

Research Report on Chinese Steel Industry, 2008-2009

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Abstracts

From January to June of 2009, the output of Chinese steel was 266.5829 million tons, increasing by 1.23% YOY; the pig iron output was 258.799 million tons, increasing by 5.56% YOY; the output of the continuous casting billet was 258.7469 million tons, rising by 1.57% YOY; the steel product output was 346.4824 million tons, growing by 5.67% YOY; the coke output was 158.4645 million tons, decreasing by 4.85% YOY; the output of the iron ore was 379.9193 million tons, reducing by 4.82% YOY; the iron alloy output was 9.2403 million tons, declining by 0.99% YOY.

In 2009H1, the outputs of steel, iron and steel product increased but the growth rates saw obvious decrease compared with those in the same period of the last year. Meanwhile, the outputs of iron ore and iron alloy declined compared with those in the same period of the last year.

From January to June of 2009, the output of Chinese steel product was 316.4824 million tons, increasing by 5.67% YOY. Among the 22 categories of steel products, the outputs of 12 categories increased while the outputs of the other 10 categories decreased. Among them, the growth rate of the hot rolled sheet was the highest. The output of it was 2.4747 million tons, increasing by 77.9% YOY. The other categories with a growth rate over 20% were the steel for railways, small and medium steel and the reinforcing steel bar. The outputs of the three categories of steel were 3.1528 million tons, 19.37 million tons and 57.7597 million tons respectively, increasing by 45.94% YOY, 23.55% YOY and 22.03% YOY separately; the output of other steel products was 5.2641 million tons, increasing by 21.90% YOY.

From January to June of 2009, Chinese import of steel products was 8.1307 million tons, decreasing by 1.53% YOY. The import was 126,300 tons less than that in the same period of the last year. The total export was 9.3456 million tons, 17.5672 tons less than that in the same period of the last year, declining by 65.27% YOY.

In 2009H1, Chinese government implemented positive fiscal policies and loose monetary policies to promote domestic demand. Total investment in fixed assets was RMB 9.1321 trillion, increasing by 33.5% YOY; planned investment for construction projects was RMB 30.763 trillion, rising by 36.1%; planned investment for newly started projects was RMB 7.3830 trillion, increasing by 87.3%; new credit was RMB 7.37 trillion. There was comparatively adequate financial support for production and construction. The investment in infrastructure construction of railways, highways and electric grids, etc. in the downstream of the steel industry was strengthened. Launched projects exploded. According to the progress of those projects, there will be a small tide of infrastructure construction in H2 of 2009. Thus there will be a constant demand for construction steel.

In 2009H2, the situation of global economy is still gloomy. The low demand on the international market cannot be improved in a short term. Chinese export will continue to decrease. The prospect of Chinese steel export is not optimistic. Moreover, trade protectionism is rising in various countries. According to the incomplete statistics, anti-dumping and countervailing cases in Chinese steel industry were as high as seven in 2009H1. A variety of products such as hot rolled sheets, seamless tubes and fastening pieces were involved in the cases. Frictions involving tariff barrier and anti dumping were more frequent. The export of Chinese steel is worsening. The low demand from the international market is the major obstacle of Chinese steel export. Though there is a rebound in some economies, the recovery of the entire economy is gloomy. The demand for steel is estimated to be no great increase.

It is predicted that Chinese government will implement constant and stable policies to promote economy development. The downstream industries of steel will benefit from this. This will thus form pulling effects on Chinese steel industry. However, the production of Chinese steel saw over growth in 2009H1. The productivity was severely surplus. A large quantity of steel products demand domestic consuming because of export decline. The great pressure on domestic supply will affect the price trend of steel and the operations of enterprises. Therefore, considering the impacts home and abroad, Chinese steel industry will slowly recover with some fluctuation in 2009H2.

Through this report, readers can acquire more information:

- Operations of Chinese steel industry, 2008-2009H1
- Chinese crude steel output from January to June of 2009
- Chinese pig iron output from January to June of 2009

- Chinese steel product output from January to June of 2009
- Chinese coke output from January to June of 2009
- Chinese steel product price trend from January to June of 2009
- Import and export of Chinese steel, 2008-2009
- Policy trend of Chinese steel industry, 2008-2009
- Hot events in Chinese steel industry, 2008-2009
- Development trend of Chinese steel industry, 2008-2009

Following persons are recommended to buy this report:

- Steel producers
- Steel traders
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- Research institutions concerning Chinese steel industry
- Others concerning Chinese steel industry

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China Ministry of Industry and Information Technology issued the production-restricting order to control the rapid increase of steel productions; investigate the backward productivity and formulate the elimination plan; regulate the blind expansion of productivity; adjust the export rebate rate and export tariff to improve the export environment; deal with steel trade conflicts actively.

- Events

EU Anti-dumping Committee supported to levy anti-dumping tax on Chinese seamless pipes;

EU levied 24% of anti-dumping tax on Chinese steel wire rods;

Wuhan Iron and Steel (Group) Corporation acquired CLM of Canada;

Baosteel Group Corporation ranked among Global Top 500 for the sixth year;

Agricultural Bank of China released RMB 50 billion of credit loan to Baosteel Group Corporation.

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