

## **WORLD STEEL REVIEW**

**Iron & Steel Statistics Bureau, January 2010**



Crude steel production in the 66 countries reporting to the World Steel Association totalled 107 million tonnes in November 2009, 24% higher than in November 2008. However, the eleven months total was 1,090 million tonnes, 10.8% lower than the same period last year. Excluding China, the monthly rise was 15.6%, whereas the year to date total was down by 24.7%. All regions showed a rise in the monthly total with most countries recording an increase in November.

Steel production in the 27 member countries of the European Union increased by 10.8% in November 2009 compared to the previous November to 14.2 million tonnes; the eleven months total, however, was 33.2% lower at 126.3 million tonnes. German production rose in November by 8%, bringing the eleven months total down 31.7% to 29.6 million tonnes. Production in Italy, on the other hand, was down 17.2% in November, while the year to date total fell by 37.3% to 18.2 million tonnes. French steel production rose by 27.2% in the month, bringing the year to date total down 31.9% to 11.7 million tonnes. Spanish November production jumped by 43%, although the eleven months total fell by 28.3% to 12.8 million tonnes. UK monthly steel production increased by 18.8%, while the year to date total was down 31.3% to 8.9 million tonnes. Apart from the fall in Italian monthly steel production, there was also a decrease in Sweden, Slovenia and Hungary in November. All 27 countries showed a fall in the year to date totals.

In the rest of Europe the largest producer is Turkey, where steel production increased by 18.3% in November, but was down by 8.4% in the year to date to 22.9 million tonnes. Although the monthly total in Serbia more than doubled, the total for the eleven months decreased by 39% to just under one million tonnes.

According to ACEA, the European car manufacturers' association, European car registrations rose by 26.6% in November, but were down by 2.8% in the eleven months. Registrations in Germany, the largest market, increased by 19.7% in November, while in France they jumped by 48%. The UK total for November was 58% higher, while in Italy monthly registrations were up by 31%. Year to date totals in Germany were up 25% to 3.6 million cars, with the French total just over 2 million, up by 7.6%. The Italian eleven month total was only down by 1.4% at just under 2 million cars, while UK registrations fell by 8.8% to 1.84 million cars. The fifth largest market, Spain, was down by 20.8% in the year to date at 862 thousand cars.

In the CIS countries crude steel production in Russia rose by 42.6% in November bringing the year to date total down 16.6% to 54.4 million tonnes. Ukrainian November production increased by 67%, making the eleven months total 27 million tonnes, a decrease of 23.4%. Steel production in Kazakhstan more than doubled in November, but decreased by 5.9% in the year to date to 3.8 million tonnes.

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Steel production in the USA increased by 27% in November, although the year to date total was down by 40% at 52.6 million tonnes. Canadian production was up by 56% in November, with the eleven months total down by 41% at 8.4 million tonnes. Mexican steel production rose by 31% in the month, although the year to date total fell by 22.2% at 12.8 million tonnes.

In South America, Brazilian crude steel production increased by 15.1% in November, while the year to date total was down 25.4% to 23.9 million tonnes compared to last year. Argentinian production in November rose by 5.9%, although the eleven months total fell by 31.3% to 3.6 million tonnes. Venezuelan crude steel production, on the other hand, decreased by 6% in the month, while the year to date total was down by 12.6% to 3.4 million tonnes.

In Africa and the Middle East steel production rose overall. Iranian production decreased by 3.5% in November, although the year to date total rose by 10.3% to 10 million tonnes. The South African monthly total was 43% up with the eleven months total down 16.1% to 6.8 million tonnes. In Egypt steel production only rose slightly in the month, but fell by 14.3% in the year to date to 5 million tonnes. Saudi Arabian production jumped by 30% in the month bringing the January to November total down 2.6% to 4.3 million tonnes.

In Asia Chinese steel production increased by 37.4% in November, while the eleven months total was up by 12.1% to 518 million tonnes. Indian steel production increased by 4.7% in the month, and by 2.4% in the year to date to 51.7 million tonnes. Japanese production showed a very slight increase in November, while the year to date total fell by 29.4% to 78.6 million tonnes. South Korean steel production rose by 7.5% in the month, but showed a drop of 11.4% in the year to date. Taiwanese steel production increased by 15.6% in November, but was down by 24.4% to 14.1 million tonnes in the January to November period.

Exports of steel in the first nine months of 2009 have fallen for nearly every country compared to the same period in 2008, with South Africa (up 29%) and Argentina (up 11%) being the rare exceptions. The largest drop was in China where exports in 2009 were less than one third of the 2008 total. However, in several countries exports have started to increase during 2009 with Chinese exports in Q3 2009 being 54% up on the exports in Q2 2009. Japan's Q3 total was 47% higher than in Q2, with Brazil's Q3 total up by 46% on Q2. The USA Q3 total was 27% higher than in Q2. In the European Union Dutch exports were 26% up in Q3 followed by Poland and Denmark at 20% up. German exports in Q3 were only 7.4% up on the Q2 total. Turkish steel exports were 5.7% down in Q3, with Belgian exports down 7.2% and Taiwanese exports down by 8.4% compared to Q2 2009. Spanish exports were 22.4% down in Q3.

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