



2007 | 2011

European Steel in Figures

EUROFER
The European Steel Association

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The EU economy started 2011 on a positive note: growth was bolstered by strong exports and an investment-driven improvement in domestic demand, with additional support from mild weather conditions. However, this changed from the second quarter onwards as the temporary boost from weather conditions tapered off, austerity measures became more pronounced and the Eurozone's debt crisis started to eat its way into the real economy. At the end of the year, several EU countries had slipped into a recession. Meanwhile, most indicators suggest that the recession will be short and shallow.

The EU steel market followed this trend closely. Steel demand and production was particularly robust in the first half of the year. From mid-2011 onwards, output growth in the steel using sectors started to weaken with a negative impact on real steel consumption. In combination with especially steel distributors reducing their product inventories, apparent steel demand fell almost 8% in Q4-2011. In the whole of 2011, apparent steel consumption grew 6.2%. Consequently, also EU steel output ended the year on a weak note. In 2011, crude steel production in the EU amounted to 177 million tonnes, a 2.5% rise compared with 2010. The share of the EU in total global crude steel output remained at 12%.

The outlook for 2012 is for the downward trend in demand to reverse into a gradual strengthening during the year.

Hopefully this fourth edition of our European Steel in Figures will again meet your expectations and prove valuable for you.

For further information you may want to visit our website:

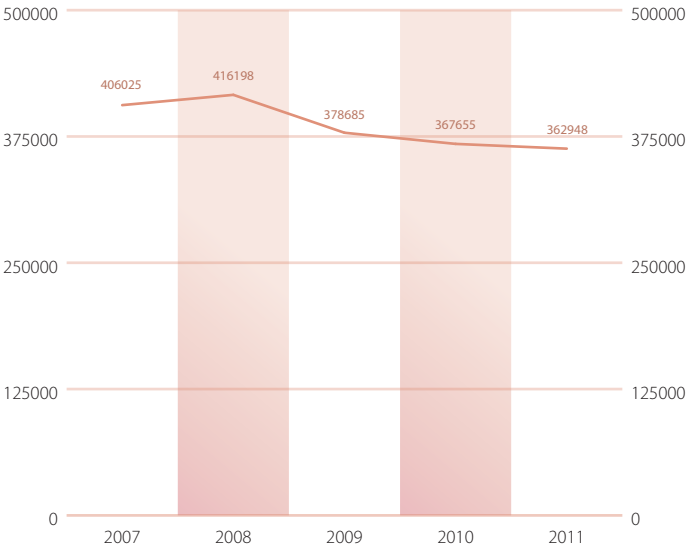
www.eurofer.eu

May 2012

Gordon Moffat
Director General

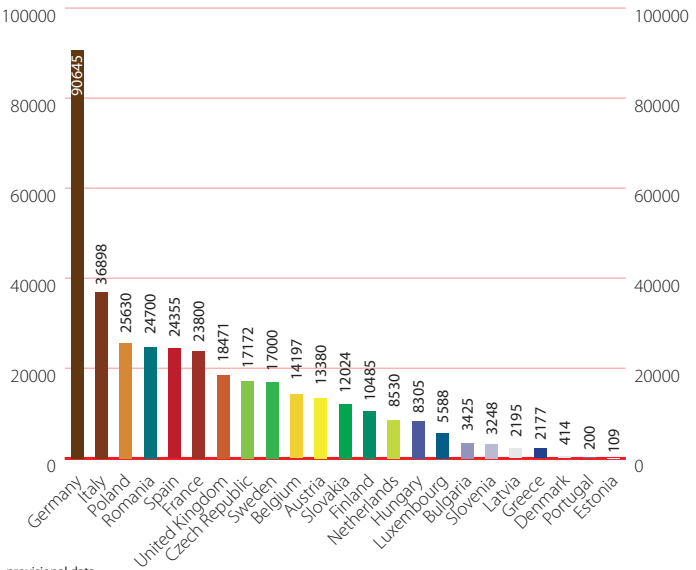
4 • EMPLOYMENT

EVOLUTION OF EMPLOYMENT



provisional data for 2011

EMPLOYMENT (2011)



provisional data

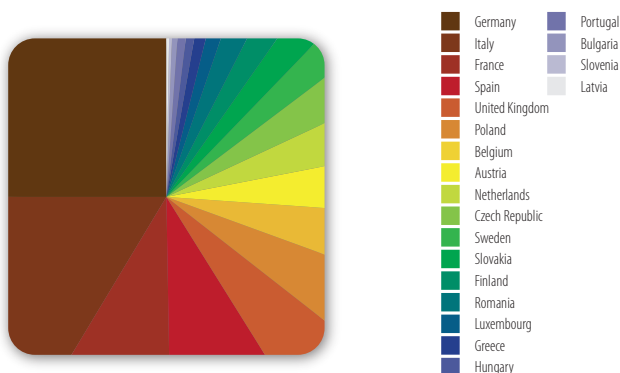
CRUDE STEEL PRODUCTION • 5

All qualities
in '000 metric tonnes

CRUDE STEEL OUTPUT PER COUNTRY

	2007	2008	2009	2010	2011	% share of EU 2011
Austria	7578	7594	5662	7206	7474	4.2
Belgium	10692	10673	5635	7973	8026	4.5
Bulgaria	1909	1330	726	744	835	0.5
Czech Republic	7057	6387	4594	5179	5583	3.2
Finland	4431	4418	3078	4030	3986	2.3
France	19250	17879	12840	15414	15780	8.9
Germany	48550	45833	32670	43830	44284	25
Greece	2554	2477	2000	1821	1934	1.1
Hungary	2241	2097	1403	1678	1732	1
Italy	31553	30590	19848	25750	28726	16.2
Latvia	696	635	692	655	568	0.3
Luxembourg	2858	2582	2141	2548	2521	1.4
Netherlands	7368	6853	5194	6651	6937	3.9
Poland	10632	9728	7129	7993	8779	5
Portugal	1847	1630	1587	1351	1351	0.8
Romania	6137	4917	2686	3613	3645	2.1
Slovakia	5089	4489	3747	4588	4242	2.4
Slovenia	638	641	430	606	665	0.4
Spain	18999	18640	14358	16343	15504	8.8
Sweden	5635	5164	2778	4817	4829	2.7
United Kingdom	14317	13520	10079	9706	9478	5.4
EU 27	210030	198076	139278	172496	176880	100

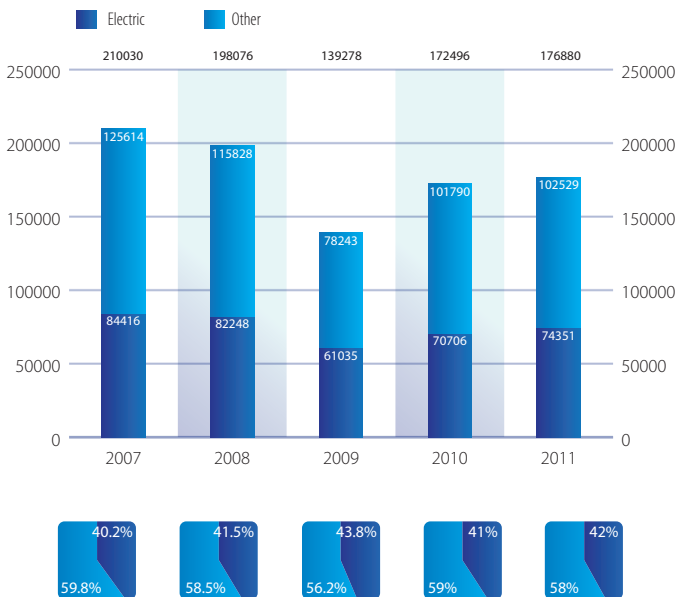
SHARE PER COUNTRY (2011)



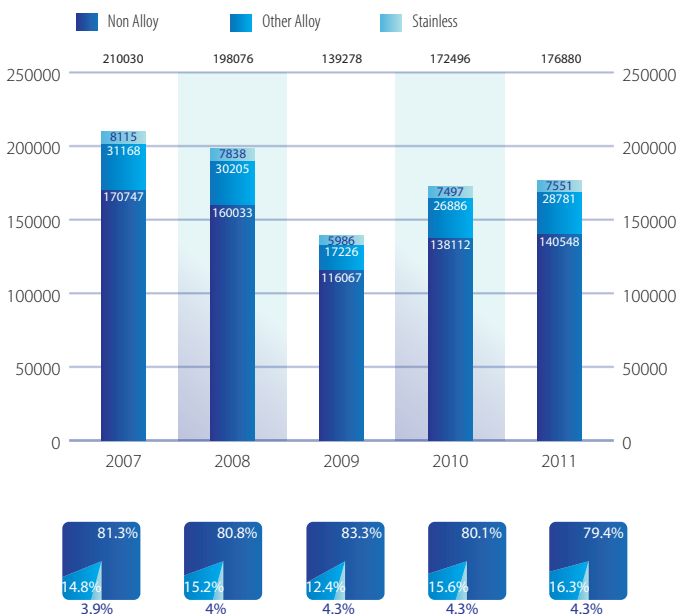
6 • CRUDE STEEL PRODUCTION

All qualities
in '000 metric tonnes

CRUDE STEEL PRODUCTION BY PROCESS



CRUDE STEEL PRODUCTION BY QUALITY



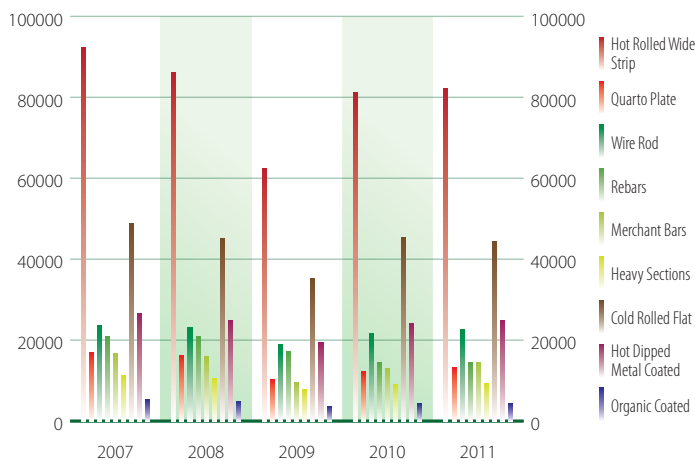
FINISHED STEEL PRODUCTION • 7

All qualities
in '000 metric tonnes

TOTAL FINISHED STEEL PRODUCTION

	2007	2008	2009	2010	2011
Total Hot Rolled	187364	178074	129796	156289	160942
Flat	111199	104331	73664	94967	97066
Hot Rolled Wide Strip	92250	86221	62340	81164	82152
Quarto Plate	16828	16116	10230	12143	13154
Long	76165	73742	56131	61323	63876
Wire Rod	23691	23010	19003	21586	22544
Rebars	20987	20796	17078	14492	14462
Merchant Bars	16644	15881	9480	12928	14498
Heavy Sections	11294	10529	7729	9055	9335
Cold Rolled Flat	48857	45196	35144	45367	44466
Hot Dipped Metal Coated	26589	24797	19445	24149	24814
Organic Coated	5337	4934	3723	4339	4344

VOLUME PER SELECTED PRODUCT CATEGORY



Shares in total hot rolled:

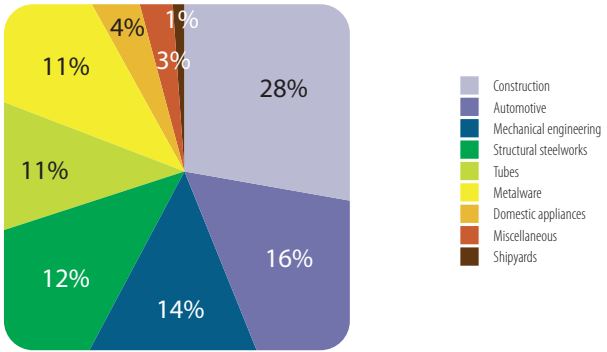


8 • SECTOR STATISTICS

Average 2007/2011

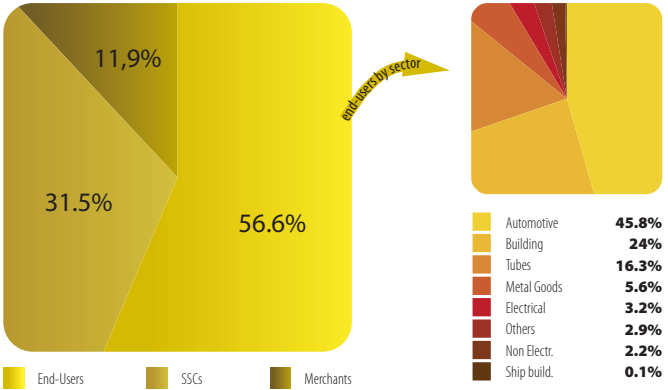
All qualities:

SECTOR SHARES IN TOTAL STEEL CONSUMPTION

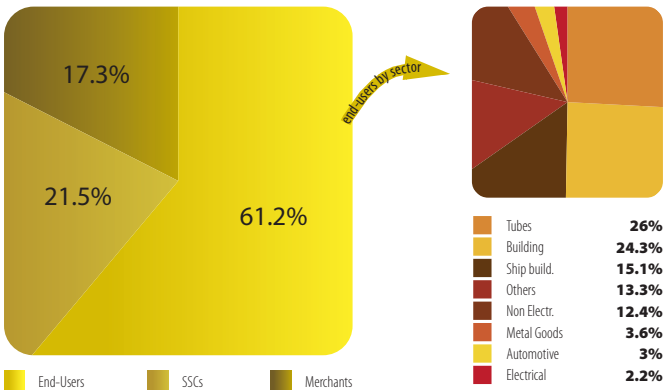


Non-alloy steels and other alloy steels:

FLAT PRODUCTS DELIVERIES: STRIP MILL PRODUCTS



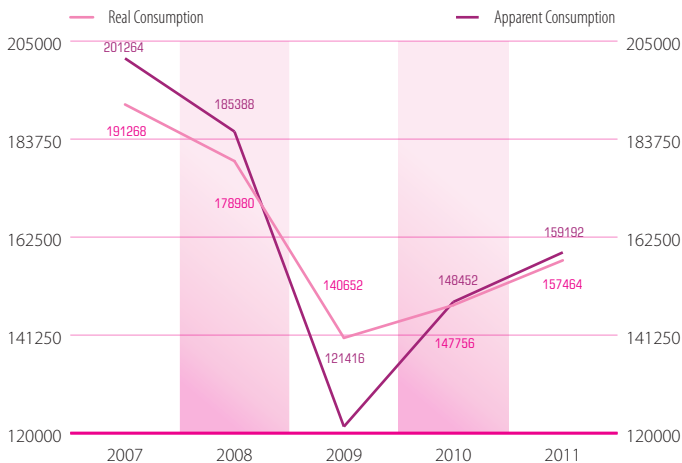
FLAT PRODUCTS DELIVERIES: QUARTO PLATES



REAL VS APPARENT CONSUMPTION • 9

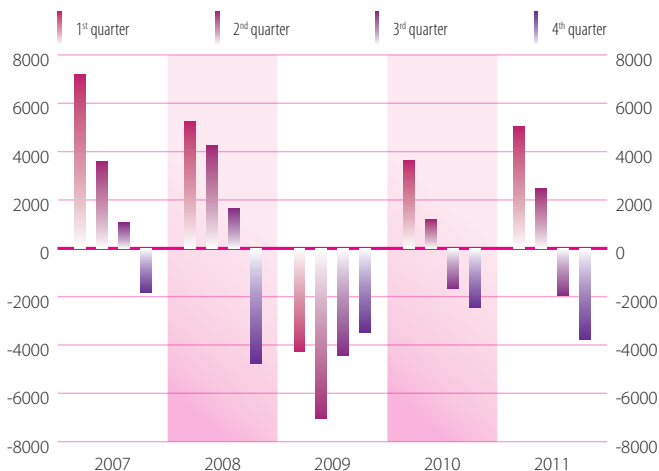
All qualities
in '000 metric tonnes

REAL & APPARENT CONSUMPTION



STOCK CHANGE

		2007	2008	2009	2010	2011
1st quarter	■	7203	5253	-4269	3636	5019
2nd quarter	■	3576	4248	-7062	1191	2457
3rd quarter	■	1053	1659	-4434	-1674	-1971
4th quarter	■	-1833	-4749	-3471	-2457	-3771



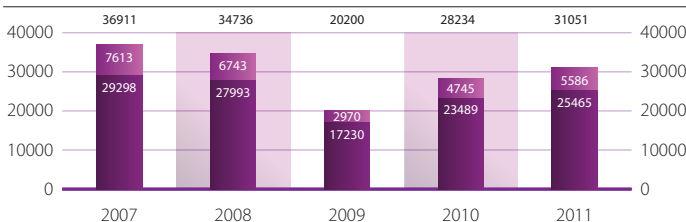
10 • MARKET SUPPLY

European Deliveries

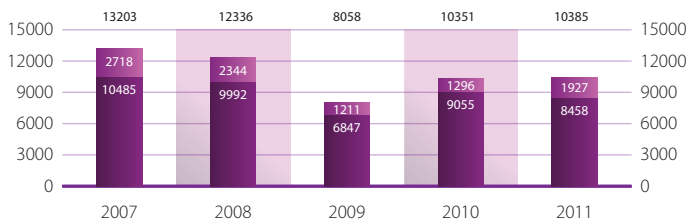
Imports third countries

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

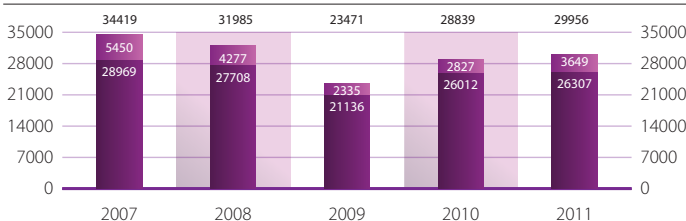
HOT ROLLED FLAT PRODUCTS



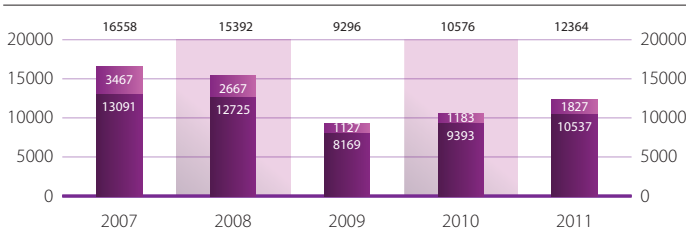
COLD ROLLED SHEETS



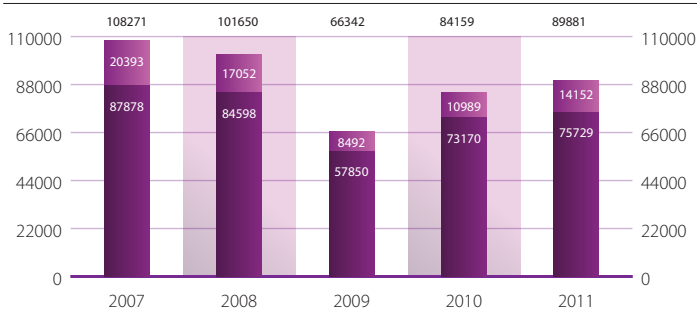
TOTAL COATED SHEETS



QUARTO PLATES



TOTAL FLAT PRODUCTS

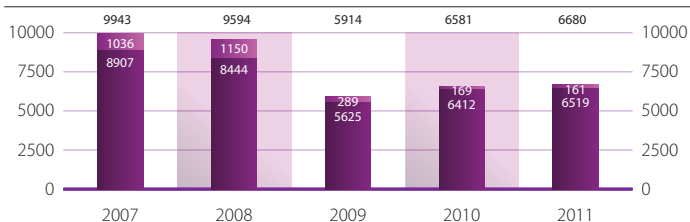


Non-alloy steels
and other alloy steels
in '000 metric tonnes

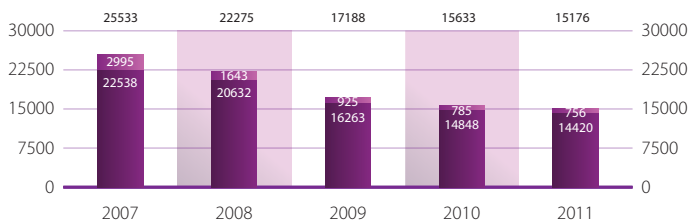
European
Deliveries

Imports third
countries

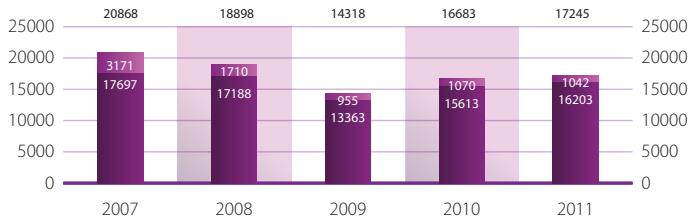
BEAMS



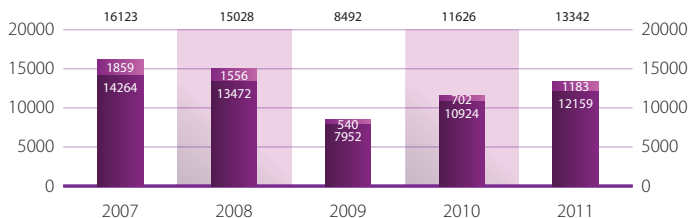
REBARS + DEFORMED RODS



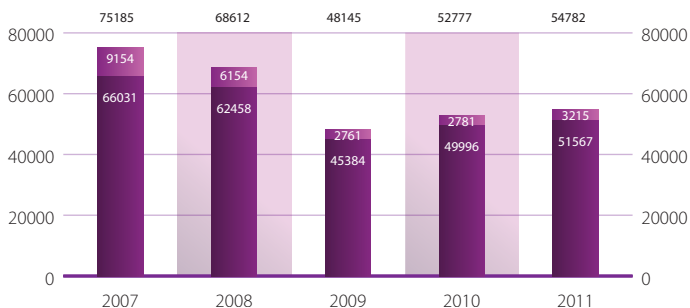
WIRE ROD - DEFORMED RODS



MERCHANT BARS



TOTAL LONG PRODUCTS

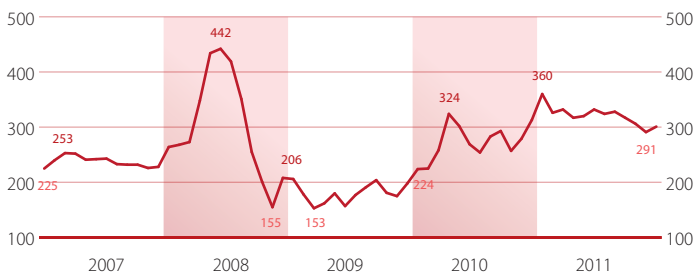


12 · SCRAP

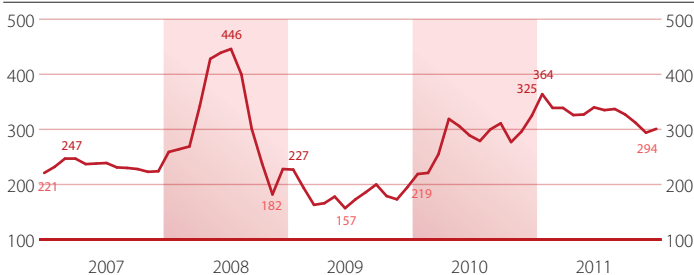
EU Scrap price index (2001 = 100) based on the average price in France, Germany, Italy Spain and United Kingdom.

Higher / Lower value of each year

DEMOLITION QUALITY



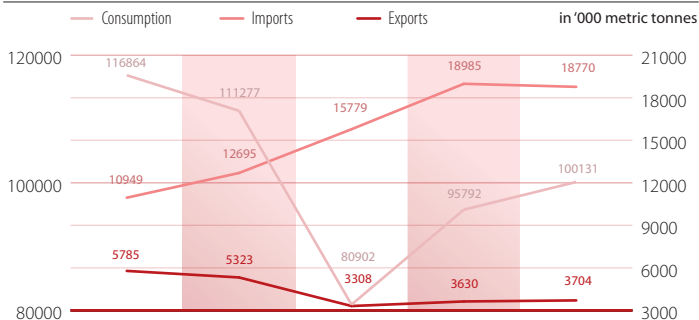
NEW ARISING



SHREDDED



SCRAP IMPORTS, EXPORTS & CONSUMPTION

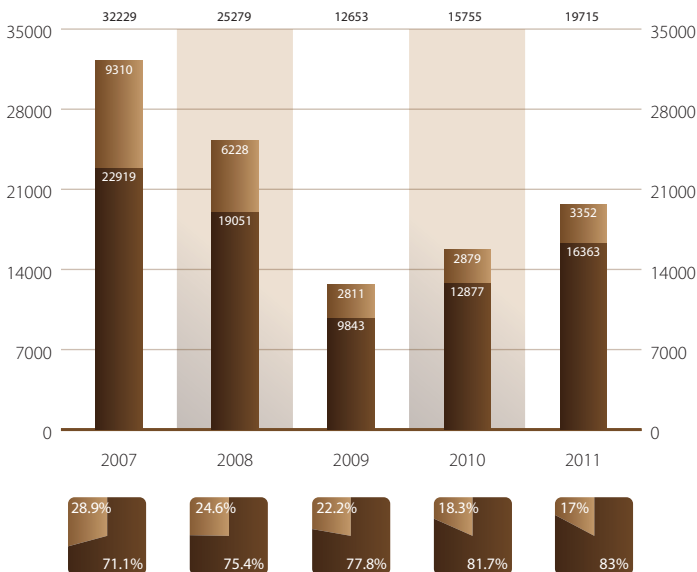


All qualities
in '000 metric tonnes

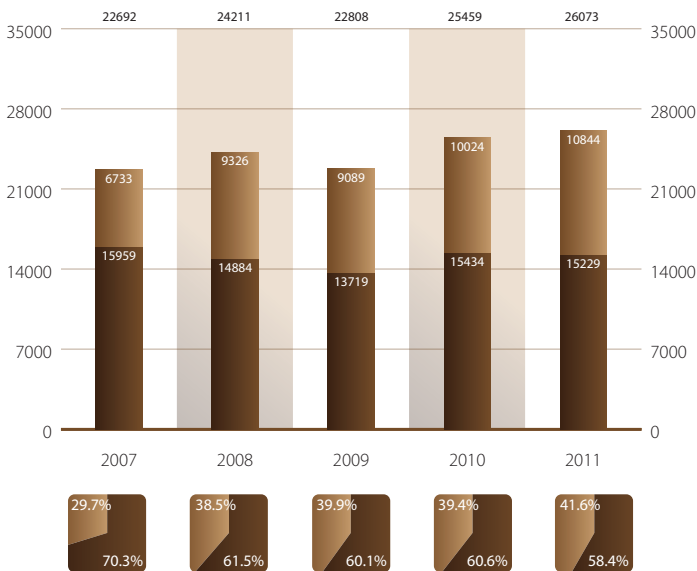
Flat

Long

THIRD COUNTRIES IMPORTS



THIRD COUNTRIES EXPORTS



14 • TRADE

All qualities

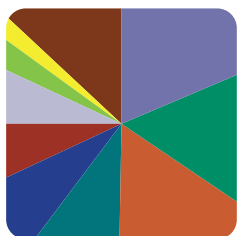
TOP IMPORTS

FLAT PRODUCTS



	2011	Avg'06/'10
China	24%	26%
Ukraine	13%	6%
Russia	12%	14%
Turkey	10%	4%
South Korea	8%	6%
India	7%	7%
Serbia	5%	6%
Brazil	4%	4%
Taiwan	3%	2%
Others	15%	23%

LONG PRODUCTS



	2011	Avg'06/'10
Ukraine	19%	10%
Turkey	16%	32%
Switzerland	16%	9%
Norway	10%	6%
Russia	8%	6%
Belarus	7%	5%
China	7%	13%
South Korea	3%	5%
India	2%	1%
Others	13%	14%

TOP EXPORTS

FLAT PRODUCTS



	2011	Avg'06/'10
Turkey	20%	22%
U.S.A.	11%	10%
India	8%	7%
Switzerland	8%	7%
Russia	5%	4%
China	5%	5%
Mexico	5%	4%
Algeria	2%	2%
Pakistan	2%	2%
Others	34%	37%

LONG PRODUCTS



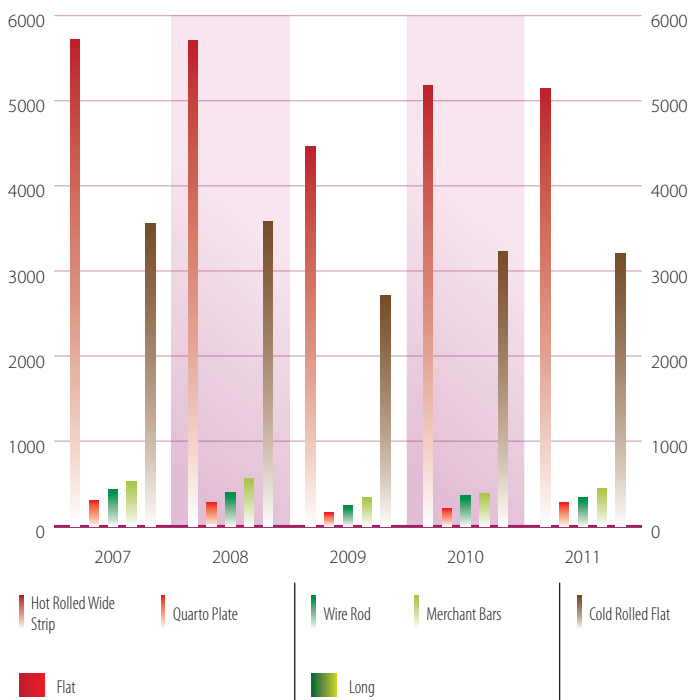
	2011	Avg'06/'10
Algeria	29%	25%
Turkey	8%	8%
U.S.A.	8%	10%
Switzerland	7%	9%
Canada	4%	3%
Morocco	2%	2%
United Arab Emirates	2%	2%
Norway	2%	3%
Israel	2%	1%
Others	35%	37%

in '000 metric tonnes

TOTAL FINISHED STAINLESS STEEL PRODUCTION

	2007	2008	2009	2010	2011	
Total Hot Rolled	6975	6943	5207	6136	6211	
Flat	6019	5988	4622	5386	5425	
Hot Rolled Wide Strip	■	5714	5704	4464	5176	5147
Quarto Plate	■	304	284	158	210	278
Long		956	955	585	750	786
Wire Rod	■	433	392	241	359	336
Merchant Bars	■	523	563	344	391	450
Cold Rolled Flat	■	3558	3581	2710	3224	3210

VOLUME PER SELECTED PRODUCT CATEGORY



Shares in total hot rolled:



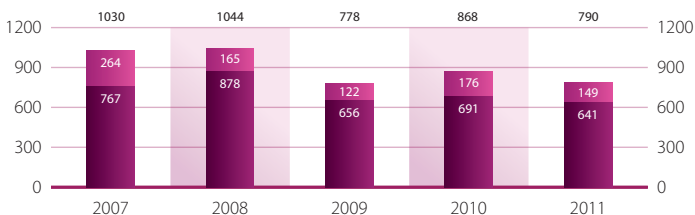
16 • STAINLESS STEEL - MARKET SUPPLY

European Deliveries

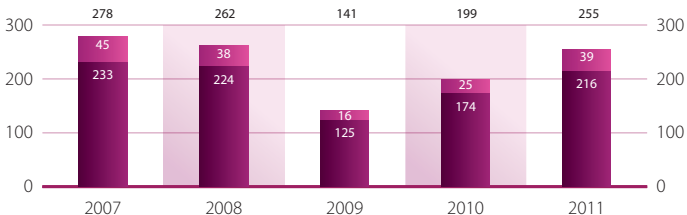
Imports third countries

in '000 metric tonnes

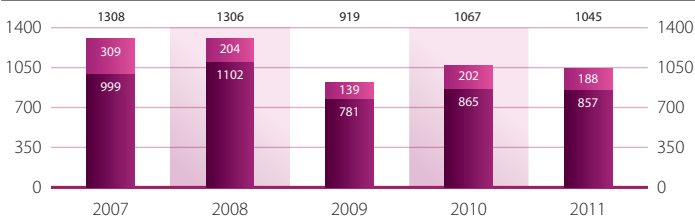
HOT ROLLED STRIP MILL PRODUCTS FOR DIRECT USE



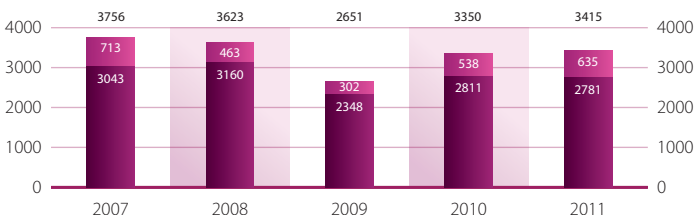
QUARTO PLATES



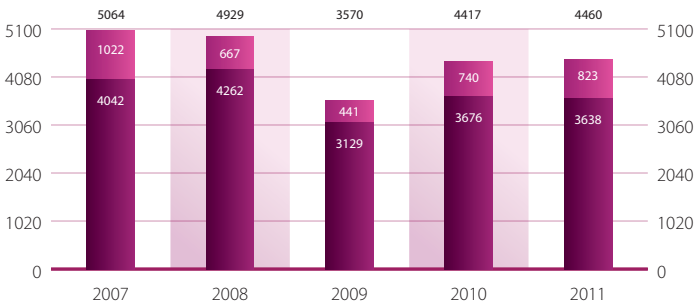
TOTAL HOT ROLLED FLAT PRODUCTS



COLD ROLLED FLAT PRODUCTS



TOTAL STAINLESS STEEL FLAT PRODUCTS



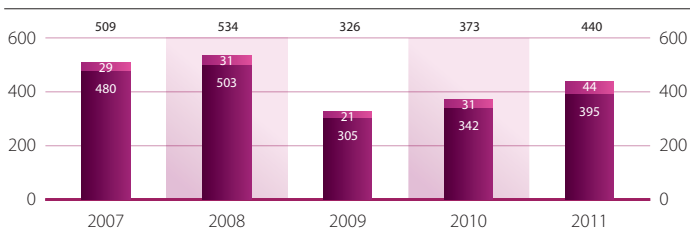
STAINLESS STEEL - MARKET SUPPLY • 17

in '000 metric tonnes

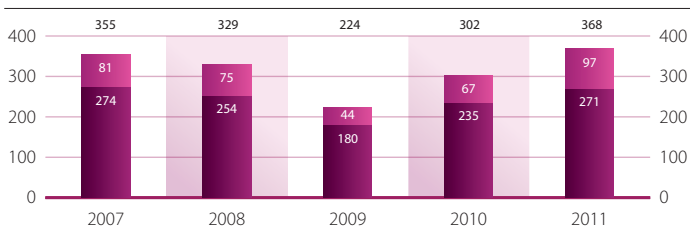
European Deliveries

Imports third countries

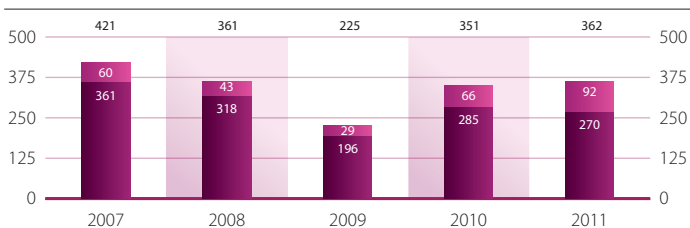
HOT ROLLED BARS AND SECTIONS



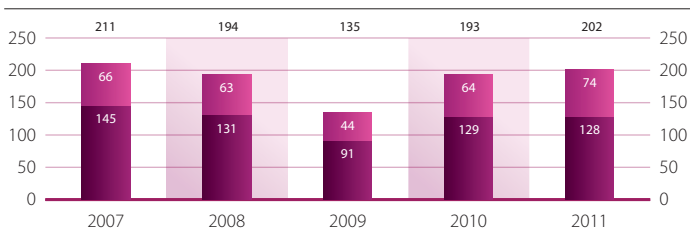
BRIGHT BARS



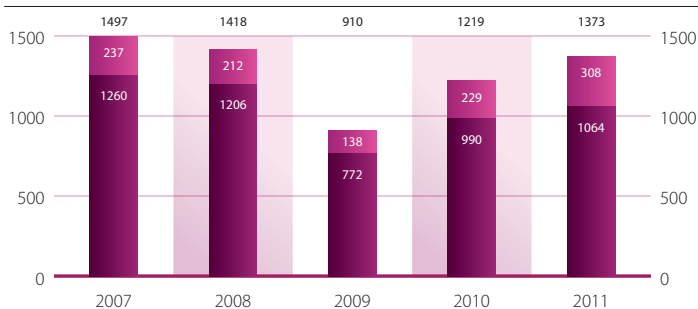
WIRE ROD



DRAWN WIRES



TOTAL STAINLESS STEEL LONG PRODUCTS



Including 1st transformation

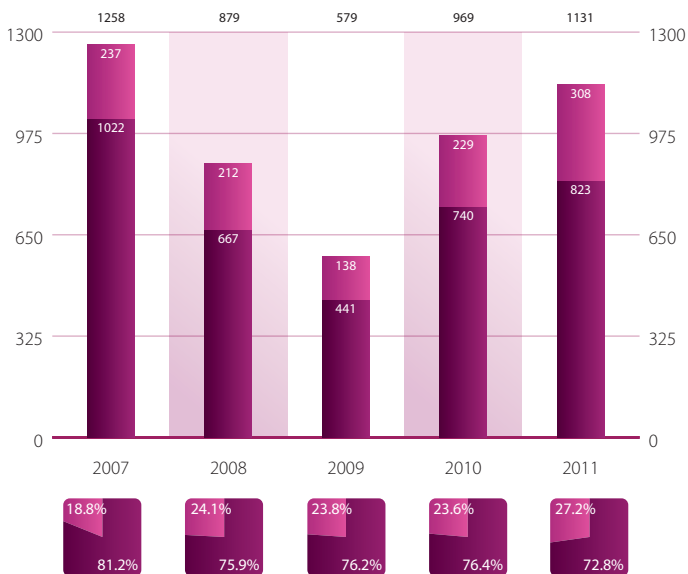
18 • STAINLESS STEEL - TRADE

Flat Long

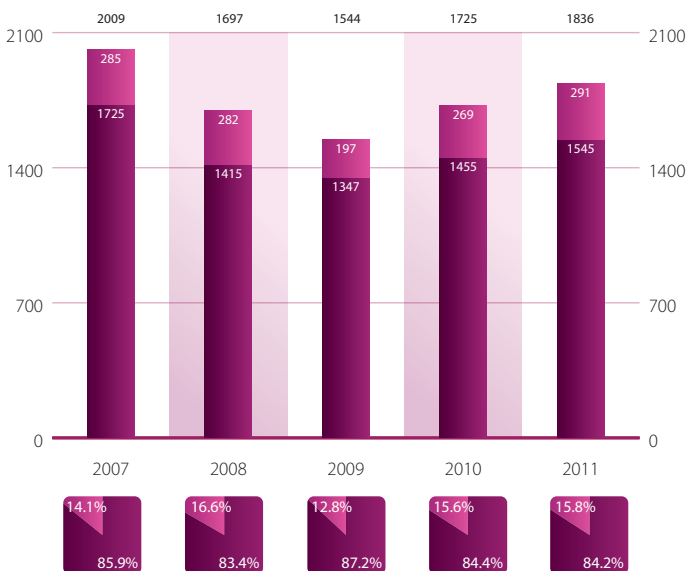
in '000 metric tonnes

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 Industr – BAMl

Celsa Group
<http://www.gcelsa.com>

Chambre Syndicale des Producteurs d'Aciers Fins et Spéciaux
<http://www.spas.fr>

CMC Zawiercie
<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

Evraz 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.com>

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 Przemysłowo-Handlowa
<http://www.hiph.com.pl>

ISD Dunaferr
<http://www.dunaferr.hu>

ISD Huta Czeszochowa
<http://www.isd-hcz.com.pl>

Jernkontoret
<http://www.jernkontoret.se>

Lech-Stahlwerke
<http://www.lech-stahlwerke.de>

Liepājas Metalurģs
<http://www.metalurģs.lv>

Lucchini Group
<http://www.lucchini.it>

Magyar Vas-és Acélpári Egyesülés
<http://www.mvae.hu>

Marienhütte
<http://www.marienhuetten.at>

Metallinjaloštajat
<http://www.teknologiateollisuus.fi/>

Metinvest Trametall
<http://www.trametall.it>

Nedstaal BV
<http://www.nedstaal.nl>

NLMK Europe
<http://www.eu.nlmk.com>

Outokumpu
<http://www.outokumpu.com>

Ovako Group
<http://www.ovako.com>

Riva Group
<http://www.rivagroup.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.tatasteelurope.com>

ThyssenKrupp AG
<http://www.thyssenkrupp.com>

Trinecké Železářny
<http://www.trz.cz>

U.S. Steel Kosice
<http://www.usste.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.vorsklaesteel.com>

Wirtschaftsvereinigung Stahl
<http://www.wvstahl.de>

ASSOCIATED MEMBERS

Çolakoglu Metalurji
<http://www.colakoglu.com.tr>

Demir Çelik Üreticileri Derneği - DÇÜD
<http://www.dcuud.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>

HABAŞ - Sinaı ve Tibbi Gazlar İstihsal Endüstrisi
<http://www.habas.com.tr>

İçdas Çelik Enerji - Tersane ve Ulaşım Sanayi
<http://www.icdas.com.tr>

IDÇ - İzmir Demir Çelik Sanayi
<http://www.idcsteel.com>

İsdemir - İskenderun Demir ve Çelik Fabrikaları
<http://www.isdemir.com.tr>

Kremikovtzi
<http://www.kremikovtzi.com>

Swiss Steel
<http://www.swiss-steel.com>

