



Global and China Stainless Steel & Products Industry Report, 2012-2015

May 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

In 2012, stainless steel prices showed the tendency of “rise before fall and mobile descending”, resulting in a downward trend for most of the traditional stainless steel producing countries. Global stainless steel production for the whole year attained to 35.36 million tons, a slight year-on-year increase, of which, down 1.6% YoY in Western Europe, down 1.2% YoY in the Americas; up 3.7% YoY in Asia; up 18.2% YoY in South Africa.

In recent years, China relying on its substantially increased production has become the main engine for global stainless steel output growth. In 2012 China's stainless steel crude steel production climbed 14% YoY to 16.08 million tons, accounting for 45.5% of the global stainless steel production, of which, 300 series products held a proportion of 49.3%, 200 series products 30.8%, and 400 series products 19.9%.

In China, stainless steel is mainly consumed in household metal products, building materials, machinery, etc., whose stainless steel apparent consumption in 2012 accounted for 28%, 26% and 19% of annual consumption, respectively.

China, as a large producer of stainless steel tableware and kitchenware, exports products to developed countries and regions. However, in 2012 under the influence of the Eurozone debt crisis and weak U.S. economic recovery, the exports were impeded, with annual export value down 3.7% YoY to US\$1.82 billion.

With respect to major steel mills, stainless steel output in 2012 all saw different rates of growth. Acerinox produced more stainless steel crude steel in Spain, the United States and South Africa than the same period of the previous two years, with annual output exceeding two million tons. Outokumpu's output in Finland also witnessed significant growth, after the merger with ThyssenKrupp Inoxum at the end of 2012, it surpassed Taiyuan Iron & Steel (Group) Co., Ltd. (TISCO) and South Korea's POSCO to be the world's largest stainless steel manufacturer with a total capacity of 5.5 million tons of stainless steel.

In 2012, TISCO realized scheduled stainless steel output of 3.1 million tons, a year-on-year increase of 2.6%. 23 products occupied the largest share of the domestic market, 36 varieties could be substitutes for imported goods. But affected by the price decline, the company's stainless steel revenue fell 11.4% YoY.

With new capacity put into production in 2012, Tsingshan Holding Group ushered in output growth of 56%, producing 2.11 million tons of stainless steel crude steel for the whole year. In consideration of the high cost and middle-low level profitability, Baoshan Iron & Steel Co., Ltd. sold the stainless steel and special steel business to Shanghai Baosteel Group Corp., thereby concentrating on carbon steel plate and related business.

Consisting of seven chapters, Global and China Stainless Steel & Products Industry Report, 2012-2015 makes an in-depth analysis of the development background and market pattern of global and China stainless steel & products industry with detailed data, a specific analysis of operation of 14 Chinese and foreign companies (Outokumpu, Acerinox, TISCO, etc.) as well as a prediction about the future development.

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