

## **WORLD STEEL REVIEW**

**Iron & Steel Statistics Bureau, September 2013**



Production of crude steel in July for the 64 countries reporting to the World Steel Association was estimated to be 132 million tonnes, an increase of 2.7% over July 2012. The total for the first seven months of 2013, however, showed a rise of just 2% to 922 million tonnes. If China is excluded from the total, the total for July fell by 0.5% with the year to date total down by 2.6%.

In the European Union 27, crude steel production fell by 6% in July to 13.4 million tonnes compared to July 2012; total production for the seven months to date was 5.3% down on the previous year's total at 97.5 million tonnes. German crude steel production decreased by 5.4% in July, bringing the year to date total down 2.1% to 25 million tonnes. Italy's steel production fell by 8.5% in July, while the seven months total decreased by 13.9% to 14.9 million tonnes. France is the third largest steel producer in the EU but production fell by 9% in July, while the year to date total was down 5% to 9.3 million tonnes. Spanish production declined by 3.4% in July, while the seven months total decreased by 1.3% to 8.4 million tonnes. UK steel production, on the other hand, rose by 1.8% in July, and the year to date total was 21% higher at 6.6 million tonnes.

Germany's imports of steel in the first six months of 2013 fell by 9.1% compared to the same period in 2012, but were 23% down on the same period in 2011. Exports were also down by 6.1% on 2012 and by 7.6% on January to June 2011. Some 87% of Germany's imports came from other EU countries in 2013 with a similar percentage in the previous three years. Only 74% of Germany's exports, on the other hand, went to other EU countries.

The picture for the UK, however, was rather different with imports in the first six months of 2013 falling by almost 17% compared to 2012, while exports of steel actually rose by 68%. In terms of markets, other EU countries accounted for 69% of UK imports in 2013, only slightly less than in earlier years, while exports to EU countries in 2013 were only 46.5% of the total, down from 66% in 2012 and 75% in 2011. The main reason for the drop in 2013 was the significant increase in exports of semis to Thailand, although exports to Turkey were also significantly up.

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In the rest of Europe, Turkey's steel production fell by 10.1% in July, bringing the year to date total down by 4% to 20.2 million tonnes. Bosnia's seven months total rose by 8% to 438 thousand tonnes, while Serbia's total decreased by 50% to 171 thousand tonnes. The Norwegian total was down 14.7% to 322 thousand tonnes.

In the CIS countries Russian production fell by 2.4% in July, bringing the year to date total to 40.4 million tonnes, 2.9% down on the previous year. Ukrainian crude steel production, however, increased by 8.8% in July, while the year to date total fell by 1.1% to 19.5 million tonnes. Kazakhstan's seven month total showed a drop of 22% in production to 1.8 million tonnes, while in Belarus the year to date total was actually up by 0.4% to 1.6 million tonnes.

On the North American continent US crude steel production rose by 3.3% in July to nearly 7.6 million tonnes, although the seven months total declined by 5.3% to 50.7 million tonnes. Canadian monthly production dropped by 18%, with the year to date total 12.8% lower at 7 million tonnes. Crude steel production in Mexico, however, decreased by 3.4% in July, making the year to date total 1.5% lower at 10.2 million tonnes compared to the first seven months of 2012.

In South America Brazilian steel production was 1.4% lower in July, while the year to date total was 2.1% down at almost 20 million tonnes. Production in Argentina, however, jumped by 34% in July, although the seven months total was down by 6.9% to 2.9 million tonnes. Venezuelan steel production, on the other hand, was 26% up in the month, bringing the year to date total up 7.9% to over 1.5 million tonnes. Chile's seven months total declined by 25% to 743 thousand tonnes with Colombia down 22% at 633 thousand tonnes. The Peruvian seven months total, however, was 15% up at 628 thousand tonnes.

Turning to Africa and the Middle East, Iranian production rose by 16% in July, bringing the year to date total up 1.8% to 8.7 million tonnes. South African production increased by 2.7% in July, but the seven months total was down 8.9% at 3.9 million tonnes. Egypt's seven months total, on the other hand, was just 0.9% lower at 3.8 million tonnes, while Saudi Arabian year to date production increased by 7.7% to 3.2 million tonnes.

Crude steel production in China increased by 6.2% in July to 65.5 million tonnes, bringing the year to date total up by 7.1% to 456 million tonnes, over 49% of world steel production. Japanese steel production only increased by 0.5% in the month, and by just 1.1% in the first seven months to 64 million tonnes. In India production increased by 4.3% in July, and by 2.7% in the year to date to 46.3 million tonnes. South Korean steel production, however, fell by 5.8% in July, with the seven months total down 5.3% at 38.6 million tonnes. Taiwanese crude steel production, on the other hand, increased by 19.8% in July and by 9.3% in the year to date to 13.5 million tonnes.

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Indian exports of steel in the first five months of 2013 were 15.3% higher than in 2012 at 4 million tonnes, although they were 17.7% below the same period in the peak year of 2011. The largest tonnage exported in 2013 was hot rolled coil at 1.2 million tonnes, some 30% of the total, which was up by nearly 80% on 2012. After hot rolled coil, exports of zinc and other coated sheet and strip rose by 23.5% to 839 thousand tonnes.

Exports to other Asian countries accounted for 30% of the total in 2013, a jump of 56% on the 2012 total. Thailand, Vietnam and Nepal were the three largest markets in Asia. The Middle East accounted for 21.7% of total exports in 2013 with the UAE and Saudi Arabia taking the bulk of this tonnage. The European Union only took 17.5% of total exports.

Indian imports of steel in 2013, on the other hand, fell by 11.8% to 3.6 million tonnes compared to the same period in 2012 with the May total at its lowest point since September 2010.

While Singapore steel exports in the first six months of 2013 rose by 5.4% to 1.2 million tonnes compared to 2012, steel imports in the same period increased by 23.6% to 3.3 million tonnes. One quarter of total imports in 2013 at 828 thousand tonnes were hot rolled plates, up by 32% on 2012, while imports of deformed reinforcing bars and rods were almost 800 thousand tonnes which was 67% higher than in 2012.

China supplied 48% of Singapore's steel imports in the first six months of 2013 at nearly 1.6 million tonnes which was 52% up on the same period in 2012. Japan supplied a further 531 thousand tonnes which was 56% up on 2012. Ukraine was the third largest origin for steel imports at 265 thousand tonnes.

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