

2005
2009

**EUROPEAN STEEL
IN FIGURES**

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The second edition of EUROFER's European Steel in Figures is published at a time when the European economy is showing the first signs of recovery from the deepest financial and economic crisis that has hit the world since WWII.

The unprecedented deterioration in market fundamentals in 2009 can be clearly identified in the European steel statistics over the period 2005 – 2009. Crude steel output for example fell by 30% in 2009 compared to 2008 and apparent consumption by almost 35%. In fact, most figures for 2009 have fallen back to levels lastly registered in the early 1990s.

It may take several years before activity in the European steel sector and its key client industries will be nearing pre-crisis levels again.

While business conditions at the start of 2010 are definitely more benign than anytime in the past 12 months, the recovery in steel market fundamentals expected for this year will be slow and surrounded by uncertainties. Risks include steel imports rising faster than EU demand and the huge increase in iron ore prices recently announced by the main suppliers. The unavoidable sharp rise in steel prices could nip the fragile economic recovery in the bud.

I hope that this compendium of European key figures will be useful for you.

For further information you may want to visit our website:

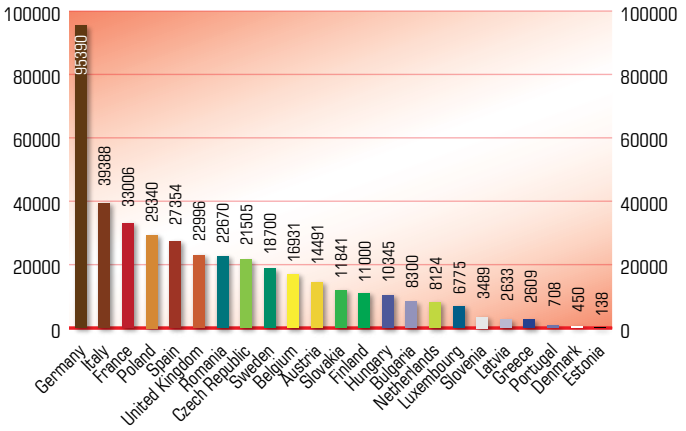
www.eurofer.eu

March 2010

Gordon Moffat
Director General

EMPLOYMENT (2008)

Total: 408183



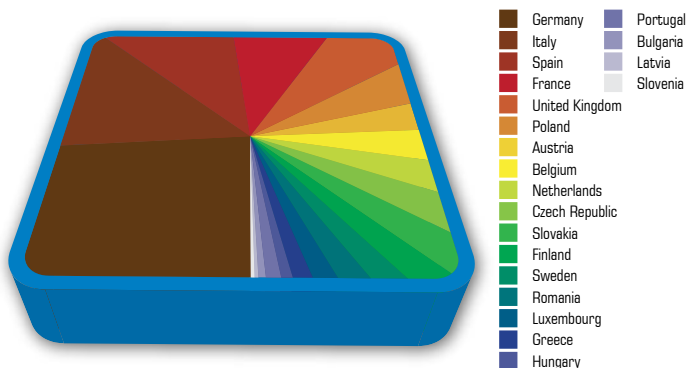
CRUDE STEEL OUTPUT PER COUNTRY

All qualities

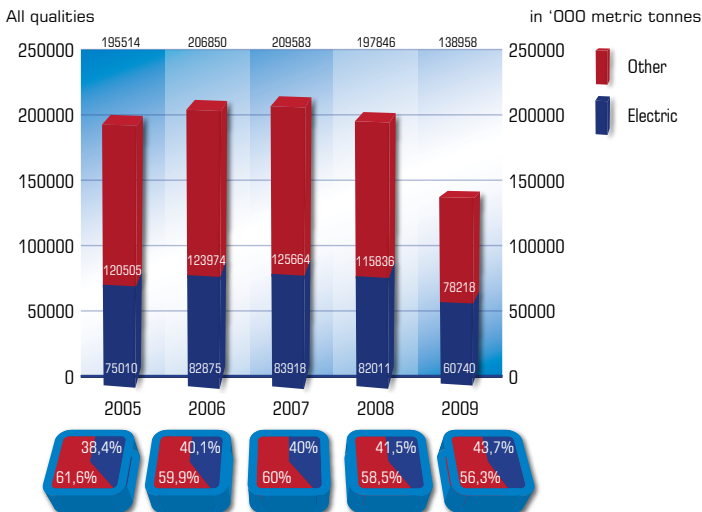
in '000 metric tonnes

| | 2005 | 2006 | 2007 | 2008 | 2009 | % share of EU 2009 |
|----------------|---------------|---------------|---------------|---------------|---------------|--------------------|
| Austria | 7031 | 7129 | 7578 | 7594 | 5662 | 4,1 |
| Belgium | 10420 | 11631 | 10692 | 10673 | 5635 | 4,1 |
| Bulgaria | 1949 | 2102 | 1909 | 1330 | 726 | 0,5 |
| Czech Republic | 6188 | 6860 | 7057 | 6387 | 4594 | 3,3 |
| Finland | 4739 | 5052 | 4431 | 4418 | 3078 | 2,2 |
| France | 19481 | 19852 | 19250 | 17879 | 12840 | 9,2 |
| Germany | 44524 | 47224 | 48550 | 45833 | 32670 | 23,5 |
| Greece | 2266 | 2416 | 2554 | 2477 | 2000 | 1,4 |
| Hungary | 1958 | 2084 | 2241 | 2097 | 1403 | 1,0 |
| Italy | 29350 | 31624 | 31553 | 30590 | 19714 | 14,2 |
| Latvia | 688 | 690 | 696 | 635 | 692 | 0,5 |
| Luxembourg | 2194 | 2802 | 2858 | 2582 | 2141 | 1,5 |
| Netherlands | 6919 | 6372 | 7368 | 6853 | 5194 | 3,7 |
| Poland | 8444 | 10008 | 10632 | 9728 | 7129 | 5,1 |
| Portugal | 1400 | 1400 | 1400 | 1400 | 1400 | 1,0 |
| Romania | 6150 | 6170 | 6137 | 4917 | 2686 | 1,9 |
| Slovakia | 4485 | 5093 | 5089 | 4489 | 3747 | 2,7 |
| Slovenia | 583 | 628 | 638 | 641 | 430 | 0,3 |
| Spain | 17826 | 18391 | 18999 | 18640 | 14358 | 10,3 |
| Sweden | 5692 | 5435 | 5635 | 5164 | 2778 | 2,0 |
| United Kingdom | 13226 | 13886 | 14317 | 13520 | 10079 | 7,3 |
| EU 27 | 195514 | 206850 | 209583 | 197846 | 138958 | 100 |

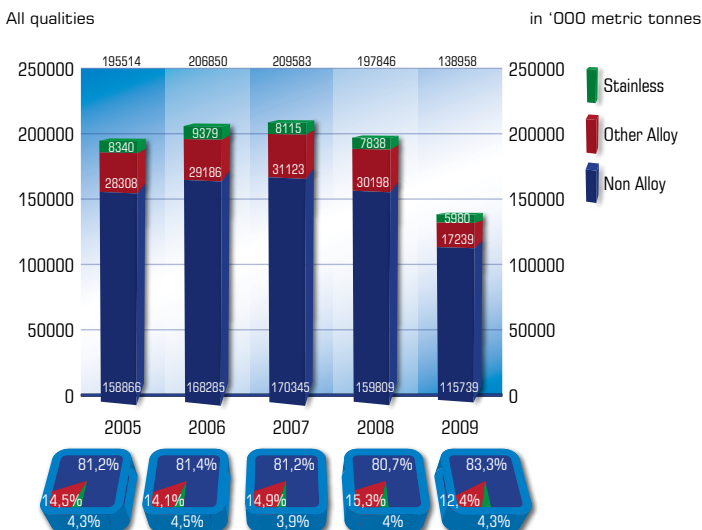
SHARE PER COUNTRY (2009)



CRUDE STEEL PRODUCTION BY PROCESS



CRUDE STEEL PRODUCTION BY QUALITY



TOTAL FINISHED STEEL PRODUCTION

All qualities

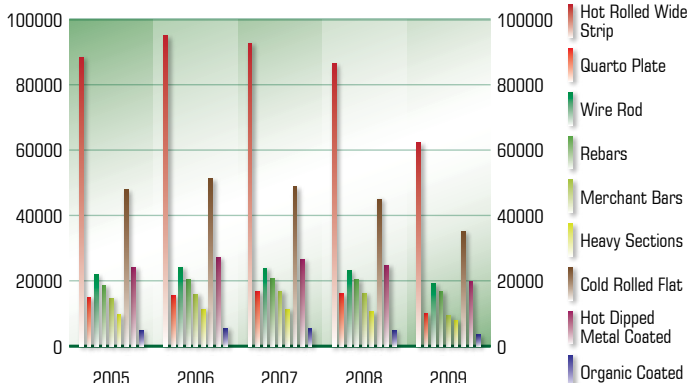
in '000 metric tonnes

| | 2005 | 2006 | 2007 | 2008 | 2009 |
|-------------------------|--------|--------|--------|--------|--------|
| Total Hot Rolled | 173079 | 187549 | 187669 | 178613 | 129584 |
| Flat | 105362 | 112650 | 111612 | 104784 | 73647 |
| Hot Rolled Wide Strip | 88336 | 94989 | 92639 | 86473 | 62298 |
| Quarto Plate | 14963 | 15505 | 16731 | 16005 | 10033 |
| Long | 67717 | 74898 | 76057 | 73829 | 55938 |
| Wire Rod | 21794 | 24092 | 23799 | 23109 | 19053 |
| Rebars | 18631 | 20412 | 20576 | 20498 | 16787 |
| Merchant Bars | 14612 | 15800 | 16865 | 16142 | 9375 |
| Heavy Sections | 9676 | 11335 | 11269 | 10554 | 7881 |
| Cold Rolled Flat | 47899 | 51210 | 48717 | 45015 | 34963 |
| Hot Dipped Metal Coated | 24070 | 27257 | 26584 | 24761 | 19701 |
| Organic Coated | 4915 | 5459 | 5264 | 4869 | 3520 |

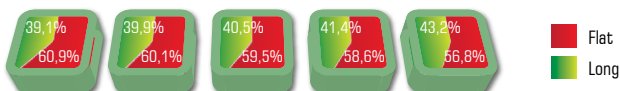
VOLUME PER SELECTED PRODUCT CATEGORY

All qualities

in '000 metric tonnes

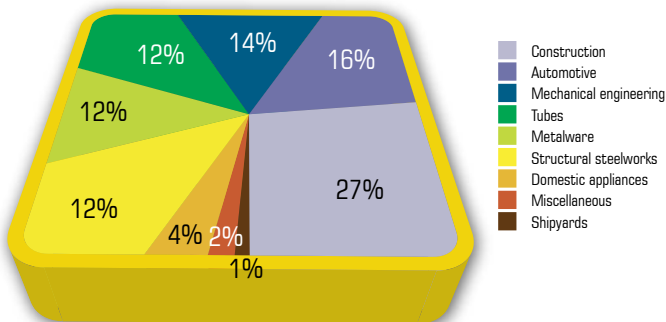


Shares in total hot rolled:



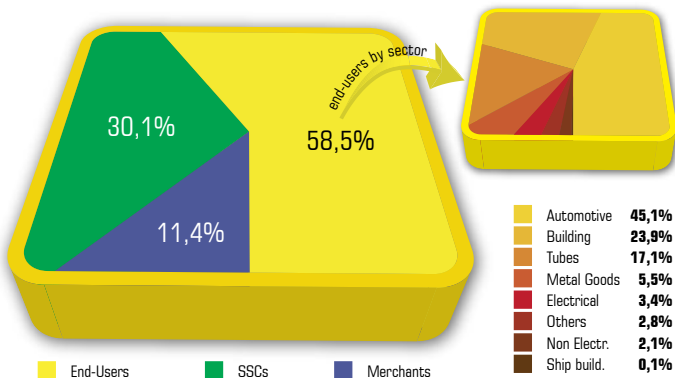
SECTOR SHARES IN TOTAL STEEL CONSUMPTION (Avg '05/'09)

All qualities



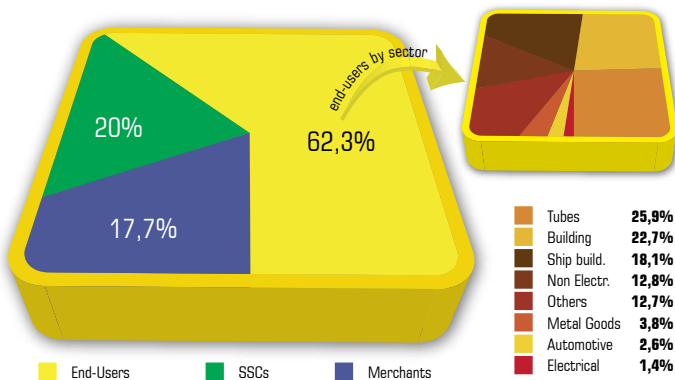
FLAT PRODUCTS DELIVERIES: STRIP MILL PRODUCTS (Avg '05/'09)

Non-alloy steels and other alloy steels

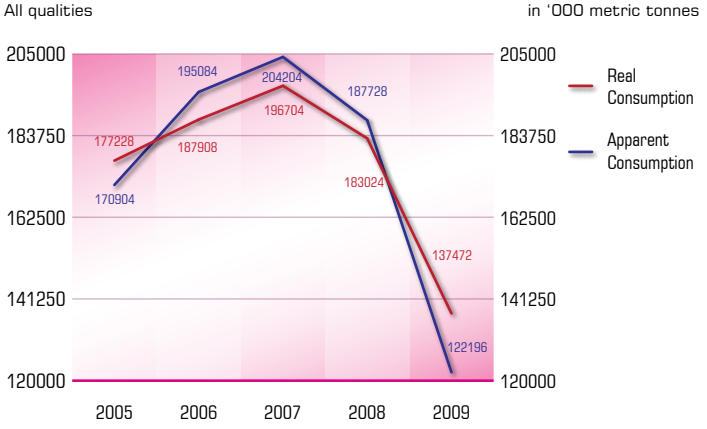


FLAT PRODUCTS DELIVERIES: QUARTO PLATES (Avg '05/'09)

Non-alloy steels and other alloy steels



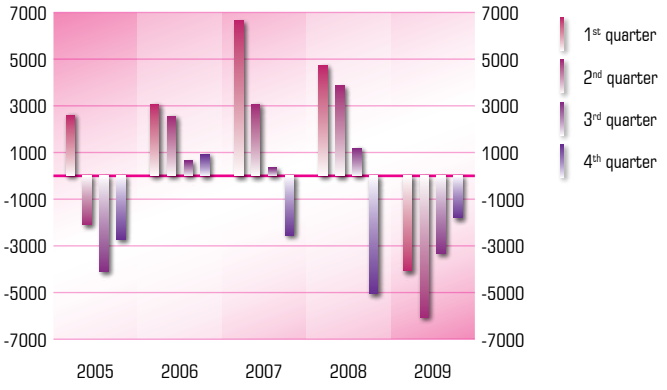
REAL & APPARENT CONSUMPTION



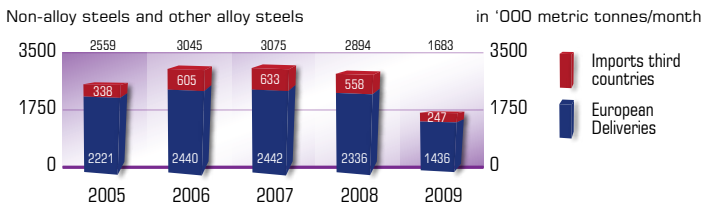
STOCK CHANGE

All qualities in '000 metric tonnes

| | 2005 | 2006 | 2007 | 2008 | 2009 |
|-------------|-------|------|-------|-------|-------|
| 1st quarter | 2598 | 3075 | 6648 | 4716 | -4074 |
| 2nd quarter | -2091 | 2547 | 3060 | 3855 | -6066 |
| 3rd quarter | -4098 | 639 | 354 | 1182 | -3330 |
| 4th quarter | -2730 | 918 | -2556 | -5055 | -1797 |



HOT ROLLED FLAT PRODUCTS



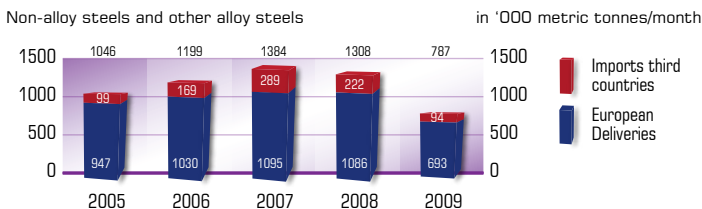
COLD ROLLED SHEETS



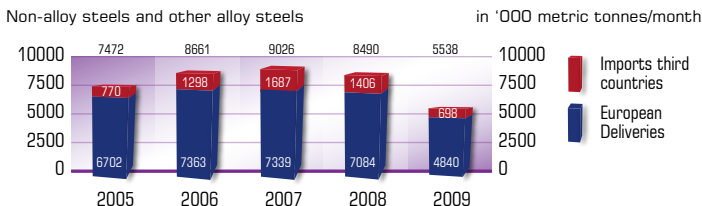
TOTAL COATED SHEETS



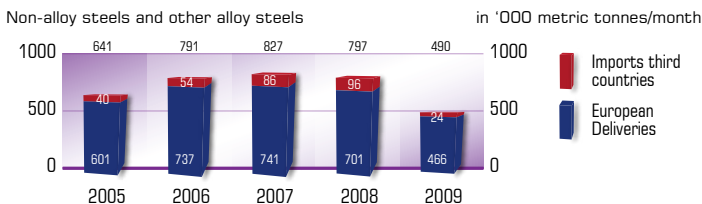
QUARTO PLATES



TOTAL FLAT PRODUCTS



BEAMS



REBARS + DEFORMED RODS



WIRE ROD - DEFORMED RODS



MERCHANT BARS



TOTAL LONG PRODUCTS



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

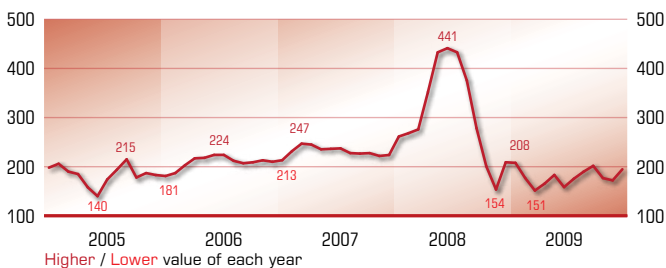
DEMOLITION QUALITY



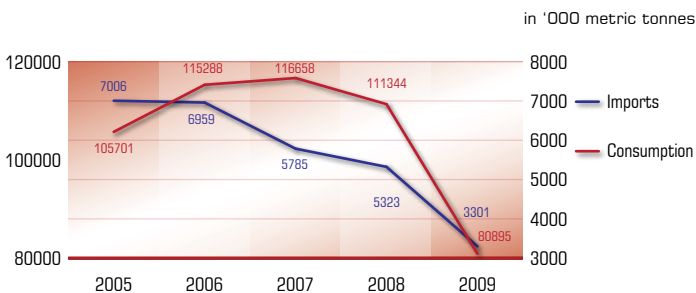
NEW ARISING



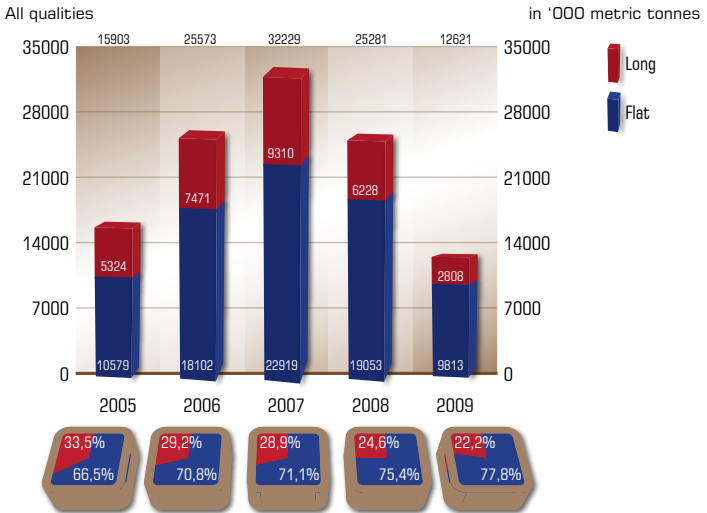
SHREDDED



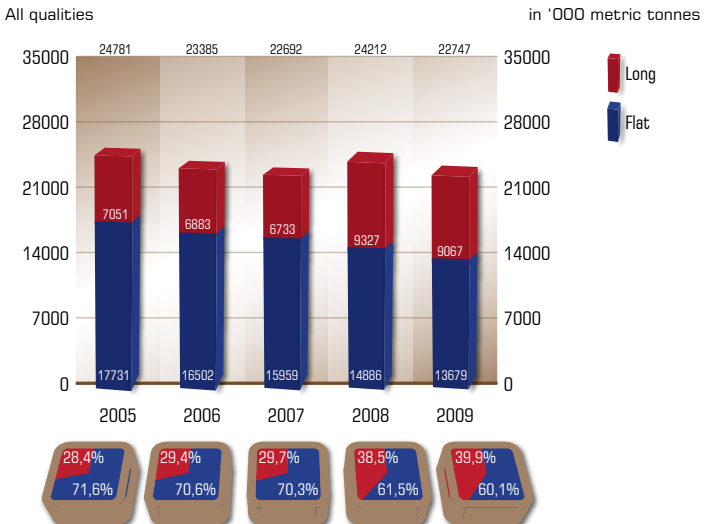
SCRAP IMPORTS & CONSUMPTION



THIRD COUNTRIES IMPORTS



THIRD COUNTRIES EXPORTS



TOP IMPORTS: FLAT PRODUCTS

All qualities



| | 2009 | Avg'04/'08 |
|-------------|------|------------|
| Russia | 17% | 15% |
| China | 12% | 24% |
| South Korea | 10% | 5% |
| Ukraine | 10% | 6% |
| Turkey | 8% | 4% |
| India | 8% | 8% |
| Serbia | 7% | 5% |
| Brazil | 5% | 5% |
| Others | 23% | 28% |

TOP IMPORTS: LONG PRODUCTS

All qualities



| | 2009 | Avg'04/'08 |
|-------------|------|------------|
| Turkey | 26% | 34% |
| Ukraine | 15% | 10% |
| Switzerland | 12% | 8% |
| Belarus | 10% | 4% |
| Norway | 9% | 6% |
| Russia | 7% | 5% |
| South Korea | 7% | 4% |
| Moldova | 3% | 4% |
| China | 3% | 11% |
| Others | 8% | 14% |

TOP EXPORTS: FLAT PRODUCTS

All qualities



| | 2009 | Avg'04/'08 |
|-------------|------|------------|
| Turkey | 22% | 20% |
| India | 10% | 5% |
| U.S.A. | 6% | 12% |
| China | 6% | 6% |
| Switzerland | 6% | 7% |
| Russia | 4% | 3% |
| Algeria | 3% | 1% |
| Mexico | 3% | 5% |
| Pakistan | 3% | 2% |
| Others | 37% | 39% |

TOP EXPORTS: LONG PRODUCTS

All qualities



| | 2009 | Avg'04/'08 |
|-------------|------|------------|
| Algeria | 35% | 14% |
| Switzerland | 8% | 10% |
| U.S.A. | 5% | 17% |
| Turkey | 5% | 8% |
| Egypt | 3% | 1% |
| Iran | 3% | 2% |
| Croatia | 3% | 3% |
| Morocco | 2% | 2% |
| Israel | 2% | 1% |
| Others | 34% | 42% |

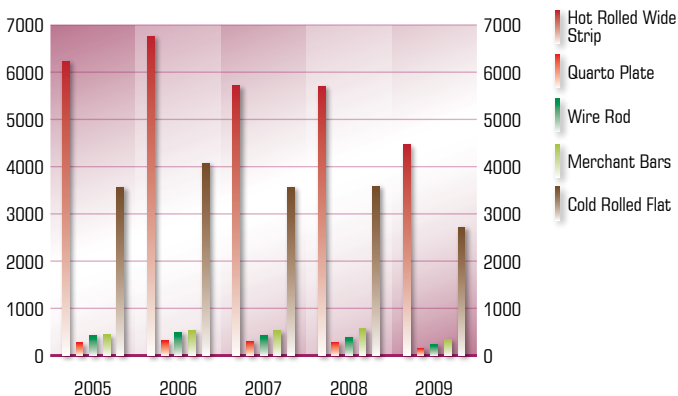
TOTAL FINISHED STAINLESS STEEL PRODUCTION

in '000 metric tonnes

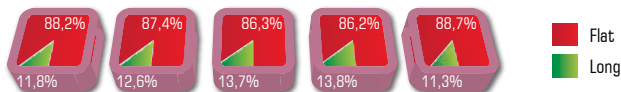
| | 2005 | 2006 | 2007 | 2008 | 2009 |
|-----------------------|------|------|------|------|------|
| Total Hot Rolled | 7366 | 8085 | 6975 | 6944 | 5211 |
| Flat | 6499 | 7069 | 6019 | 5988 | 4624 |
| Hot Rolled Wide Strip | 6228 | 6759 | 5714 | 5704 | 4465 |
| Quarto Plate | 270 | 311 | 304 | 284 | 158 |
| Long | 867 | 1015 | 957 | 956 | 587 |
| Wire Rod | 425 | 488 | 433 | 392 | 241 |
| Merchant Bars | 442 | 528 | 524 | 564 | 346 |
| Cold Rolled Flat | 3561 | 4069 | 3558 | 3581 | 2711 |

VOLUME PER SELECTED PRODUCT CATEGORY

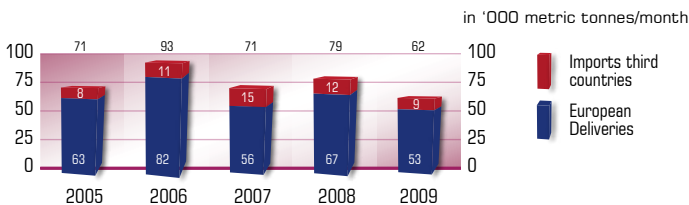
in '000 metric tonnes



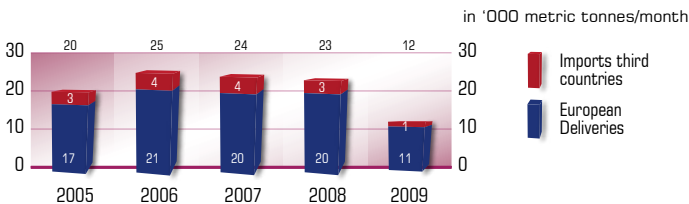
Shares in total hot rolled:



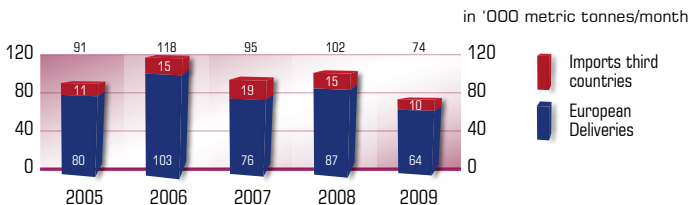
HOT ROLLED STRIP MILL PRODUCTS FOR DIRECT USE



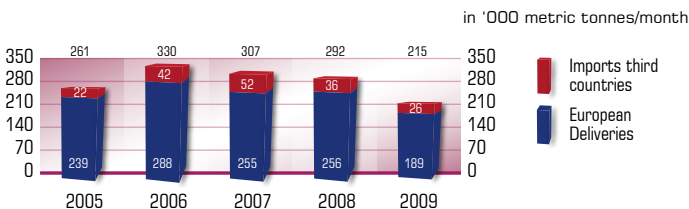
QUARTO PLATES



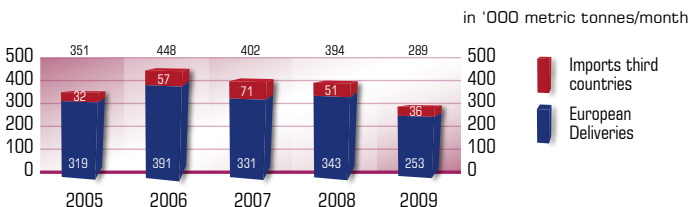
TOTAL HOT ROLLED FLAT PRODUCTS



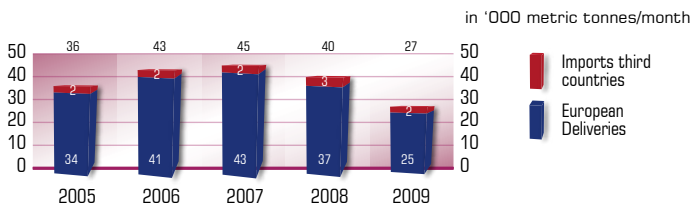
COLD ROLLED FLAT PRODUCTS



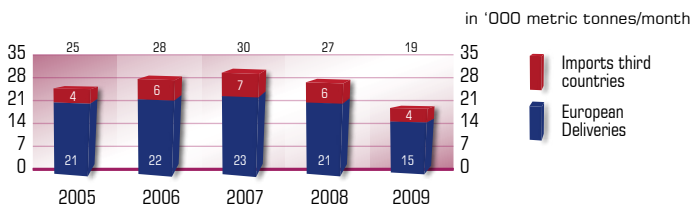
TOTAL STAINLESS STEEL FLAT PRODUCTS



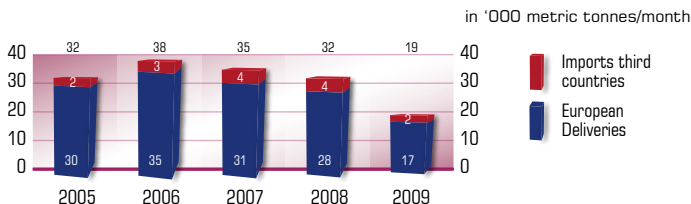
HOT ROLLED BARS AND SECTIONS



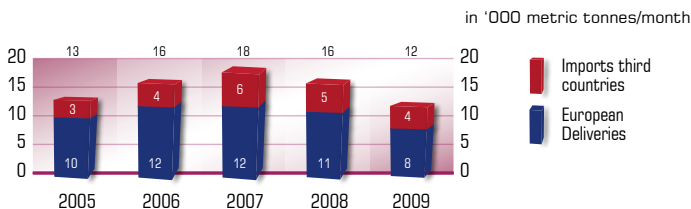
BRIGHT BARS



WIRE ROD

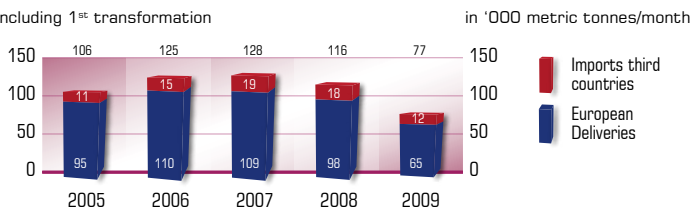


DRAWN WIRES

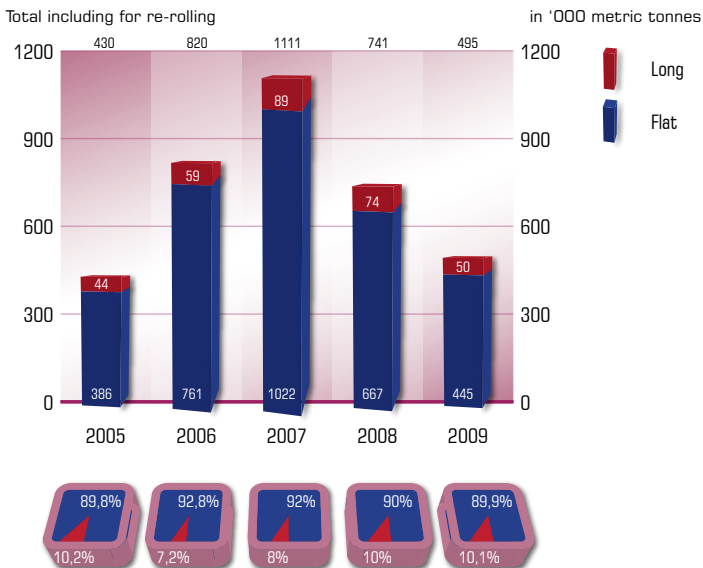


TOTAL STAINLESS STEEL LONG PRODUCTS

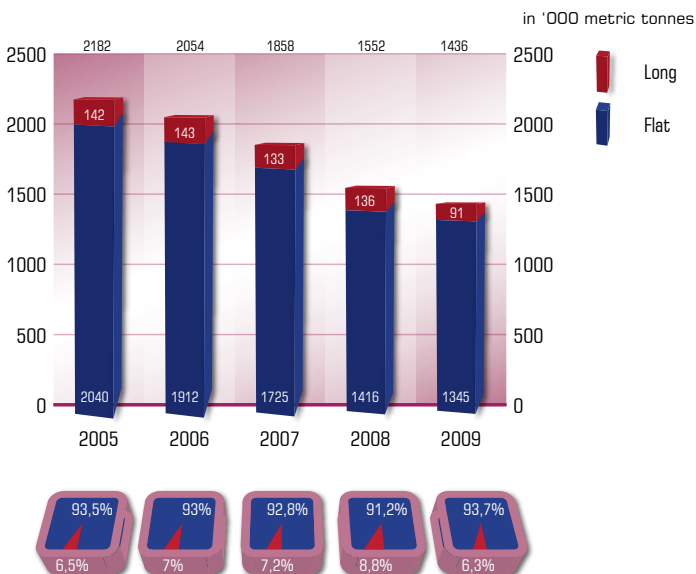
Including 1st transformation



THIRD COUNTRIES IMPORTS



THIRD COUNTRIES EXPORTS



MEMBERS

- Acciaieria Arvedi S.p.A
<http://www.arvedi.it>
- Acerinox SA
<http://www.acerinox.es>
- ArcelorMittal Group
<http://www.ArcelorMittal.com>
- BSW - Badische Stahlwerke GmbH
<http://www.bsw-kehl.de>
- Böhler-Uddeholm AG
<http://www.boehler-uddeholm.com>
- Bulgarian Association of the Metallurgical Industry
<http://www.bcm-bg.com>
- CELSA Group
<http://www.gcelso.com>
- CMC Zawiercie S.A.
<http://www.cmcpoland.com>
- Corus Group
<http://www.corusgroup.com>
- DanSteel AS
<http://www.dansteel.dk>
- Deutsche Edelstahlwerke GmbH
<http://www.dew-stahl.com>
- Dillinger Hüttenwerke AG
<http://www.dillinger.de>
- Duferco S.A.
<http://www.duferco.com>
- Edelstahl-Vereinigung E.V.
http://www.stahl-online.de/stahl_zentrum/edelstahl_vereinigung_e_v.htm
- ENXE - Hellenic Steelmakers Union
- Evraz Vitkovice Steel a.s.
<http://www.vitkovicesteel.com>
- Fachverband der Bergwerke und Eisen erzeugenden Industrie
<http://www.wk.or.at/bergbau-stahl>
- Federacciai
<http://www.federacciai.it>
- Federation Française de l'Acier
<http://www.ffa.fr>
- Feralpi Siderurgica S.p.A.
<http://www.feralpi.it>
- Georgsmarienhütte Group
<http://www.gmh.de>
- Georgsmarienhütte Holding GmbH
<http://www.gmh.de>
- Groupement de la Sidérurgie asbl
<http://www.steelbel.be>
- Grupo Alfonso Gallardo
<http://www.grupoag.es>
- Gruppo Riva
<http://www.rivagroup.com>
- Halyvourgiki Inc.
<http://www.halyvourgiki.com>
- Hellenic Halyvourgia
<http://www.hlv.gr>
- Hutnictvi Zeleza
<http://www.hz.cz>
- ISD Dunaferr Co.Ltd.
<http://www.dunaferr.hu>
- ISD Huta Czesochowa Sp.
<http://www.isd-hcz.com.pl>
- Jernkontoret
<http://www.jernkontoret.se>
- Lech-Stahlwerke GmbH
<http://www.lech-stahlwerke.de>
- Liepajas Metalurģs
<http://www.metalurģs.lv>
- Marienhütte Stahl- und Walzwerk GmbH
<http://www.marienhuette.at>
- Metallinjaloštajet
<http://www.teknologiateollisuus.fi>
- Metinvest Trameal SpA
<http://www.trametal.it>
- MVAE - Association of the Hungarian Steel Industry
<http://www.mvae.hu>
- Nedstaal BV
<http://www.nedstaal.nl>
- Outokumpu Oyj
<http://www.outokumpu.com>
- Ovako Group
<http://www.ovako.com>
- Polish Steel Association
<http://www.hiph.com.pl>
- Ruukki
<http://www.ruukki.com>
- SIJ Slovenian Steel Group
<http://www.sij.si>
- SSAB Group
<http://www.ssab.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 S.A.
Store Steel
<http://www.store-steel.si>
- SPAS - Chambre Syndicale des Producteurs d'Aciers fins et Spéciaux
<http://www.spas.fr>
- ThyssenKrupp AG
<http://www.thyssenkrupp.com>
- Trinecke Zelezarny AS
<http://www.trz.cz>
- U.S. Steel Kosice
<http://www.uske.sk>
- UK Steel - EEF
<http://www.uksteel.org.uk>
- UNESID Spanish Steel Association
<http://www.unesid.org>
- UniRomSider
http://www.web2all.ro/us_romana.htm
- Vorskla Steel Denmark A/S
<http://www.vorskla.dk>
- Voestalpine AG
<http://www.voestalpine.com>
- Wirtschaftsvereinigung Stahl
<http://www.wvstahl.de>
- ZDB Group a.s.
<http://www.zdb.cz>

ASSOCIATED MEMBERS

- Colakoglu Metalurji
<http://www.colakoglu.com.tr>
- Diler Demir Celik
http://www.dilerhld.com/diler_demircelik/index.html
- Eregli Iron and Steel Works
<http://www.erdemir.com.tr>
- HABAS
<http://www.abas.com.tr>
- ICDAS
<http://www.icdas.com.tr>
- Iskenderun Demir ve Celik ISDEMIR
<http://www.isdemir.com.tr>
- Izmir Demir Celik IDC
<http://www.idcsteel.com>
- Kremikovtzi AG
<http://www.kremikovtzi.com>
- Swiss Steel AG
<http://www.swiss-steel.com>
- DCUD - Turkish Iron & Steel Producers Association
<http://www.dcud.org.tr>



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ASBL

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<http://www.eurofer.eu/>