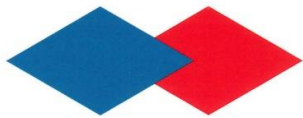


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refractories

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Japan

Shinagawa Refractories: Refractory Experience since 1875

Shinagawa Refractories Co., Ltd., a Japanese company, headquartered in Tokyo, is one of the largest refractory suppliers in the world. Since its establishment in 1875 as a first private fire brick company in Japan, Shinagawa has always retained passion and commitment to quality and continues to enhance 145 years of refractory expertise. With a focus on “proximity,” the company places the greatest importance on pursuing improvements and providing one-of-a-kind solutions for each and every customer in essential industries worldwide. Promising the highest and most consistent performance, Shinagawa looks to expand global business to better serve all the needs of customers.

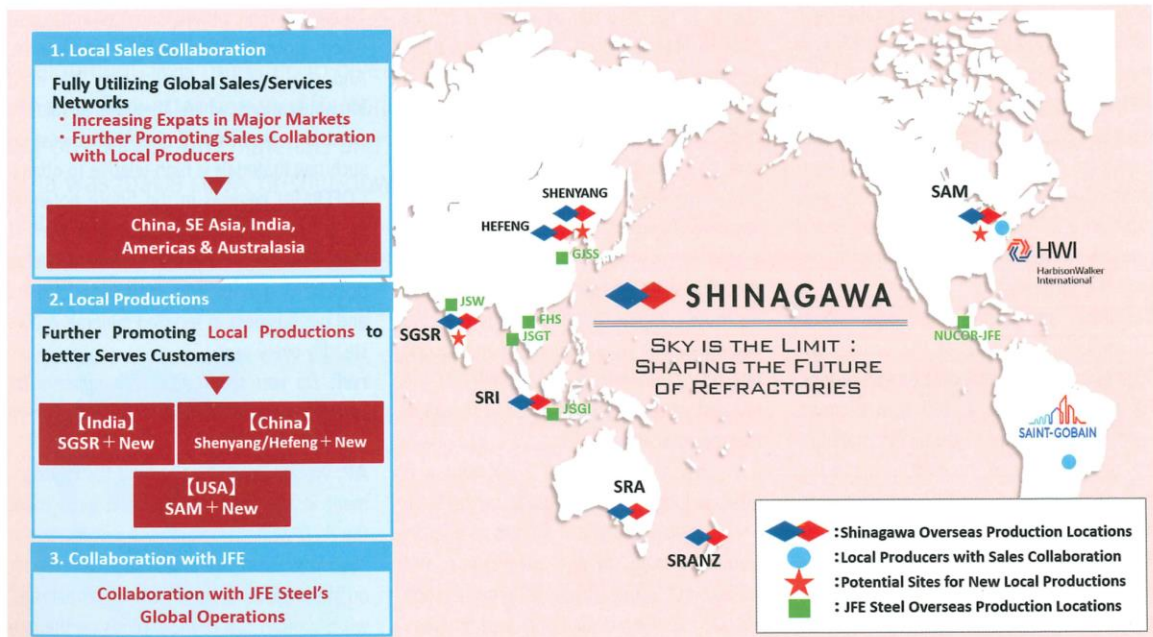


Fig. 1 Shinagawa overseas business expansion

145 years of refractory experience

Shinagawa’s founder, Katsuzo Nishimura, commenced production of fired bricks in 1875 amid Japan’s Westernization movement during the Meiji Era. Indeed, Shina-

Shinagawa Refractories Co., Ltd
Tokyo 100-0004, Japan
www.shinagawa.co.jp/en/

gawa was the first to manufacture fired bricks as a private company in Japan. Starting from refractory bricks for gas generation furnaces, the company eventually started production of refractory bricks for a series of different applications; such as sulphuric acid furnace and glass furnace. In 1894, Shinagawa patented silica bricks, which led the company to expand its business into the iron and steel industry. After the 1905 Japanese-Russo War, Japan saw a robust economic growth. In line with nationalisation of the railway, development

of gas infrastructure and construction boom, the company started production of decorative bricks for buildings. In fact, Shinagawa manufactured all of the original burgundy-colour decorative bricks for the Central Railway Station of the Ministry of Railways, which is currently known as Tokyo Station. For this honourable project, for the first time in Japan, Shinagawa imported a press machine from Germany and employed double-action press technique, which was still rare in the world of brick manufacturing. It took almost a year to complete the production

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“As a cornerstone of global refractory manufacturing, SHINAGAWA combines world class facilities with high quality product and excellent customer support to provide industry with the best refractory solutions.”

Rob Lavin
Managing Director
Shinagawa Refractories Australasia

SHINAGAWA

“From iron and steel to cement and many other essential industries, SHINAGAWA offers series of products and services and every day we gain experience and build expertise in refractories. Through sincere communication, we find optimal solutions with each and every customer.”

Yuri Korai
Sales - Steel Electric Furnaces
& Cement Industries

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SHINAGAWA

“SHINAGAWA is proud of providing World Class Refractory Solution - High Quality Products & Excellent Installation Service - to Indonesian Market.”

Hiroshi Nakamura
President Director
PT Shinagawa Refractories
Indonesia

SHINAGAWA AMERICAS

“With State-of-the Art Manufacturing and Research Facilities, knowledgeable and experienced employees, SHINAGAWA Refractories, is ready to supply your refractory and ceramic needs with dependable and advanced products today and into the future.”

Steve Campbell
Executive V. P. Sales & Technology
Shinagawa Americas

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Fig. 2 The Faces of SHINAGAWA Campaign Statements

and delivery of some 940 000 red ornamental bricks. Refractories support operations of virtually every essential industry: iron and steel, non-ferrous, power generator, cement, glass, chemicals, pulp and paper, refineries and many others. The history of Shinagawa is the reflection of dedication to the development of Japanese fundamental industry and vital social infrastructure. With 145 years of stellar track record as Japan’s high quality refractory supplier, Shinagawa is well positioned to extend its reach for the global market and serve all the needs of customers worldwide.

Global business expansion with a focus on “proximity”

Shinagawa built its very first plant in Shibaura, Tokyo, and later added one in Iwaki, Fukushima and one in Bizen, Okayama. The company now has 14 manufacturing plants worldwide and further looks to expand its global reach with a focus on “proximity”. Proximity – nearness in space, time and re-

lationship – is the core of Shinagawa’s strategic global strategy. Proximity could also be translated as physical or geographical closeness, availability in the same time zone and a reliable relationship based upon trust and confidence. Achieving all these aspects of proximity is how and why Shinagawa has established its position as Japan’s leading refractory manufacturer. On its home ground in Japan, Shinagawa operates six production plants at two main locations: East Works and West Works. While East Works mainly produce value-added functional shaped refractories, such as shrouds and nozzles for steel-making process, West Works cover a wide variety of products, from shaped refractories to monolithic, precast shapes and even mould powders for continuous casting of steel. Although the first plant in Tokyo was eventually closed, the works in Fukushima and Okayama have remained to hold two of the largest production capacities of the company through 145 years.

Turning to overseas markets, Shinagawa has achieved great success in developing the finest mould powders for high-end steel mills in China. Two joint venture company, Shenyang Shinagawa Metallurgy Materials in Shenyang since 1997 and Liaoning Shinagawa Hefeng Metallurgical Material in Anshan since 2008, have achieved a predominant market share as suppliers of spray-dried mould powders for major steel producers in China. In recent years, they further extend their proximity for customers in South Korea, Vietnam, India, Australia and Brazil. In Australia and Oceania, Shinagawa Refractories Australasia (SRA) was established in 1998 and now covers more than 30 % market share of all refractory spend in the region. Three highly efficient monolithic plants are located in Unanderra, NSW, and Kwinana, WA, in Australia and Huntly in New Zealand. As the largest local refractory supplier in the region, SRA delivers cost-competitive, consistent quality products for Australian steel producers and many industrial customers.

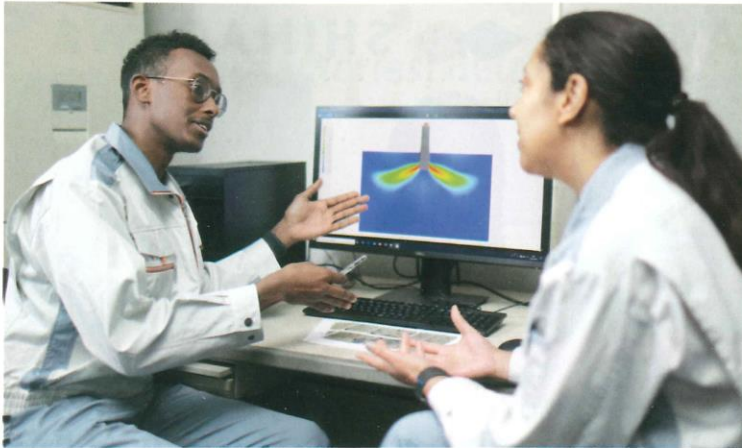


Fig. 3 R&D activity

(Figs: Shinagawa)

In the ASEAN region, Shinagawa Refractories Indonesia (SRI), established in 2014, locally manufactures monolithic refractories. Located in Jakarta, the centre of a rapidly growing economy, SRI supports development of vital social infrastructures by providing full-range high-quality refractory materials from all Shinagawa group companies.

In USA, Shinagawa Advanced Materials Americas (SAM) became a 100 % subsidiary of Shinagawa Refractories in 2006. SAM operates a mould powders plant in Mogadore, OH, and its dedicated technical team and three expat engineers from Japan work closely together to offer superior "Made in America" mould powders and functional refractories imported from Japan. Beyond the company's own network, Shinagawa has seen a successful sales evolution through business alliance with HarbisonWalker International, Pittsburgh, PA,

the largest supplier of refractory products and services in USA. Even further, Shinagawa is considering a new local production investment and potential technical collaboration.

In India, SG Shinagawa Refractories India (SGSR), established in August 2019, supplies premium quality tap hole clay for blast furnaces in India from its plant in Halol, Gujarat. For a stable operation of local blast furnaces, SGSR provides flexible delivery lead time and on-site technical support with two expat engineers from Japan. Here also, another local production project is in discussion, and Shinagawa plans to strengthen the "Made in India" product portfolio in coming years.

Innovative refractory solutions for sustainable future

Shinagawa's global proximity strategy is also the key to find common environmental

interests among the global communities. In response to growing focus on carbon-neutral initiative and sustainable future, the company has initiated a series of refractory recycling projects and new investments for such technology development.

The Shinagawa Group operation now covers East Asia, the ASEAN region, Oceania, Americas and India, and, in order to reduce total CO₂-emission, the company's extended commitments include taking the initiative in leading the way to energy transition. Promoting sustainability and environment-friendly technologies, Shinagawa is committed to providing quality products while improving energy efficiency and utilising recycled materials.

Midterm strategy

On the financial year 2021 annual sales revenue basis, Shinagawa is the fourth largest refractory supplier in the world. The company's 2023 midterm performance target includes 35 % growth from 2020 in its overseas sales revenue. As Heiki Miki, Overseas Business Division Director, emphasized: "Shinagawa will be there for our customers worldwide: we are reachable where they need us most, with solutions and improvements they need most. Achieving proximity in every sense, Shinagawa is ready to serve customers anywhere, anytime and for anything at all."

