Steel Business Briefing
Quality News First

China's White Goods
A Steel Analysis

SBB Research Report

Executive Summary

China's construction sector grew by 18% p.a. in terms of the RMB value of its output between 1985 and 2005, while the growth in floor space under construction and completed both grew by 13% p.a. over the same period.

This growth has come both in response to the demand from an ever expanding economy but also from a growing and, more importantly migrating population. China is in the process of urbanising, at a rate of 16m to 19m people a year between 1996 and 2005, and a forecast rate of at least 14m to 15m people annually in future. This population is also demanding ever more floor space per capita, estimated to increase by 75% between 2005 and 2020.

This report answers the following key questions:

- Will domestic supply be able to meet domestic demand?
- What H-Beam lines exist and are under construction?
- Will the sector continue to dominate China's steel demand?
- Which companies are buying all the steel?

At present we calculate steel demand in construction (excluding infrastructure) to have been approximately 157m t in 2005. The majority of this was made up by lower value steel products (rebar and wire rod). However, high value products are finding an ever greater market share as the construction of steel structures vs. reinforced concrete grows.

In this report we also note advancements in the development and application of higher strength and higher value construction steel products, reviewed in a case study on the construction of the Shanghai Hills World Financial Centre.

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Includes profiles of major white goods producers!

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