



POLISH STEEL INDUSTRY REPORT

Supply and demand-side review



Steel industry experts Metals Consulting International Limited have published a new study about the Polish Steel Industry. The 45 page report offers readers an up-to-date 'snapshot' of the Polish steel sector. Written by consultants who have been extensively involved in privatization and restructuring of the East European steel industry for the last 15 years, the report covers:

- Supply side
 - Recent ownership changes, current structure
 - Current capacity and investments
 - Steel production and production process routes
 - Environmental performance and issues outstanding
 - Supply side geography

- Demand side
 - Current steel demand levels
 - The segmentation of steel demand
 - Demand end uses and demand geography
 - Steel trade issues including import penetration
 - Steel demand forecasts to 2020
 - Expected changes in future steel demand mix
 - The latest estimates for 2009 steel demand.

The report concludes with a summary of the strengths, weaknesses, threats & opportunities to the industry and offers an outline of the challenges ahead.

SELECTED REPORT EXTRACTS

“With a 3-4 fold difference in average hourly wages between Poland and other parts of the EU however, it seems clear that despite the lower productivity level, the Polish steel sector still enjoys a significant labour cost per tonne advantage over countries such as the UK or Germany”

“After decades of environmental mismanagement, some experts consider that land in former steelmaking areas in Poland (especially in regions such as Silesia) may still contain significant heavy metals contamination in the soil; give rise to potential contamination of groundwater reservoirs; and / or hold significant quantities of pollutants in landfill sites. It is the authors' view that privatization of the steel sector in Poland did not adequately address these matters. Whilst restructuring of the Polish steel sector achieved much and was in many ways very successful, the authorities' approach to certain environmental issues has actually been a major disappointment”

“A striking characteristic of Polish steel demand is the magnitude of steel imports. In finished steel products, imports are currently at double the volume of exports. Imports today approach ~2/3rds of total demand. This import penetration tells us that further modernisation should now be at or near the top of Polish steel managers' agendas”

“Much progress has been made by the Polish steel industry in recent years – especially with respect to privatization, restructuring, modernization and efficiency. This is reflected in the technology and quality capability of much of the plant, especially. It is reflected also in the much stronger commercial orientation of much of the industry – now geared far less to volume and far more to value issues. Making money rather than making steel is much more evident on the agenda today”

Available from MCI the report is priced at just €395 (+ VAT as appropriate) for a single user licence.

For more information please email MCI@steelonthenet.com, or telephone +44 775 149 0885 or purchase online at http://www.steelonthenet.com/commerce/profiles/polish_steel.html.

Published: October 2009

Publisher: Metals Consulting International Limited

Distributor: <http://www.steelonthenet.com>

Format: Adobe Acrobat pdf file - supplied electronically

Report length: 45 pages

Contents include: 36 exhibits / tables [including 4 appendices]

Steelonthenet.com

