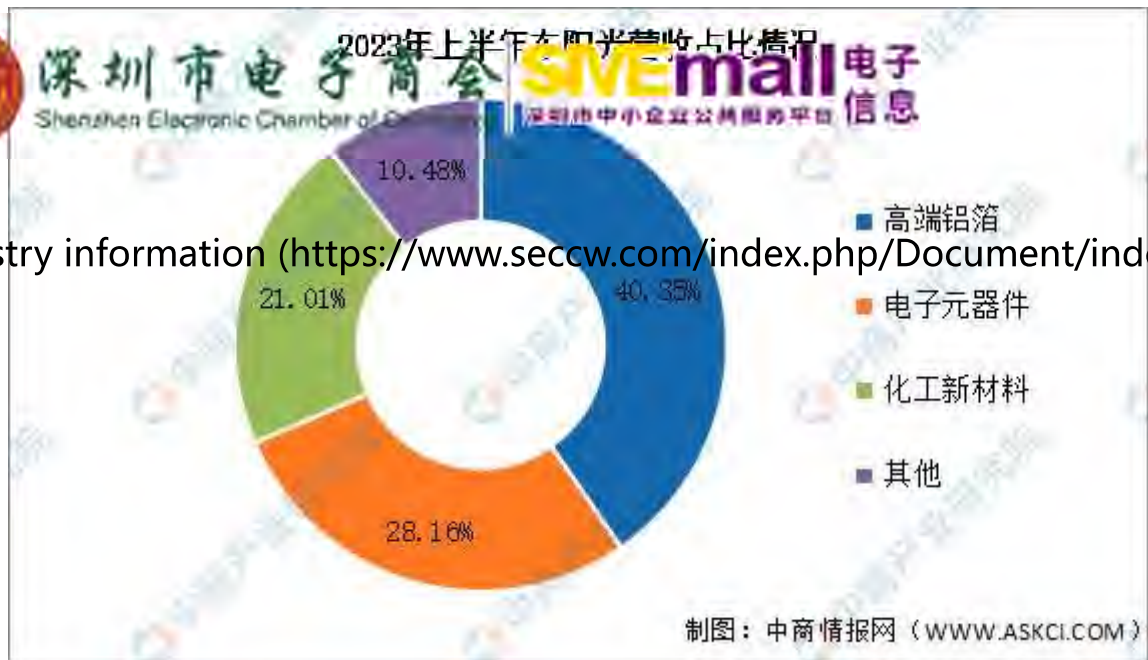


Data source: China Commercial Industry Research Institute



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Data source: China Commercial Industry Research Institute

4. Mingtai Aluminum

河南明泰铝业股份有限公司主营业务为铝板带箔、铝型材、再生资源综合利用业务。明泰铝业主要产品包括铝板带、铝箔、铝合金轨道车体、电、汽等。

In the first half of 2023, the operating income will be 12.639 billion yuan, a year-on-year decrease of 18.35%; The net profit attributable to the parent company was 803 million yuan, a year-on-year decrease of 26.4%. In the first half of 2023, the main products include aluminum strip and aluminum foil, accounting for 77.67% and 18.29% of the overall revenue, respectively.



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Data source: China Commercial Industry Research Institute



Data source: China Commercial Industry Research Institute

5. Wanshun new materials

Shantou Wanshun New Material Group Co., Ltd. is mainly engaged in three major businesses: aluminum processing business, paper packaging materials and functional films. The main products are aluminum foil, aluminum strip,

carbon foil, transfer paper, composite paper, high barrier film, conductive film,



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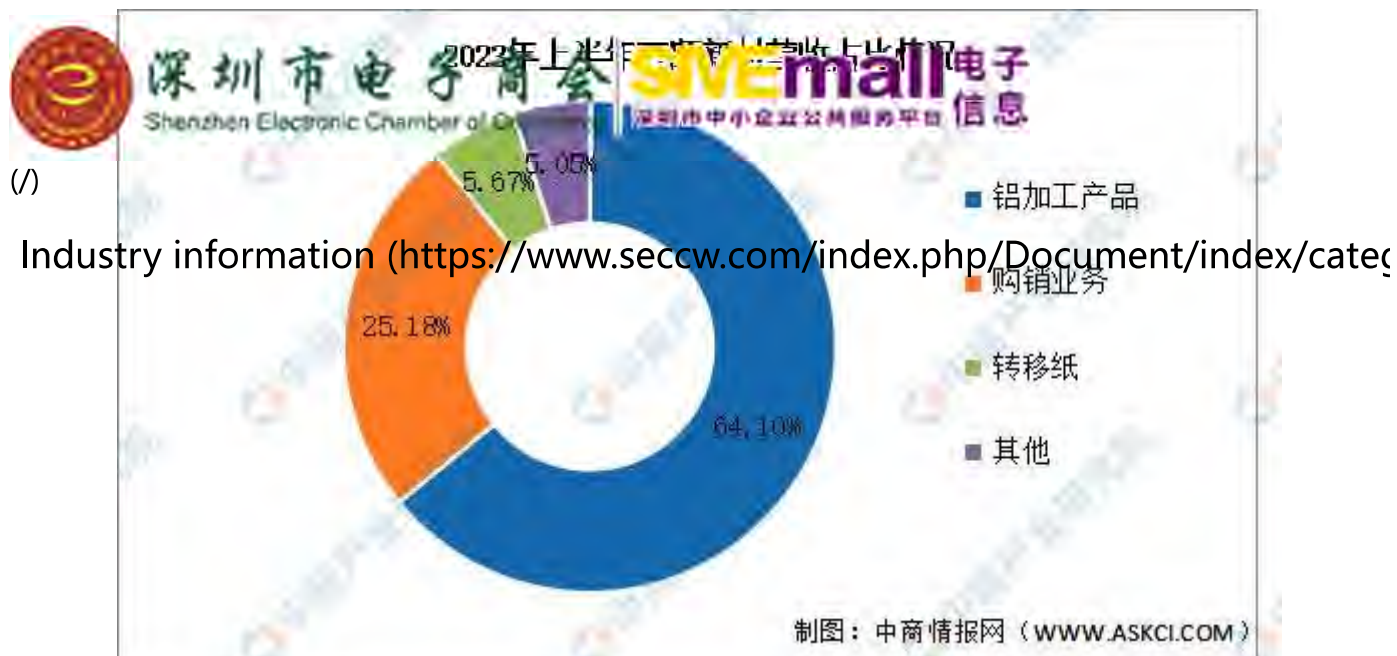
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In the first half of 2023, the operating income will be 2.457 billion yuan, a year-on-year decrease of 11.68%; The net profit attributable to the parent company was 31 million yuan, a year-on-year decrease of 74.38%. In the first half of 2023, the main products include aluminum processing products, purchase and sales business, and transfer paper, accounting for 64.10%, 25.18%, and 5.67% of the overall revenue, respectively.



Data source: China Commercial Industry Research Institute



Data source: China Commercial Industry Research Institute

Fifth, the development prospect of the aluminum foil industry

1. Policies are favorable for the development of the industry

China is in the critical stage of economic transformation and upgrading, and the broad application range of electronic special materials has promoted scientific and technological progress and social and economic development, and plays an important role in the national economy. China has successively issued a number of industrial support policies such as the Action Plan for the Development of the Basic Electronic Components Industry (2021-2023), the Opinions of the General Office of the State Council on Deepening the Reform of the Management System of the Electronic and Electrical Industry, and the Guiding Opinions on Accelerating the Cultivation and Development of High-quality Manufacturing Enterprises, which vigorously support the development of the aluminum foil material industry chain for aluminum electrolytic capacitors and lay a good policy environment and market foundation for the healthy development of the industry.

2. The development of downstream industries drives the growth of industry demand

Benefiting from the rapid development of global new energy vehicles, power battery market has driven the rapid growth of battery aluminum foil market demand. The global energy system is accelerating from traditional thermal power generation to renewable energy based energy system. Document industry in the field of energy storage in an all-round way, will bring about the rapid development of the energy storage battery market pattern, the development of the energy storage battery market, will bring a broad market space for battery aluminum boxes. The global lithium resource reserves are limited, the bottleneck of the resource side is gradually emerging, the new energy vehicle industry has accelerated the research and mass production process of the battery system with richer resource reserves and lower cost, and major companies have begun to lay out sodium-ion batteries as substitutes, which is expected to promote the commercialization process of sodium-ion batteries, and sodium-ion batteries will promote the growth of battery aluminum foil demand in the future.

3. Overseas production capacity is gradually transferred to China

After years of R&D and experience accumulation, with the gradual improvement of domestic production technology, domestic manufacturers have gradually narrowed the technical gap with Japanese enterprises, and China has the advantages of raw materials, energy and labor costs, some product quality and performance have reached the international advanced level, the domestic aluminum electrolytic capacitor aluminum foil material production capacity has gradually increased, and the international competitiveness continues to improve. The production capacity of aluminum foil materials for aluminum electrolytic capacitors and the trend of downstream demand transfer to China will further enhance China's competitiveness in the international market and provide good opportunities for the rapid development of aluminum foil materials for aluminum electrolytic capacitors in China.

Source: China Business Industry Research Institute