

## WORLD STEEL REVIEW

Iron & Steel Statistics Bureau, January 2006



World crude steel production in the eleven months to November 2005 for the 61 countries reporting to the IISI was 1011.6 million tonnes. This was 6.1% higher than the eleven months total in 2004. The November month total was only 4.1% up on November 2004 at 94.1 million tonnes. However, excluding China, the eleven months total fell by 0.9%, and the November month total was down by 1.2% compared to the previous year.

In the European Union 25, crude steel production in November fell by 4%, with the year to date down by 3.8% to 171.5 million tonnes. German steel production was down 10.4% in the month, and by 4.2% in the eleven months to 41.0 million tonnes. In France steel production fell by 4.5% in November, bringing the year to date down 6.1% to 17.9 million tonnes. Italian production was flat in the month, with a rise of 2.6% in the year to date to 26.9 million tonnes. Spanish steel production decreased by 1.4% in November, although the eleven months total was 0.7% higher at 16.5 million tonnes. The UK November figure was flat, while the year to date was down 5.1% to 12.1 million tonnes. Amongst the new members Poland's crude steel production in the eleven months was down 20.6% to 7.8 million tonnes. The Czech Republic was also down by 12.5% in the year to date to 5.7 million tonnes.

Crude steel production in the rest of Europe increased by almost 1% in the year to date, dominated by Turkish steel production which rose by 13.2% in November, with the eleven months total 2.5% higher at 19.2 million tonnes. Romanian steel production, however, was down 3.3% in November, bringing the year to date down 4.9% to 5.2 million tonnes. In Serbia and Montenegro, on the other hand, steel production in November rose by 16.6%, pushing the eleven months total up 11.1% to almost 1.2 million tonnes.

European car registrations published by ACEA showed a fall of 2.8% in November, with the eleven months total down by 0.5%. German registrations fell by 3.4% in November, but were up 2.6% in the eleven months to just below 3.1 million cars. In the UK the November total was 7.9% down, while the year to date was down 5.8% at 2.3 million cars. In Italy, monthly registrations rose by 3.1% with the January to November total 1.1% down at 2.1 million cars. The French total was down 2.1% in the month, but up 3.1% in the year to 1.9 million cars. The next largest car market, Spain, showed a fall of 4% in registrations in November, bringing the year to date total for the eleven months up 0.9% to 1.4 million cars.

In the CIS, Russian crude steel production increased by 3.9% in November and by 1.3% in the year to date total to 59.6 million tonnes. Ukrainian steel production rose by 0.2% in November, while the year to date total fell 1% to 35.2 million tonnes. The Kazakhstan eleven months total was 17.9% down at 4.1 million tonnes.

Russian steel exports rose by 4.2% in the first ten months of 2005 to over 26 million tonnes, with exports of semis, accounting for 45% of the total, up 9%. Ukrainian steel exports, however, fell

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For further information please contact: Phil Hunt Tel: +44 (0) 20 7343 3916 Fax: +44 (0) 020 7343 3903  
e-mail: [tradeadmin@issb.co.uk](mailto:tradeadmin@issb.co.uk) website: [www.issb.co.uk](http://www.issb.co.uk) or write to:  
Publications Dept, Ref: SOTN, ISSB Limited, 1 Carlton House Terrace, London, SW1Y 5DB, England

by 1.7% to 22.6 million tonnes in the ten months. Exports of semis were 2% down at 8.2 million tonnes, while plate exports were 7.4% up at 3.7 million tonnes. Steel exports by Kazakhstan fell by 17% in the first nine months of 2005 to 2.6 million tonnes.

On the North American continent US crude steel production decreased by 5.6% in November and by 5.9% in the eleven months to date to 85.4 million tonnes. Canadian steel production was also down by 5.2% in the month, with the year to date total was down 4.9% to 14.3 million tonnes. In Mexico steel production decreased by 7.7% in November, bringing the year to date total down 2.9% to 14.8 million tonnes.

Brazilian crude steel production fell by 4.4% in November, bringing the year to date total down 3.8% to 29 million tonnes. In Argentina steel production was flat in November, although the eleven months total was up 5.3% to 4.9 million tonnes. In Venezuela, on the other hand, crude steel production increased by 15.4% in November and by 7.7% in the year to date to 4.5 million tonnes.

South African steel production showed a marked drop in the month of 13.1%, although the year to date was 0.5% up at 8.7 million tonnes. Iranian steel production increased by 4.5% in November, with the eleven months total up 8.5% to 8.6 million tonnes. Egyptian production rose by 12.4% in the month, with the year to date up 18.3% to 5.1 million tonnes. In Saudi Arabia, November's steel production only rose 0.7%, although the year to date total was up 7.1% to 3.8 million tonnes.

Despite increasing production, steel imports by the middle east have risen in 2005; Iranian imports exceeded 5 million tonnes in the first 8 months, of which 30% were semis, while Egyptian imports topped 2 million tonnes, of which 75% were semis. Saudi Arabian imports also exceeded 2 million tonnes, although semis only accounted for a quarter of the total.

Turning to Asia, only China and India showed increased steel production in both November and the year to date. Chinese production rose by 17.4% in November and by 25.5% in the eleven months to 317.7 million tonnes. Indian steel production was up 19.2% in the month, and by 16.6% in the year to date to 34.6 million tonnes. Japanese production actually fell in November by 3.3%, leaving the year to date only slightly up at 103.4 million tonnes. In South Korea steel production reached 43.6 million tonnes in the eleven months, 0.4% up on the previous year's total, with a 1.6% fall in November. Taiwanese crude steel production was down 4.3% in November, with the year to date total down by 0.9% to 17.7 million tonnes.

Japanese steel exports during January to November 2005 fell by 7.5% to 29.4 million tonnes, which could jeopardise its position as the world's top exporter in 2005. However, exports of semis showed a 26% rise to 3.6 million tonnes. Exports of hot rolled coil, on the other hand, fell by nearly 18% to 6.3 million tonnes. Japan's two largest markets, South Korea and China, both showed a drop in the steel they imported from Japan, by 13% and 16% respectively, whereas exports to Thailand, its third largest market increased by 8%. These three markets accounted for 55% of Japanese exports in 2005.

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For further information please contact: Phil Hunt Tel: +44 (0) 20 7343 3916 Fax: +44 (0) 020 7343 3903  
e-mail: [tradeadmin@issb.co.uk](mailto:tradeadmin@issb.co.uk) website: [www.issb.co.uk](http://www.issb.co.uk) or write to:  
Publications Dept, Ref: SOTN, ISSB Limited, 1 Carlton House Terrace, London, SW1Y 5DB, England