

## **WORLD STEEL REVIEW**

### **Iron & Steel Statistics Bureau, January 2014**



Crude steel production in the 65 countries reporting to the World Steel Association totalled 127 million tonnes in November 2013, 3.6% higher than in November 2012. The eleven months total was 1,448 million tonnes, which was 3.2% higher than the same period last year. However, excluding China, the monthly total only rose by 3%, whereas the year to date total actually fell by 0.9%.

Steel production in the 27 member countries of the European Union increased by 5.3% in November 2013 compared to the previous November to 14.25 million tonnes, although the eleven months total was 2.8% lower at 152.5 million tonnes. German production increased by 5.7% in November, bringing the eleven months total down 1.1% to 39.2 million tonnes. Production in Italy, on the other hand, fell by 4.5% in November, while the year to date total decreased by 12.8% to 22.3 million tonnes. French steel production rose by 3.5% in the month, while the year to date total only decreased by 0.9% to 14.5 million tonnes. Spanish November production, however, was up by 15.5%, while the eleven months total was flat at 12.8 million tonnes. UK monthly steel production increased by 20.4%, bringing the year to date total up 23% to 10.8 million tonnes. The Polish eleven month total fell by 6.4% to 7.3 million tonnes, just ahead of the Austrian January to November total which was up by 6.2%.

Turning to the rest of Europe Turkish steel production increased by 3% in November, but fell by 3.2% in the year to date to 32 million tonnes. The Norwegian eleven months total dropped by 15.4% to 544 thousand tonnes, while in Bosnia-Herzegovina the year to date total increased by 2.9% to 654 thousand tonnes.

According to ACEA, the European car manufacturers' association, European car registrations rose by 0.9% in November, but were down by 2.8% in the eleven months. Registrations in Germany, the largest market, decreased by 2% in November, and by 4.9% in the year to date to 2.7 million cars. French registrations, however, were down by 4% in November and by 7.1% in the eleven months to 1.6 million cars. The UK, on the other hand, showed a 7% increase in November, while the year to date total was 9.9% up at 2.1 million cars. In Italy monthly registrations were down by 4.5% with the year 7.7% down at 1.2 million cars. The fifth largest market, Spain however, showed an increase of 15% in the month and 2.1% in the year to date to 662 thousand cars, while the Belgian eleven month total was just 0.7% down at 461 thousand cars.

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In the CIS countries crude steel production in Russia fell by 0.7% in November bringing the year to date total down 2.2% to 63 million tonnes. Ukrainian November production was down by 7.9%, making the eleven months total 30.1 million tonnes, a drop of just 1%. Steel production in Kazakhstan decreased by 15.7% in the year to date to just under 3 million tonnes.

Russian exports of steel in the first eleven months of 2013 were 13.1% below the January to November 2012 total. This puts Russia down from 4th to 6th place in the top exporting countries behind Germany and the Ukraine. Billets and slabs accounted for 58% of Russian exports in 2013. Some 39% of Russian exports went to the European Union in 2013, 8.3 million tonnes, and a further 18% went to Asian countries, 3.9 million tonnes. There was a large increase in the exports to Turkey to 2.8 million tonnes which was more than the 2.5 million tonnes which went to all the other countries in the CIS combined.

Steel production in the USA increased by 5.3% in November, bringing the year to date total down 2.1% to 80 million tonnes. Canadian production, however, fell by 5.8% in November, and by 8.6% in the eleven months to 11.4 million tonnes. Mexican steel production was flat in the month, while the year to date total increased by 1.5% to 16.8 million tonnes.

In South America, Brazilian crude steel production fell by 2.8% in November, and the year to date total was down 1.4% to 31.5 million tonnes compared to last year. However, Argentinian production in November jumped by 18.7%, bringing the eleven months total up 2% to 4.75 million tonnes. Venezuelan crude steel production, on the other hand, dropped by over 20% in the month, making the year to date total fall by 6.4% to 2.1 million tonnes.

Crude steel production in the MENA region was mixed with Iranian production up 12.5% in November and 6% in the year to 14.1 million tonnes. The Egyptian total, on the other hand, fell by 2.5% in the month, but was up by 3.4% in the year to date to 6.2 million tonnes. Saudi Arabian production was 10.9% down in November, but 2.9% higher in the eleven months at 4.9 million tonnes. However, South African steel production was 38% up in the month, although the eleven months total was only up by 4.6% to 6.8 million tonnes. The UAE eleven month total rose by nearly 22% to 2.6 million tonnes.

In Asia Chinese steel production increased by 4.2% in November, while the eleven months total was up by 7.8% to 713 million tonnes, 49% of the world total. Indian steel production decreased by 2.4% in the month, but increased by 1.9% in the year to date to 72 million tonnes. Japanese production rose by 8.9% in November, while the year to date total was up by 2.6% to 101 million tonnes. South Korean steel production was down slightly in the month, but fell by 4.8% in the year to date to 60 million tonnes. Taiwanese steel production, however, rose by 6.9% in November and by 7.8% in the January to November period to 20.4 million tonnes.

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Although Chinese exports dropped slightly in November compared to October, exports in the first eleven months of 2013 reached 56 million tonnes, 12.4% above the same period in 2012. China is by far the largest exporter of steel in the world with a 52% increase in the exports of hot rolled bars to 7.6 million tonnes and a 44% increase in rod exports to 7.3 million tonnes. 57% of Chinese exports went to other Asian countries with South Korea being by far the largest market. Only 6% of Chinese exports went to the European Union.

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