

## **WORLD STEEL REVIEW**

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



The World Steel Association estimated global crude steel production for the full list of 98 countries to be 1607 million tonnes in 2013, 3.1% up on the annual 2012 total of 1559 million tonnes and the highest total ever. However, China accounted for 48% of this total, and the annual total excluding China was actually flat compared to 2012. Europe, the CIS, and both North and South America all showed a drop in crude steel production in 2013.

#### **European Union**

Total crude steel production for the 27 countries of the European Union in December actually rose by 11.5%, although the annual total was down by 1.8% to 166 million tonnes, 10.3% of the world total. Germany made almost 26% of the EU total at 42.6 million tonnes, which was the same as in 2012, although the December total was up by 12.8%. Italian steel production was 4.4% up in December, but fell by 11.7% in the year to 24.1 million tonnes. French December production jumped by 22.3%, bringing the year to date total to 15.7 million tonnes, an increase of 0.5%. Spanish steel production increased by 11.6% in December making the year total 13.7 million tonnes which was just 0.7% higher than in 2012. Steel production in the UK, however, rose by 34.5% in December bringing the year to date total up by 23.8% to 11.9 million tonnes. The 12 months total in Poland decreased by 4.9% to 8 million tonnes, while the Austrian total rose by 7% to 7.9 million tonnes.

#### **Other Europe**

In Turkey, the largest West European steel producer outside the European Union, crude steel production was nearly 34.7 million tonnes in 2013, a decrease of 3.4% compared to 2012, while the December total rose by 1.9%. Steel production in Bosnia-Herzegovina increased by 3.1% in 2013 to 722 thousand tonnes, while Norwegian production fell by 13.6% to 605 thousand tonnes.

European car registrations decreased by 1.8% in 2013 compared to the previous year, according to ACEA, to 12.3 million cars, although the December total increased by 13%. German registrations decreased by 4.2% to just under 3 million cars, while the French total fell by 5.7% to 1.8 million cars. In the United Kingdom, however, registrations increased by 10.8% to 2.26 million cars, with a 24% rise in the December total. While in Italy registrations dropped by 7.1% to 1.3 million cars, Spanish registrations increased by 3.3% to 723 thousand cars. The Belgian total remained flat at 486 thousand cars.

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### The CIS countries

The countries of the former USSR showed an increase of 5.3% in crude steel production in December while the annual total was down by 1.9% to 108.7 million tonnes, 6.8% of world production. Russian steel production rose by 3.8% in December, but actually fell by 1.5% in the year to date to 69 million tonnes making it the fifth largest producer in the world ahead of South Korea. Ukrainian December production increased by 4.2% bringing the annual total down 0.5% to 32.8 million tonnes. Steel production in Kazakhstan dropped by 9.5% in 2013 to 3.3 million tonnes, while production in Belarus was down 16.3% to 2.25 million tonnes.

### North America

North America accounted for 7.4% of the world's total, with production in the USA decreasing by 2% in the year to date to 87 million tonnes, maintaining its position as the third largest steel producer in the world. The US December production, however, showed a slight increase of 0.4% on December 2012. Canadian annual crude steel production was 7.8% down at 12.5 million tonnes, while the December month total rose by 2.8%. Mexican December production rose by 4.8%, although the year total only increased by 1.8% to 18.4 million tonnes. In Trinidad and Tobago the annual total fell by 1.9% to 616 thousand tonnes.

The USA is the largest exporter of ferrous scrap in the world, but in the 11 months to November 2013 their exports fell by 14.5% from 19.8 to 16.9 million tonnes. The price also fell by 7.2% to 411 dollars per tonne. All the major exporters also experienced a drop in exports: German exports fell by 8.3% to 7.6 million tonnes, Japanese exports fell by 1.2% to 7.6 million tonnes and UK exports fell by 4% to 6.4 million tonnes. The price of German scrap fell by 9.8% to 505 dollars per tonne, while the Japanese export price was down 7.7% to 469 dollars per tonne.

### South America

In South America, crude steel production rose by 8.5% in December, but fell by 0.8% in the full year to 46 million tonnes, just 2.9% of world production. Brazilian annual steel production was down by 1% to 34.2 million tonnes, while the December total increased by 4%. Argentinian steel production jumped by 30% in the month, bringing the annual total up by 3.8% to 5.2 million tonnes. Although Venezuelan production was 30% up in December, the annual total fell by 4.5% to 2.25 million tonnes. Annual steel production in Chile decreased by 21% to 1.3 million tonnes, while in Colombia it was down by just 0.8% to 1.3 million tonnes. In Peru, however, steel production was 11% higher at 1.1 million tonnes.

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## Africa and the Middle East

Steel production in Africa and the Middle East accounted for 2.6% of the world total. African production rose by 4.6% to 16 million tonnes in 2013, while in the Middle East it rose by 6.8% to 26.3 million tonnes. Iran was the largest producer in the region with production increasing by 6.6% to 15.4 million tonnes, while South Africa's steel production increased by 4.1% to 7.2 million tonnes. Egypt's annual total rose by 1.9% to 6.8 million tonnes, while Saudi Arabian steel production increased by 2.9% to 5.4 million tonnes. Qatar made 2.2 million tonnes of steel in 2013, 4.2% up on the previous year.

## Asia

Crude steel production in the Asian countries increased by 5.4% in the year to nearly 1.1 million tonnes, 67% of world production. China's December production was 6.5% higher, bringing the year to date total up by 7.5% to 779 million tonnes, the highest annual crude steel production ever. Japan's annual crude steel production was 3.1% up in 2013 at 110 million tonnes, although the monthly total increased by 9%. India increased its annual production by 5.1% to nearly 81 million tonnes, only 6 million tonnes less than the USA. South Korean steel production in December rose by 1.6%, but the year to date total decreased by 4.4% to 66 million tonnes in 2013. Crude steel production in Taiwan increased by 6.4% in December, and by 8.1% in the year to 22.3 million tonnes. Australia's annual total, however, decreased by 5.1% to 4.6 million tonnes.

Chinese steel exports in 2013 totalled 61.5 million tonnes, 15% of the world total of 406 million tonnes. The next largest exporting country was Japan at 42 million tonnes. In the case of China exports to other Asian countries only accounted for 57% of their exports in 2013, whereas for Japan Asian countries took 79% of their exports. North and South America took nearly 15% of Chinese exports, but just 11% of Japanese exports.

China was also the largest exporter of stainless steel which reached 2.7 million tonnes in 2013, a 27% increase on 2012. The next largest exporting country was Belgium at 1.7 million tonnes, an increase of only 2.2%. Some 74% of Chinese stainless steel exports went to other Asian countries in 2013, with 10% going to the European Union and 7% going to North and South America. Stainless HR wide strip was China's largest export at over one million tonnes, 38% of the total in 2013, followed by CR sheet and plate at 31% of the total. Stainless tubes and fittings accounted for 15% of the total in 2013.

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