

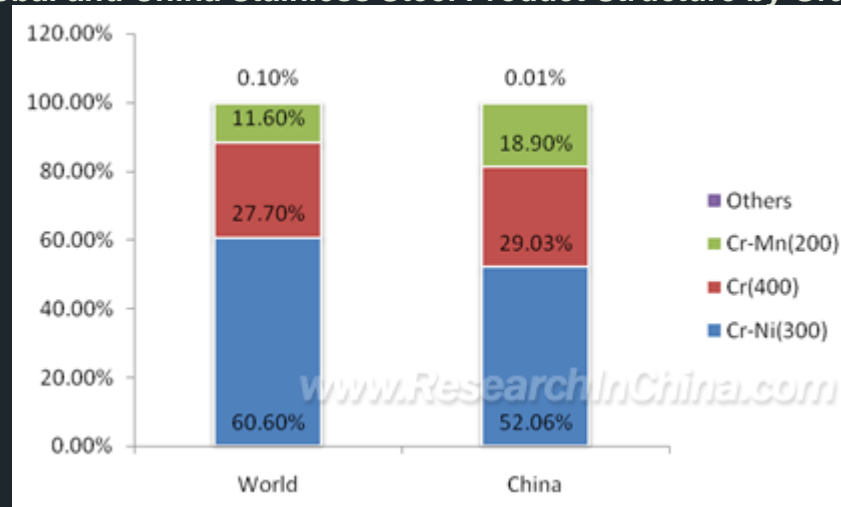
Global and China Stainless Steel Industry Report, 2009-2010



Stainless steel can be classified into 300 series, 400 series and 200 series, among which, 300 series boasts the mainstream in the market. In 2009, 300 series accounted for 60.6% of the global stainless steel output and 52.06% of the Chinese stainless steel output.

With the growing demand for stainless steel in emerging economies like China, South Korea and India, the global stainless steel industry is transferring to these countries at an ever faster speed. In 2009, against the backdrop of declining consumer demand for stainless steel in Europe and America, global crude stainless steel output dropped 5.2% year on year to 24.6 million tons. By contrast, the stainless steel output in Asia increased by 6.2%. A case in point is China, whose output of crude stainless steel rose by 26.8% to 8.805 million tons.

Global and China Stainless Steel Product Structure by Grade, 2009



Source: ISSF; ResearchInChina

Global and China Crude Stainless Steel Output, 2005-2009 (mln tons)



Source: ISSF; ResearchInChina

In recent years, with the increasing consumer demand for stainless steel in China, stainless steel industry segments such as stainless steel board, strip, section and pipe have seen rapid increase in output, and the emergence of competitive flagship enterprises.

In the stainless steel board sector, Lianzhong (Guangzhou) Stainless Steel Corporation has the largest output of 200 series stainless steel coil. Shanxi Taigang Stainless Steel, Baosteel Stainless Steel, Zhangjiagang Pohang Stainless Steel, Jiuquan Iron & Steel Group, and Taishan Steel are competitive in the 400 series stainless steel coil market. In particular, Shanxi Taigang Stainless Steel ranked No.1 in the world in terms of the stainless steel output in 2009.

In the stainless steel strip sector, private stainless steel enterprises are major players. Fujian Wuhang Stainless Steel Products, with hot-rolled and cold-rolled stainless steel strips as main products, achieved an annual crude stainless steel output of 900,000 tons in 2009. Southwest Stainless Steel, a hot-rolled stainless steel strip manufacturer, achieved an annual crude stainless steel output of 400,000 tons.

In the stainless steel section sector, there are 18 leading enterprises, including Tsingshan Holding Group and Dongbei Special Steel Group. Dongbei Special Steel Group mainly manufactures stainless steel bar and wire rod. Dalian Special Steel Products Co., Ltd of Dongbei Special Steel Group accounts for over 50% of the domestic output of stainless wire in coil.

In the stainless steel pipe sector, 10 stainless steel manufacturers including Shanxi Taigang Stainless Steel, Baosteel Stainless Steel and Zhejiang Jiuli Hi-tech Metals are leading seamless stainless steel pipe providers in China, while five stainless steel enterprises including Winner Stainless Steel Tube, Foshan Outstanding Stainless Steel, Jiuli Hi-tech Metals, Foshan Lanshi Yuhang Star Stainless Steel and Jiangsu Wujin Stainless Steel Pipe Group are leading welded stainless steel pipe suppliers in China.

Table of Contents

- **1. Overview**
 - 1.1 Definition & Classification
 - 1.1.1 Definition
 - 1.1.2 Classification
 - 1.2 Cost Structure
- **2. Industry Development in the World**
 - 2.1 Supply
 - 2.2 Industry Pattern
- **3. Industry Development in China**
 - 3.1 Industrial Policy
 - 3.1.1 Industrial Policy
 - 3.1.2 Export Policy
 - 3.2 Industrial Structure
 - 3.3 Supply & Demand
 - 3.3.1 Supply
 - 3.3.2 Demand
 - 3.3.3 Import & Export
 - 3.4 Market Price
- **4. Market Segments in China**
 - 4.1 Stainless Steel Board
 - 4.1.1 Production
 - 4.1.2 Import & Export
 - 4.1.3 key Manufacturers
 - 4.2 Stainless Steel Strip
 - 4.2.1 Production
 - 4.2.2 Import & Export
 - 4.2.3 key Manufacturers
 - 4.3 Stainless Steel Section
 - 4.3.1 Production
 - 4.3.2 Import & Export
 - 4.3.3 key Manufacturers
 - 4.4 Stainless Steel Pipe
 - 4.4.1 Production
 - 4.4.2 Import & Export

- **5. Global Stainless Steel Manufacturers**

- 5.1 ThyssenKrupp Stainless GmbH
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Business Development in China
- 5.2 Arcelor Mittal
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Business Development in China
- 5.3 POSCO
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Business Development in China
- 5.4 Acerinox Group
 - 5.4.1 Profile
 - 5.4.2 Operation
- 5.5 Outokumpu Stainless Steel Oy
 - 5.5.1 Profile
 - 5.5.2 Operation
 - 5.5.3 Investment Plan
 - 5.5.4 Business Development in China

- **6. Chinese Stainless Steel Manufacturers**

- 6.1 Shanxi Taigang Stainless Steel Co., Ltd.
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Competitive Edge
 - 6.1.4 Investment in Overseas Minerals
- 6.2 Baoshan Iron & Steel Co., Ltd.
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Stainless Steel Projects under Construction
- 6.3 Tsingshan Holding Group
 - 6.3.1 Profile
 - 6.3.2 Operation
 - 6.3.3 Investment
- 6.4 Fujian WuHang Stainless Steel Products Co., Ltd.
 - 6.4.1 Profile
 - 6.4.2 Operation
- 6.5 Lianzhong (Guangzhou) Stainless Steel Corporation
 - 6.5.1 Profile

- 6.5.2 Operation
- 6.6 Yongxing Special Stainless Steel Co., Ltd.
 - 6.6.1 Profile
 - 6.6.2 Operation
- 6.7 Dongbei Special Steel Group Co., Ltd.
 - 6.7.1 Profile
 - 6.7.2 Operation
- 6.8 Shandong Taishan Steel Group
 - 6.8.1 Profile
 - 6.8.2 Operation
- 6.9 RUITIAN Steel Co., Ltd.
 - 6.9.1 Profile
 - 6.9.2 Operation
- 6.10 Sichuan Southwest Stainless Steel Co., Ltd.
 - 6.10.1 Profile
 - 6.10.2 Operation

Selected Charts

- Stainless Steel Types by Grade
- Raw Material Cost of 304# Stainless Steel
- Raw Material Cost of 430# Stainless Steel
- Global Stainless Steel Output, 1950-2009
- Global Stainless Steel Output by Grade, 2009
- Global Stainless Steel Output by Region, 2005-2009
- Cold-rolled Stainless Steel Output of Global Major Enterprises, 2008
- Major Stainless Steel Industry Policies of China, 2008-2010
- Crude Stainless Steel Output of China by Region, 2009
- Major Stainless Steel Enterprises in China, 2009
- Crude Stainless Steel Output of China, 2000-2010
- Crude Stainless Steel Product Structure of China, 2007-2010
- Apparent Consumption of Stainless Steel in China, 2000-2010
- Stainless Steel Market Consumption Structure in China, 2009
- Import & Export of Stainless Steel in China, 2000-2010
- Market Price of 304/2B 2*C Stainless Steel Coil Made by Shanxi Taigang Stainless Steel in Wuxi, 2009-2010
- Market Price of 430/2B 2*C Stainless Steel Coil Made by Shanxi Taigang Stainless Steel in Wuxi, 2009-2010
- Market Price of 202/2B 2*L Stainless Steel Board made by Lianzhong (Guangzhou) Stainless Steel Corporation in Wuxi, 2009-2010
- Output of Stainless Steel Coil in China, 2008-2010
- Product Structure of Stainless Steel Coil in China by Grade, 2008-2010
- Import & Export of Stainless Steel Coil in China, 2008-2010
- Output of Hot-rolled Steel Strip in China, 2009-2010

- Import & Export of Stainless Steel Strip in China, 2008-2010
- Output of Stainless Steel Bar and Wire in China, 2008-2010
- Export of Stainless Steel Section in China, 2008-2010
- Output of Seamless Stainless Steel Pipe of Major Chinese Manufacturers, 2008-2010
- Seamless Stainless Steel Pipe Manufacturers in China, 2009
- Output of Welded Stainless Steel Pipe of Major Chinese Manufacturers, 2009-2010
- Import & Export of Seamless Stainless Steel Pipe of China, 2009
- Import & Export of Welded Stainless Steel Pipe in China, 2009
- Major Stainless Steel Businesses of ThyssenKrupp Stainless GmbH
- Projects under Construction of ThyssenKrupp Stainless GmbH
- Sales Revenue and PBT of ThyssenKrupp Stainless GmbH, FY2005-FY2010
- Scale Indicators of Shanghai Krupp Stainless, 2004-2008
- Major Stainless Steel Products of Shanghai Krupp Stainless
- Selling Price of Stainless Steel of Shanghai Krupp Stainless, 2010
- Prime Operating Revenue and Total Profit of Shanghai Krupp Stainless, 2004-2008
- Major Stainless Steel Businesses of Arcelor Mittal
- Operating Income and Net Income of Arcelor Mittal, 2005-2009
- Operating Income and Operating Profit from Stainless Steel Business of Arcelor Mittal, 2006-2009
- Scale Indicators of Arcelor Mittal (Changzhou), 2004-2008
- Prime Operating Revenue and Total Profit of Arcelor Mittal (Changzhou), 2004-2008
- Sales Revenue and Net Income of POSCO, 2003-2009
- Stainless Steel Output of POSCO, 2003-2009
- Major Stainless Steel Businesses of POSCO in China
- Ex-factory Prices of ZPSS, QPSS 304 Series 0.3mm Thin Stainless Steel Board, 2008-2010

- Output of ZPSS, QPSS Stainless Steel, 2002-2008
- Sales Revenue and Net Income of ZPSS, 2002-2008
- Sales Revenue and Net Income of QPSS, 2004-2008
- Major Stainless Steel Businesses of Acerinox Group
- Net Sales of Acerinox Group by Region, 2009
- Output of Flat Stainless Steel of Acerinox Group, 2006-2010
- Output of Long Stainless Steel of Acerinox Group, 2006-2010
- Net Sales and Net Income of Acerinox Group, 2006-2010
- Major Stainless Steel Businesses of Outokumpu Stainless Steel Oy
- Stainless Steel Delivery of Outokumpu Stainless Steel Oy, 2005-2009
- Sales Revenue and Net Income of Outokumpu Stainless Steel Oy, 2005-2009
- Average Price and Gross Profit of Stainless Steel Products Made by Shanxi Taigang Stainless Steel, 2006-2010
- Operating Income and Net Income of Shanxi Taigang Stainless Steel, 2006-2010
- Operating Income of Shanxi Taigang Stainless Steel by Product, 2007-2010
- Major Stainless Steel Businesses of Baoshan Iron & Steel
- Sales Volume of Baoshan Iron & Steel by Product, 2009
- Operating Income and Net Income of Baoshan Iron & Steel, 2006-2010
- Operating Income of Major Iron & Steel Products of Baoshan Iron & Steel, 2007-2009
- Major Stainless Steel Products of Tsingshan Holding Group by Type and Grade
- Stainless Steel Output of Tsingshan Holding Group, 2007-2010
- Sales Revenue of Tsingshan Holding Group, 2006-2010
- Major Stainless Steel Products of Fujian WuHang Stainless Steel Products
- Prime Operating Revenue and Total Profit of Fujian WuHang Stainless Steel Products, 2004-2008
- Major Stainless Steel Products of Lianzhong (Guangzhou) Stainless Steel Corporation

- Operating Income of Lianzhong (Guangzhou) Stainless Steel Corporation, 2007-2009
- Stainless Steel Output of Yongxing Special Stainless Steel, 2006-2009
- Operating Income and Net Income of Yongxing Special Stainless Steel, 2006-2009
- Major Stainless Steel Products of Dongbei Special Steel Group
- Prime Operating Revenue of Dongbei Special Steel Group, 2005-2009
- Operating Income and Net Income of Fushun Special Steel Group, 2005-2010
- Operating Income of Major Steel Products of Fushun Special Steel Group 2007-2010
- Major Stainless Steel Products of Shandong Taishan Steel Group
- Prime Operating Revenue of Shandong Taishan Steel Group, 2004-2009
- Specifications of Major Stainless Steel Products of RUITIAN Steel
- Ex-factory Price of 202/NO.1 Stainless Steel Coil Made by RUITIAN Steel, 2009-2010
- Prime Operating Revenue of RUITIAN Steel, 2004-2009
- Market Quotation on 1240mm Hot-rolled Stainless Steel Narrow Strip Made by Sichuan Southwest Stainless Steel, 2010
- Sales Revenue of Sichuan Southwest Stainless Steel, 2007-2010

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