

## **WORLD STEEL REVIEW**

### **Iron & Steel Statistics Bureau, February 2010**



The World Steel Association estimated crude steel production for its 66 monthly countries to be 1199 million tonnes in 2009, 8.1% down on the annual 2008 total of 1304 million tonnes. However, China accounted for 47% of this total, and the annual total excluding China fell by 21.5% compared to 2008. The December crude steel production for the 66 countries increased by 30% to 106.4 million tonnes, and China accounted for just under 45% of this total. The World Steel Association assessment of total global production in 2009 is 1220 million tonnes, 8% less than the 2008 total of 1326 million tonnes.

Production has risen in the last half of 2009 compared to the first half, but is not yet at the levels of the first half of 2008. Non Chinese crude steel production rose from an average of about 45 million tonnes in the first few months of 2009 to about 60 million tonnes by the end of 2009 which is a clear sign of the beginnings of recovery. Chinese production showed a more gradual increase during 2009.

#### **European Union**

Total crude steel production for the 27 countries of the European Union in December was 35% up, while the annual total was 139.1 million tonnes, 11.6% of the world total, and almost 30% lower than the total for 2008. Germany made 23% of the EU total at 32.7 million tonnes, a drop of 28.7% on 2008, with the December total up by 23.7%. Italian steel production was down 10% in December and fell by 35.5% in the year to 19.7 million tonnes. Spanish December production, however, increased by 44.8%, bringing the year to date total down 23.3% to 14.3 million tonnes. French steel production jumped by 71% in December making the year total 12.8 million tonnes which was 28% down on 2008. UK December steel production also shot up by 73%, bringing the year to date down 25% to 10.1 million tonnes. The 12 months total in Belgium fell by 47% to 5.6 million tonnes, and both the Romanian and Swedish totals fell by 46%.

#### **Other Europe**

In Turkey, the largest West European steel producer outside the European Union, crude steel production was 25.3 million tonnes, a fall of 5.6% compared to 2008, while December production increased by 24.7%. Serbian steel production was 1.1 million tonnes in 2009, 34% lower than in 2008. Switzerland's annual total was just under one million tonnes, 25% down on the previous year.

European car registrations decreased by 1.6% in 2009 compared to the previous year according to ACEA, reaching 14.5 million cars. German registrations, however, increased by 23.2% to 3.8 million cars, while the French total rose by 10.7% to 2.3 million cars. Italian registrations were only slightly down at 2.2 million cars, while in the UK registrations fell by 6.4% to 2.0 million cars. Spanish registrations dropped by 18% to 953 thousand cars. These five countries accounted for

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77% of the European total. The newer East European members of the European Union showed a combined fall of 26.6% in registrations, although the largest of these, Poland, had a flat total for 2009 at 320 thousand cars. Registrations in the Czech Republic actually increased by 12.5% to 162 thousand cars.

### **The CIS countries**

The countries of the former USSR showed a decrease of 14.7% in crude steel production with the overall total down to 97 million tonnes, 8.1% of world production. The December total, however, was up by 53%. Russian steel production was 66% higher in December, although the year to date total was 12.5% down at 60 million tonnes making it the third largest producer in the world just ahead of the USA. Ukrainian December production increased by 35% bringing the annual total down 20% to 29.8 million tonnes. Steel production in Kazakhstan fell by 2.4% in 2009 to 4.1 million tonnes, with production in Belarus down 6.6% to 2.4 million tonnes.

### **North America**

North America accounted for only 6.9% of the world's total, with production in the USA dropping by 36.4% in the year to date to 58.1 million tonnes. However, the US December production showed a marked improvement, up by 48% on December 2008. Canadian annual crude steel production was down almost 40% to 9 million tonnes, although the December month total was up by 37%. Mexican December production jumped by 72% while the year total fell by 17.7% to 14.2 million tonnes.

### **South America**

In South America, crude steel production increased by 52.6% in December, with the full year down 20% to 37.8 million tonnes, 3.2% of world production. Brazilian annual steel production fell by 21.4% to 26.5 million tonnes, but the December total increased by 56%. Argentinian steel production rose by 47.5% in the month, but the annual total fell by 27.6% to 4 million tonnes. Venezuelan production was up by 8.2% in December, bringing the annual total down by 9.5% to 3.8 million tonnes. Annual steel production in Chile decreased by 14.5% to 1.3 million tonnes, while in Colombia it actually rose by 2.5% to 1.1 million tonnes.

### **Africa and the Middle East**

Steel production in Africa and the Middle East fell by 4% to 31.4 million tonnes in 2009. Iran was the largest producer in the region with production increasing by 9.1% to 10.9 million tonnes making it larger than both the UK and Canada. South Africa's steel production fell by 9.5% to 7.5 million tonnes. Egypt's annual total showed a drop of 11% to 5.5 million tonnes, while Saudi Arabian steel production actually rose by 0.5% to 4.7 million tonnes. Africa and the Middle East accounted for 2.6% of world steel production.

### **Asia**

Crude steel production in the five Asian countries increased by 23.6% in December, and by 3.8% in the year to 776.3 million tonnes, 64.7% of world production. China's December production was 26.6% up, bringing the year to date total up by 13.5% to 568 million tonnes, the highest annual crude steel production ever. Japan's annual crude steel production was down by 26% to 87.5 million tonnes, while the monthly total increased by 19.6%. India increased its annual production by 2.8% to 56.6 million tonnes, just a little less than the US total. India's

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monthly total was 7.1% up. Korean steel production in December rose by 18%, but the year to date total decreased by 9.4% to 48.6 million tonnes in 2009. Crude steel production in Taiwan jumped by 37% in December, but was down 21% in the year to 15.7 million tonnes. Australia's annual total fell by 31% to 5.2 million tonnes.

Trade in steel in 2009 dropped significantly compared to 2008 with the top 25 countries down an average of 30%. Chinese exports fell by 60% to 24 million tonnes making them the fourth largest exporting country after Japan, Russia and the Ukraine.

Japanese steel exports only fell by 15.5% in the first 11 months of 2009. Hot rolled coil accounted for 26% of the total at 7.7 million tonnes which was a drop of 5.2% compared to 2008. Exports of semis actually rose by 21% to 5.2 million tonnes. Other Asian countries accounted for about 85% of Japanese exports with South Korea and China by far the largest markets, together accounting for 47% of total exports. South Korea and Taiwan accounted for 83% of semis exports with very little tonnage exported outside of Asia.

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