

# Global and China Stainless Steel Industry Report, 2011

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## Abstracts

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.

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.

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