

2014 EDITION

COVERING 2009-2013

EUROPEAN STEEL IN FIGURES



EUROFER
The European Steel Association

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The EU steel sector has gone through challenging and difficult times ever since the shockwave of the global recession hit steel demand and production in Europe at the end of 2008.

2013 has been no exception to that rule, but it is fair to say that market conditions at the end of the year were looking significantly better than at the start.

Steel demand started to improve from mid-2013 onwards. Key factors in this positive trend have been the low level of inventories which did not require the massive destocking as seen in H2-2012 and real steel consumption slightly outperforming expectations. As low stocks also meant that real and apparent steel consumption were closely balanced, the cautious upturn in steel users' activity translated directly into better demand levels. On balance, apparent steel consumption in 2013 stabilised at just below the year earlier level.

Meanwhile, the outlook for 2014 is for the steel market recovery in the EU gaining further traction. Nevertheless, market conditions will remain challenging, particularly with respect to continued margin pressure owing to the unfair cost burden for EU steelmakers as a result of EU's energy and climate policy.

In this sixth edition of "European Steel in Figures" you will find much more detail on the EU steel market over the past five years. I am convinced that this overview will again prove its value to you.

For further information you may want to visit our website:

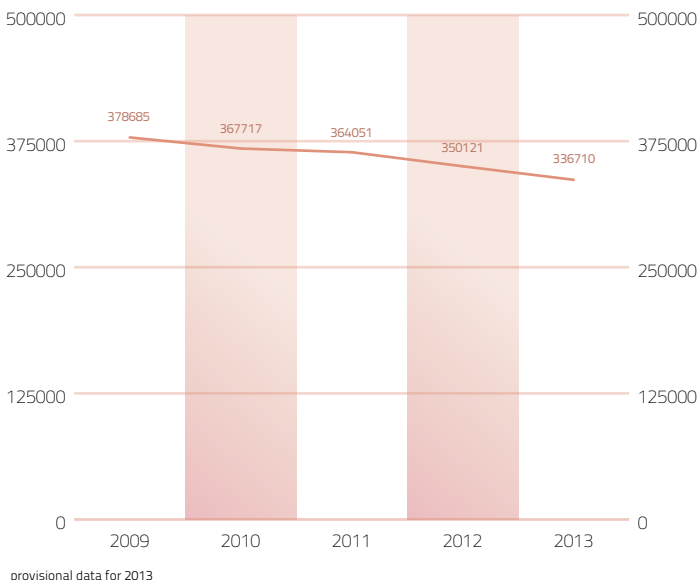
www.eurofer.eu

April 2014

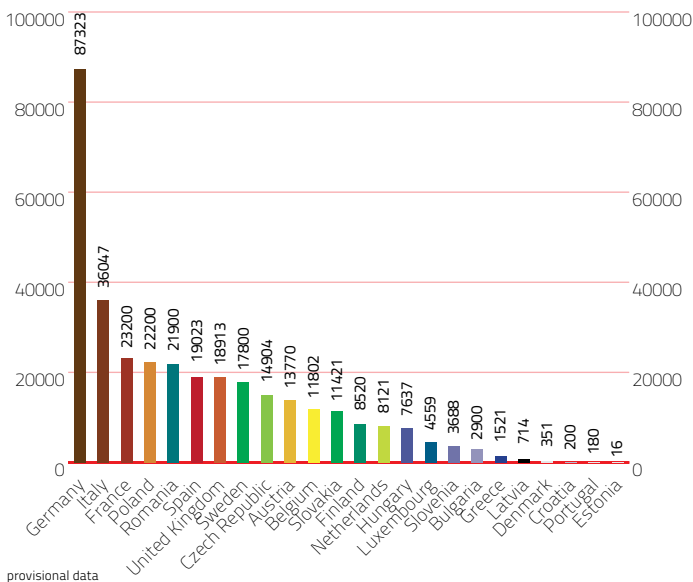
Gordon Moffat
Director General

4 ■ EMPLOYMENT

EVOLUTION OF EMPLOYMENT



EMPLOYMENT (2013)

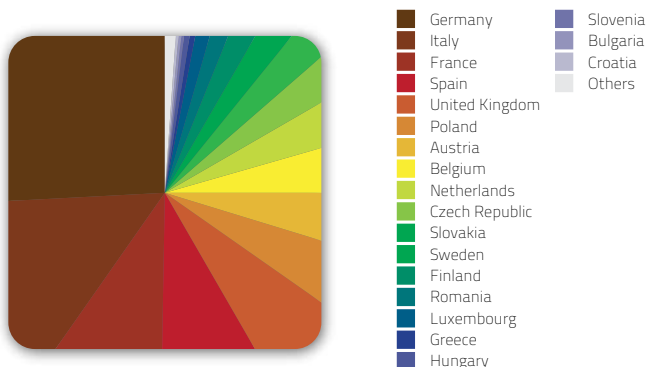


All qualities
in '000 metric tonnes

CRUDE STEEL OUTPUT PER COUNTRY

	2009	2010	2011	2012	2013	% share of EU 2013
Austria	5662	7206	7474	7421	7943	4.8
Belgium	5635	7973	8026	7301	7127	4.3
Bulgaria	726	744	835	633	523	0.3
Croatia	43	95	96	1	135	0.1
Czech Republic	4594	5179	5583	5072	5152	3.1
Finland	3078	4030	3986	3759	3517	2.1
France	12840	15414	15780	15607	15685	9.4
Germany	32670	43830	44284	42661	42645	25.8
Greece	2000	1821	1934	1247	1030	0.6
Hungary	1403	1678	1732	1542	883	0.5
Italy	19848	25750	28735	27257	24054	14.5
Luxembourg	2141	2548	2521	2208	2089	1.3
Netherlands	5194	6651	6937	6879	6713	4.0
Poland	7129	7993	8779	8366	7950	4.8
Romania	2686	3613	3645	3292	2985	1.8
Slovakia	3747	4588	4242	4403	4511	2.7
Slovenia	430	606	665	666	654	0.4
Spain	14358	16343	15504	13639	14130	8.5
Sweden	2778	4817	4829	4289	4372	2.6
United Kingdom	10079	9706	9478	9753	11874	7.1
Others	2306	2198	2510	2764	2206	1.3
EU 28	139349	172782	177576	168762	166176	100

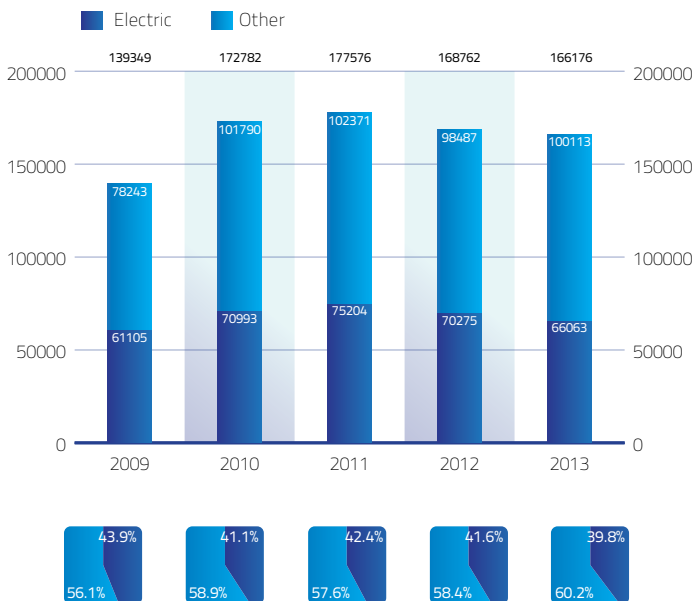
SHARE PER COUNTRY (2013)



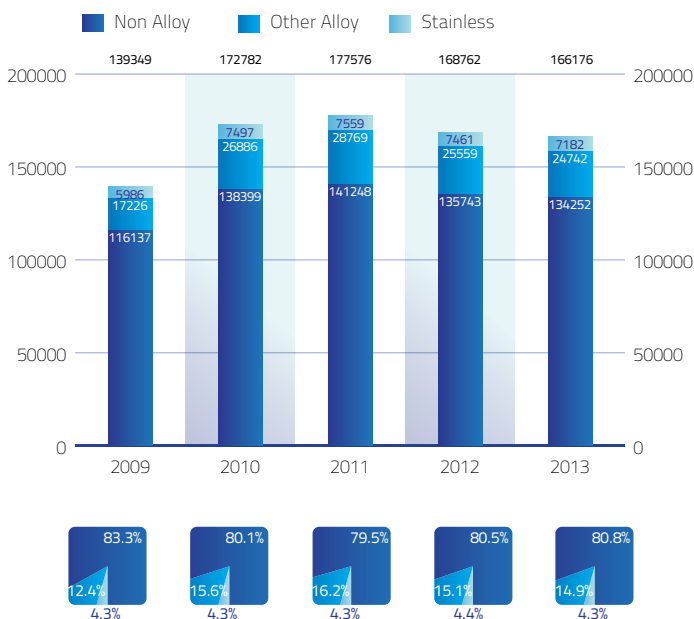
6 ■ CRUDE STEEL PRODUCTION

All qualities
in '000 metric tonnes

CRUDE STEEL PRODUCTION BY PROCESS



CRUDE STEEL PRODUCTION BY QUALITY



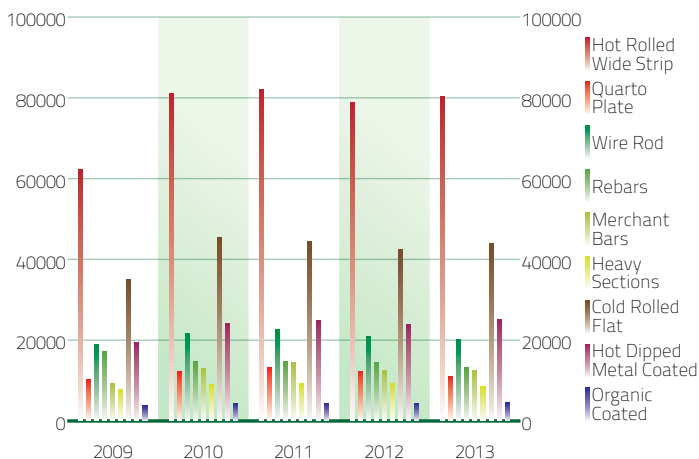
FINISHED STEEL PRODUCTION ■ 7

All qualities
in '000 metric tonnes

TOTAL FINISHED STEEL PRODUCTION

	2009	2010	2011	2012	2013
Total Hot Rolled	129659	156456	161515	152656	150442
Flat	73664	94967	97086	92602	92852
Hot Rolled Wide Strip	62340	81164	82151	78729	80377
Quarto Plate	10230	12143	13175	12350	11018
Long	55994	61489	64430	60054	57589
Wire Rod	19004	21622	22653	20820	20125
Rebars	17078	14606	14837	14469	13117
Merchant Bars	9343	12944	14568	12447	12558
Heavy Sections	7729	9055	9335	9300	8585
Cold Rolled Flat	35144	45367	44466	42419	43915
Hot Dipped Metal Coated	19445	24149	24805	23985	25009
Organic Coated	3723	4339	4346	4318	4479

VOLUME PER SELECTED PRODUCT CATEGORY



Shares in total hot rolled:

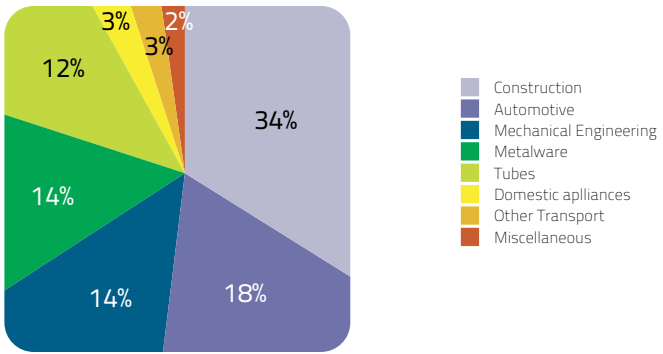


8 ■ SECTOR STATISTICS

Average 2009/2013

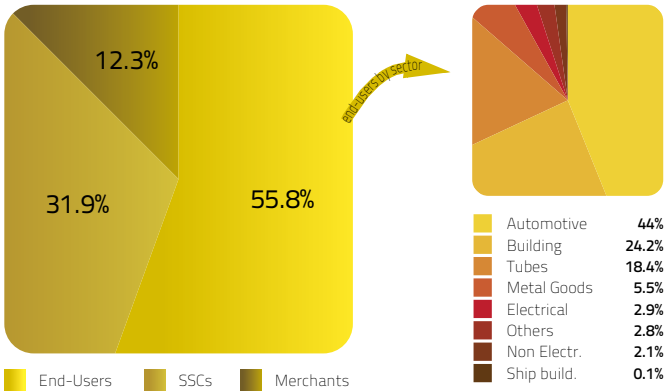
All qualities:

SECTOR SHARES IN TOTAL STEEL CONSUMPTION

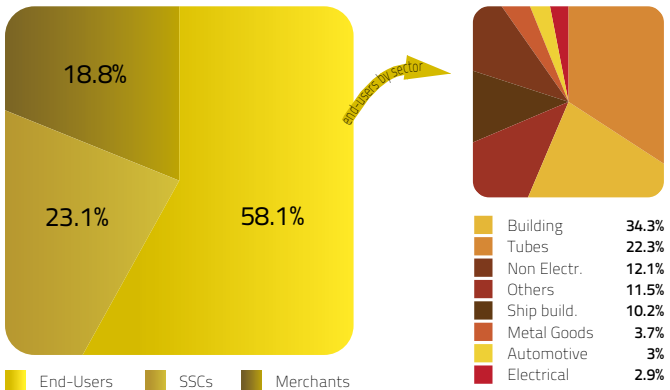


Non-alloy steels and other alloy steels:

FLAT PRODUCTS DELIVERIES: STRIP MILL PRODUCTS



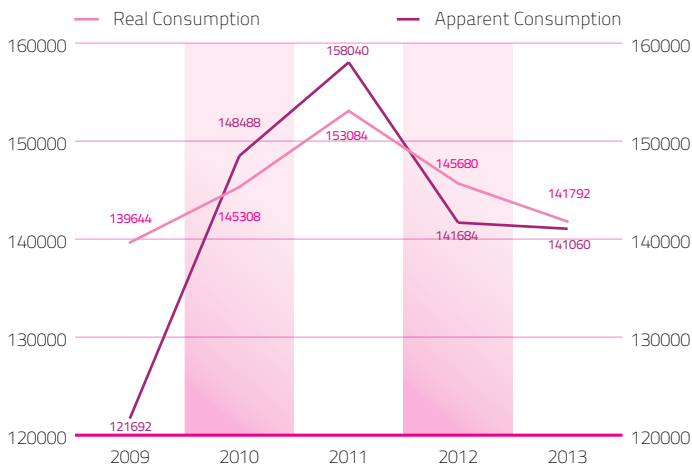
FLAT PRODUCTS DELIVERIES: QUARTO PLATES



REAL vs APPARENT CONSUMPTION ■ 9

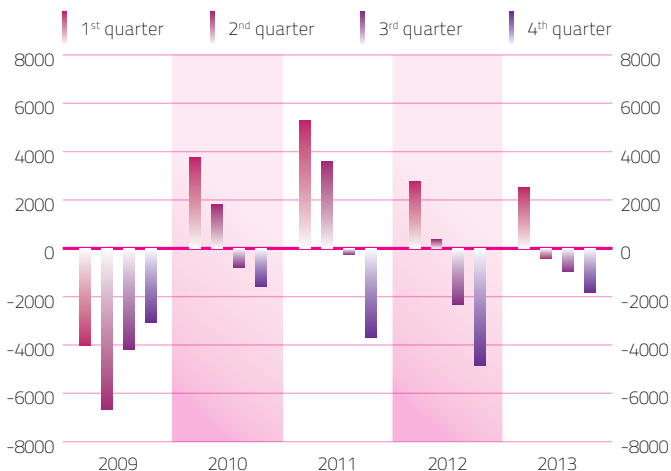
All qualities
in '000 metric tonnes

REAL & APPARENT CONSUMPTION



STOCK CHANGE

	2009	2010	2011	2012	2013
1st quarter	-4032	3744	5298	2772	2517
2nd quarter	-6678	1803	3609	378	-429
3rd quarter	-4173	-783	-270	-2319	-978
4th quarter	-3075	-1584	-3681	-4833	-1842

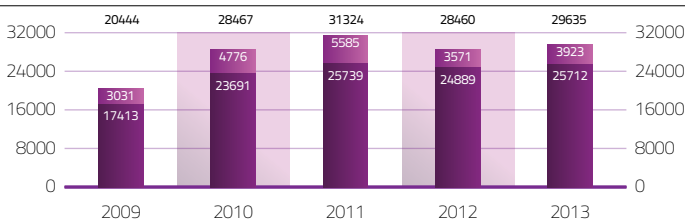


10 ■ MARKET SUPPLY

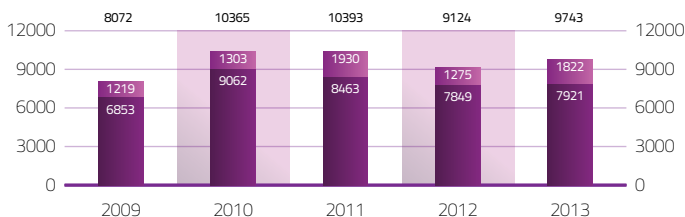
European Deliveries Imports third countries

Non-alloy steels and other alloy steels in '000 metric tonnes

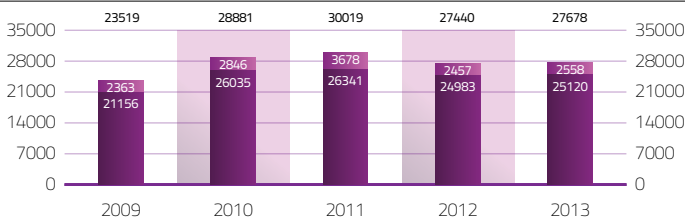
HOT ROLLED FLAT PRODUCTS



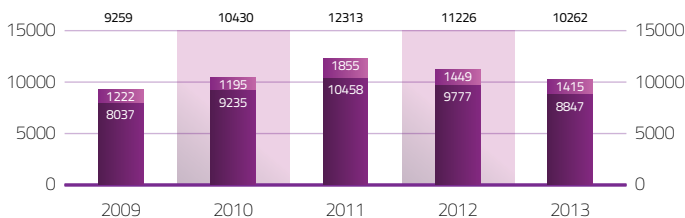
COLD ROLLED SHEETS



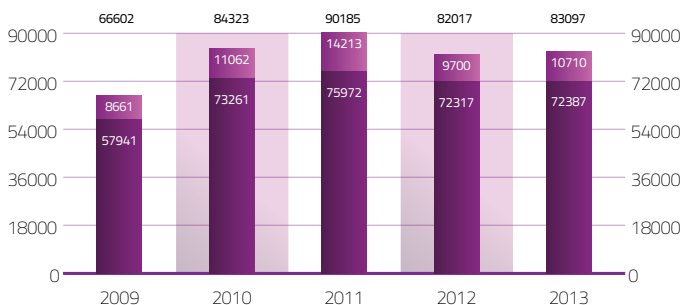
TOTAL COATED SHEETS



QUARTO PLATES



TOTAL FLAT PRODUCTS

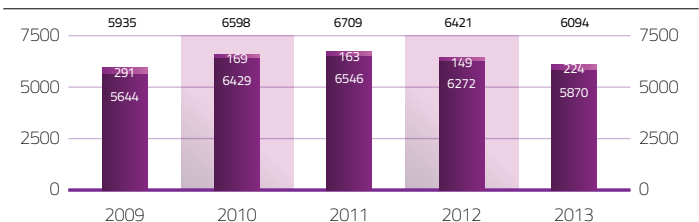


MARKET SUPPLY ■ 11

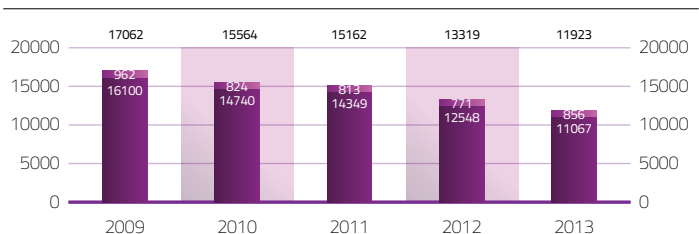
Non-alloy steels
and other alloy steels
in '000 metric tonnes

European Deliveries Imports third countries

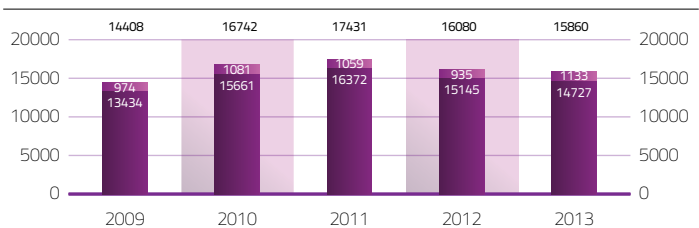
BEAMS



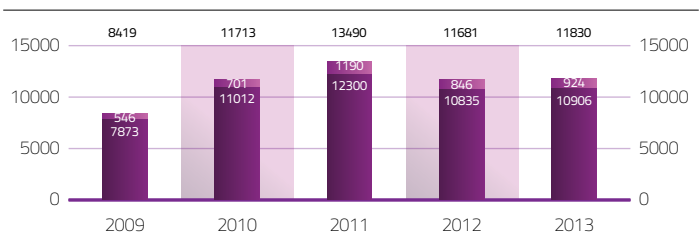
REBARS + DEFORMED RODS



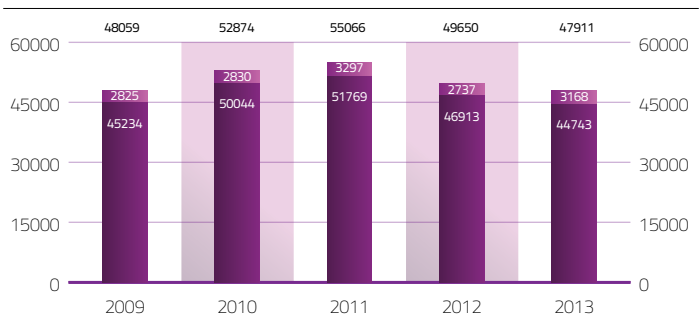
WIRE ROD - DEFORMED RODS



MERCHANT BARS



TOTAL LONG PRODUCTS

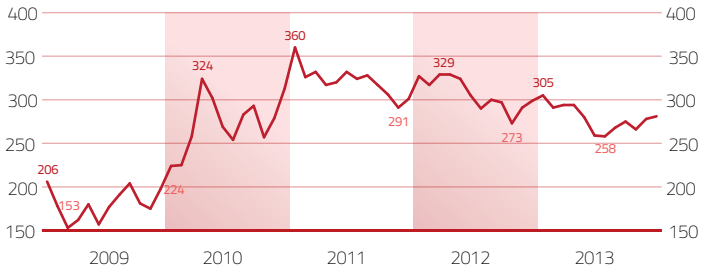


12 ■ SCRAP

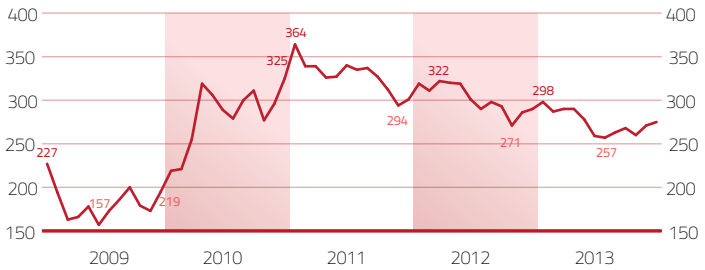
EU Scrap price index (2001 = 100) based on the average price in France, Germany, Italy Spain and United Kingdom.

Higher / Lower value of each year

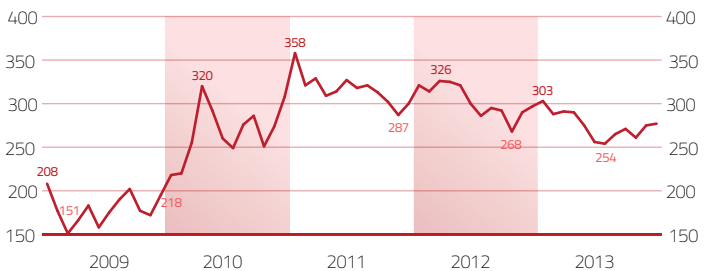
DEMOLITION QUALITY



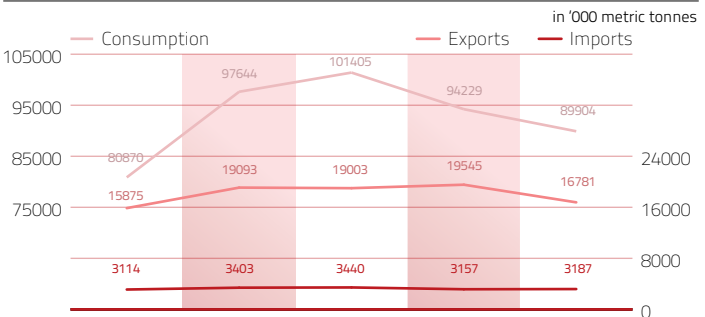
NEW ARISING



SHREDDED



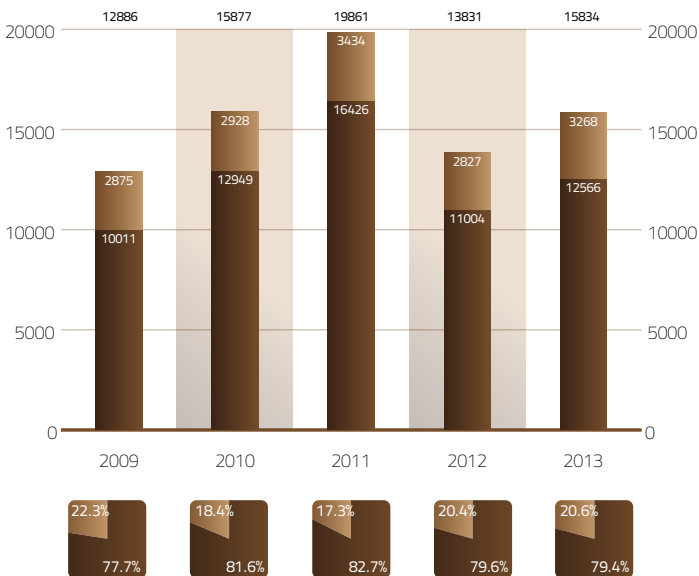
SCRAP IMPORTS, EXPORTS & CONSUMPTION



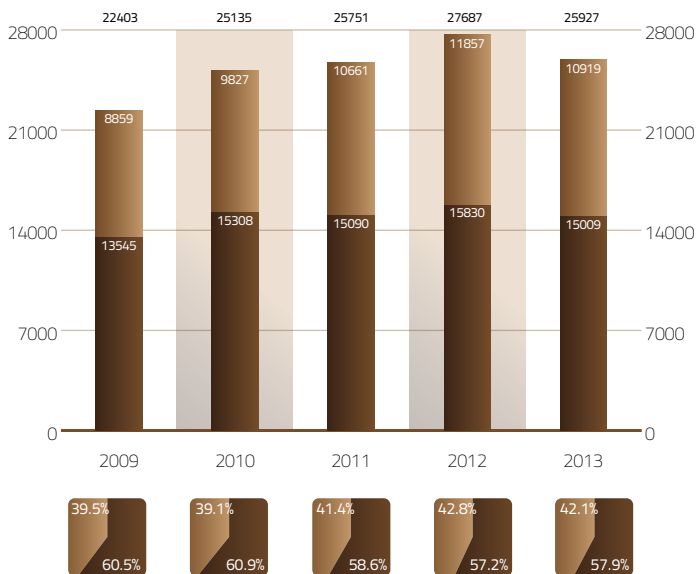
All qualities
in '000 metric tonnes

■ Flat ■ Long

THIRD COUNTRIES IMPORTS



THIRD COUNTRIES EXPORTS



All qualities

TOP IMPORTS FLAT PRODUCTS



	2013	Avg'08/'12
China	22%	24%
Russia	19%	15%
Ukraine	13%	10%
South Korea	10%	8%
Turkey	10%	6%
India	9%	7%
Taiwan	5%	3%
U.S.A.	2%	2%
Serbia	2%	6%
Others	8%	19%

LONG PRODUCTS



	2013	Avg'08/'12
Turkey	19%	21%
Switzerland	16%	13%
Ukraine	12%	14%
Norway	10%	9%
Russia	9%	7%
Belarus	7%	7%
China	7%	7%
Bosnie-Herzegovine	6%	3%
Moldova	3%	3%
Others	11%	16%

TOP EXPORTS FLAT PRODUCTS



	2013	Avg'08/'12
Turkey	24%	21%
U.S.A.	14%	10%
Switzerland	7%	7%
China	5%	5%
Mexico	4%	4%
Russia	4%	5%
Algeria	4%	3%
India	4%	8%
Morocco	2%	2%
Others	32%	35%

LONG PRODUCTS



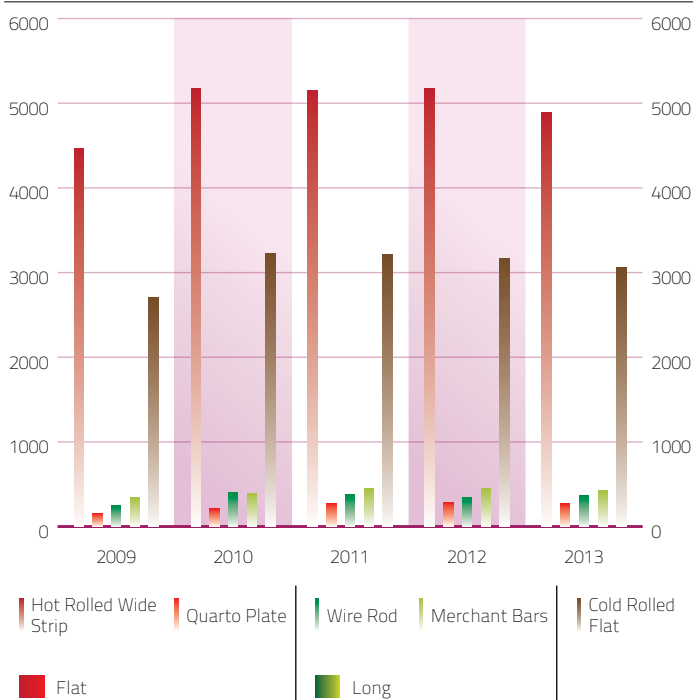
	2013	Avg'08/'12
Algeria	37%	30%
Turkey	8%	8%
Switzerland	8%	8%
U.S.A.	7%	7%
Morocco	4%	2%
Russia	3%	2%
Canada	3%	3%
Norway	2%	2%
Brazil	2%	2%
Others	26%	36%

in '000 metric tonnes

TOTAL FINISHED STAINLESS STEEL PRODUCTION

	2009	2010	2011	2012	2013
Total Hot Rolled	5220	6175	6257	6255	5963
Flat	4622	5386	5424	5464	5159
Hot Rolled Wide Strip	■ 4464	5176	5146	5179	4889
Quarto Plate	■ 158	210	278	285	270
Long	598	789	833	791	803
Wire Rod	■ 254	398	383	346	373
Merchant Bars	■ 344	391	450	445	430
Cold Rolled Flat	■ 2710	3224	3209	3167	3062

VOLUME PER SELECTED PRODUCT CATEGORY



Shares in total hot rolled:

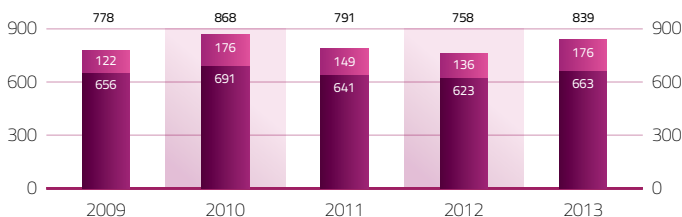


16 ■ STAINLESS STEEL – MARKET SUPPLY

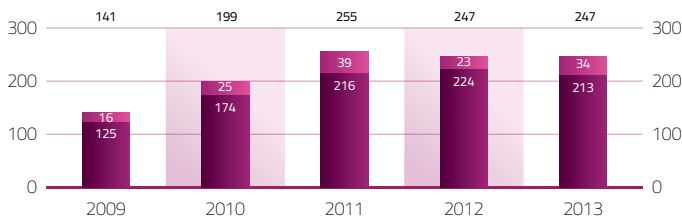
in '000 metric tonnes

European Deliveries Imports third countries

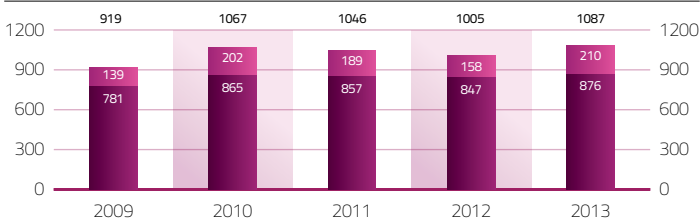
HOT ROLLED STRIP MILL PRODUCTS FOR DIRECT USE



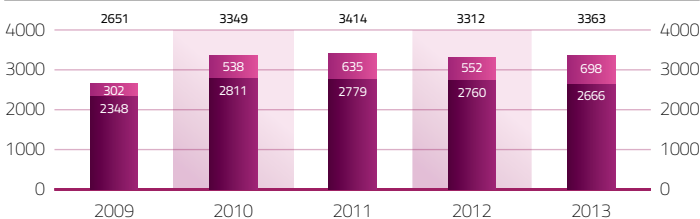
QUARTO PLATES



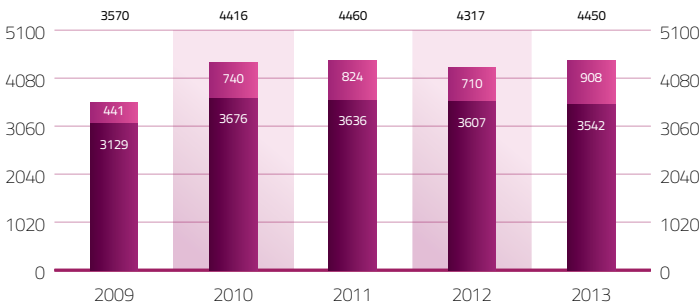
TOTAL HOT ROLLED FLAT PRODUCTS



COLD ROLLED FLAT PRODUCTS



TOTAL STAINLESS STEEL FLAT PRODUCTS

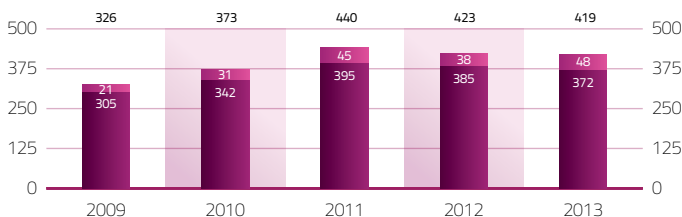


STAINLESS STEEL - MARKET SUPPLY ■ 17

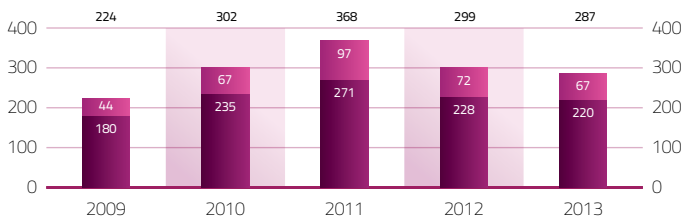
in '000 metric tonnes

■ European Deliveries ■ Imports third countries

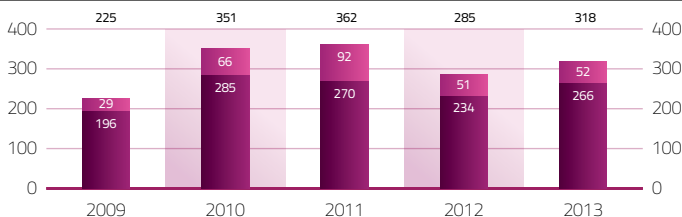
HOT ROLLED BARS AND SECTIONS



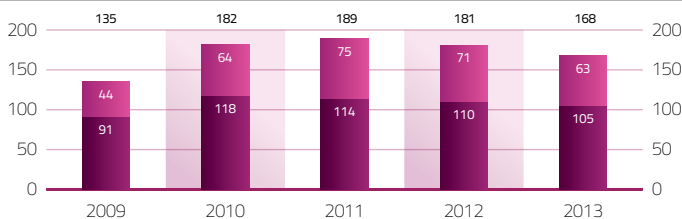
BRIGHT BARS



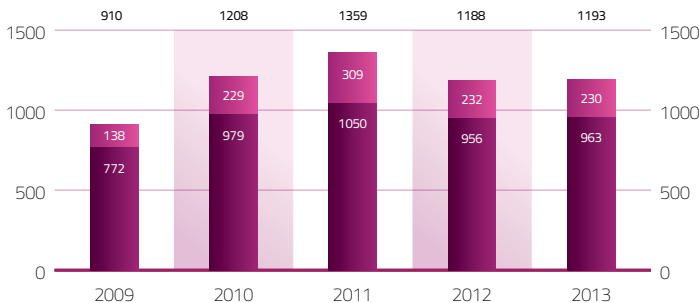
WIRE ROD



DRAWN WIRES



TOTAL STAINLESS STEEL LONG PRODUCTS



Including 1st transformation

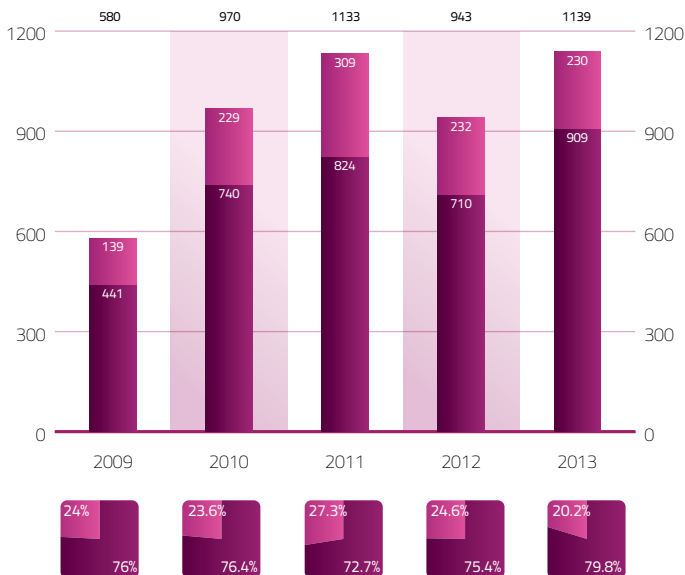
18 ■ STAINLESS STEEL - TRADE

■ Flat ■ Long

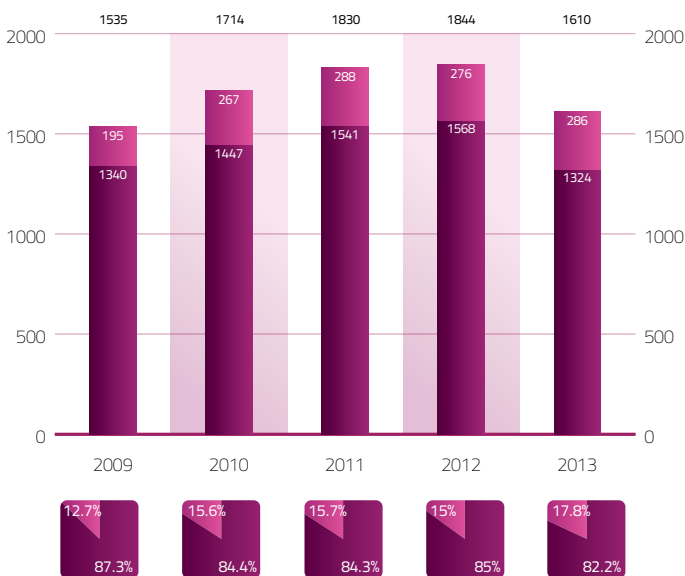
in '000 metric tonnes

Total including for re-rolling

THIRD COUNTRIES IMPORTS



THIRD COUNTRIES EXPORTS



MEMBERS

- Acciaieria Arvedi
<http://www.arvedi.it>
- Acerinox
<http://www.acerinox.es>
- Aperam
<http://www.aperam.com>
- ArcelorMittal
<http://www.arcelormittal.com>
- Badische Stahlwerke
<http://www.bsw-kehl.de>
- Bulgarian Association of the Metallurgical Industries – BAMl
- Celsa Group
<http://www.gcelsa.com>
- Chambre Syndicale des Producteurs d'Aciers Fins et Spéciaux
<http://www.spas.fr>
- CMC Poland
<http://www.cmcpoland.com>
- Deutsche Edelstahlwerke
<http://www.dew-stahl.com>
- Dillinger Hütte
<http://www.dillinger.de>
- Duferco Belgium
<http://www.duferco.be>
- Edelstahl – Vereinigung
http://www.stahl-online.de/stahl_zentrum/edelstahl_vereinigung_e_v.htm
- Evráz Vitkovice Steel
<http://www.vitkovicesteel.com>
- Fachverband der Bergwerke und Eisen erzeugenden Industrie
<http://www.wk.or.at/bergbau-stahl>
- Federacciai
<http://www.federacciai.it>
- Fédération Française de l'Acier
<http://www.ffa.fr>
- Feralpi Group
<http://www.feralpi.it>
- FNsteel Group
<http://www.fnsteel.eu>
- Georgsmarienhütte
<http://www.gmh.de>
- Groupement de la Sidérurgie – GSV
<http://www.steelbel.be>
- Halyvourgiki
<http://www.halyvourgiki.com>
- Hellenic Steelmakers' Union – ENXE
- Helliniki Halyvourgia
<http://www.hlv.gr>
- Hutnictví Železa
<http://www.hz.cz>
- Hutnicza Izba Przemysłowa-Handlowa
<http://www.hiph.com.pl>
- ILVA
<http://www.gruppoilva.com>
- ISD Dunaferr
<http://www.dunaferr.hu>
- ISD Huta Czysta
<http://www.isd-hcz.com.pl>
- Jernkontoret
<http://www.jernkontoret.se>
- Lech-Stahlwerke
<http://www.lech-stahlwerke.de>
- Liepājas Metalurģis
<http://www.metalurģis.lv>
- Lucchini Group
<http://www.lucchini.it>
- Magyar Vas-és Acélpári Egyesülés
<http://www.mvae.hu>
- Marienhütte
<http://www.marienhuetten.at>
- Metallinjalostajat
<http://www.teknologiateollisuus.fi/>
- Metinvest Trameal
<http://www.trameal.it>
- NLMK Europe
<http://www.eu.nlmk.com>
- Outokumpu
<http://www.outokumpu.com>
- Ovako Group
<http://www.ovako.com>
- Riva Forni Elettrici
<http://www.rivafe.com>
- Ruukki
<http://www.ruukki.com>
- Saarstahl AG
<http://www.saarstahl.de>
- Salzgitter AG
<http://www.salzgitter-ag.de>
- Sidenor
<http://www.sidenor.gr>
- Siderurgia Nacional - Empresa de Productos Longos SA
- SIJ - Slovenian Steel Group
<http://www.sij.si>
- SSAB
<http://www.ssab.com>
- Stahlwerk Thüringen
<http://www.CSN-sections.com>
- Štore Steel
<http://www.store-steel.si>
- Tata Steel Europe
<http://www.tatasteeleurope.com>
- ThyssenKrupp AG
<http://www.thyssenkrupp.com>
- Trinecké Železářny
<http://www.trz.cz>
- U.S. Steel Kosice
<http://www.uske.sk>
- UK Steel
<http://www.uksteel.org.uk>
- Unión de Empresas Siderúrgicas – UNESID
<http://www.unesid.org>
- Uniunea Producătorilor de Oțel din România – UniRomSider
voestalpine
<http://www.voestalpine.com>
- Vorskla Steel Denmark
<http://www.vorsklasteel.com>
- Wirtschaftsvereinigung Stahl
<http://www.wvstahl.de>

ASSOCIATED MEMBERS

- Çolakoglu Metalurji
<http://www.colakoglu.com.tr>
- Türkiye Çelik Üreticileri Derneği – TÇÜD
<http://www.dcu.org.tr>
- Diler Demir Çelik Endüstrisi ve Ticaret
http://www.dilerhld.com/diler_demircelik/index.html
- Erdemir - Ereğli Demir ve Çelik Fabrikaları
<http://www.erdemir.com.tr>
- İçdas Çelik Enerji – Tersane ve Ulaşım Sanayi
<http://www.icdas.com.tr>
- İsdemir – Iskenderun Demir ve Çelik Fabrikaları
<http://www.isdemir.com.tr>
- Kremikovtzi
<http://www.kremikovtzi.com>
- Swiss Steel
<http://www.swiss-steel.com>



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