

## **WORLD STEEL REVIEW**

**Iron & Steel Statistics Bureau, September 2011**



Crude steel production in the 64 countries reporting to the World Steel Association totalled 124 million tonnes in October, 6.2% up on the October 2010 total. The ten months total was 1258 million tonnes, 8.1% higher than the same period last year. However, excluding China, the monthly total rose by only 3.7%, with an increase of 5.8% in the year to date.

Steel production in the 27 member countries of the European Union fell by 1.1% in October to 15.3 million tonnes; however, the ten months total was 3.6% higher than last year at 151 million tonnes. German production fell by 4.2% in October, bringing the ten months total up 2.7% to 37.8 million tonnes. Production in Italy actually increased by 9.6% in October, while the year to date total was up by 11.5% to 24 million tonnes. Spanish steel production decreased by 6.3% in the month, and the year to date total was down by 3.7% to 13.5 million tonnes. French production, however, rose by 2.8% in October, with the ten months total increasing by 2.5% to 13.3 million tonnes. UK monthly steel production was very slightly down, while the year to date total was 2.3% lower at 8.1 million tonnes.

European car registrations published by ACEA showed a fall of 1.4% in October, with the ten months total down by 0.9%. The largest market, Germany, actually showed an increase in registrations in the month of 0.6%, while the year to date total was up by nearly 10% at 2.66 million cars. In France registrations increased by 2.4% in October, but were only 0.4% up to 1.84 million cars in the year to date. In the United Kingdom, October's total was 2.6% up, although the year to date total was actually down by 4.5% to 1.69 million cars. Italy's monthly registrations, however, fell by 5.5%, bringing the year to date total down 10.8% to 1.50 million cars. In Spain, the fifth largest market, registrations dropped by 6.7% in the month, and were down by nearly 20% in the ten months to 681 thousand cars.

In the rest of Europe the largest steel producer is Turkey, where steel production was 12.3% higher in October, and 18.1% up in the year to date at 28.1 million tonnes. Serbia's monthly total fell by 19%, although the ten months total still increased by 6.6% to 1176 thousand tonnes. The Norwegian year to date total was 490 thousand tonnes, 16.7% higher than in 2010.

Turkish steel production topped 3 million tonnes in October for the first time, just exceeding the Ukrainian October total as well as the Brazilian total. However, monthly exports of steel have remained relatively flat averaging 1.4 million tonnes in the first nine months of 2011, which was slightly up on the monthly average for 2010. Imports have risen slightly reaching one million tonnes in September 2011, the highest monthly total since April 2010.

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Turkish steel exports in the first nine months of 2011 were 12.7 million tonnes, 40% of which went to Middle Eastern countries. The European Union accounted for a further 21.5% and African countries 17.5%. Turkish imports, on the other hand were 7.9 million tonnes in 2011, 44% of which came from CIS countries, mainly Russia and the Ukraine. A further 40% came from the European Union.

Among the CIS countries crude steel production in Russia rose by 4.6% in October to 5.9 million tonnes; the year to date total, however, rose by just 3.7% to 57.5 million tonnes. In the Ukraine October steel production increased by 4.5%, although the ten months total for Ukraine was up 7.5% to 29.6 million tonnes. Kazakhstan's year to date total rose by 12.3% to 4 million tonnes.

Steel production in the USA was up by 11.5% in October, bringing the year to date total up 6.8% to 72 million tonnes. Canadian production only rose by 3.8% in October, and the ten months total actually fell by 0.9% to 10.8 million tonnes. Mexican steel production increased by 5.3% in the month, while the year to date total increased by 8.3% to 15.1 million tonnes.

In South America, Brazilian crude steel production fell by 2.7% in October, although the year to date total increased by 6.7% to 29.7 million tonnes compared to last year. Argentinian production in October rose by 8%, while the ten months total was up 9.2% to 4.7 million tonnes. Venezuelan crude steel production increased by 9.2% in the month, making the year to date total 65% higher at 2.8 million tonnes. Chilean production in the ten months rose by 84% to 1.4 million tonnes.

Among the Middle Eastern countries Iranian steel production increased by 3.9% in the month, and by 10.9% in the ten months to 10.9 million tonnes. In Saudi Arabia steel production was 5.3% up in October, and the year to date total increased by 4.1% to 4.4 million tonnes. Egypt's monthly total fell slightly, while the year to date total rose by just 0.7% to 5.4 million tonnes. South African steel production actually fell by 7.2% in the month, bringing the ten months total down 16.6% to 5.5 million tonnes.

In Asia Chinese steel production increased by 9.7% in October, bringing the ten months total up by 11.1% to 581 million tonnes, 46% of world production. Indian monthly steel production increased by 4.5% while the year to date total was up by 5.2% to 60 million tonnes. Japanese production, however, fell by 0.3% in the month, bringing the year to date total down 1% to 90.5 million tonnes. South Korean steel production jumped by 17.8% in October, bringing the ten months total to 56.7 million tonnes, an increase of 18.5%. Taiwanese steel production, on the other hand, was estimated to be 5.4% lower in October, but 14% up in the year to date at 18.6 million tonnes.

Chinese exports of steel have been gradually dropping since the March peak of 4.8 million tonnes, and reached 3.7 million tonnes in October. Most exports have fallen compared to September, but welded tubes was one of the few products to increase in October. China exports welded tubes quite widely around the world with one third going to other Asian countries. Chinese October imports of steel fell by 8% to below 1.3 million tonnes compared to the September total.

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