

## **WORLD STEEL REVIEW**

**Iron & Steel Statistics Bureau, June 2012**



Production of crude steel for the 62 countries reporting to the World Steel Association in April was estimated to be 128.4 million tonnes, an increase of just 1.2% over April 2011. The total of the 4 months to date was 504 million tonnes, only 0.7% above the January to April total in 2011. Excluding China, which accounted for 46% of world production in the first four months of 2012, steel production actually fell in both April and the four months.

In the European Union 27, crude steel production fell by 5.2% in April to 14.9 million tonnes compared to April 2011, and by 4.2% in the 4 months to date to 59 million tonnes. 13 EU countries showed a drop in production in April, with 12 countries showing a drop in the year to date. Monthly production in Germany fell by 5.5% in April, and by 5% in the January to April period to 14.4 million tonnes. Italian crude steel production decreased by 3.2% in April, but was 3.4% up in the year to date to 9.8 million tonnes. Steel production in France fell by just 1.8% in the month, but was 5.4% higher in the four months to date at 5.6 million tonnes. Spanish production, however, dropped by 14.3% in April, while the year to date total was down 14.9% to 5 million tonnes. In the UK, steel production actually rose by 2.8% in April, but the 4 months total was 15.8% lower at 2.8 million tonnes.

In the rest of Europe Turkish production increased by 4.7% in April and by 11.4% in the four months to 11.9 million tonnes. The four months total for Serbia was 207 thousand tonnes, 67% down on the previous year's total. While in Norway steel production was 40% up in the year to date at 253 thousand tonnes.

New car registrations in Europe fell by 6.5% in April compared to the previous April, according to ACEA, the European Car Manufacturers Association, while the four months total showed a decrease of 7.1% to less than 4.5 million cars. German registrations actually rose by 2.9% in April and by 1.8% in the year to date to over one million cars. UK registrations increased by 3.3% in April, while the year to date total was 1.4% up at 706 thousand. French registrations, however, fell by 1.9% in April and were 17.5% down in the year to date at 674 thousand cars. Italian registrations, on the other hand, were 18% down in April and 20% down in the four months to 537 thousand cars. The Spanish automotive market fared even worse with a drop 21.7% in the month and 7% in the January to April period to 260 thousand cars. These 5 countries accounted for only 66% of the European market.

Crude steel production in the CIS countries fell by 4.7% in April, although Russian production was 3.6% up. Ukrainian steel production, however, was down by 17.7%. This brought the year to date total for the CIS down by 2.5% with Russia's four month total up 3.6% to 24 million tonnes. Ukrainian steel production decreased by 11.4% in the year to date to 10.5 million tonnes. In Kazakhstan steel production dropped by nearly 24% in the four months to 1.2 million tonnes.

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On the North American continent US steel production rose by 9.3% in April and by 9.2% in the year to date, bringing the year to date total to 30.9 million tonnes. Mexican steel production decreased by 6.1% in April, while the four months total was down by 3.8% to 5.8 million tonnes. Canadian steel production, however, only showed a slight fall in April but was 8.5% up in the year to date, bringing the total to 4.7 million tonnes.

US imports of steel rose in March by 23% to 2.85 million tonnes, the highest level since October 2008. The increase in semi finished steel imports was particularly marked, up by 40% to 754 thousand tonnes which was just over one quarter of total imports in March. Over 90% of this tonnage was slabs, mainly from Brazil and Russia. The next largest product group imported was welded tubes, some 490 thousand tonnes, which was 17% of total imports in March 2012. Line pipe accounted for 44% of the welded tubes imported in March with oil and gas casing tube accounting for a further 31%. Welded tubes were imported from a variety of countries with South Korea, Canada and Greece accounting for half the total.

US steel exports, on the other hand, have not risen, remaining at about 1.2 million tonnes in March 2012. However, the USA is the largest exporter of ferrous scrap in the world and exports rose to 2.15 million tonnes from a low point in January of 1.42 million tonnes. The March total was 14% higher than the March 2011 total. 62% of ferrous scrap exports in March 2012 went to Asian countries, particularly China, South Korea and Taiwan, and a further 26% went to Turkey.

Crude steel production in South America declined by 1.1% in April with Brazilian production down 1.2% although the year to date total was 1.7% higher at 11.8 million tonnes. Steel production in Argentina increased by 1.3% in April, while the four months total was up 4.3% to 1.8 million tonnes. Venezuelan production, however, fell by 8% in April, bringing the year to date total down 17% to 955 thousand tonnes.

In Africa and the Middle East Iran's production rose by 0.6% in April, while the year to date total was up by 5.2% to 4.7 million tonnes. South African steel production, however, decreased by 24% in April, and by 18.6% in the four months to 2.3 million tonnes. Egyptian production rose by 7.6% in April, and by 4.6% in the year to date to 2.2 million tonnes, while Saudi Arabian steel production was 1.9% down in April and 0.6% down in the four months to 1.8 million tonnes.

Turning to the Far East, China's steel production increased by just 2.6% in April, bringing the four months total up 1.9% to 234 million tonnes. Japanese crude steel production rose by 7.6% in April, while the January to April total fell by 1.4% to 35.6 million tonnes. South Korean production was up 2.1% in April with the year to date total at 23.3 million tonnes, 3.9% up on the same period in 2011. In India production rose by 3.5% in April, bringing the four months total to 24 million tonnes, just 0.8% higher than in 2011. Crude steel production in Taiwan was slightly down in April, and the year to date total was 8.9% lower at 7 million tonnes.

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