

Global and China Stainless Steel Industry Report, 2011

Apr. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

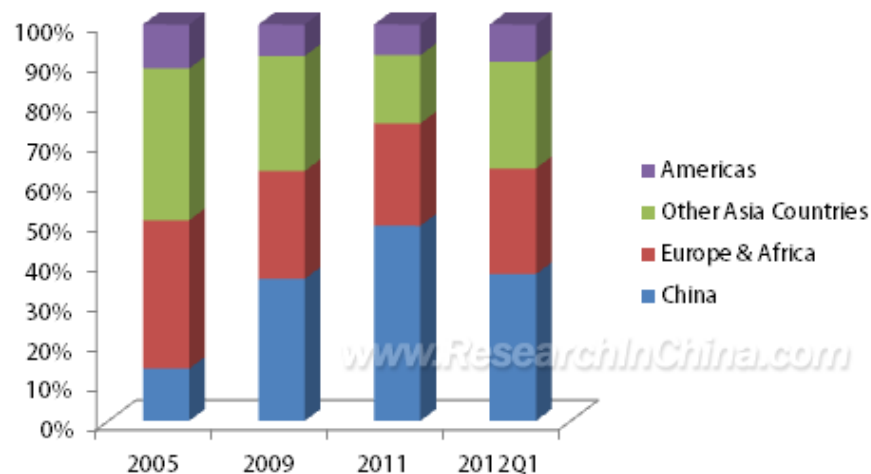
The primary information sources include ISSF, NBS(National Bureau of Statistics of China), WIND and China Custom etc.

Abstract

Due to the financial crisis, major stainless steel tycoons worldwide suffered decline in business performance and have not yet to totally gain resumption from the setback. In order to improve the declining profitability and competitiveness, the European stainless steel titans accelerated the restructuring in 2011. For example, the stainless steel division under TK Stainless GmbH became an independent operator which was renamed Inoxum. Inoxum will merge with Finland-based Outokumpu Stainless Steel Oy in February 2012; in January 2011, the world's largest steel producer ArcelorMittal split the stainless steel business and special steel business and set up an independent company- Aperam. After Aperam was established, its plants with poor profitability located in France and Belgium was shut down or reduced.

The stagnant development of stainless steel corporations in American and European countries caused the global stainless steel industry to transfer to emerging markets like China at a sped-up rate. In terms of stainless steel output, the proportion of Europe and Africa in the world's total decreased to 17% in 2011 from 38% in 2005, while the figure of China saw constant increase to 49% in 2011.

Stainless Steel Output Percentage by Region, Worldwide, 2005-2012



Source: ISSF , Global and China Stainless Steel Industry Report, 2010-2011

In 2005-2011, the CAGR of stainless steel output in China approximated 25%, far ahead of the global average 4.23%. It is expected that China's stainless steel output will exceed 14 million tons in 2012. With the sustained progression of Chinese stainless steel industry, a batch of competitive flagship enterprises will emerge in the market segments such as stainless steel sheet, strip, section and pipe.

In the stainless steel sheet sector, Lianzhong (Guangzhou) Stainless Steel Corporation is the largest producer of 200 series stainless steel coil, while its counterparts including Shanxi Taigang Stainless Steel Co., Ltd., Baoshan Iron & Steel Co., Ltd., POSCO, Jiuquan Iron & Steel Group and Taishan Steel bear more competitive edge in 400 series stainless steel coil market.

In the stainless steel strip sector, private-owned stainless steel enterprises are in the dominant position. For instance, Fujian WuHang Stainless Steel Products Co., Ltd, which specializes in hot-rolling and cold-rolling stainless steel strip, has realized the annual capacity of 900,000 tons of crude stainless steel.

Another case is Sichuan Southwest Stainless Steel Co., Ltd., which is accomplished in hot-rolling stainless steel strip, reaches the annual capacity of 800,000 tons of crude stainless steel.

In the field of stainless steel profiles, there are 18 mainstream players like Tsingshan Holding Group and Dongbei Special Steel Group Co., Ltd. The major stainless steel products of Dongbei Special Steel Group Co., Ltd. cover stainless steel bar and wire. And the stainless steel grail heavy wires, produced by the affiliated business, Dalian Special Steel, make up over 50% of the national total in terms of output.

The report highlights global stainless steel supply and industrial pattern; supply & demand of stainless steel industry of China, industrial policy, import & export prices and market prices; supply of stainless steel sheet, strip, section and tube, import & export and leading companies; operation and development of 15 major stainless steel makers worldwide.

1. Overview of Stainless Steel	4. Market Segments in China	5.3 POSCO	6.4.1 Profile
1.1 Definition & Classification	4.1 Stainless Steel Sheet	5.3.1 Profile	6.4.2 Operation
1.1.1 Definition	4.1.1 Production	5.3.2 Operation	6.4.3 Investment Plan in 2011-2012
1.1.2 Classification	4.1.2 Import & Export	5.3.3 Business Development in China	6.5 Lianzhong (Guangzhou) Stainless Steel Corporation
1.2 Cost Structure	4.1.3 Key Manufacturers	5.4 Acerinox Group	6.5.1 Profile
2. Global Stainless Steel Industry	4.2 Stainless Steel Strip	5.4.1 Profile	6.5.2 Operation
2.1 Supply	4.2.1 Production	5.4.2 Operation	6.5.3 Investment Plan in 2010-2012
2.2 Industry Pattern	4.2.2 Import & Export	5.5 Outokumpu Stainless Steel Oy	6.6 Yongxing Special Stainless Steel Co., Ltd.
2.2.1 Regional Competition	4.2.3 Key Manufacturers	5.5.1 Profile	6.6.1 Profile
2.2.2 Competition of Companies	4.3 Stainless Steel Section	5.5.2 Operation	6.6.2 Operation
3. Stainless Steel Industry in China	4.3.1 Production	5.5.3 Investment Plan	6.7 Dongbei Special Steel Group Co., Ltd.
3.1 Industrial Policy	4.3.2 Import & Export	5.5.4 Business Development in China	6.7.1 Profile
3.1.1 Industrial Policy	4.3.3 Key Manufacturers	6. Chinese Stainless Steel Manufacturers	6.7.2 Operation
3.1.2 Export Policy	4.4 Stainless Steel Pipe	6.1 Shanxi Taigang Stainless Steel Co., Ltd.	6.8 Shandong Taishan Steel Group
3.2 Industrial Structure	4.4.1 Production	6.1.1 Profile	6.8.1 Profile
3.3 Supply & Demand	4.4.2 Import & Export	6.1.2 Operation	6.8.2 Operation
3.3.1 Supply	5. Stainless Steel Makers Worldwide	6.1.3 Investment Plan of Stainless Steel	6.8.3 Development Plan for Stainless Steel in 2012
3.3.2 Demand	5.1 Inoxum	6.2 Baoshan Iron & Steel Co., Ltd.	6.9 RUITIAN Steel Co., Ltd.
3.3.3 Import & Export	5.1.1 Profile	6.2.1 Profile	6.9.1 Profile
3.4 Market Price	5.1.2 Operation	6.2.2 Operation	6.9.2 Operation
3.4.1 Stainless Steel Price	5.1.3 Business Development in China	6.2.3 Stainless Steel Business for Sale	6.10 Sichuan Southwest Stainless Steel Co., Ltd.
3.4.2 Nickel Price	5.2 Aperam	6.3 Tsingshan Holding Group	
	5.2.1 Profile	6.3.1 Profile	
	5.2.2 Operation	6.3.2 Operation	
	5.2.3 Business Development in China	6.3.3 Investment in 2009-2011	
		6.4 Fujian WuHang Stainless Steel Products Co., Ltd	

- 
- Stainless Steel Types by Grade
 - Raw Material Cost of 304# Stainless Steel
 - Raw Material Cost of 430# Stainless Steel
 - Global Stainless Steel Output, 2003-2012E
 - Global Stainless Steel Output Percentage by Grade, 2011
 - Global Stainless Steel Output Percentage by Region, 2005-2012
 - Stainless Steel Output of Global Major Companies, 2011
 - Crude Stainless Steel Output of China, 2000-2012
 - Crude Stainless Steel Product Structure in China, 2007-2011
 - Apparent Consumption of Stainless Steel in China, 2000-2012E
 - Stainless Steel Market Consumption Structure in China, 2010
 - Import & Export Volume of Stainless Steel in China, 2003-2011
 - Stainless Steel Price Index in China, 2010-2011
 - LEM Nickel Spot Price, 2010-2011
 - Output of Stainless Steel Coil in China, 2008-2011
 - Product Structure of Stainless Steel Coil by Grade in China, 2008-2011
 - Import & Export Volume of Stainless Steel Coil in China, 2008-2011
 - Output of Hot-rolled Steel Strip by Grade in China, 2009-2011
 - Import & Export of Stainless Steel Strip in China, 2008-2011
 - Output of Stainless Steel Bar and Wire in China, 2009-2011
 - Import & Export Volume of Stainless Steel Profiles in China, 2008-2011
 - Output of Seamless Stainless Steel Pipe of Major Chinese Manufacturers, 2009-2011
 - Output of Welded Stainless Steel Pipe of Major Chinese Manufacturers, 2009-2011
 - Import & Export Volume of Stainless Steel Pipes in China, 2009-2011
 - Major Stainless Steel Businesses of Inoxum

- 
- Sales and EBT of Innoxum GmbH, FY2005-FY2011
 - Scale Indicators of Shanghai Krupp Stainless, 2004-2009
 - Major Stainless Steel Products of Shanghai Krupp Stainless
 - Selling Price of Stainless Steel of Shanghai Krupp Stainless, 2011-2012
 - Operating Revenue and Total Profit of Shanghai Krupp Stainless, 2004-2009
 - Major Stainless Steel Businesses of Aperam
 - Shipment of Stainless Products of Aperam, 2007-2011
 - Operating Revenue and Net Income of Arcelor Mittal, 2005-2009
 - Scale Indicators of Arcelor Mittal (Changzhou), 2004-2009
 - Operating Revenue and Total Profit of Arcelor Mittal (Changzhou), 2004-2009
 - Overseas Ongoing Flat Stainless Steel Product Project of POSCO, 2012-2013
 - Sales and Net Income of POSCO, 2007-2011
 - Stainless Steel Output of POSCO, 2007-2011
 - Major Stainless Steel Businesses of POSCO in Chinese Market
 - Ex-factory Prices of ZPSS and QPSS 304 Series 0.3mm Stainless Steel Thin Sheet
 - Total Output of ZPSS, QPSS Stainless Steel, 2002-2012
 - Major Stainless Steel Businesses of Acerinox
 - Stainless Steel Output of Acerinox, 2010-2011
 - Output of Flat/Long Stainless Steel of Acerinox, 2010-2011
 - Operating Revenue and Net Income of Acerinox, 2007-2011
 - Revenue Structure of Acerinox by Region, 2010-2011
 - Investment of Acerinox Group, 2010-2011
 - Major Stainless Steel Businesses of Outokumpu Stainless Steel Oy
 - Stainless Steel Shipment of Outokumpu Stainless Steel Oy, 2007-2011
 - Sales and Net Income of Outokumpu Stainless Steel Oy, 2007-2011

- Investment Expenditure Structure of Outokumpu, 2009-2011
- Average Price and Gross Margin of Stainless Steel Products of Shanxi Taigang Stainless Steel, 2007-2011
- Operating Revenue and Net Income of Shanxi Taigang Stainless Steel, 2007-2011
- Operating Revenue of Shanxi Taigang Stainless Steel by Product, 2010-2011
- Major Stainless Steel Businesses of Baoshan Iron & Steel
- Operating Revenue and Net Income of Baoshan Iron & Steel, 2007-2011
- Gross Margin of Baosteel Stainless Steel Business, 2007-2011
- Main Stainless Steel Grades and Numbers of Tsingshan Holding Group
- Stainless Steel Output of Tsingshan Holding Group, 2007-2011
- Sales of Tsingshan Holding Group, 2006-2010
- Main Stainless Steel Products of Fujian WuHang Stainless Steel Products
- Operating Revenue and Total Profit of Fujian WuHang Stainless Steel Products, 2004-2009
- Main Stainless Steel Products of Lianzhong (Guangzhou) Stainless Steel Corporation
- Operating Revenue of Lianzhong (Guangzhou) Stainless Steel Corporation, 2007-2011
- Stainless Steel Output of Yongxing Special Stainless Steel, 2007-2011
- Operating Revenue of Yongxing Special Stainless Steel, 2007-2011
- Operating Revenue of Dongbei Special Steel Group, 2007-2011
- Operating Revenue and Net Income of Fushun Special Steel Group, 2007-2011
- Operating Revenue of Major Steel Products of Fushun Special Steel Group, 2007-2011
- Main Stainless Steel Products of Shandong Taishan Steel Group
- Operating Revenue of Shandong Taishan Steel Group, 2007-2011
- Specifications of Major Stainless Steel Products of RUITIAN Steel
- 201/NO.1 Stainless Steel Coil Market Price of RUITAIN Steel, 2011-2012
- Operating Revenue of RUITIAN Steel, 2007-2011
- Market Quotation on 202/1240mm Hot-rolled Stainless Steel Narrow Strip Made by Sichuan Southwest Stainless Steel, 2011-2012
- Sales of Sichuan Southwest Stainless Steel, 2007-2011

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
Total		

Choose type of format

Hard copy1,800 USD
 PDF (Single user license)1,700 USD
 PDF (Enterprisewide license)..... 2,700 USD

※ Reports will be dispatched immediately once full payment has been received.
 Payment may be made by wire transfer or credit card via PayPal.