

China Steel Industry Report - H2, 2013

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Abstracts

This report reviews the current trends and market outlook in China's steel industry. It also highlights the leading players in the sector, among them Baoshan—exporter to 40 countries including the United States, Japan, and Korea—as well as Wuhan, Hebei, and Shanxi Taigang Stainless Steel.

The world's annual crude steel production expanded at a CAGR of 4.34% between 2005 and 2012. In the first 11 months of 2013, crude steel output in Asia was up by 5.9% y/y to 967.1mn tons. In the same period, China's steel industry revenue was up 3.3% y/y to RMB 3.35tn, but net profit margin remained low at 0.48%, primarily due to overcapacity. Industry fixed asset investment increased by 25.5% y/y to RMB 516.7bn in 2012. Industry total asset size reached RMB 4.44tn by November 2013.

China has become a net exporter of steel products since 2006, reducing its imports of steel products over the years. Steel sheets and plates was the largest category of steel product imports as well as the exports in 2013.

Key Points:

The report includes stock performance information and financial highlights for the firms Baoshan Iron & Steel Co. Ltd. (Baosteel), Wuhan Iron & Steel Co. Ltd. (WISCO), Hebei Iron & Steel Co. Ltd. (HBIS), and Shanxi Taigang Stainless Steel Co. Ltd. (TISCO).

The year 2013 witnessed rapid adoption and migration to e-commerce by steelmakers and steel traders in China. About RMB 10tn of e-commerce sales transactions took place and business-to-business (B2B) made up about 80% of total transactions.

In October 2013, Chinese government introduced policy to modernize equipment and to shut down mills with capacity on dated and highly polluting equipment. This new policy will drive steel mills to switch from fines to pellets that burn cleaner.

The situation of oversupply is likely to persist in the near-term due to the slowdown in demand from downstream industries.

Contents

1. INDUSTRY PROFILE

- 1.1 Global Steel Industry
- 1.2 China Steel Industry Market Size and Value
- 1.3 Steel Trades in China

2. MARKET TRENDS AND OUTLOOK

- 2.1 E-Commerce in Steel Industry
- 2.2 Iron Ore
- 2.3 Steel Consumption and Sales
- 2.4 Policy to Modernize Equipment
- 2.5 Steel Production

3. LEADING PLAYERS AND COMPARATIVE MATRIX

- 3.1 Leading Players
 - 3.1.1 Baoshan Iron & Steel Co. Ltd.
 - 3.1.2 Wuhan Iron & Steel Co. Ltd.
 - 3.1.3 Hebei Iron & Steel Co. Ltd.
 - 3.1.4 Shanxi Taigang Stainless Steel Co. Ltd.
- 3.2 Comparative Matrix
- 3.3 SWOT Analysis

4. TABLES AND CHARTS

- Table 1: World's Ten Largest Steel Makers 2012
- Table 2: Baosteel Financial Highlights
- Table 3: WISCO Financial Highlights
- Table 4: HBIS Financial Highlights
- Table 5: TISCO Financial Highlights
- Table 6: Selected Peer Comparison of Key Financial Ratios
- Chart 1: World Crude Steel Production
- Chart 2: Crude Steel Production by Region 2012
- Chart 3: World's Ten Largest Steel Makers 2012
- Chart 4: World's Apparent Steel Use
- Chart 5: Number of Enterprise in the Steel Industry

- Chart 6: Total Asset of Steel Industry
- Chart 7: Gross Industrial Output of Steel Industry
- Chart 8: Import and Export of Steel Product
- Chart 9: Steel Product Imports by Category
- Chart 10: Steel Product Exports by Category
- Chart 11: Domestic Iron Ore Production in China
- Chart 12: Iron Ore Average Price in China
- Chart 13: Apparent Steel Use of Finished Steel Product
- Chart 14: Apparent Steel Use per Capita
- Chart 15: Sales of Steel Product by Large and Medium Enterprises
- Chart 16: Monthly Production of Crude Steel in 2013
- Chart 17: Production of Crude Steel and Steel Product
- Chart 18: China Steel Product Price Indices
- Chart 19: Baosteel Segment Revenue 1H2013
- Chart 20: WISCO Segment Revenue 1H2013
- Chart 21: HBIS Segment Revenue 1H2013
- Chart 22: TISCO Segment Revenue 1H2013

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