

## **WORLD STEEL REVIEW**

**Iron & Steel Statistics Bureau, July 2013**



Production of crude steel for the 63 countries reporting to the World Steel Association in May was estimated to be 136 million tonnes. This was 2.6% higher than in May 2012, and the year to date was only 2.1% higher than the total for the same period in 2012 at 658 million tonnes. Excluding China, however, the May total was actually 1.5% lower than May 2012 and the 5 months total was 3.2% down on 2012. China accounted for 49% of world steel production in the first five months of 2013.

In the European Union crude steel production for the 27 fell by 4.7% in May to 14.7 million tonnes, compared to May 2012. This brought the five months year to date total down by 5.7% to 70 million tonnes. German steel production only fell by 1.5% in May, bringing the year to date total to 18 million tonnes, just 0.6% down on the previous year. Italian steel production, however, fell by 11.1% in May and by 15.6% in the five months to 10.5 million tonnes. French production decreased by 3.5% in May, while the year to date total fell by 5.6% to 6.6 million tonnes. On the other hand Spanish production actually rose by 4.3% in May, although the year to date total was down by 0.7% to 6.3 million tonnes. In the United Kingdom steel production decreased by 2.6% in May, but was 29% up in the five months to 4.7 million tonnes.

Imports by the European Union from outside the EU rose again in March to almost 2.8 million tonnes, the highest since May 2012. Almost 30% of the total was imported by Italy. Total Italian imports rose to 1.6 million tonnes, although half of this was from other EU countries. Outside of the EU Italy's largest suppliers were Russia and the Ukraine. More than one third of Italy's imports in March were hot rolled coil where the largest suppliers were Germany, Turkey and Russia.

Turkish steel production fell by 2% to 3 million tonnes in May and by 4.1% to 14.4 million tonnes in the five months. Turkey is still the eighth largest steel producing country in the world ahead of Brazil and the Ukraine. Norwegian steel production fell by 13.4% in the year to date to 253 thousand tonnes, while in Bosnia steel production rose by 13.6% to 316 thousand tonnes.

According to ACEA, the European car manufacturers association, car registrations fell by 5.9% in May, and the five months total fell by 6.8%. German registrations were down by 9.9% in May, bringing the year to date total to 1.2 million cars, 8.8% lower than in 2012. French registrations fell by 10.4% in May, and by 11.9% in the year to date to 740 thousand cars. Registrations in the UK, however, actually rose by 11% in May, and by

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9.3% in the first five months to 949 thousand cars. In Italy, on the other hand, registrations decreased by 8% in May, bringing the year to date total to 609 thousand cars, a fall of 11.3%. The Spanish five months total fell by 5.8% to 314 thousand cars.

Russian crude steel production was 6.1 million tonnes in May, the same as in May 2012, while the year to date total was 3.2% down at 29 million tonnes. Ukrainian monthly production, however, decreased by 6.5%, bringing the five months total to 14 million tonnes, a drop of 2.4%. In Kazakhstan the year to date total was down by 22% to 1.3 million tonnes.

Russian steel exports in the first four months of 2013 were 8.2% down on the same period in 2012 at 8 million tonnes. Exports of semis, accounting for 57% of the total, fell by 11.4% to 4.6 million tonnes. Hot rolled coil exports only fell by 1.5% to 1.5 million tonnes, while exports of CR actually rose by 38% to 439 thousand tonnes.

The European Union was Russia's largest market taking 45% of total exports in the first four months of 2013 with Italy by far the largest single market taking almost 2 million tonnes. Exports to CIS countries rose by 20% to 922 thousand tonnes and exports to Taiwan increased slightly to 916 thousand tonnes. In fact Asian countries accounted for 1.6 million tonnes, 20% of total exports.

On the North American continent US crude steel production fell by 4.9% in May, and by 7.1% to 36.2 million tonnes in the year to date. Canadian steel production was 5.9% down in the month, and 6.8% down in the five months to 5.5 million tonnes. In comparison Mexican steel production decreased by 4.2% in May, and by just 0.9% in the year to date to 7.4 million tonnes.

Crude steel production in the South American countries was down apart from Brazil where production rose by 5.5% in May, although the year to date was down by 3.1% to 14.1 million tonnes. Argentinian steel production was down by 2.1% in the month, bringing the five months total to 2 million tonnes, a drop of 13%. In Venezuela the monthly total decreased by 7.3%, while the year to date total actually rose by 2.9% to over one million tonnes. Chilean year to date steel production fell by 23% to 553 thousand tonnes, while Colombian production was down by 25% to 435 thousand tonnes. However, in Peru steel production rose by 17.8% to 440 thousand tonnes.

In Africa, South African steel production fell by 7.6% in May and by 11.4% in the year to date to just under 2.8 million tonnes. Egyptian production, however, increased by 0.7% in the five months to 2.8 million tonnes. In the Middle East, Iran showed a 3.7% increase in steel production in May although the year to date total was down by 1.4% to 6.1 million tonnes. Saudi Arabian steel production, however, rose by 1.9% in the year to date to 2.3 million tonnes.

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Turning to the Far East, Chinese steel production increased by 7.3% in May to 67 million tonnes, bringing the year to date total up 8% to 325 million tonnes, 49% of world production. Japan's May production rose by 4.3%, while the year to date total was 1.3% higher at 45 million tonnes. As the second largest steel producer in the world Japan accounted for only 7% of global production. Crude steel production in South Korea fell by 7.1% in the month, making 27.6 million tonnes in the five months, a drop of 5.2% on the previous year. India's production increased by 1.5% in May, while the year to date total was up by 3% to 33 million tonnes making it the fourth largest steel producing country in the world just 3 million tonnes behind the USA. Taiwan's monthly production, however, increased by 14.2%, bringing the year to date total to 9.4 million tonnes, an increase of 6.8%.

World exports of stainless steel topped 1.5 million tonnes in March 2013, the highest level since May 2012, with April likely to be even higher. In fact Chinese exports of stainless in April reached 246 thousand tonnes, their highest monthly total ever. China is by far the largest exporter of stainless steel followed by Belgium and Italy.

In the first five months of 2013 Chinese exports of stainless steel exceeded one million tonnes of which 39% was hot rolled coil and 34% was CR. Other Asian countries accounted for 76% of Chinese exports, while European Union countries took 9%.

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