



**MARCEGAGLIA  
SPECIALTIES**

**STAINLESS STEEL DIVISION**

# MARCEGAGLIA GROUP

# INTERNATIONAL PLAYER IN STEEL

MARCEGAGLIA IS THE ITALIAN  
INDUSTRIAL GROUP LEADING THE EUROPEAN  
AND WORLDWIDE STEEL MARKET.

A UNIQUE COMBINATION OF THE DYNAMIC ITALIAN  
FAMILY BUSINESS MODEL WITH THE GREAT  
OPERATING CAPACITY AND PRESENCE  
IN THE INTERNATIONAL MARKETS,  
TYPICAL OF THE LARGE CORPORATIONS.

**6.2 MILLION TONS**  
PROCESSED YEARLY

**8 BILLION EUROS SALES**  
MARCEGAGLIA HOLDING

**(7.7 BILLION EUROS SALES** MARCEGAGLIA STEEL)

**6,600 EMPLOYEES**

**29 STEEL PLANTS**

**60 SALES OFFICES**

**1<sup>st</sup> INDEPENDENT PLAYER**  
IN STEEL PROCESSING SECTOR IN THE WORLD

**1<sup>st</sup> PRODUCER OF STAINLESS STEEL**

**WELDED TUBES** IN THE WORLD

**1<sup>st</sup> PRODUCER OF CARBON STEEL**

**WELDED TUBES** IN EUROPE

**1<sup>st</sup> SERVICE CENTER** IN ITALY



# CORPORATE CULTURE

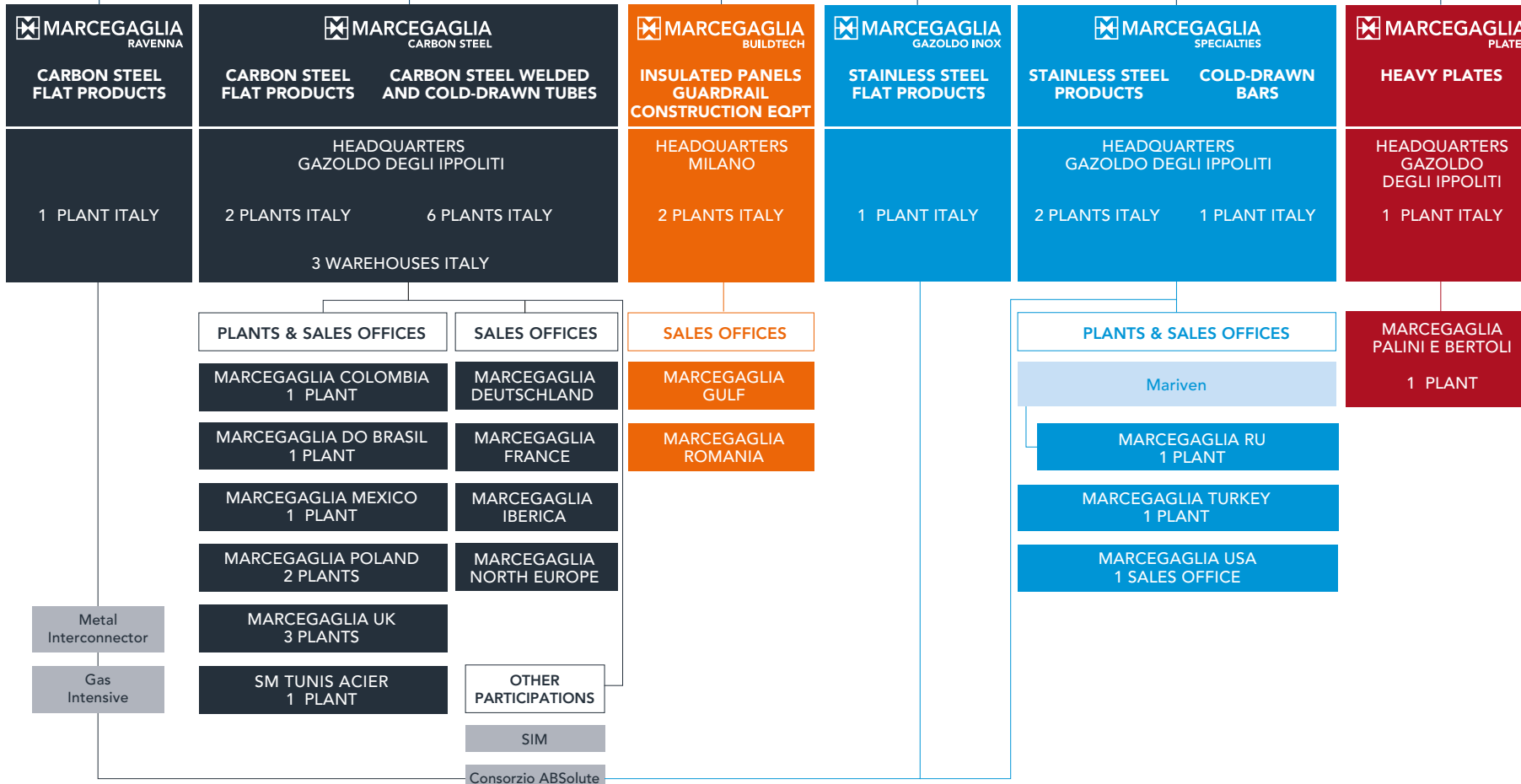
INDEPENDENCE, DYNAMISM, RESILIENCE,  
COMPETENCE, VERSATILITY, REACTIVITY:  
IN OVER 60 YEARS OF HISTORY,  
THESE DISTINCTIVE VALUES MADE MARCEGAGLIA  
THE PRIVILEGED PARTNER  
IN THE STEEL PROCESSING INDUSTRY.

THE COMPANY CULTURE IS BASED  
ON PEOPLE CENTRICITY AND SHARING  
OF THE SAME KEY VALUES WHICH  
ARE SHAPING MARCEGAGLIA  
UNIQUE BUSINESS MODEL.

# STEEL CORE

CORE BUSINESS ACTIVITIES, CONTROLLED BY MARCEGAGLIA STEEL (HOLDING COMPANY, WHICH REPRESENTS 97% OF TOTAL ACTIVITIES), ARE ORGANIZED THROUGH SIX DIFFERENT OPERATING COMPANIES: MARCEGAGLIA RAVENNA, MARCEGAGLIA CARBON STEEL WITH THE FLAT PRODUCTS AND WELDED TUBES DIVISIONS, MARCEGAGLIA BUILDTECH, MARCEGAGLIA GAZOLDO INOX, MARCEGAGLIA SPECIALTIES WITH THE STAINLESS PRODUCTS AND COLD DRAWN BARS DIVISIONS, MARCEGAGLIA PLATES FOR THE HEAVY PLATES PRODUCTION.

MARCEGAGLIA INVESTMENTS IS THE HOLDING FOR THE DIVERSIFIED ACTIVITIES (3% OF TOTAL ACTIVITIES).



#### HOME PRODUCTS

Oskar  
Imat

#### ENGINEERING

Elet.Ca

#### ENERGY

CO.GE.AM → Other particip.  
EuroEnergy → Other particip.  
ETA

#### HSE

Made HSE

#### HOSPITALITY ACTIVITIES & REAL ESTATE

Albarella → Other particip.  
Pugnochiuso  
Gaia Turismo → Other particip.  
Palazzo Agricoltura  
Gabetti Property Solutions

#### OTHER PARTICIPATIONS

# STEEL IN THE WORLD



BOLTIERE  
LOMAGNA  
LAINATE  
RIVOLI  
DUSINO SAN MICHELE  
POZZOLO FORMIGARO  
CORSICO  
MILANO  
GRAFFIGNANA  
CASALMAGGIORE

CONTINO  
SAN GIORGIO DI NOGARO  
TEZZE SUL BRENTA  
GAZOLDO DEGLI IPPOLITI, HQ  
RAVENNA  
FORLÌ  
OSTERIA GRANDE



## STEEL PRODUCTION

### PRIMARY INDUSTRY

Via either blast furnace, using iron mineral and carbon, or electric furnace, using re-melted scrap steel.

## ACTIVITIES

Iron making  
Steel making  
Casting  
Hot rolling

## OUTPUT

Coils  
Bars  
  
● Heavy plates

## 1<sup>st</sup> TRANSFORMATION

Crude products are chemically and/or mechanically processed to make them suitable for specific industrial purposes

Pickling  
Cold rolling  
Galvanizing  
Pre-painting

○ Galvanized coils  
○ Pickled coils  
○ Cold rolled coils  
○ Pre-painted coils  
● Hr/Cr Coils

## 2<sup>nd</sup> TRANSFORMATION

Advanced processing to customize steel products on clients specific requests

Tube forming  
Slitting and cutting to length  
Drawing

○ Tubes  
○ Strips and sheets  
○ Drawn bars  
● Tubes  
● Strips and sheets  
● Drawn bars

## DISTRIBUZIONE

Direct selling and/or retailing to industrial clients or further processing under request

Finishing  
Distribution

○ All products  
● All products

## END USERS MARKETS

○ Carbon steel products   ● Stainless steel products   ● Heavy plates

## UNIQUE STRATEGIC POSITIONING








Marcegaglia is covering the whole down- stream and distribution steel value chain, both horizontally and vertically, thanks to its unique strategic position. Marcegaglia is the first steel processor with a range of products that varies from carbon to stainless, from long to flat products, from commodity to specialty.






# STEEL UNIQUE



# PRODUCT RANGE







## **MARCEGAGLIA** CARBON STEEL

-  CARBON STEEL COILS
-  CARBON STEEL STRIPS
-  CARBON STEEL SHEETS
-  CARBON STEEL WELDED TUBES
-  COLD-DRAWN WELDED TUBES
-  REFRIGERATION TUBES
-  HOT DIP GALVANIZED COILS








-  HOT DIP GALVANIZED STRIPS
-  HOT DIP GALVANIZED SHEETS
-  PRE-PAINTED COILS
-  PRE-PAINTED STRIPS
-  PRE-PAINTED SHEETS

## **MARCEGAGLIA** PLATES HEAVY PLATES

## **MARCEGAGLIA** SPECIALTIES

-  **STAINLESS STEEL COILS**
-  **STAINLESS STEEL STRIPS**
-  **STAINLESS STEEL SHEETS**
-  **STAINLESS STEEL WELDED TUBES**
-  CARBON AND STAINLESS STEEL COLD-DRAWN BARS
-  STAINLESS STEEL FLAT BARS
-  STAINLESS STEEL COLD FORMED SECTIONS

## **MARCEGAGLIA** BUILDTech

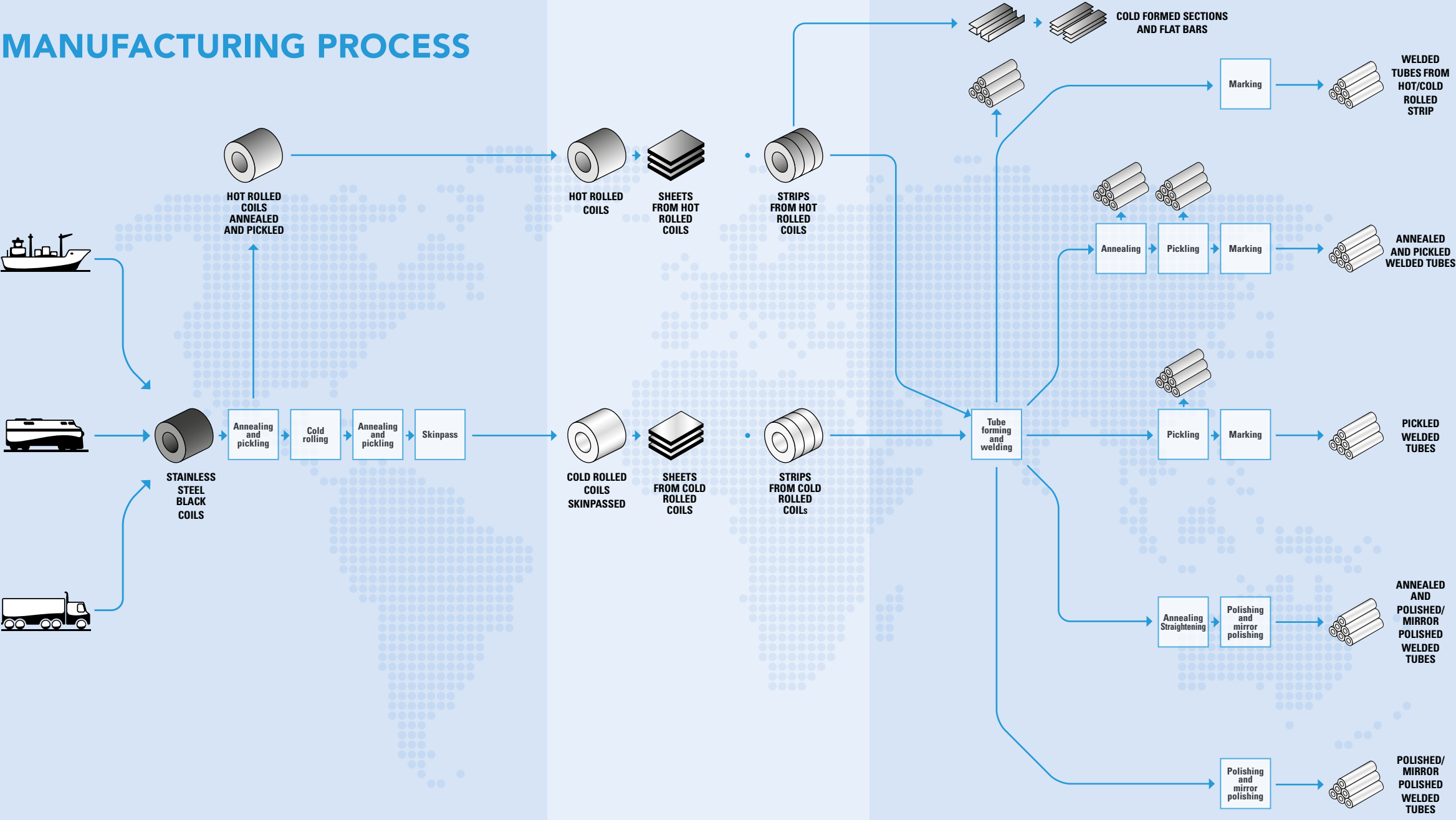
-  INSULATED PANELS
-  INSULATED PANELS FOR SECTIONAL DOORS
-  TRAPEZOIDAL CORRUGATED SHEETS
-  SM8 SYSTEM
-  SCAFFOLDING SYSTEMS
-  SAFETY BARRIERS
-  PLANK

# MARCEGAGLIA STAINLESS STEEL DIVISION

# A UNIQUE GLOBAL PLAYER IN STAINLESS STEEL WELDED TUBES



# MANUFACTURING PROCESS





# MANUFACTURING PLANTS - ITALY



CONTINO  
**Stainless steel bright bars**



GAZOLDO DEGLI IPPOLITI  
HEADQUARTERS  
**Stainless steel flat products**



FORLÌ  
**Stainless steel welded tubes**  
automotive tubes and pipes,  
process pipes for fluids,  
construction and ornamental tubes



**MARCEGAGLIA**  
SPECIALTIES

# MANUFACTURING PLANTS - WORLD



GARUVA, BRAZIL

## **Stainless steel welded tubes**

automotive tubes and pipes,  
process pipes for fluids,  
construction and ornamental tubes



VLADIMIR - RUSSIA

## **Stainless steel welded tubes**

automotive tubes and pipes,  
process pipes for fluids,  
construction and ornamental tubes

## **Stainless steel flat products**



ISTANBUL - TURKEY

## **Stainless steel welded tubes**

polished tubes / decoration  
and corrosion tube sector

○ Stainless steel production  
in Marcegaglia Carbon  
Steel plant

# PRODUCT RANGE



## STAINLESS STEEL PRODUCTS

### FLAT PRODUCTS

HOT ROLLED COILS  
COLD ROLLED COILS  
HOT ROLLED SHEETS  
COLD ROLLED SHEETS  
HOT ROLLED STRIPS  
COLD ROLLED STRIPS

### WELDED TUBES AND LONG PRODUCTS

WELDED TUBES  
- high-frequency  
- laser  
- TIG  
  
LONG PRODUCTS  
- bright bars  
- flat bars  
- cold formed section

## COLD-DRAWN BARS

### STAINLESS STEEL COLD-DRAWN BARS

COLD-DRAWN  
BARS

### CARBON STEEL COLD-DRAWN BARS

COLD-DRAWN BARS  
  
FREE CUTTING STEEL  
COLD-DRAWN BARS



# A UNIQUE GLOBAL PLAYER

## IN STAINLESS STEEL WELDED TUBES

### Product range

thickness min. mm 0.8

thickness max. mm 6

diameter min. mm 6

diameter max. mm 406,4

### SQUARE

min. mm 10x10

max. mm 200x200

### ROUND

Ø min. mm 6

Ø max. mm 406,4



**MARCEGAGLIA**  
SPECIALTIES



# STAINLESS STEEL FLAT PRODUCTS

## **Stainless steel coils**

- hot rolled (1D finish): from 3 to 12 mm thick
- cold rolled (2B finish): from 0.8 to 5 mm thick

## **Stainless steel strips**

- hot rolled (1D finish): from 3 to 6 mm thick
- cold rolled (2B finish): from 0.8 to 4 mm thick

## **Sheets**

- hot rolled (1D finish): from 3 to 12 mm thick
- cold rolled (2B finish): 0.8 to 4 mm thick

## **Flat Bars**

- from 10x3 mm up to 200x12 mm

## **Cold-drawn bars**

- from 5 mm up to 100 mm in diameter



**MARCEGAGLIA**  
SPECIALTIES

# STAINLESS STEEL FLAT PRODUCTS

## **Moving ahead in the stainless sector.**

Within a strategy of consistent investments in its production chain, Marcegaglia Specialties has added the manufacturing of coils and sheets 1D and 2B finish to its range of austenitic and ferritic stainless steel products.



# TYPICAL APPLICATIONS

A new product range of stainless steel flats make Marcegaglia Specialties the partner of choice for manufacturers who engineer solutions in the sectors of building and **construction**, **food** and **beverage**, **automotive** and **mechanical** applications.



**MARCEGAGLIA**  
SPECIALTIES



# STAINLESS STEEL HOT ROLLED COILS

2 ANNEALING AND PICKLING LINES

500,000 T/Y  
MANUFACTURING CAPACITY

PRODUCT: HOT ROLLED  
COILS 1D FINISH

THICKNESS: 3.00/12.00 MM

WIDTH: UP TO 1500 MM

MAX WEIGHT: 30 T



Thickness min. - max. (mm) 3 - 12

Width min. - max. (mm) 1,000 - 1,500



# STAINLESS STEEL COLD ROLLED COILS

2 COLD ROLLING LINES

2 SKINPASS LINES

300,000 T/Y  
MANUFACTURING CAPACITY

PRODUCT:  
COLD ROLLED  
COILS 2B FINISH

THICKNESS: 0.8/5.0 MM

WIDTH: UP TO 1500 MM

MAX WEIGHT: 30 T



**NEW GRADE**  
FOR EN 1.4571  
**AISI 316Ti**  
2B FINISH  
thickness 1.5 - 3 mm  
width 1,250 - 1,500 mm

Thickness min. - max. (mm) 0.8 - 5

Width min. - max. (mm) 1,000 - 1,500

# STAINLESS STEEL HOT ROLLED SHEETS

1 HOT ROLLED CUT-TO-LENGTH LINE  
(TILL 2,000 MM WIDTH)

2 HOT ROLLED CUT-TO-LENGTH LINES  
(TILL 1,500 MM WIDTH)

2 CUT TO LENGTH LINES

150,000 T/Y  
MANUFACTURING CAPACITY

PRODUCT:  
HOT ROLLED SHEETS  
1D FINISH

**HR 2000**

**PRODUCT RANGE  
EXTENSION**

sizes available on stock  
width 2,000 mm

Thickness min. - max. (mm) 3 - 12

Width min. - max. (mm) 1000x2000 - 2000x6000

 **MARCEGAGLIA**  
SPECIALTIES



# STAINLESS STEEL COLD ROLLED SHEETS

2 CUT TO LENGTH LINES

1 COLD ROLLED CUT-TO-LENGTH LINE  
(TILL 2,000 MM WIDTH)

2 COLD ROLLED CUT-TO-LENGTH LINES  
(TILL 1,500 MM WIDTH)

150,000 T/Y  
MANUFACTURING CAPACITY

PRODUCT:  
COLD ROLLED SHEETS  
2B FINISH

.....  
Thickness min. - max. (mm) 0.8 - 4  
.....

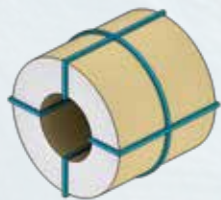
.....  
Width min. - max. (mm) 1000x2000 - 1500x6000  
.....

 **MARCEGAGLIA**  
SPECIALTIES

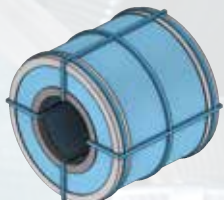


# STANDARD PACKAGING

NON STANDARD  
PACKAGING  
IS DEVELOPED  
ACCORDING  
TO CUSTOMER  
REQUEST



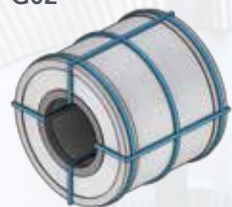
G01



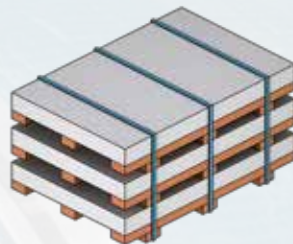
G02



G03



G04



PALLET

RADIAL STRAPS

CIRCUMFERENTIAL STRAPS

INTERNAL METALLIC CORNER

EXTERNAL METALLIC OR CARDBOARD CORNER

POLY-COATED PAPER

PROTECTION PAPER BETWEEN EACH COIL LOOP

WOODEN PALLET

STRAPS FIXED TO PLATFORM

PLASTIC FILM PROTECTION OF EXTERNAL STEEL SURFACES

PROTECTION PAPER BETWEEN EACH SHEET

PLASTIC FILM PROTECTION ON EACH SHEET



# STAINLESS STEEL HOT AND COLD ROLLED STRIPS

4 SLITTING LINE

20,000 T/Y  
MANUFACTURING CAPACITY

**Product range - Hot rolled strips 1D**

thickness mm	width mm
3	from 40 up to 1500
4	from 40 up to 1500
5	from 40 up to 1500
6	from 40 up to 1500

**Product range - Cold rolled strips 2B**

thickness mm	width mm
0,8	from 35 up to 1500
1	from 35 up to 1500
1,2	from 35 up to 1500
1,5	from 35 up to 1500
2	from 35 up to 1500
2,5	from 35 up to 1500
3	from 35 up to 1500
4	from 35 up to 1500

# STANDARD PACKAGING

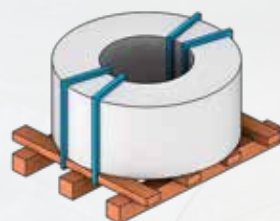
RADIAL STRAPS

VERTICAL ORIENTATION

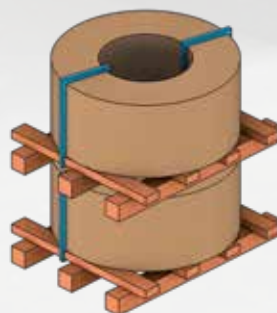
PALLET

EXTERNAL PROTECTIVE PAPER

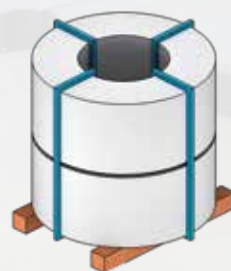
NON STANDARD  
PACKAGING  
IS DEVELOPED  
ACCORDING  
TO CUSTOMER  
REQUEST



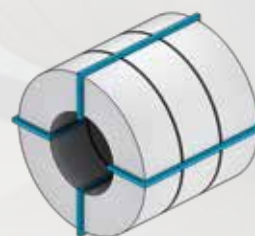
S03



S04



S02



S01



# STAINLESS STEEL WELDED TUBES

Marcegaglia stands out today as the world's top producer of stainless steel welded tubes with top-level certified manufacturing activities worldwide and an overall capacity of 700 thousand tons per year.

# TYPICAL APPLICATIONS

CONSTRUCTION AND  
ORNAMENTAL TUBES

**Building with steel means excellence.**

Mechanical properties, aesthetic values and durability: stainless steel is the environment-friendly material of choice for **contemporary architecture**.



# TYPICAL APPLICATIONS

The product range of tubes for **exhaust systems**, tubes for **hydroforming** applications and special shapes for **automotive construction** is engineered and manufactured in Marcegaglia stainless steel production plants worldwide: **Brazil, Russia, and Italy**, hosting more than 70 high-technology tube processing lines.

TUBES FOR MECHANICAL  
AND AUTOMOTIVE  
APPLICATIONS



# TYPICAL APPLICATIONS

In order to offer the most advanced technological response and to help develop, apply and enforce the most rigorous protocols for food safety, Marcegaglia Specialties was the **first company** the stainless steel tubes to obtain for process pipes for the food and dairy industry EN 10217-7 the **EHEDG** certification, about the compliance of the preparation and packaging processes of food products, according to hygiene criteria.

PROCESS PIPES FOR THE FOOD  
AND DAIRY INDUSTRY



# TYPICAL APPLICATIONS

The great attention to quality and process improvement has led Marcegaglia Specialties to obtain important certifications: **round welded process pipes for oil and gas EN 10217-7** are TUV - AD2000 W2 / W10 certified, according to PED 2014/68/EU Directive about the design, construction, equipment and installation of pressure equipment.

The EU Pressure Equipment Directive aims to guarantee free movement of the products in its scope while ensuring a high level of safety.

PROCESS PIPES FOR OIL  
AND GAS APPLICATIONS



# TYPICAL APPLICATIONS

Marcegaglia process pipe range include certified products for **chemical and pharmaceutical, oil and gas, electrical resistances** and other **mechanical applications**.

Marcegaglia Specialties manufactures a range of stainless steel round tubes EN 10217-7 and has strengthened production with the introduction of two new laser lines, for the processing of tubes with a diameter of less than 35 mm, to better serve the market of **heat exchangers** and **boilers**.

FEEDWATER HEATER TUBES  
FOR POWER PLANTS

# QUALITY STRATEGY

- Each plant can ensure the same quality level of product and service, thanks to Marcegaglia Specialties shared knowledge base, shared quality procedures and learning activities, and the same mills suppliers.
- Continuous process of technological upgrade and product development
- Marcegaglia Specialties in a proactive role to promote the right stainless steel grade in accordance with actual application requirements:  
eg. ferritic grades in substitution to austenitics for handrailing, etc.

# A UNIQUE GLOBAL PLAYER IN STAINLESS STEEL WELDED TUBES

Marcegaglia Specialties today is the **world's top manufacturer** of stainless steel welded tubes, with a yearly capacity of 700 thousand tonnes.

Some applications:

- automotive
- food and dairy, drinkable water
- household appliances
- chemical and petrochemical
- pharmaceutical
- heat exchangers (e.g. feedwater heaters)
- building and construction
- furniture and decoration





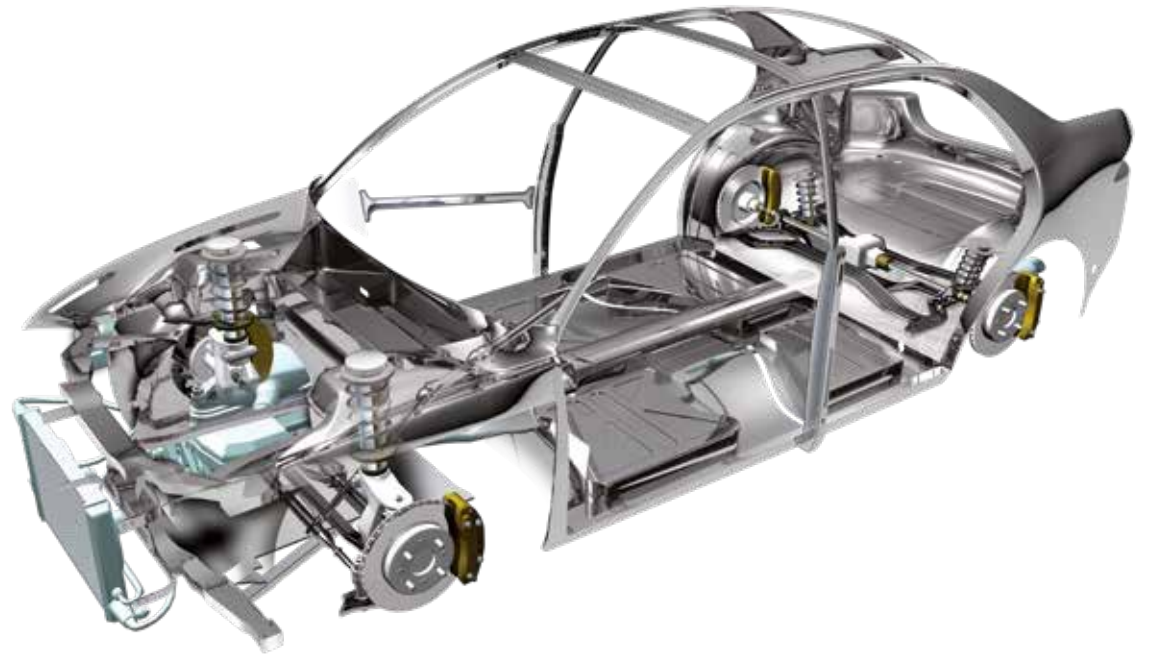
# A UNIQUE GLOBAL PLAYER IN STAINLESS STEEL WELDED TUBES

Throughout the years, Marcegaglia Specialties has also developed a specific know-how in **automotive stainless tubes for exhaust systems** (manifold, front and center pipes, flexible joints, catalytic shells, mufflers, tail pipes) and for hydroforming applications, as well as custom-designed box sections for bus frames and other structural applications in the commercial vehicle industry.



# THE GROWTH GUIDELINES

- FOCUS ON PROJECTS/END USERS
- AUTOMOTIVE TUBES  
growing presence in the automotive market in countries with high growth potential
- PROCESS PIPES
  - Heat Exchangers
  - Feedwater Heaters
  - Power Plant Evaporators
  - Boiler Tubes
  - Press Fitting
  - Thin Wall Small Tubes in Ferritic
  - Duplex and Exotic Grades



# THE GROWTH GUIDELINES:

## MARCEGAGLIA SPECIALTIES ON THE EXHAUST SYSTEM MARKETS

The first 3-4 key players in manufacturing of exhaust system are Europe-based **with global activities**.

Marcegaglia Specialties aims to become the **only global player** in stainless steel welded tubes.

Marcegaglia Specialties manufacturing units in **Italy, Russia, Turkey, Brazil** - in partnership with Marcegaglia Carbon Steel plants - are strategically located to serve these key automotive districts.

*(The India project is under evaluation)*



# THE GROWTH GUIDELINES

Marcegaglia Specialties gives the same great importance to the supplier as to the customer and human resources.

For this reason, we have chosen to co-operate with a limited number of selected suppliers, with focus on long-term partnerships on industrial basis.





June 2022

# OUR STEEL BRINGS YOUR WORLD TO LIFE



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60<sup>th</sup>  
1959-2019  
MARCEGAGLIA