

## WORLD STEEL REVIEW

Iron & Steel Statistics Bureau, September 2010



Production of crude steel in July for the 66 countries reporting to the World Steel Association was estimated to be 114.8 million tonnes, an increase of 9.6% over July 2009. The total for the first seven months of 2010, however, showed a jump of 25% to 821 million tonnes. All regions showed a rise in crude steel production in both the month and year to date. If China is excluded from the total, the July increase was 16.6% and the seven months total rose by 31%.

In the European Union 27, crude steel production rose by 23% in July to 13.9 million tonnes compared to July 2009; total production for the seven months to date, however, was 41% up on the previous year's total at 103.7 million tonnes. German crude steel production increased by 30% in July, bringing the year to date total up 59% to 26.2 million tonnes. Italy's steel production rose by 33% in July, while the seven months total increased by 35.6% to 15.6 million tonnes. Spain was the third largest steel producer in the EU with a rise of 18.5% in July, and a 30% increase in the year to date to 10 million tonnes. French production was nearly 31% higher in July, while the seven months total rose by 39% to 9.7 million tonnes. UK steel production, on the other hand, fell by 5.8% in July, although the year to date total was 13% higher at 5.9 million tonnes.

Among the newer EU members crude steel production decreased in July in Poland, the Czech Republic and Slovakia. However, Romanian production showed a 40% increase in the month, with the seven months total up 63% to nearly 2.3 million tonnes.

In the rest of Europe, Turkey's steel production showed a very slight rise in July, bringing the year to date total up 11% to 15.9 million tonnes. Serbia's seven months total more than doubled to 747 thousand tonnes, putting it ahead of Switzerland whose total rose by 42% in the year to date to 726 thousand tonnes.

In the countries of the former USSR Russian production rose by 11.5% in July, bringing the year to date total to 38.3 million tonnes, 18.7% up on the previous year. Ukrainian crude steel production, however, decreased by 9.6% in July, while the year to date total rose by 15.3% to 18.8 million tonnes. The other significant steel producer, Kazakhstan, showed an increase of 18.4% in production in July, bringing the year to date total up by 12.8% to 2.5 million tonnes.

On the North American continent US crude steel production rose by 33% in July to 6.7 million tonnes, bringing the seven months total up by 62% to 47.6 million tonnes. Canadian monthly production jumped by 65%, with the year to date total 54% higher at 7.3 million tonnes. Crude steel production in Mexico increased by 15.5% in July, making the year to date total 26% higher at 9.7 million tonnes compared to the first seven months of 2009.

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In South America Brazilian steel production was 18% higher in July, while the year to date total was 48% up at 19.3 million tonnes. Production in Argentina increased by 23% in July, and by 43% in the seven months to 2.9 million tonnes. Venezuelan steel production, on the other hand, fell by 56% in the month, bringing the year to date total down 66% to only 852 thousand tonnes. Colombia's seven months total was 7% up at 662 thousand tonnes, while in Peru steel production in the year to date jumped by 38% to 500 thousand tonnes.

Turning to Africa and the Middle East, Iranian production fell by 4% in July, bringing the year to date total up 1.8% to 6.8 million tonnes. South African production, however, rose by 12% in July, with the seven months total up 22% at 4.9 million tonnes. Egypt's seven months total was 15% higher at 3.6 million tonnes, while Saudi Arabian year to date production increased by 19% to 3 million tonnes.

Crude steel production in China only rose by 2.2% in July, bringing the year to date total up by 18% to 375 million tonnes, 45.7% of world steel production. Japanese steel production was 20% up in the month, with the first seven months total up by 44% to 63.8 million tonnes. In India production increased by 5.7% in July, and by 8.6% in the year to date to 38.9 million tonnes. South Korean steel production rose by 16% in July, with the seven months total up 27% at 33.1 million tonnes. Taiwanese crude steel production increased by 26% in July and by 30% in the year to date to 10.6 million tonnes. Australian year to date production was 83% higher at 4.2 million tonnes.

South Korea has become the largest importer of steel in the world in 2010, importing 15.2 million tonnes in the first seven months. However, this is still below the 2008 peak of 18.4 million tonnes for the same period. One third of the steel imported in 2010 was hot rolled wide strip with ingots and semis accounting for a further 23%. Hot rolled plates was the third largest product group accounting for 15.7% of the total. These 3 products accounted for 72% of total imports in 2010.

Almost 84% of South Korean steel imports in 2010 came from other Asian countries with Japan supplying 43% of the total, some 6.6 million tonnes, and China a further 37%, nearly 5.7 million tonnes. Brazil was their third largest single country supplier with just 4.5% of the total, although the CIS group of countries supplied 5%. The European Union only accounted for 2.7% of the total in 2010.

While Japan was the leading exporter of steel in the world in 2009, China has taken the lead again in 2010 with 23.2 million tonnes in the first six months compared to Japan's 21.7 million tonnes. However, the Chinese steel export tonnage in July 2010 dropped to 4.5 million tonnes from the June peak of 5.6 million tonnes. This may well be due to the cut in the export rebate on selected flat products in mid July.

84% of Japanese steel exports in 2010 went to other Asian countries with South Korea taking 26% of the total and China a further 17%. Hot rolled wide strip accounted for 28% of total exports in 2010 at 6.1 million tonnes, with exports of CR and zinc coated steel totalling 2.7 million tonnes each. Exports of semis were 2.5 million tonnes with hot rolled plates at 2.3 million tonnes.

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