

Global and China Galvanized Sheet Industry Report, 2010-2011

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Abstracts

With rapid development of lightweight structure in architecture, the yearly increasing automobile output and the wide prevalence of household appliances, the world's consumption of galvanized sheet presented significant growth in 2010 with an output of around 150 million tons, up 24% YoY, which is expected to reach 175 million tons in 2011, an increase of 16.5%.

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.

Contents

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 Sumitomo Metal Industries and Nippon Steel Corporation announced merger talks
- 4.4 KOBELCO
 - 4.4.1 Profile
 - 4.4.2 Business
 - 4.4.3 Development in China
- 4.5 JFE Steel Corporation
 - 4.5.1 Profile
 - 4.5.2 Business
 - 4.5.3 Development in China

5 CHINA GALVANIZED SHEET MANUFACTURERS

- 5.1 Baoshan Iron & Steel Co.,Ltd.
 - 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 Wuhan Iron and Steel Company Limited
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Project Planning
- 5.3 Angang Steel Company Limited
 - 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 Maanshan Iron & Steel Company Limited
 - 5.4.1 Profile
 - 5.4.2 Operation
 - 5.4.3 Strategy
- 5.5 Bengang 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 Inner Mongolia Baotou Steel Union Co.,Ltd.
 - 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

Selected Charts

SELECTED CHARTS

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

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
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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