

## **WORLD STEEL REVIEW**

**Iron & Steel Statistics Bureau, November 2012**



Crude steel production in September for the 62 countries reporting to the World Steel Association was 123.6 million tonnes, exactly the same as in September 2011. The total for the first nine months of 2012 was 1149 million tonnes, just 0.6% higher than the previous year's January to September total. However, excluding China, there was a very slight drop in both September and the year to date production. Global crude steel production for the full year is estimated to be 1500 million tonnes, compared to 1485 million in 2011.

In the European Union crude steel production for the 27 countries decreased by 3.9% in September to 14.1 million tonnes bringing the year to date total down by 4.6% to 130 million tonnes. Germany's September production fell by 2.2%, while the year to date total was down 4.9% at 32 million tonnes. Italy's monthly production fell by 7.8%, bringing the nine months total down 2.6% to almost 21 million tonnes. French production decreased by 3% in September, while the year to date total was up by 1.1% to 12 million tonnes. In Spain the monthly total was down 10.6%, while the year to date fell by 11.8% to 10.7 million tonnes. The UK monthly total fell by 1.5%, and the nine months total was down 2% at 7.2 million tonnes.

European car registrations in the 28 countries monitored by ACEA fell by 11% in September 2012 compared to 2011, bringing the year to date total down by 7.2% to 9.7 million cars. In Germany registrations decreased by 11% in September, and by 1.8% in the nine months to 2.4 million cars. French registrations were down by 18% in the month, with the year to date total down 13.8% at 1.4 million cars. In the UK the monthly total actually rose by 8.2%, bringing the nine months total up by 4.3% to 1.6 million cars. Italian registrations showed a marked drop of 25.7% in September, while the year to date total dropped by 20.5% to 1.1 million cars. Spain's monthly total decreased by 37% in September, and was down by 11% in the nine months to 555 thousand cars.

Crude steel production in the rest of Europe is dominated by Turkey where September production increased by 1.9%, bringing the year to date total up 8.4% to 27 million tonnes, ahead of the Ukraine and Brazil. Steel production has ceased in Serbia, although in Bosnia production was 10% up in the nine months to 527 thousand tonnes. Norwegian steel production was nearly 20% up in the year to date at 507 thousand tonnes.

Russian crude steel production showed a rise of 15% in September, with the nine months total up by 4.3% to 53.8 million tonnes. Ukrainian steel production, however, decreased by 8.3% in September, while the year to date total fell by 4.3% to 25 million tonnes. Kazakhstan's nine months total was down by 18% to 3 million tonnes. Belarus had a 2.5% increase to 2 million tonnes in the nine months. Exports of steel by Russia in the first 8 months of 2012 were 11.5% higher than in 2011 at 18.1 million tonnes, although they were still down 7.8% on the 2010 total. Some 58% of Russian exports in 2012 were semi finished steel which was 24% up on the

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previous year. Hot rolled coil accounted for a further 18% of total exports, although this was 5% down on 2011. Russia's largest single market in 2012 was Italy at 3.7 million tonnes followed by Taiwan at 1.8 million tonnes. In fact the European Union accounted for 40% of Russian exports in 2012 with Asia accounting for a further 23%. The Middle East accounted for just 10% with exports to Iran falling by 50% compared to 2011 to just over one million tonnes.

On the North American continent US September crude steel production fell by 3%, bringing the year to date total to 68 million tonnes, an increase of 5.3%. Canadian production, however, rose by 1.5% in September, and by 4.9% in the year to date to just over 10 million tonnes. In Mexico monthly steel production was 2.8% down, while the nine months total fell by 2.5% to 13.3 million tonnes. Production in Trinidad and Tobago reached 469 thousand tonnes in the year to date.

While US steel exports rose by 10% to 9.4 million tonnes in the first 8 months of 2012, imports jumped by over 16% to 21.7 million tonnes. Seamless and welded tubes accounted for a quarter of total imports in 2012 at 5.5 million tonnes, with semis accounting for a further 21.6% at 4.7 million tonnes. The largest supplier to the USA in 2012 was Canada at 3.8 million tonnes followed by Brazil at 2.5 million tonnes and South Korea at 2.3 million tonnes. In fact Asian countries supplied 31% of US imports in 2012.

In South America Brazilian crude steel production decreased by only 0.4% in September, but by 3% in the year to date to 26 million tonnes. Argentinian production, however, dropped by 67% in September, bringing the nine months total to 3.6 million tonnes, a decrease of 13%. In Venezuela monthly crude steel production fell by 18%, while the year to date total was almost 25% down at 1.8 million tonnes. Steel production in Chile was 1.7% higher in the nine months at 1.3 million tonnes, while Colombian production reached one million tonnes, an increase of 3.3%.

In Africa and the Middle East, South African crude steel production rose by 11% in September, although the year to date total was still 12% down at 5.1 million tonnes, just ahead of Egypt at 5 million tonnes, an increase of 2.9%. Iranian steel production was flat in the month, while the year to date total was 8.2% higher at 10.7 million tonnes, just ahead of Spain and Canada. The Saudi Arabian nine months total fell by 2.8% to 3.8 million tonnes.

The five major Asian countries - China, India, Japan, South Korea and Taiwan – all showed an increase in monthly steel production except for Japan. Chinese production rose by just 0.6% in September, although the year to date total increased by 1.7% to 542 million tonnes, 47% of global steel production. Japanese production, on the other hand, decreased by 1% in the month, bringing the cumulative total to 81 million tonnes, a rise of just 0.4%. Indian steel production was 5.6% up in the month and 3.1% higher in the year to date at almost 57 million tonnes. South Korean production increased by 1.8% in September, and by 3% in the nine months to 52 million tonnes. However, Taiwanese steel production was slightly up in the month, but 7.6% lower in the year to date at nearly 16 million tonnes.

Chinese exports of steel continued to rise in September topping 5 million tonnes, the third month in 2012 over 5 million. Exports in the first 9 months of 2012 were 10% above the same period in 2011 with a marked 54% increase in exports of long products. Almost one quarter of the exports of long products went to South Korea.

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