China Special Steel Industry Report, 2006-2007

Phone: +44 20 8123 2220
Fax: +44 207 900 3970
office@marketpublishers.com
http://marketpublishers.com

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Date:	January 1, 2007
Pages:	148
Price:	US$ 2,100.00
ID:	C7D650C8920EN

Nowadays, China is the largest steel producer as well as the largest consumer in the world. However, Chinese steel industrialization is still in its early stage, high value-added products with high technical content are still in short supply. Besides, the quality of steel product is not very high, and the product structure is also unreasonable, as a result, China is merely a large steel manufacturing country instead of a powerful one.

Unlike the common steel, which is mainly used in building, road, bridge and steel structure construction etc, the special steel is mainly applicable for industries of machinery, military, automobile, railway, aviation, petroleum and coal etc, all of which have special requirements for the physical and chemical performance of the steel. And accordingly, the manufacturing process of special steel product is more complicated, and the technical content is higher than that of common steel.

The development of such powerful steel countries as U.S., Russia and Japan etc shows that the demands for special steel will become increasingly strong if the demands for common steel get saturated in a country. And the proportion of special steel products in total steel output represents the whole level of national steel industry. At present, special steel products in the developed countries normally account for 15%-25% of total steel output. For instance, it accounts for 25% in Japan, 20% in U.S. and 18% in Europe. The special steel products in China, however, only shared as low as 8%-10%.

In July 2005, China issued the policy on steel industry, which provided favorable polices for the development of special steel. It was specified that the Chinese government would encourage the large scale special steel enterprises to develop high value-added and high-end products so that the resource advantages can be transferred into the industrial advantages. Guided by the new industrial policies, Chinese special steel enterprises will not only develop towards more professional, but also can achieve further advancement in grouping strategy and scale benefits and moreover, the quality and deep processing of products will also make a great progress.

According to the statistics of China Special Steel Enterprises Association, the accumulative output of prime special steel amounted to 46.953 million tons in 2005, up by 14.50% over the year of 2004, among which the non-alloy steel output was 23.551 million tons with a year-on-year growth of 16.48%, that of the low alloy steel was 11.599 million tons with 14.28%, the alloy steel output was 10.476 million tons with 9.86% and the stainless steel was 1.237 million tons with 20.45%.

Since the initial integration, China special steel industry has gradually formed four large scale special steel conglomerates: Xingcheng-Xinyegang Group in East & Central South China, Dongbei Special Steel Group in Northeast China, Baosteel Special Steel Group in East China and Xining Special Steel Group in Northwest China.

China special steel industry should comply with the development trend of the international special steel industry, focus on intensive operation, and carry out structural adjustment and reorganization etc, so as to achieve sustainable development in a growing competitive market both at China and abroad.

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