

# 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.

## Contents

### **1. OVERVIEW OF STAINLESS STEEL**

#### 1.1 Definition & Classification

##### 1.1.1 Definition

##### 1.1.2 Classification

#### 1.2 Cost Structure

### **2. GLOBAL STAINLESS STEEL INDUSTRY**

#### 2.1 Supply

#### 2.2 Industry Pattern

##### 2.2.1 Regional Competition

##### 2.2.2 Competition of Companies

### **3. STAINLESS STEEL INDUSTRY IN CHINA**

#### 3.1 Industrial Policy

##### 3.1.1 Industrial Policy

##### 3.1.2 Export Policy

#### 3.2 Industrial Structure

#### 3.3 Supply & Demand

##### 3.3.1 Supply

##### 3.3.2 Demand

##### 3.3.3 Import & Export

#### 3.4 Market Price

##### 3.4.1 Stainless Steel Price

##### 3.4.2 Nickel Price

### **4. MARKET SEGMENTS IN CHINA**

#### 4.1 Stainless Steel Sheet

##### 4.1.1 Production

##### 4.1.2 Import & Export

##### 4.1.3 Key Manufacturers

#### 4.2 Stainless Steel Strip

##### 4.2.1 Production

##### 4.2.2 Import & Export

- 4.2.3 Key Manufacturers
- 4.3 Stainless Steel Section
  - 4.3.1 Production
  - 4.3.2 Import & Export
  - 4.3.3 Key Manufacturers
- 4.4 Stainless Steel Pipe
  - 4.4.1 Production
  - 4.4.2 Import & Export

## **5. STAINLESS STEEL MAKERS WORLDWIDE**

- 5.1 Inoxum
  - 5.1.1 Profile
  - 5.1.2 Operation
  - 5.1.3 Business Development in China
- 5.2 Aperam
  - 5.2.1 Profile
  - 5.2.2 Operation
  - 5.2.3 Business Development in China
- 5.3 POSCO
  - 5.3.1 Profile
  - 5.3.2 Operation
  - 5.3.3 Business Development in China
- 5.4 Acerinox Group
  - 5.4.1 Profile
  - 5.4.2 Operation
- 5.5 Outokumpu Stainless Steel Oy
  - 5.5.1 Profile
  - 5.5.2 Operation
  - 5.5.3 Investment Plan
  - 5.5.4 Business Development in China

## **6. CHINESE STAINLESS STEEL MANUFACTURERS**

- 6.1 Shanxi Taigang Stainless Steel Co., Ltd.
  - 6.1.1 Profile
  - 6.1.2 Operation
  - 6.1.3 Investment Plan of Stainless Steel
- 6.2 Baoshan Iron & Steel Co., Ltd.

- 6.2.1 Profile
- 6.2.2 Operation
- 6.2.3 Stainless Steel Business for Sale
- 6.3 Tsingshan Holding Group
  - 6.3.1 Profile
  - 6.3.2 Operation
  - 6.3.3 Investment in 2009-2011
- 6.4 Fujian WuHang Stainless Steel Products Co., Ltd
  - 6.4.1 Profile
  - 6.4.2 Operation
  - 6.4.3 Investment Plan in 2011-2012
- 6.5 Lianzhong (Guangzhou) Stainless Steel Corporation
  - 6.5.1 Profile
  - 6.5.2 Operation
  - 6.5.3 Investment Plan in 2010-2012
- 6.6 Yongxing Special Stainless Steel Co., Ltd.
  - 6.6.1 Profile
  - 6.6.2 Operation
- 6.7 Dongbei Special Steel Group Co., Ltd.
  - 6.7.1 Profile
  - 6.7.2 Operation
- 6.8 Shandong Taishan Steel Group
  - 6.8.1 Profile
  - 6.8.2 Operation
  - 6.8.3 Development Plan for Stainless Steel in 2012
- 6.9 RUITIAN Steel Co., Ltd.
  - 6.9.1 Profile
  - 6.9.2 Operation
- 6.10 Sichuan Southwest Stainless Steel Co., Ltd.
  - 6.10.1 Profile
  - 6.10.2 Operation

## Selected Charts

### SELECTED CHARTS

Stainless Steel Types by Grade

Raw Material Cost of 304# Stainless Steel

Raw Material Cost of 430# Stainless Steel

Global Stainless Steel Output, 2003-2012E

Global Stainless Steel Output Percentage by Grade, 2011

Global Stainless Steel Output Percentage by Region, 2005-2012

Stainless Steel Output of Global Major Companies, 2011

Crude Stainless Steel Output of China, 2000-2012

Crude Stainless Steel Product Structure in China, 2007-2011

Apparent Consumption of Stainless Steel in China, 2000-2012E

Stainless Steel Market Consumption Structure in China, 2010

Import & Export Volume of Stainless Steel in China, 2003-2011

Stainless Steel Price Index in China, 2010-2011

LEM Nickel Spot Price, 2010-2011

Output of Stainless Steel Coil in China, 2008-2011

Product Structure of Stainless Steel Coil by Grade in China, 2008-2011

Import & Export Volume of Stainless Steel Coil in China, 2008-2011

Output of Hot-rolled Steel Strip by Grade in China, 2009-2011

Import & Export of Stainless Steel Strip in China, 2008-2011

Output of Stainless Steel Bar and Wire in China, 2009-2011

Import & Export Volume of Stainless Steel Profiles in China, 2008-2011

Output of Seamless Stainless Steel Pipe of Major Chinese Manufacturers, 2009-2011

Output of Welded Stainless Steel Pipe of Major Chinese Manufacturers, 2009-2011

Import & Export Volume of Stainless Steel Pipes in China, 2009-2011

Major Stainless Steel Businesses of Inoxum

Sales and EBT of Inoxum GmbH, FY2005-FY2011

Scale Indicators of Shanghai Krupp Stainless, 2004-2009

Major Stainless Steel Products of Shanghai Krupp Stainless

Selling Price of Stainless Steel of Shanghai Krupp Stainless, 2011-2012

Operating Revenue and Total Profit of Shanghai Krupp Stainless, 2004-2009

Major Stainless Steel Businesses of Aperam

Shipment of Stainless Products of Aperam, 2007-2011

Operating Revenue and Net Income of Arcelor Mittal, 2005-2009

Scale Indicators of Arcelor Mittal (Changzhou), 2004-2009

Operating Revenue and Total Profit of Arcelor Mittal (Changzhou), 2004-2009

Overseas Ongoing Flat Stainless Steel Product Project of POSCO, 2012-2013  
Sales and Net Income of POSCO, 2007-2011  
Stainless Steel Output of POSCO, 2007-2011  
Major Stainless Steel Businesses of POSCO in Chinese Market  
Ex-factory Prices of ZPSS and QPSS 304 Series 0.3mm Stainless Steel Thin Sheet  
Total Output of ZPSS, QPSS Stainless Steel, 2002-2012  
Major Stainless Steel Businesses of Acerinox  
Stainless Steel Output of Acerinox, 2010-2011  
Output of Flat/Long Stainless Steel of Acerinox, 2010-2011  
Operating Revenue and Net Income of Acerinox, 2007-2011  
Revenue Structure of Acerinox by Region, 2010-2011  
Investment of Acerinox Group, 2010-2011  
Major Stainless Steel Businesses of Outokumpu Stainless Steel Oy  
Stainless Steel Shipment of Outokumpu Stainless Steel Oy, 2007-2011  
Sales and Net Income of Outokumpu Stainless Steel Oy, 2007-2011  
Investment Expenditure Structure of Outokumpu, 2009-2011  
Average Price and Gross Margin of Stainless Steel Products of Shanxi Taigang  
Stainless Steel, 2007-2011  
Operating Revenue and Net Income of Shanxi Taigang Stainless Steel, 2007-2011  
Operating Revenue of Shanxi Taigang Stainless Steel by Product, 2010-2011  
Major Stainless Steel Businesses of Baoshan Iron & Steel  
Operating Revenue and Net Income of Baoshan Iron & Steel, 2007-2011  
Gross Margin of Baosteel Stainless Steel Business, 2007-2011  
Main Stainless Steel Grades and Numbers of Tsingshan Holding Group  
Stainless Steel Output of Tsingshan Holding Group, 2007-2011  
Sales of Tsingshan Holding Group, 2006-2010  
Main Stainless Steel Products of Fujian WuHang Stainless Steel Products  
Operating Revenue and Total Profit of Fujian WuHang Stainless Steel Products,  
2004-2009  
Main Stainless Steel Products of Lianzhong (Guangzhou) Stainless Steel Corporation  
Operating Revenue of Lianzhong (Guangzhou) Stainless Steel Corporation, 2007-2011  
Stainless Steel Output of Yongxing Special Stainless Steel, 2007-2011  
Operating Revenue of Yongxing Special Stainless Steel, 2007-2011  
Operating Revenue of Dongbei Special Steel Group, 2007-2011  
Operating Revenue and Net Income of Fushun Special Steel Group, 2007-2011  
Operating Revenue of Major Steel Products of Fushun Special Steel Group, 2007-2011  
Main Stainless Steel Products of Shandong Taishan Steel Group  
Operating Revenue of Shandong Taishan Steel Group, 2007-2011  
Specifications of Major Stainless Steel Products of RUITIAN Steel

201/NO.1 Stainless Steel Coil Market Price of RUITAIN Steel, 2011-2012

Operating Revenue of RUITIAN Steel, 2007-2011

Market Quotation on 202/1240mm Hot-rolled Stainless Steel Narrow Strip Made by  
Sichuan Southwest Stainless Steel, 2011-2012

Sales of Sichuan Southwest Stainless Steel, 2007-2011



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