

## WORLD STEEL REVIEW

Iron & Steel Statistics Bureau, April 2014



Total crude steel production for the 65 countries reporting to the World Steel Association in February 2014 was estimated to be 125 million tonnes, an increase of 0.6% on February 2013. The total for the two months to date in 2014 was 1.6% up on the same period in 2013 at 262 million tonnes. However, excluding China, global crude steel production increased by 0.7% in February and by 1.4% in the two months. The CIS and North and South America all showed a decline in steel production in both the month and year to date.

In the European Union, crude steel production by the 28 rose by 4.7% in February, and by 6.6% to 28.4 million tonnes in the two months to date compared to the same period last year. German crude steel production was up 4.2% in February, and rose by 3.2% in the year to date to 7.2 million tonnes. Production in Italy increased by 3.6% in February, while the two months total was up by 10.2% to 4.3 million tonnes. French monthly production, however, decreased by 3.9%, although the year to date total rose 2.3% to 2.7 million tonnes. In Spain steel production increased by 10.2% in February and by 10.6% in the two months to 2.3 million tonnes while in the United Kingdom steel production rose by 16.6% in February, bringing the year to date total up 25.7% to 2.1 million tonnes.

The balance of trade of the 28 countries in the European Union remained positive throughout 2013, but averaged 693 thousand tonnes per month compared to over one million tonnes per month in 2012. This was due to a drop in the average tonnage exported as well as an increase in the average tonnage imported.

The European Union's largest market remains Turkey which took over 6 million tonnes in 2013, 16.7% of the total exported, followed by Algeria at 4.7 million tonnes and the USA at 4.5 million tonnes. These 3 countries accounted for over 40% of total exports in 2013. The largest supplier of steel to the European Union in 2013 was the Ukraine at 6.4 million tonnes, 22.5% of the total imported. Russia supplied 6 million tonnes and China 4 million tonnes. These 3 countries accounted for 58% of total imports in 2013.

In 2013 the European Union exported 36.7 million tonnes of steel with the largest products being hot rolled wide coil (4.7mt), deformed reinforcing bars (4.4mt) and tubes, pipes and fittings (4.4mt). Semis accounted for a further 4.1mt. Total imports in 2013 were 28.3 million tonnes of which semis were 7.9 million tonnes followed by hot rolled wide coil at 4.5 million tonnes. CR was the third largest product imported at 2.5 million tonnes.

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Crude steel production in Turkey in February was just 0.7% up at 2.7 million tonnes with the year to date total virtually flat at 5.5 million tonnes. Bosnian steel production, on the other hand, rose by 15.6% in February and by 19% in the year to date to 139 thousand tonnes. Norwegian steel production was flat in the year to date at 101 thousand tonnes.

ACEA, the European car manufacturers association, reported that car registrations in Europe rose by 7.6% in February, and the year to date total increased by 6.3%, to 1.86 million cars. German registrations were up 4.3% in February and 5.7% in the two months at 415 thousand cars, while French registrations fell by 1.4% in the month and by 0.5% in the two months to 267 thousand cars. The Italian February total, however, rose by 8.6% and the year to date was up by 6% to 236 thousand cars, while in the UK the February total increased by 3% and the two months total increased by 6.1% to 223 thousand cars. The Spanish two months total was 13% up to 122 thousand cars, while the Belgian total decreased slightly to just under 96 thousand cars. These six countries accounted for 73% of total registrations in Europe.

In the CIS crude steel production decreased by 5.1% in February, while the year to date total was down 3% at 17.2 million tonnes. Russia's monthly total fell by 3.1%, while the two months were just 0.3% up at 11.2 million tonnes. Ukrainian steel production, however, fell by 10.7% in February, bringing the year to date total to 4.9 million tonnes, a decrease of 11.9%. In Kazakhstan the two month crude steel production total increased by 27% to 538 thousand tonnes, while Belarus steel production fell by nearly 26% to 319 thousand tonnes.

Turning to North America, US crude steel production fell by 1.7% in February, and by 1% in the year to date to 14 million tonnes. Mexican steel production also fell by 1.5% in the month, and by 0.8% in the two months to date to just under 3 million tonnes. Canadian production, on the other hand, fell by 9.3% in February, and by 6.7% in the year to date to 2 million tonnes.

US imports of steel in January 2014 rose to their highest level since July 2007 at almost 3 million tonnes. Semis were the largest product group imported at 673 thousand tonnes, 57.5% above the January 2013 total. Hot rolled wide coil came second at 415 thousand tonnes, 46% higher than the same month last year. However, welded tubes at 391 thousand tonnes was 10.4% lower than in January 2013.

In South America, there was a 1.2% increase in Brazilian crude steel production in February, with the year to date total virtually flat at 5.3 million tonnes. Argentinian production jumped by 18.6% in the month and by 21% in the two months to 777 thousand tonnes, while Venezuelan steel production dropped by 57% in the month and by 48% in the year to date to 212 thousand tonnes. Production in Chile was down 29% in the two months to 179 thousand tonnes, while the Colombian total was down by 5% to 169 thousand tonnes. Peruvian steel production, however, rose by 1.2% in the year to date to 170 thousand tonnes.

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South African crude steel production in February increased by 19.3%, while the year to date total was up 8.3% to nearly 1.2 million tonnes. Egyptian steel production, however, decreased by 15.9% in the two months to one million tonnes. Production in Iran rose by 5.1% in February, and by 3.9% in the year to date to 2.4 million tonnes, while in Saudi Arabia steel production was 12% up in February and 6.5% up in the two months at 958 thousand tonnes.

Crude steel production in the Far East varied in the 5 major countries. Chinese production increased by just 0.4% in February and by 1.7% in the two months to 131 million tonnes. Japanese production rose by 1.4% in February and by 3.8% in the year to date to 17.8 million tonnes. However, Indian production fell by 3.2% in February, and by 1.5% in the year to date to 13.2 million tonnes. South Korean steel production increased by 6.2% in the month, bringing the year to date total up 3.8% to 11.3 million tonnes. Taiwanese production rose by 4.4% in February and by 2.7% in the two months total to 3.4 million tonnes.

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