This report

◆ Analyzes the development of global and China Galvanized Sheet industry

◆ Focuses on Galvanized Sheet Manufacturers worldwide and China

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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.
1 Profile of Galvanized Sheet
1.1 Definition and Classification
1.1.1 Definition
1.1.2 Classification
1.2 Industry Chain
1.2.1 Upstream
1.2.2 Downstream

2 Global Galvanized Sheet Industry
2.1 Development Status
2.2 Supply and Demand
2.3 Price Tendency
2.4 Major Countries
2.5 Dynamics

3 China Galvanized Sheet Industry
3.1 Development Status
3.2 Supply and Demand
3.2.1 Supply
3.2.2 Demand
3.3 Competition Pattern
3.4 Import and Export
3.5 Price Analysis
3.6 Trends and Problems

4 Galvanized Sheet Manufacturers Worldwide
4.1 Nippon Steel Corporation
4.1.1 Profile
4.1.2 Business
4.1.3 Strategy
4.2 ArcelorMittal
4.2.1 Profile
4.2.2 Operation
4.2.3 Development in China
4.3 Sumitomo Metal Industries
4.3.1 Profile
4.3.2 Business
4.3.3 Strategy
4.4 KOBELCO
4.4.1 Profile
4.4.2 Business
4.4.3 Strategy

5 China Galvanized Sheet Manufacturers
5.1 Baosteel
5.1.1 Profile
5.1.2 Business
5.1.3 Baosteel-NSC/Arcelor Automotive Steel Sheets Co., Ltd.
5.1.4 Baosteel Huangshi Coated and Galvanized Sheet Co., Ltd.
5.1.5 Dynamics
5.2 WISCO
5.2.1 Profile
5.2.2 Operation
5.2.3 Project Planning
5.3 Angang Steel
5.3.1 Profile
5.3.2 Operation
5.3.3 Tianjin Angang Steel Tiantie Cold Rolled Sheet Co., Ltd
5.3.4 ThyssenKrupp Steel AG and Angang Steel Co., Ltd (TAGAL)
5.3.5 Cold Rolled Project in Putian
5.4 Magang
5.4.1 Profile
5.4.2 Operation
5.4.3 Strategy
5.5 Bensitan Steel Plates
5.5.1 Profile
5.5.2 Operation
5.5.3 Strategy
5.6 Hebei Iron and Steel
5.6.1 Profile
5.6.2 Operation
5.6.3 Orders
5.7 Baotou Steel
5.7.1 Profile
5.7.2 Operation
5.8 Shougang
5.8.1 Profile
5.8.2 Operation
5.8.3 Auto Sheet Blanking Pressure Molding Line Project
5.9 Jinan Iron and Steel
5.9.1 Profile
5.9.2 Operation
5.9.3 Projects to be Invested
5.10 Pangang Group Steel Vanadium & Titanium Co., Ltd.
5.10.1 Profile
5.10.2 Operation
5.10.3 Projects to be Invested
• Introduction to Galvanized Sheet/Roll
• Classification of Galvanized Sheet
• Zinc Output in China, 2006-2011
• Steel Output in China, 2006-2011
• Downstream Application of Galvanized Sheet
• Output and Growth Rate of Global Galvanized Sheet, 2005-2011
• Average Price of Global Galvanized Sheet, 2006-2011
• Output and Growth Rate of China Galvanized Sheet, 2005-2011
• Apparent Consumption and Growth Rate of Galvanized Sheet in China, 2005-2011
• Output of Top 10 Galvanized Sheet Manufacturers in China, 2007-2011
• Import and Export Volume of China Galvanized Sheet, 2005-2011
• Average Price of China Galvanized Sheet, 2005-2011
• Sales and Operating Income of NSC, FY 2006-FY2010
• Global Distribution of NSC Automotive Sheet
• Global Supply and Distribution Network of NSC
• Sales of ArcelorMittal by Business, 2006-2010
• Steel Production Base of ArcelorMittal in Asia, 2010
• Net Sales and Operating Margin of Steel Plate and Structural Steel of Sumitomo Metal, FY 2006-FY2010
• Net Sales of Steel Plate and Structural Steel of Sumitomo Metal by Product, FY2010
• Net Sales and Operating Revenue of Steel Business of KOBELCO, FY2006-FY2010
• Net Sales of JFE Steel Corporation, FY2001-FY2010
• Ordinary Income Margin of JFE Steel Corporation, FY2001-FY2010
• Structure of JFE Steel Corporation by Business
• Operating Revenue and Total Profit of Guangzhou JFE Steel Sheet Co., Ltd., 2007-2009
• Operating Revenue of Baosteel by Product, 2008-2010
Selected Charts

- Galvanized Sheet Output of Baosteel, 2007-2011
- Operating Revenue and Net Income of Baosteel-NSC/Arcelor Automotive Steel Sheets Co., Ltd., 2008-2010
- Operating Revenue and Net Income of Baosteel Huangshi Coated and Galvanized Sheet Co., Ltd., 2008-2010
- Operating Revenue of WISCO by Product, 2008-2010
- Galvanized Sheet Output of WISCO, 2007-2011
- Operating Revenue Percentage of WISCO by Region, 2010
- Operating Revenue of Ansteel by Product, 2008-2010
- Galvanized Sheet Output of Ansteel, 2007-2011
- Operating Revenue Percentage of Ansteel by Region, 2008-2010
- Operating Revenue of Magang by Product, 2008-2010
- Galvanized Sheet Output of Magang, 2007-2011
- Operating Revenue Percentage of Magang by Region, 2008-2010
- Operating Revenue of Bengang by Product, 2008-2010
- Galvanized Sheet Output of Bengang, 2007-2011
- Operating Revenue Percentage of Bengang by Region, 2008-2010
- Operating Revenue of Hebei Iron and Steel by Product, 2008-2010
- Galvanized Sheet Output of Hebei Iron and Steel, 2007-2011
- Operating Revenue Percentage of Hebei Iron and Steel by Region, 2008-2010
- Operating Revenue of Baotou Steel by Product, 2008-2010
- Galvanized Sheet Output of Baotou Steel, 2007-2011
- Operating Revenue Percentage of Baotou Steel by Region, 2008-2010
- Operating Revenue of Shougang by Product, 2008-2010
- Galvanized Sheet Output of Shougang, 2007-2011
- Operating Revenue Percentage of Shougang by Region, 2008-2010
Selected Charts

- Operating Revenue of Jinan Iron and Steel by Product, 2008-2010
- Galvanized Sheet Output of Jinan Iron and Steel, 2007-2011
- Operating Revenue Percentage of Jinan Iron and Steel by Region, 2008-2010
- Major Project Investment Budget of Jinan Iron and Steel, 2011
- Operating Revenue of Pangang Group Steel Vanadium & Titanium Co., Ltd. by Product, 2008-2010
- Galvanized Sheet Output of Pangang Group Steel Vanadium & Titanium Co., Ltd., 2007-2011
- Operating Revenue Percentage of Pangang Group Steel Vanadium & Titanium Co., Ltd. by Region, 2008-2010
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