

## WORLD STEEL REVIEW

### Iron & Steel Statistics Bureau, February 2008



The IISI estimated crude steel production for its 67 monthly countries to be 1322 million tonnes in 2007, 7.3% up on the year 2006 total of 1232 million tonnes. However, China accounted for 37% of this total, and the total excluding China rose by only 3.2% compared to 2006. The December crude steel production for the 67 countries rose by 5% to 110.6 million tonnes.

The IISI estimates crude steel production annually for 100 countries which was 1343 million tonnes in 2007, with all regions showing an increase in production.

#### *European Union*

Total crude steel production for the 27 countries of the European Union was 210.3 million tonnes, 16% of the world total, and 1.6% higher than the total for 2006. Germany made 23% of the EU total at 48.6 million tonnes, an increase of 2.8% on 2006. This makes Germany the seventh largest steel producing country in the world. Italian steel production rose by 1.2% in the year to 32 million tonnes, its highest total ever. French production, on the other hand, fell by 3% to 19.3 million tonnes, its lowest total in a decade. Spanish steel production rose by 3.6% on the 2006 total reaching 19.1 million tonnes, also its highest total ever. UK steel production increased by 3% to 14.3 million tonnes. Poland's annual total was up 6.6% at 10.7 million tonnes, making it equal with Belgium whose total fell by 8.1% to 10.7 million tonnes. The largest increase was in the Netherlands which was up 15.6% to 7.4 million tonnes.

#### *Other Europe*

In Turkey, the largest West European steel producer outside the European Union, crude steel production reached 25.8 million tonnes, an increase of 10.5% and its highest total ever. This puts Turkey in 11th place behind Italy. Serbian steel production reached 1.5 million tonnes, just higher than Switzerland at 1.3 million tonnes.

European car registrations increased by 1.1% in 2007 compared to the previous year according to ACEA, reaching 16 million cars. German registrations, however, decreased by 9.2% to 3.1 million cars, while the Italian total rose by 7.1% to 2.5 million cars, just ahead of the UK. UK registrations rose by 2.5% to 2.4 million cars, while the French total increased by 3.2% to 2.1 million cars. Spanish registrations were down 1.2% to 1.6 million cars. These five countries accounted for 73% of the European total. After the big 5 came Belgium (525 thousand cars) and the Netherlands (504 thousand cars). Amongst East European countries Romania's total jumped by 26% to 313 thousand cars, and Poland's total increased by 23% to 293 thousand cars.

#### *The CIS countries*

The countries of the former USSR showed an increase of 3.5% in crude steel production with

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the overall total up to 123.9 million tonnes, 9.4% of world production. Russian steel production grew by 2% to 72.2 million tonnes making it the fourth largest steel producer in the world, while Ukrainian production increased by 4.7% to 42.8 million tonnes putting it in eighth place behind Germany. Steel production in Kazakhstan rose by 12% to 4.8 million tonnes with Belarus up 3.7% to 2.4 million tonnes. Moldova's steel production almost reached one million tonnes.

While production has been increasing in Russia and the Ukraine, their steel exports have fallen slightly. Russia's exports in the first eleven months of 2007 fell by 6.6% to 27.1 million tonnes compared to 2006. Half of Russia's exports were semis, the majority of which was slabs, although the total was 3.2% down on 2006; hot rolled coil exports fell by 9.7% to 4.3 million tonnes. Total exports by the Ukraine were down 2.6% at 27.4 million tonnes. Semis, fairly evenly split between billets and slabs, accounted for 38% of Ukraine's exports at 10.5 million tonnes, down by 9.5% on 2006. Hot rolled plate exports were 3.8 million tonnes, up 3.4% on 2006, while hot rolled coil exports fell slightly to just under 3 million tonnes.

#### *North America*

North America accounted for 10% of the world's total, with production in the USA, the third largest steel producer in the world, decreasing by 1.4% in 2007 to 97.2 million tonnes. Canadian crude steel production was up 5.7% to 16.4 million tonnes, while Mexican production rose by 5.3% to 17.2 million tonnes.

#### *South America*

In South America, crude steel production increased by 6.5% to 48.3 million tonnes, 3.6% of world production. Brazilian steel production increased by 9.3% to 33.8 million tonnes, making it the ninth largest steel producer in the world, ahead of Italy. Argentinian steel production, on the other hand, fell by 2.6% to 5.4 million tonnes. While Venezuelan production rose by 3.2% to 5.0 million tonnes. Steel production in Chile increased by 2.4% to 1.7 million tonnes, while in Colombia it was up 3.3% to 1.3 million tonnes.

#### *Africa and the Middle East*

Steel production in Africa rose by 0.1% to 18.4 million tonnes despite South African production decreasing by 6.4% to 9.1 million tonnes; Egyptian production rose by 3% to 6.2 million tonnes. Iranian steel production showed an increase of 2.7% to 10.1 million tonnes, while Saudi Arabian steel production rose by 16.8% to 4.6 million tonnes. Africa and the Middle East accounted for 1.2% of world steel production.

#### *Asia*

Crude steel production in Asia rose by 11.5% to 734.1 million tonnes, 55.5% of world production. China strengthened its position as the largest steel producing country in the world, increasing production in 2007 by 15.3% to 489 million tonnes, more than four times the Japanese total, and the highest annual crude steel production ever. The Chinese December total was 41 million tonnes, an increase of 7.7% on the December 2006 total. Japan's crude steel production rose by 3.4% to 120.2 million tonnes. India increased production by 7.3% to 53.1 million tonnes, more than double the 1999 total and making it the fifth largest steel producer in the world, just ahead of South Korea. Korean steel production increased by 6% to 51.4 million tonnes in 2007, also its highest level ever. Crude steel production in Taiwan rose to 20.5 million tonnes, an increase of 2.3% on 2006. Elsewhere in Asia, Malaysian steel production rose by 4.9% to 6.1 million tonnes, while Thailand's production was up 5% to 5.5 million tonnes.

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Chinese steel exports rose in the month of December following a fall in seven consecutive months. They increased by 15.3% to 4.8 million tonnes with exports of hot rolled wide strip increasing by 69% to 887 thousand tonnes, although exports of hot rolled plate lengths fell slightly to just under 800 thousand tonnes. China's third largest export was seamless tubes which rose by 21.8% to 403 thousand tonnes. South Korea remains China's largest export market at 1.1 million tonnes followed by Vietnam (535kt) and India (210kt).

Trade in steel in 2007 is likely to exceed 410 million tonnes, of which nearly 17% is Chinese exports at just under 69 million tonnes. Based on the first eleven months Japan is the second largest exporter at 33 million tonnes, whereas Germany, at 27.7 million, is just ahead of the Ukraine at 27.4 million, followed by Russia at 27.1 million. The largest importer of steel in the world remains the USA followed by Germany and South Korea.

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