



Global and China Galvanized Sheet Industry Report, 2010-2011

Sep. 2011

This report

- ◆ **Analyzes the development of global and China Galvanized Sheet industry**

- ◆ **Focuses on Galvanized Sheet Manufacturers worldwide and China**

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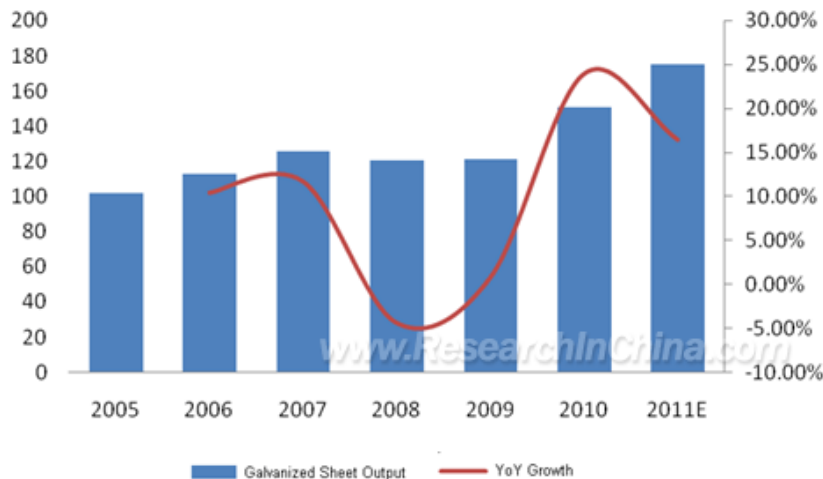
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Abstract

With rapid development of lightweight structure in architecture, the yearly increasing automobile output and the wide prevalence of household appliances, the world's consumption of galvanized sheet presented significant growth in 2010 with an output of around 150 million tons, up 24% YoY, which is expected to reach 175 million tons in 2011, an increase of 16.5%.

Output and Growth Rate of Global Galvanized Sheet, 2005-2011
(Unit: mln tons)



Source: ResearchInChina

The global galvanized sheet output is mainly concentrated in Europe, Japan and other developed countries, whose demand for galvanized sheet basically remains stable, while the developing countries in Asia like China, Vietnam, Thailand, etc. will become the new force of production and marketing in the coming years. In 2010, China's output of galvanized sheet registered 19.2 million tons, sharing 12.77% of global total. Despite the substantial increase in output, most capacity mainly focuses on low-end common galvanized sheet field, resulting in short supply of the high-end galvanized sheet, which relies largely on imports from Japan, Europe and America.

In terms of market competition pattern, there is a relatively high degree of enterprise concentration in Chinese galvanized sheet industry. From 2007 to 2010, the top ten enterprises accounted for over 50%, represented by Baosteel, WISCO and Ansteel.

Baosteel The leading galvanized sheet manufacturer in China with a 12% share of total domestic output. Affected by financial crisis, the galvanized sheet output of it decreased somewhat in 2008-2009, then increased by 37.5% YoY to 2.2 million tons in 2010. Technologically, it also keeps ahead. In 2010, the high-conductivity fingerprint-resistant electro-galvanized products of Baosteel broke the monopoly of Japanese counterparts, realizing the batch supply.

WISCO The galvanized sheet output of it was 1.2 million tons in 2010, mainly sold in Central and Eastern China with a nearly 70% share of total sales altogether. With an annual designed capacity of 300 kilotons, the No.2 cold rolled electro-galvanized unit is positioned to produce top-grade automotive sheet and household appliance plate, 83.27% of which has been completed by the end of 2010 with the investment of RMB115 million, and now goes small scale trial production. Concerning new product, American Standard SS275 structural grade galvanized sheet was successfully developed in April 2011.

Ansteel From 2008 to 2010, the galvanized sheet output of it declined yearly in the ratio of domestic total; products mainly sell in Northeast China, sharing more than 30%. In March 2011, the cold rolled project in Putian commenced trial production with an annual designed capacity of one million tons, with the products dominated by household appliance plate as well as considering automobile and architectural plates. The project is expected to achieve full production in 2012 with total investment of RMB3.798 billion and the construction period of 30 months.

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