

## **WORLD STEEL REVIEW**

**Iron & Steel Statistics Bureau, June 2007**



Production of crude steel for the 67 countries reporting to the IISI in April was estimated to be 109.2 million tonnes, an increase of 7.5% over April 2006. The total of the 4 months to date was 428.4 million tonnes, 9.8% above the January to April period in 2006. Excluding China, which accounted for 36% of world production in the first four months of 2007, the rise in April was only 2.8%, with the four months total only up by 4.3%. Global trade in steel exceeded 410 million tonnes in 2006 (including internal EU trade), over 12% higher than in 2005. China has almost doubled its exports to become the largest steel exporter in the world at nearly 52 million tonnes, followed by Japan, Russia, Ukraine and Germany. The top 13 exporting countries all increased their exports in 2006, and 43 countries exported more than one million tonnes.

In the European Union 27, crude steel production rose by 2.3% in April to 18.3 million tonnes compared to April 2006, and by 4.7% in the 4 months to date to 72.2 million tonnes. Monthly production in Germany rose by 0.5% in April, although the January to April total was 7.1% up at 16.4 million tonnes. Italian crude steel production increased by 2.5% in April, and by 4.2% in the year to date to 11.1 million tonnes. Steel production in France rose by 1.4% in the month, and by 1.1% in the four months to date to 7.1 million tonnes. Spanish production, however, fell by 2.9% in April, although the year to date was up 4.6% to 6.2 million tonnes. In the UK, production increased by 3.9% in April, bringing the 4 months total up 3.1% to 4.8 million tonnes. Polish steel production showed a marked increase, rising by 15.9% in April, with the year to date up 16.8% to 3.6 million tonnes.

In the rest of Europe Turkish production increased by 10.4% in April and by 12.7% in the four months to 8.3 million tonnes. The four months total for Serbia and Montenegro was 8.8% up at 634 thousand tonnes.

New car registrations in Europe fell by 0.6% in April compared to the previous April, according to ACEA, the European Car Manufacturers Association, with the four months total down by 0.2% to 5.5 million cars. Registrations in Germany, the largest market, fell by 7% in April, and by 9.2% in the year to date to 982 thousand. Italy, with the second largest market, saw registrations increase by 9.6% in April, with the four months total up 5.4% at 940 thousand cars. UK registrations rose by 4.3% in April, and by 3.1% in the year to date to 859 thousand. In France registrations decreased by 5% in April, and by 2.3% in the year to date to 692 thousand cars. However, registrations among the new EU members rose by 12.9% in April, and by 14.2% in the four months; the Polish four month total was up 25% and the Romanian total increased by 21%.

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Crude steel production in the CIS countries was 4.8% up in April, with Russian production only 2.8% up at 6.1 million tonnes, bringing the year to date up 6.7% to 24.4 million tonnes. Ukrainian steel production increased by 6.8% in April, with the year to date total up 11.2% at 14.2 million tonnes. Kazakhstan's steel production rose by 13.7% in the four months to 1.5 million tonnes.

On the North American continent US steel production fell by 6.6% in April to 8 million tonnes, bringing the year to date total down 5.2% to 31.5 million tonnes. Canadian steel production fell by 24.8% in April, while the four months total was down 22.7% to 4.1 million tonnes. Mexican steel production, however, increased by 15.5% in April, with the year to date total up 6.4% to 5.65 million tonnes.

Crude steel production in South America showed an increase with Brazilian production up 12.1% in April and by 11.5% in the year to date to 10.7 million tonnes. Steel production in Venezuela rose by 11.7% in April, bringing the four months total to just under 1.8 million tonnes, a rise of 6.1%. Argentinian production, however, fell by 1.4% in April, while the year to date total was down 7.7% at 1.7 million tonnes.

In Africa and the Middle East, South African production fell by 8.8% in April, bringing the year to date down 2.1% to 3 million tonnes. Egypt's steel production, however, increased by 15.6% in April, while the four months total was 6.2% up at 2 million tonnes. Iranian production decreased by 2.6% in the month, although the year to date total was up 3.8% to nearly 3.4 million tonnes.

Turning to the Far East, China's steel production increased by 16.5% in April to 40.3 million tonnes, and by 21.2% in the four months to 155.1 million tonnes. Japanese crude steel production was up 4.1% in April to 9.7 million tonnes, while the January to April total increased by 5.1% to 39.3 million tonnes. South Korean production rose by 10.9% in April with the year to date total at 16.9 million tonnes, 8.7% up on the same period in 2006. In India, production showed a rise of 5.7% in April, bringing the four months total up by 7.6% to 15.4 million tonnes. Crude steel production in Taiwan fell by 0.3% in April, although the year to date total was up by 2.6% to 6.9 million tonnes.

Chinese exports have continued to rise in 2007, reaching 23.8 million tonnes in the first four months of the year, more than double the total for the same period in 2006. Exports of five products exceeded 2 million tonnes in the four months: HR coil at 2.9mt, HR plate at 2.8mt, semis at 2.6mt, wire rod at 2.5mt and rebars at 2.4mt. Some 13.5 million tonnes, 57% of the total, went to other Asian countries, the top 4 being South Korea, Vietnam, Taiwan and India. 3.4 million tonnes, 14.5% of the total, went to European Union countries, particularly Italy, Spain and Belgium. The middle east, excluding North Africa, took just 3 million tonnes, 12.8% of the total, with Iran, the UAE and Saudi Arabia the top 3 importing countries. 1.5 million tonnes went to the USA, China's third largest market after South Korea and Vietnam.

Japanese steel exports have also risen to 8.7 million tonnes, a 9% increase in Q1 compared to Q1 2006. Japan's largest exports were HR coil at 2.1 million tonnes (up 19%), followed by galvanised sheet and strip at 1.2 million tonnes (up 7.5%) and semis at 1.1 million tonnes (up 7.2%). The largest markets were South Korea which accounted for 25% of Japan's exports, followed by China which accounted for 18%, and Thailand for 12%. Other Asian countries accounted for 81% of Japan's exports.

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South Korea was the fourth largest steel importing country in the world in 2006, and in Q1 2007 its imports rose by 34% to 6.4 million tonnes. China and Japan together accounted for 87.5% of this total. Its largest imports were HR coil (2.1mt), semis (1.3mt) and HR plate (1.1mt).

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