

## WORLD STEEL REVIEW

Iron & Steel Statistics Bureau, June 2014



Production of crude steel for the 65 countries reporting to the World Steel Association in April was estimated to be 136.6 million tonnes, an increase of just 1.7% over April 2013. The total of the 4 months to date was 543 million tonnes, 2.5% above the January to April total in 2013. Excluding China, which accounted for 50% of world production in the first four months of 2014, steel production rose by 1.3% in April and 2.4% in the four months.

In the European Union 28, crude steel production increased by 4% in April to 14.6 million tonnes compared to April 2013, and by 6.2% in the 4 months to date to 58.5 million tonnes. Monthly production in Germany rose by 3.9% in April, and by 4.3% in the January to April period to 15 million tonnes. Italian crude steel production, however, decreased by 4% in April, but rose by 5.8% in the year to date to 8.7 million tonnes. Steel production in France jumped by 16% in the month, and by 6% in the four months to date to 5.5 million tonnes. Spanish production, on the other hand, was 3.1% down in April, although the year to date total was up 6.7% to 4.9 million tonnes. In the UK, steel production actually rose by 13.5% in April, while the 4 months total was 17.6% higher at 4.3 million tonnes. The Polish year to date total was 8% higher at 2.8 million tonnes.

In the rest of Europe Turkish production actually fell by 9.1% in April and by 2.7% in the four months to 11.1 million tonnes. The four months total for Norway was 195 thousand tonnes, 3.8% down on the previous year's total, while in Bosnia steel production was 10.2% up in the year to date at 275 thousand tonnes.

New car registrations in Europe rose by 4.2% in April compared to the previous April, according to ACEA, the European Car Manufacturers Association, while the four months total showed an increase of 7.1% to nearly 4.5 million cars. German registrations actually fell by 3.6% in April but rose by 2.9% in the year to date to 986 thousand cars. UK registrations increased by 8.2% in April, while the year to date total was 12.5% up at 865 thousand. French registrations rose by 5.8% in April and by 3.7% in the year to date to 614 thousand cars. Italian registrations were just 1.9% up in April and 5% up in the four months to 496 thousand cars. The Spanish automotive market jumped by 28.7% in the month, and by 16.2% in the January to April period to 282 thousand cars. These 5 countries accounted for 72% of the European market.

Crude steel production in the CIS countries fell by just 0.6% in April, although Russian production rose by 0.7%. Ukrainian steel production, however, fell by 4.5%. This brought the year to date total for the CIS down by 2.3% with Russia's four month total flat at 22.9

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million tonnes. Ukrainian steel production decreased by 8.9% in the year to date to 10.1 million tonnes. In Kazakhstan steel production increased by 14.4% in the four months to 1.1 million tonnes.

On the North American continent US steel production fell by 1.6% in April while remaining flat in the year to date at 28.7 million tonnes. However, imports of steel in April according to the American Institute for International Steel jumped to almost 3.5 million tonnes, which takes imports in the first four months to 12.5 million tonnes, 28% above the same period in 2013. In fact the April import total was the highest since October 2006. Mexican steel production increased by 12.1% in April, while the four months total increased by 8.2% to nearly 6.5 million tonnes. Canadian steel production showed a 2% increase in April, but was 4.8% down in the year to date, bringing the total to 4.1 million tonnes.

Crude steel production in South America declined by 4.6% in April with Brazilian production down 5.1%. The year to date South American total was 0.9% lower at 14.7 million tonnes, of which Brazil was 11.1 million tonnes, an increase of just 0.1% on 2013. Steel production in Argentina, however, rose by 13.3% in April, while the four months total was up 12.9% to 1.7 million tonnes. Venezuelan production, however, slumped by 43% in April, bringing the year to date total down 38% to 495 thousand tonnes. The Chilean four month total was 11.1% down at 399 thousand tonnes and Colombia's total was 0.9% down at 387 thousand tonnes.

In Africa and the Middle East Iran's production rose by 1.6% in April, while the year to date total was up by 4.7% to 5 million tonnes. South African steel production, however, decreased by 2.4% in April, but was 8.3% up in the four months to 2.4 million tonnes. Egyptian production fell by 0.8% in April, and was 8% down in the year to date to 2.1 million tonnes. Saudi Arabian steel production, however, was 10.7% up in April and 13.8% up in the four months to 2.1 million tonnes. The Qatar year to date total increased by 22.5% to 937 thousand tonnes.

Turning to the Far East, China's steel production increased by 2.1% in April, bringing the four months total up 2.7% to 272 million tonnes. Japanese crude steel production actually fell in April by 2.5%, while the January to April total increased by 2% to 36.5 million tonnes. South Korean production rose by 10.8% in April with the year to date total up 7.6% to nearly 24 million tonnes. In India production rose by 5.3% in April, bringing the four months total to 27.8 million tonnes, an increase of 2.5% over 2013. Crude steel production in Taiwan, however, fell by 7.1% in April, and by 0.3% in the year to date to 7.4 million tonnes.

Chinese exports of steel jumped by 36% in April compared to April 2013 to almost 7.5 million tonnes, its highest level since August 2008. Hot rolled bar exports jumped by 60% to 1.2 million tonnes in April compared to the same month in 2013. Exports of hot rolled wide strip more than doubled to 1.1 million tonnes. Rods and bars in coil showed a 25% increase to 943 thousand tonnes compared to April 2013, while seamless and welded tube exports fell by 5.6% to 795 thousand tonnes.

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Other Asian countries accounted for 4.4 million tonnes of China's exports in April, 58.6% of the total, which was a 36% increase on April 2013. South Korea remains by far the largest market for China. North and South America together took nearly 1.2 million tonnes in April, 15.7% of the total, with the USA, Brazil and Chile the three largest markets. The European Union only accounted for 553 thousand tonnes, 7.4% of the total in April, with Belgium and Italy taking 45% of the EU total in April.

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