

Research Report on Chinese Stainless Steel Demand

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Research Report on Chinese Stainless Steel Demand –Jiangxi Province (Sample)

I. Introduction of Jiangxi Province

1.1 Economic Characteristic in Jiangxi Province

Jiangxi and Poyang Lake ecological economic zone, the core of ecological economy in Central China, aims to be a regional economic power in China, a comprehensive development demonstration plot and an important growth pole, connecting Yangtze River Delta and Pearl River Delta. Jiangxi is considered as one of China's rare metal industry bases and developed manufacturing bases, which meanwhile is an important regional comprehensive transportation hub.

With perfect modern industrial system and distinct characteristics of industries, Jiangxi province vigorously implements the new industrial development strategy and lays good foundation for six mainstay industries such as automotive, aerospace and precision manufacturing industries, metallurgical and metal manufacturing industries, Chinese patent medicine and biopharmaceutical industries, electronic information industry and modern home appliance industry, food industry, fine chemicals and new-type building materials; Moreover, some industries like photoelectricity, high quality steel industry, special automotive & boats, precision machinery, chemical industry, green food industry, tourism industry and new-type service etc, all show good momentum of development.

1.2 Stainless Steel Demand in Jiangxi Province

Stainless steel demands of downstream industries in Jiangxi province vary greatly among cities. Main demands for stainless steel in Nanchang and Shangrao cities are from environmental protection equipment and kitchenware and tableware industries; those in Jiujiang city are mainly from solar energy industry, taking up 41% of total demands. Architectural ornament and petrochemical industries are two major fields that consume stainless steel in Xinyu and Yichun cities. Stainless steel consumption in Jiangxi province totals 46,600 tonnes or so, about 0.48% of China’s total apparent consumption.

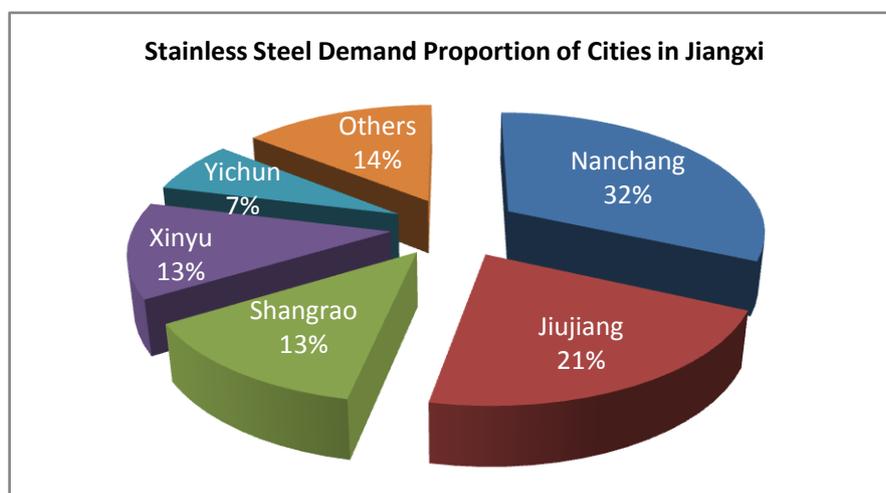
II. Overview of Stainless Steel Demand in Jiangxi

2.1 Stainless Steel Demand by Region

Stainless steel consumption is different in various regions of Jiangxi province owing to their different economic patterns. The province’s stainless steel demand mainly clusters in Nanchang, Jiujiang, Shangrao, Xinyu and Yichun, where the combined annual demand stands at 40,000 tonnes, accounting for 85.8% of the province’s total demand. In particular, stainless steel demand from Nanchang, the province’s capital city, reaches 14,800 tonnes, making up 31.8% of the province’s total.

| Region | Stainless Steel Consumption in 2013 (tonne) | Downstream Industries |
|----------|---|---|
| Nanchang | 14,800 | Environmental protection equipment, mechanical equipment, kitchenware, transportation |
| Jiujiang | 10,000 | Solar energy, transportation, hardware, architectural ornament |
| Shangrao | 6,100 | Environmental protection equipment, kitchenware, transportation |
| Xinyu | 5,900 | Architectural ornament, petrochemical, hardware |
| Yichun | 3,200 | Architectural ornament, petrochemical, mechanical equipment, electronic |
| Others | 6,600 | - |
| Total | 46,600 | - |

Chart 1: Stainless steel demand share of various regions in Jiangxi province



2.2 Stainless Steel Demand by Product Variety

| Stainless Steel Demand | | Nanchang | | Jiujiang | | Shangrao | |
|------------------------|------------|----------|--------|----------|--------|----------|--------|
| | | tonne | % | tonne | % | tonne | % |
| Varieties | 200 Series | 300 | 2.0% | 1,100 | 11.5% | 200 | 3.3% |
| | 300 Series | 12,900 | 87.4% | 8,600 | 86.5% | 4,900 | 80.9% |
| | 400 Series | 1,600 | 10.6% | 200 | 2.00% | 1,000 | 15.8% |
| | Total | 14,800 | 100.0% | 10,000 | 100.0% | 6,100 | 100.0% |

| Stainless Steel Demand | | Xinyu | | Yichun | | Others | |
|------------------------|------------|-------|--------|--------|--------|--------|--------|
| | | tonne | % | tonne | % | tonne | % |
| Varieties | 200 Series | 1,800 | 30.4% | 700 | 22.3% | 700 | 11.2% |
| | 300 Series | 4,100 | 69.6% | 2,300 | 70.1% | 5,200 | 78.5% |
| | 400 Series | 0 | 0.0% | 200 | 7.6% | 700 | 10.3% |
| | Total | 5,900 | 100.0% | 3,200 | 100.0% | 6,600 | 100.0% |

| Stainless Steel Demand | | Total | |
|------------------------|------------|--------|--------|
| | | tonne | % |
| Varieties | 200 Series | 4,900 | 10.5% |
| | 300 Series | 38,000 | 81.7% |
| | 400 Series | 3,700 | 7.9% |
| | Total | 46,600 | 100.0% |

According to the aforesaid statistics, Jiangxi province's demand for 200 series, 300 series and 400 series stainless steel is 4,900 tonnes, 38,000 tonnes and 3,700 tonnes respectively, each accounting for 10.5%, 81.7% and 7.9%.

In view of the chart above, the percentage of 300 series stainless steel consumption in Jiangxi is much higher than the country's average, mainly thanks to the wide application in sectors like the transportation, environmental protection equipment, mechanical equipment and petrochemical. Moreover, entire stainless steel demand in the province is relatively balanced, with that for 200 series and 400 series both taking a certain slice. However, no industrial cluster has been formed for sectors that consume the 200 series and 400 series, which puts their proportion in the total consumption at a low level.

III. Perspectives on Jiangxi Stainless Steel Consumer Sector by Regions

Jiangxi province has a consumption capacity of 46,600 tonne stainless steel. The whole demand pattern is relatively stable though the consumption structures of different cities have their own features, which largely reduces market risks. A basic knowledge of stainless steel purchases from the downstream industries in the province will be obtained by analyzing the consumption ability in five cities, namely, Nanchang, Jiujiang, Shangrao, Xinyu and Yichun.

3.1 Nanchang City

Nanchang, being the major city in the economic zone of lower Yangtze region, is also one of the three innovative manufacturing cities in China and the core city Poyang Lake Eco-economic Zone. Being industrially developed, Nanchang

has produced the largest attack-defense missile in China. Since China’s Reform and Opening up, its modern industry system including auto manufacturing, metallurgical industry, mechanical and electrical industries, textile industry, chemical industry, medical industry and emerging hi-tech industries, represented by electronic information, biological engineering, new materials, software and etc, have developed to a considerable level. Centering on creating a major modern manufacturing base, Nanchang City have already developed six pillar industries and ten production bases.

| Demand on Stainless Steel | | Nanchang City | |
|---------------------------|------------------------------------|---------------|--------|
| | | tonne | % |
| Industries | Catering & Kitchen | 2,600 | 17.7% |
| | Home Appliances | 800 | 5.6% |
| | Architectural Decoration | 0 | 0.0% |
| | Hardware | 0 | 0.0% |
| | Transportation | 2,100 | 14.1% |
| | Petrochemical Engineering | 1,400 | 9.5% |
| | Mechanical Equipment | 3,200 | 21.8% |
| | Solar Energy | 0 | 0.0% |
| | Environmental Protection Equipment | 4,400 | 30.0% |
| | Other | 200 | 1.3% |
| Total | | 14,800 | 100.0% |

3.2 Jiujiang City

Jiujiang, being an important city in the middle and lower reaches of Changjiang River and in the Poyang lake eco-economic zone, is one key city of opening up in inland China. Since ancient times, Jiujiang has been one metropolitan city as boats and vehicles converge and merchants gather. Jiujiang, located in the junction of Jiangxi, Hubei, Hunan and Anhui province with the river and lake around the nine parts of Jiujiang and Mt. Lushan in the north, is an important military place to compete for. Benefiting from the unique and unmatched conditions, Jiujiang has become a city of light industry long time ago and developed to an industrial city along the river. Presently, its industries like automobile, steel, furniture and solar power are well developed.

| Demand on Stainless Steel | | Jiujiang City | |
|---------------------------|------------------------------------|---------------|-------|
| | | tonne | % |
| Industries | Catering & Kitchen | 0 | 0.0% |
| | Home Appliances | 0 | 0.0% |
| | Architectural Decoration | 1,500 | 14.7% |
| | Hardware | 1,500 | 15.3% |
| | Transportation | 1,600 | 15.6% |
| | Petrochemical Engineering | 0 | 0.0% |
| | Mechanical Equipment | 0 | 0.0% |
| | Solar Energy | 4,100 | 41.0% |
| | Environmental Protection Equipment | 0 | 0.0% |
| | Other | 1,300 | 13.4% |

| Demand on Stainless Steel | | Jiujiang City | |
|---------------------------|-------|---------------|--------|
| | | tonne | % |
| | Total | 10,000 | 100.0% |

3.3 Shangrao City

Shangrao is located in the northeast of Jiangxi Province with Zhejiang in the east, Fujian in the south and Anhui in the north. At the junction of Yangtze river delta economic zone, Haixi economic zone and Poyang lake eco-economic zone, Shangrao is a typical land of fish and rice in south of the Yangtze River. Shangrao City has preliminarily developed to a production base of seven industries include high-power chips, LED lighting products, precision optical instruments; high-purity polycrystalline silicon, thin-film solar cells; lithium cells; deep processing of copper products, gold mining and processing, lead and zinc smelting; passenger cars; auto parts; magnesian ceramics and etc.

| Demand on Stainless Steel | | Shangrao City | |
|---------------------------|------------------------------------|---------------|--------|
| | | tonne | % |
| Industries | Catering & Kitchen | 1,700 | 27.8% |
| | Home Appliances | 300 | 5.3% |
| | Architectural Decoration | 0 | 0.0% |
| | Hardware | 200 | 3.8% |
| | Transportation | 1,800 | 28.7% |
| | Petrochemical Engineering | 0 | 0.0% |
| | Mechanical Equipment | 0 | 0.0% |
| | Solar Energy | 0 | 0.0% |
| | Environmental Protection Equipment | 1,900 | 30.8% |
| | Other | 200 | 3.6% |
| | Total | 6,100 | 100.0% |

3.4 Xinyu City

Xinyu is an important and the youngest industrial city in Jiangxi province, which locates between two capital cities Nanchang and Changsha. Xinyu is known as the steel city, is the “little giant” for the economic development in Jiangxi Province. It has two of the three multi-billion identified industrial engineering in Jiangxi. Due to the fast grow, its economic development model is called “Xinyu Phenomenon”.

| Stainless Steel Demand | | Xinyu | |
|------------------------|---------------------------------|-------|-------|
| | | tonne | % |
| Industry | Food | 0 | 0.0% |
| | Home Appliances and Electronics | 0 | 0.0% |
| | Architectural Decoration | 3,500 | 59.5% |
| | Hardware Products | 600 | 10.2% |
| | Transportation | 0 | 0.0% |
| | Petrochemical Industry | 1,200 | 20.5% |
| | Machinery | 0 | 0.0% |

| Stainless Steel Demand | | Xinyu | |
|------------------------|------------------------|-------|--------|
| | | tonne | % |
| | Solar Energy | 0 | 0.0% |
| | Environmental Equipmet | 0 | 0.0% |
| | Others | 600 | 9.8% |
| | Total | 5,900 | 100.0% |

3.5 Yichun City

Yichun is an important economical city in China, which locates in the center of Ganxi Area and is known as the “Lithium City in Asia”. The industrial economy of Yinchun achieves a considerable growth of in recent years; the industrial system consists of five pillars such as medicine, food, building materials, electrical and energy as well as the Chemical and Mining industry. In 2010, Foxconn, one of the world’s top 500 enterprises, settled in Hucheng.

| Stainless Steel Demand | | Yichun | |
|------------------------|---------------------------------|--------|--------|
| | | tonne | % |
| Industry | Food | 0 | 0.0% |
| | Home Appliances and Electronics | 300 | 10.2% |
| | Architectural Decoration | 1,200 | 38.5% |
| | Hardware Products | 0 | 0.0% |
| | Transportation | 0 | 0.0% |
| | Petrochemical Industry | 800 | 24.4% |
| | Machinery | 600 | 19.6% |
| | Solar Energy | 0 | 0.0% |
| | Environmental Equipmet | 0 | 0.0% |
| | Others | 200 | 7.3% |
| | Total | 3,200 | 100.0% |

3.6 Other areas

Except the top 5 areas with highest stainless steel purchasing power, the total purchasement of stainless steel in other areas of Jiangci province is about 6,600 tonnes, 14.2% of the total amount of consumption

| Stainless Steel Demand | | Other area | |
|------------------------|---------------------------------|------------|-------|
| | | tonne | % |
| Industry | Food | 1,000 | 15.2% |
| | Home Appliances and Electronics | 0 | 0.0% |
| | Architectural Decoration | 1,400 | 20.4% |
| | Hardware Products | 0 | 0.0% |
| | Transportation | 1,000 | 15.8% |
| | Petrochemical Industry | 1,000 | 14.5% |
| | Machinery | 700 | 10.5% |
| | Solar Energy | 600 | 8.8% |

| Stainless Steel Demand | | Other area | |
|------------------------|------------------------|------------|--------|
| | | tonne | % |
| | Environmental Equipmet | 0 | 0.0% |
| | Others | 1,000 | 14.8% |
| | Total | 6,600 | 100.0% |

IV. Overview of Stainless Steel Demand in Jiangxi by Downstream Industries

| Stainless Steel Demand | | Total | |
|------------------------|---------------------------------|-------|-------|
| | | tonne | % |
| Industry | Food | 5,300 | 11.4% |
| | Home Appliances and Electronics | 1,500 | 3.2% |
| | Architectural Decoration | 7,500 | 16.2% |
| | Hardware Products | 2,400 | 5.1% |
| | Transportation | 6,400 | 13.8% |
| | Petrochemical Industry | 4,400 | 9.3% |
| | Machinery | 4,600 | 9.8% |
| | Solar Energy | 4,700 | 10.0% |
| | Environmental Equipmet | 6,300 | 13.6% |
| Others | 3,500 | 7.6% | |

In combination of all the statistics in each area of Jiangxi province, the stainless plate and coil are mainly used in 7 industries with a total demand of 39,200 tonnes or accounted for 84.2%, the total demand in 5 key industries is 30,300 tonnes or 65.1%. The data shows that the overall stainless steel consumption structure is balanced between upstream and downstream industry in Jiangxi province due to the reasonable differentiation of consumption development in each area with special consumption structure. Meanwhile, the date also shows that the demand structure in Jiangxi is stable and with little risk in the market.

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