



Global and China Special Steel Industry Report, 2010-2015

July 2011

This report

- ◆ **Analyzes the development of global and China special steel industry**
- ◆ **Focuses on output and downstream of special steel**
- ◆ **Highlights the operation of special steel enterprises in China and worldwide**

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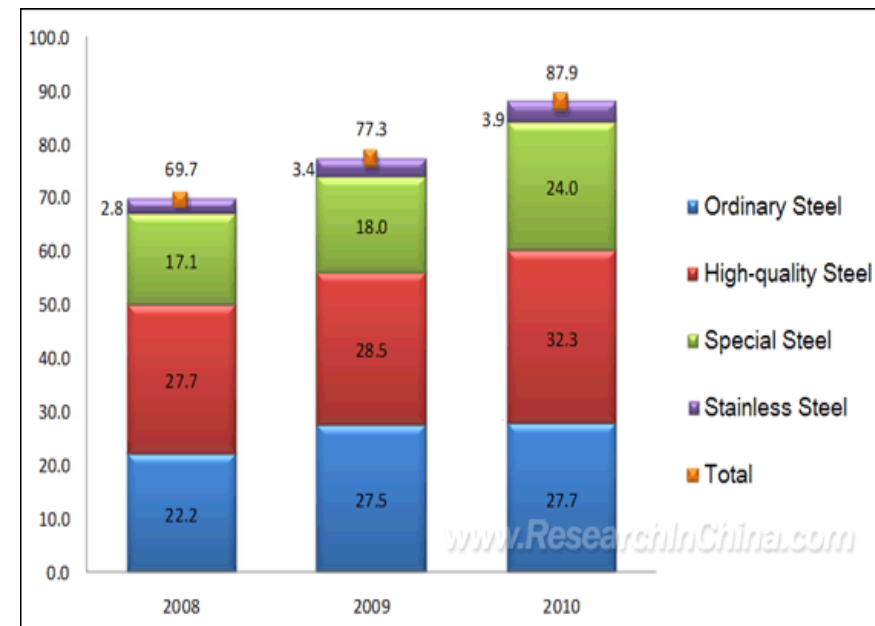
Abstract

In the world, Sweden, Germany and Japan are special steel giants, especially Japan. According to the data released by Japan Iron and Steel Federation (JISF), Japan produced 24.681 million tons of special steel in 2010, up 53.04% year on year, returning to the level in 2008 before the financial crisis.

China special steel industry is still in the growth stage. According to the statistics of Special Steel Enterprises Association of China (SSEAC), 32 Chinese special steel enterprises produced 87.865 million tons of steel totally in 2010, up 13.66% year on year, including 24.042 million tons of special steel, up 33.43% year on year. The output of 32 special steel enterprises accounted for 60% of the total output in China special steel industry.

In China special steel industry, special steel is not "special", which means the proportion of high-end products made by Chinese special steel enterprises is small. In recent three years, the ordinary steel output of 32 Chinese special steel enterprises has accounted for one-third of the total output, while the output of the low-end special steel products made in Japan has only accounted for one-fifth of the total special steel production in Japan.

Output of 32 Chinese Special Steel Enterprises, 2008-2010
(Unit: mln tons)



Source: Special Steel Enterprises Association of China;
ResearchInChina

In China, there are several large-scale special steel enterprises, such as Baosteel, CITIC Pacific, Dongbei Special Steel, Tiangong International, and Shanxi Taigang Stainless Steel.

The special steel products of CITIC Pacific generated HKD30.478 billion in 2010, up 59.75% year on year. Meanwhile, CITIC Pacific also aimed at the field of iron ore. It is expected that the special steel companies of CITIC Pacific will achieve self-sufficiency in iron ore. CITIC Pacific has Jiangyin XingCheng Special Steel Works Co., Ltd and Hubei Xinyegang Steel Co., Ltd. Daye Special Steel Co., Ltd held by Hubei Xinyegang Steel Co., Ltd is an A-share listed company.

Dongbei Special Steel Group has three production bases (namely Dalian Special Steel, Fushun Special Steel, and Beiman Special Steel) and many subsidiaries in Heilongjiang, Liaoning, Jilin, Inner Mongolia, Shandong and Shanghai. Fushun Special Steel is an A-share listed company. In 2010, Fushun Special Steel produced 667,100 tons of steel and 543,300 tons of steel materials, up 2.03% and 2.13% year on year respectively; the operating income reached RMB5.28 billion, up 26.44% year on year.

Tiangong International is an enterprise specializing in high-speed steel and tool steel. In 2010, it achieved the operating income of RMB2.349 billion, up 77.42% year on year. Tiangong International saw rapid growth in its tool steel. In 2010, the tool steel revenue reached RMB831 million, up 84% year on year; the domestic revenue and the export value grew by 14% and 662% respectively.

Shanxi Taigang Stainless Steel is a professional producer of stainless steel, and it ranks first in terms of stainless steel output and market share in China. In 2010, it achieved the operating income of RMB87.198 billion, up 21.40% year on year. The total profit was RMB 1.457 billion, up 52.63% year on year.

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