

2015 EDITION
COVERING 2010-2014
EUROPEAN STEEL IN FIGURES



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The EU steel market has been showing the first signs of recovery in 2014 as demand bounced back from the low level reached in 2012 and 2013.

Investment remained the weak spot of the economy. Difficult access to finance and credit, deleveraging, overcapacities in many sectors and unfavourable regulatory framework conditions in combination with business perspectives being obscured by economic and (geo-) political uncertainties have resulted in the corporate sector in Europe shying away from more rigorous investment.

At the start of the year, activity in the steel using sectors was boosted by very mild weather conditions. However, this positive effect faded in Q2, revealing rather weak momentum in most sectors with the exception of the automotive industry. Business conditions in industry remained challenging, also in the second half of the year.

While the EU steel market recovered from the slump in the 2012-2013 period, the almost 4% rise in steel demand benefited mostly third country steel suppliers. Total imports rose almost 12% in 2014, whereas domestic shipments from EU producers rose by less than 2%.

Also for 2015, the key uncertainty for EU steel producers is whether third country imports will prevent them from benefiting from the mildly positive trend expected for EU steel demand.

In this seventh edition of "European Steel in Figures" you will find the usual background information on the EU steel market over the past five years. I hope this overview will once more meet your expectations and prove valuable to you.

For further information you may want to visit our website:

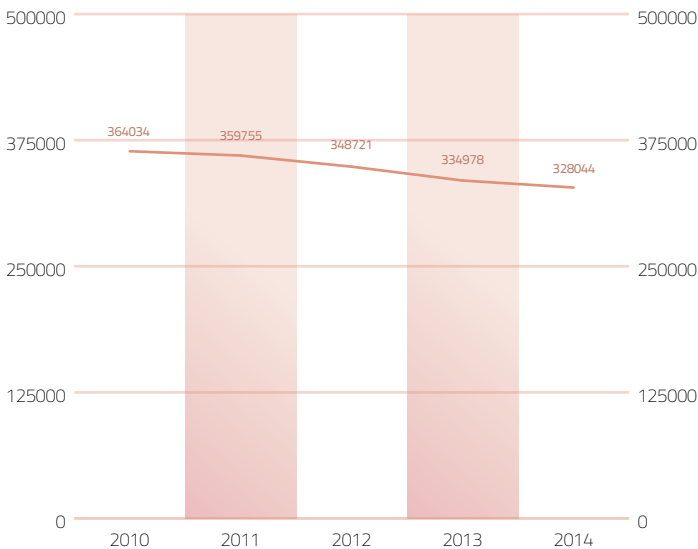
www.eurofer.eu

May 2015

Axel Eggert

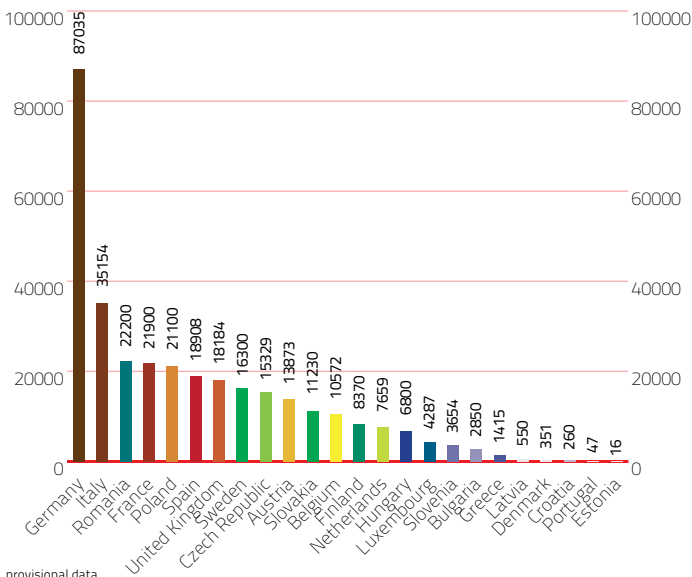
Director General

EVOLUTION OF EMPLOYMENT



provisional data for 2014

EMPLOYMENT (2014)



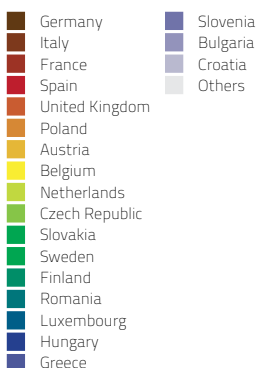
provisional data

All qualities
in '000 metric tonnes

CRUDE STEEL OUTPUT PER COUNTRY

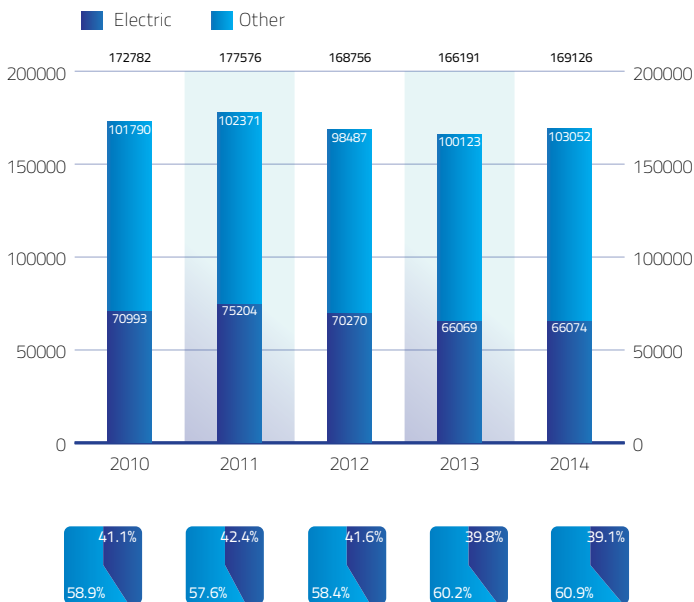
	2010	2011	2012	2013	2014	% share of EU 2014
Austria	7206	7474	7421	7953	7876	4.7
Belgium	7973	8026	7301	7093	7331	4.3
Bulgaria	744	835	633	523	612	0.4
Croatia	95	96	1	135	167	0.1
Czech Republic	5179	5583	5072	5152	5360	3.2
Finland	4030	3986	3759	3517	3807	2.2
France	15414	15780	15607	15685	16143	9.5
Germany	43830	44284	42661	42645	42943	25.4
Greece	1821	1934	1247	1030	1022	0.6
Hungary	1678	1732	1542	883	1131	0.7
Italy	25750	28735	27252	24093	23714	14
Luxembourg	2548	2521	2208	2089	2193	1.3
Netherlands	6651	6937	6879	6713	6964	4.1
Poland	7993	8779	8366	7950	8541	5
Romania	3613	3645	3292	2985	3158	1.9
Slovakia	4588	4242	4403	4511	4705	2.8
Slovenia	606	665	666	654	641	0.4
Spain	16343	15504	13639	14130	14187	8.4
Sweden	4817	4829	4289	4372	4514	2.7
United Kingdom	9706	9478	9753	11874	12061	7.1
Others	2198	2510	2764	2206	2053	1.2
EU 28	172782	177576	168756	166191	169126	100

SHARE PER COUNTRY (2014)

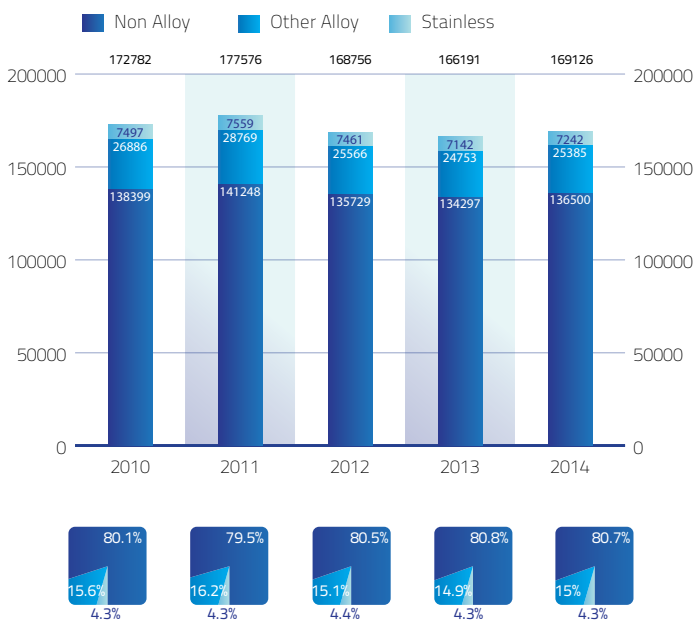


All qualities
in '000 metric tonnes

CRUDE STEEL PRODUCTION BY PROCESS



CRUDE STEEL PRODUCTION BY QUALITY



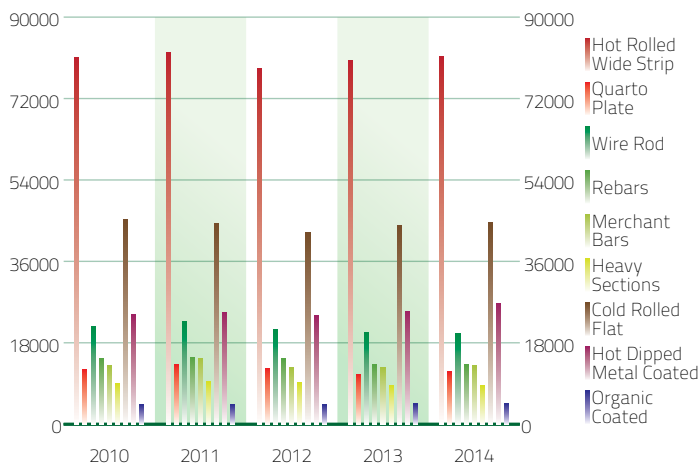
FINISHED STEEL PRODUCTION

All qualities
in '000 metric tonnes

TOTAL FINISHED STEEL PRODUCTION

	2010	2011	2012	2013	2014
Total Hot Rolled	156508	161573	152666	150524	152464
Flat	94967	97086	92602	92834	94333
Hot Rolled Wide Strip	81164	82151	78729	80358	81281
Quarto Plate	12143	13175	12350	11019	11548
Long	61541	64487	60064	57690	58131
Wire Rod	21652	22698	20830	20235	20083
Rebars	14628	14849	14469	13105	13225
Merchant Bars	12944	14568	12447	12562	13058
Heavy Sections	9055	9335	9300	8584	8590
Cold Rolled Flat	45367	44466	42419	43915	44633
Hot Dipped Metal Coated	24149	24805	23985	25009	26791
Organic Coated	4339	4346	4318	4479	4564

VOLUME PER SELECTED PRODUCT CATEGORY

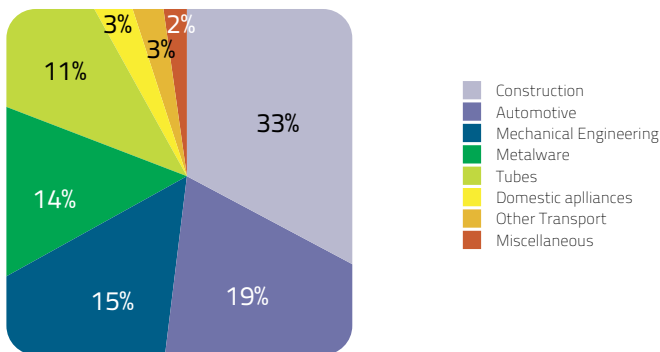


Shares in total hot rolled:



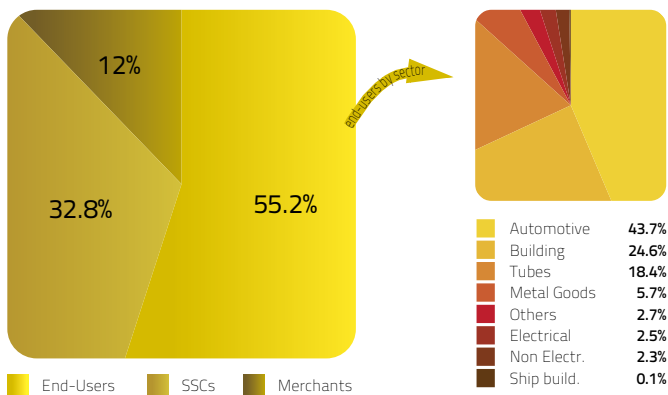
All qualities:

SECTOR SHARES IN TOTAL STEEL CONSUMPTION

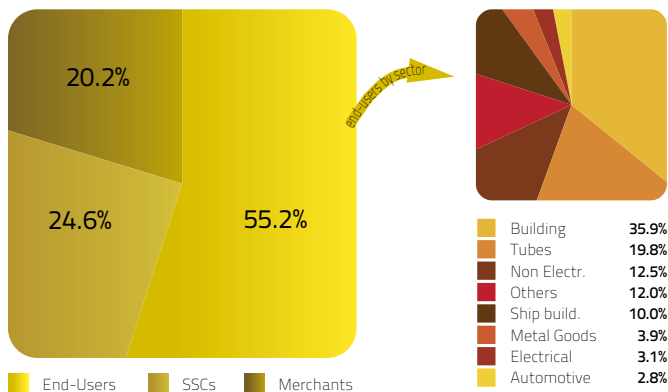


Non-alloy steels and other alloy steels:

FLAT PRODUCTS DELIVERIES: STRIP MILL PRODUCTS



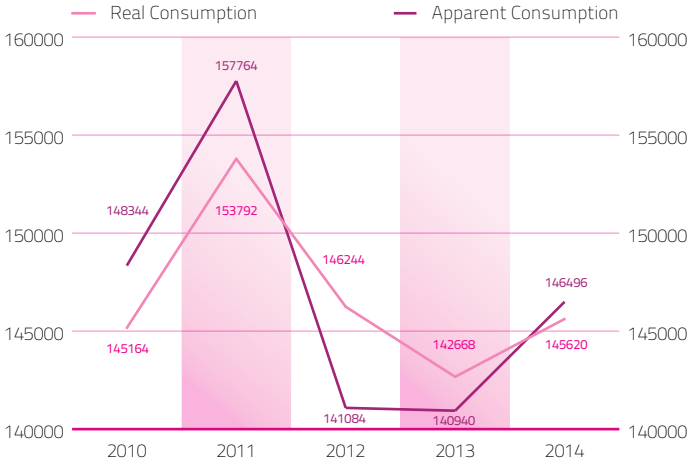
FLAT PRODUCTS DELIVERIES: QUARTO PLATES



REAL vs APPARENT CONSUMPTION

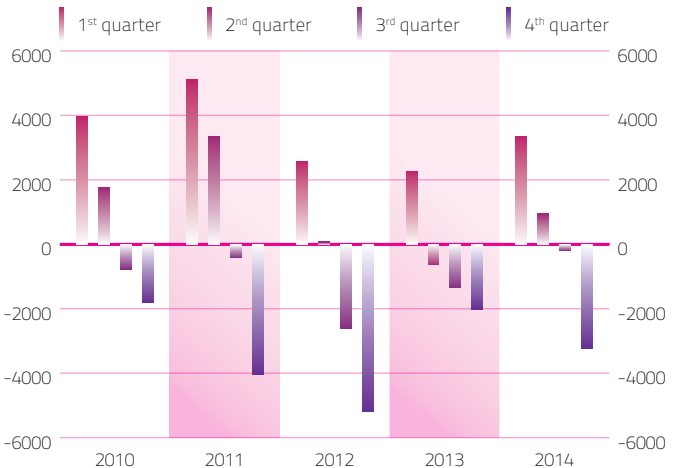
All qualities
in '000 metric tonnes

REAL & APPARENT CONSUMPTION



STOCK CHANGE

	2010	2011	2012	2013	2014
1st quarter	3966	5103	2574	2265	3351
2nd quarter	1767	3333	72	-636	945
3rd quarter	-768	-414	-2628	-1350	-189
4th quarter	-1794	-4047	-5175	-2010	-3228

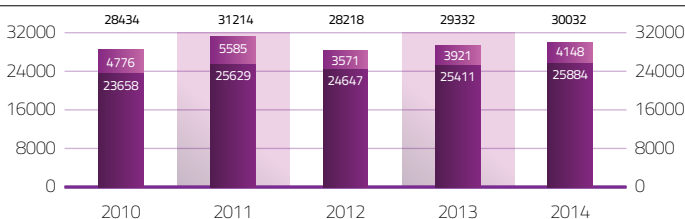


European Deliveries

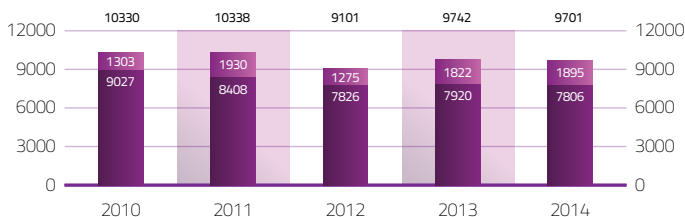
Imports third countries

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

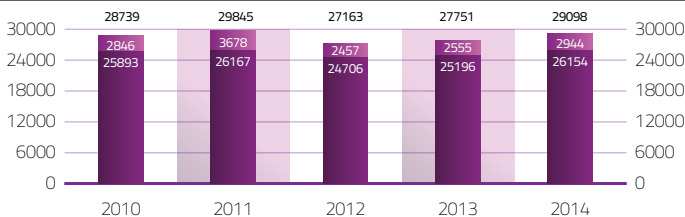
HOT ROLLED FLAT PRODUCTS



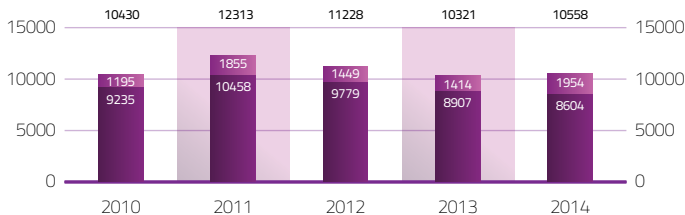
COLD ROLLED SHEETS



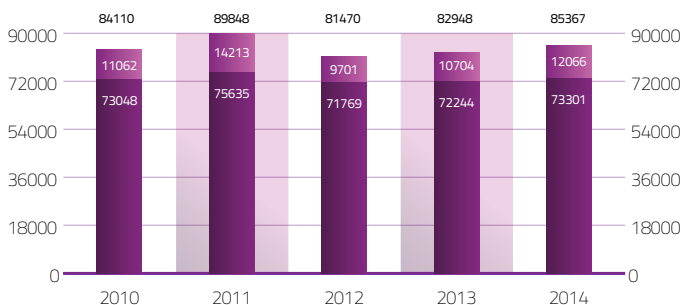
TOTAL COATED SHEETS



QUARTO PLATES



TOTAL FLAT PRODUCTS



MARKET SUPPLY

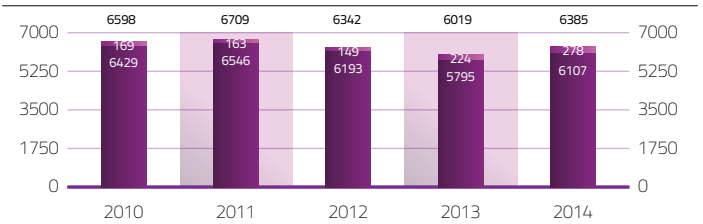
11

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

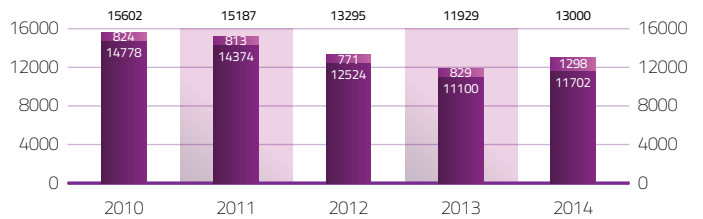
European Deliveries

Imports third countries

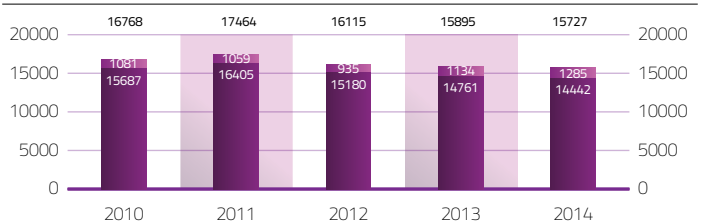
BEAMS



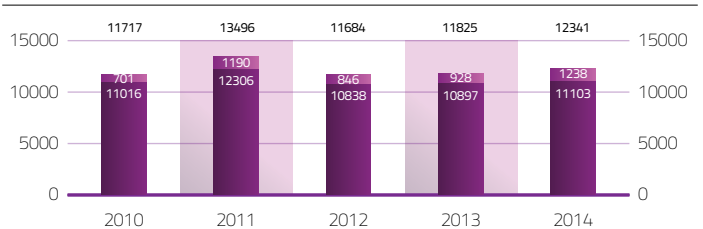
REBARS + DEFORMED RODS



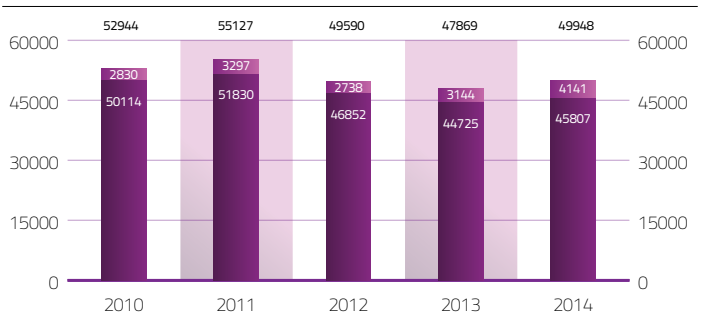
WIRE ROD - DEFORMED RODS



MERCHANT BARS



TOTAL LONG PRODUCTS



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



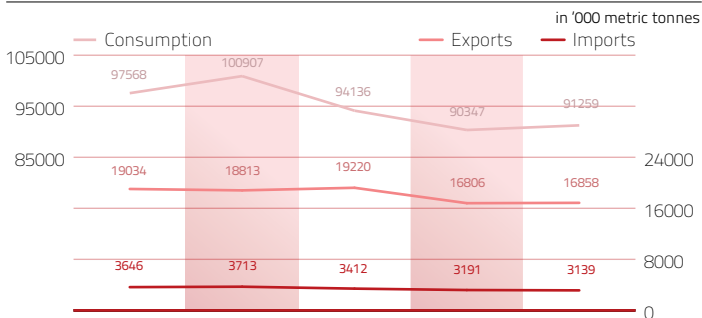
NEW ARISING



SHREDDED



SCRAP IMPORTS, EXPORTS & CONSUMPTION

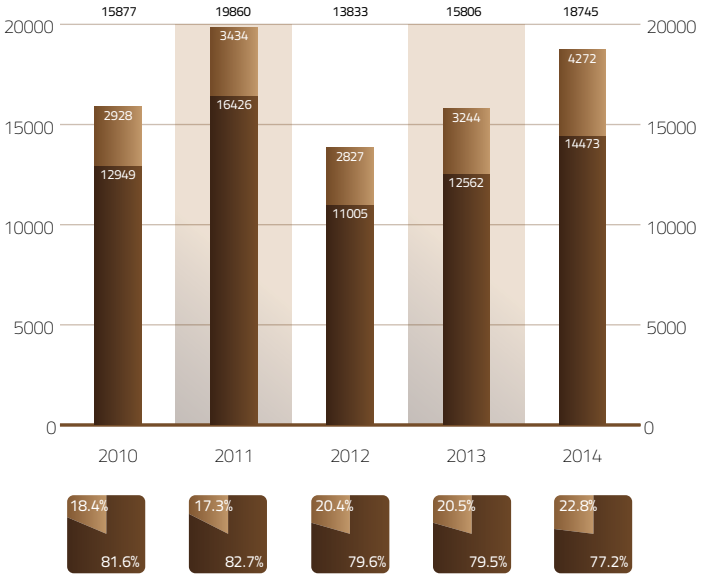


All qualities
in '000 metric tonnes

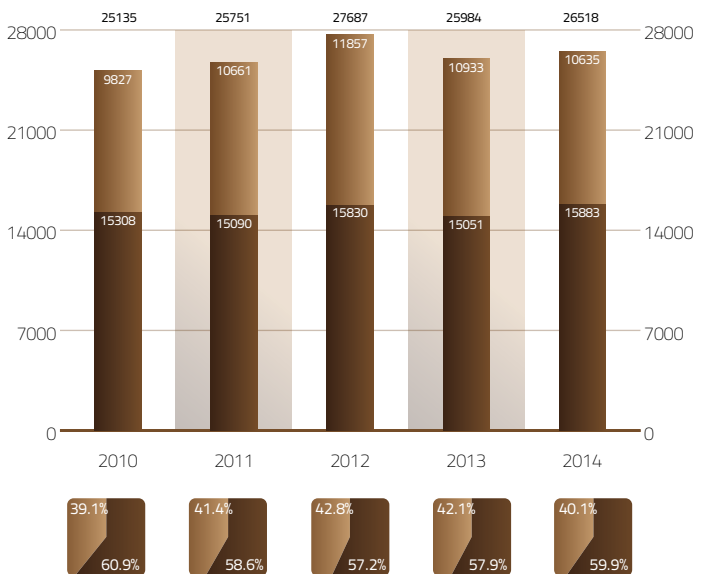
Flat

Long

THIRD COUNTRIES IMPORTS



THIRD COUNTRIES EXPORTS



All qualities

TOP IMPORTS FLAT PRODUCTS



	2014	Avg'09/'13
China	30%	22%
Russia	13%	17%
India	8%	7%
South Korea	7%	9%
Serbia	6%	5%
Ukraine	5%	13%
Egypt	4%	2%
Turkey	4%	8%
Former Yugoslav Republic	3%	2%
Others	22%	17%

LONG PRODUCTS



	2014	Avg'09/'13
Turkey	27%	18%
China	11%	5%
Ukraine	10%	16%
Switzerland	10%	15%
South Korea	7%	4%
Russia	6%	8%
Norway	6%	10%
Moldova	5%	2%
Belarus	4%	8%
Others	13%	14%

TOP EXPORTS FLAT PRODUCTS



	2014	Avg'09/'13
Turkey	22%	22%
U.S.A.	19%	11%
Switzerland	6%	7%
China	6%	5%
Russia	5%	5%
Algeria	4%	3%
India	4%	7%
Mexico	4%	4%
Morocco	2%	2%
Others	29%	34%

LONG PRODUCTS



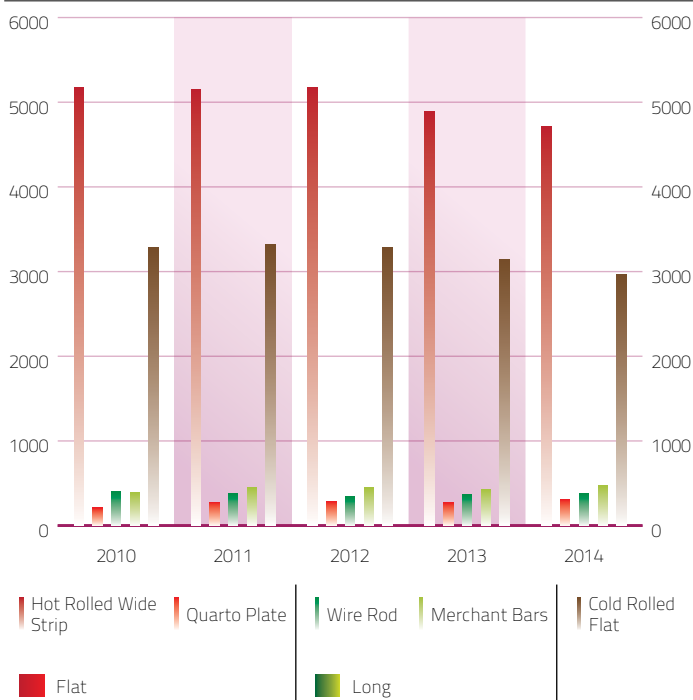
	2014	Avg'09/'13
Algeria	40%	32%
U.S.A.	10%	7%
Switzerland	8%	8%
Turkey	6%	8%
Canada	4%	3%
Morocco	3%	3%
Norway	2%	2%
China	2%	2%
Israel	2%	2%
Others	22%	34%

in '000 metric tonnes

TOTAL FINISHED STAINLESS STEEL PRODUCTION

	2010	2011	2012	2013	2014
Total Hot Rolled	6174	6256	6255	5959	5875
Flat	5386	5424	5464	5157	5019
Hot Rolled Wide Strip	5176	5146	5179	4887	4711
Quarto Plate	210	278	285	270	308
Long	789	832	791	803	856
Wire Rod	398	383	346	373	384
Merchant Bars	390	449	445	430	472
Cold Rolled Flat	3290	3315	3279	3141	2971

VOLUME PER SELECTED PRODUCT CATEGORY



Shares in total hot rolled:

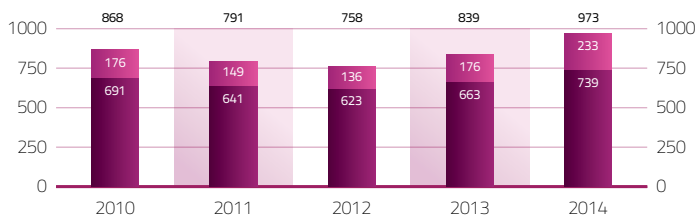


16 STAINLESS STEEL - MARKET SUPPLY

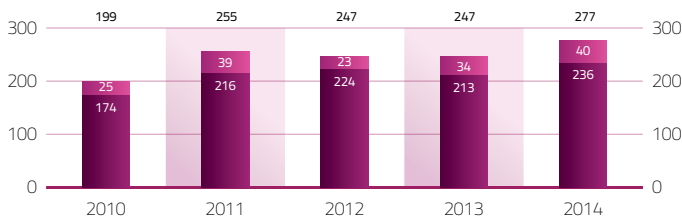
in '000 metric tonnes

European Deliveries Imports third countries

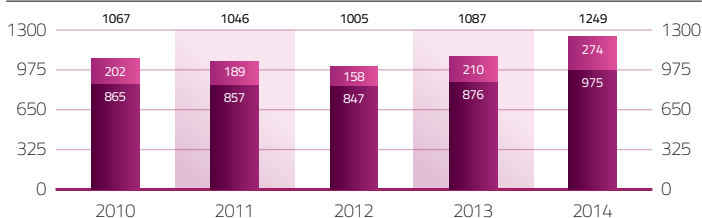
HOT ROLLED STRIP MILL PRODUCTS FOR DIRECT USE



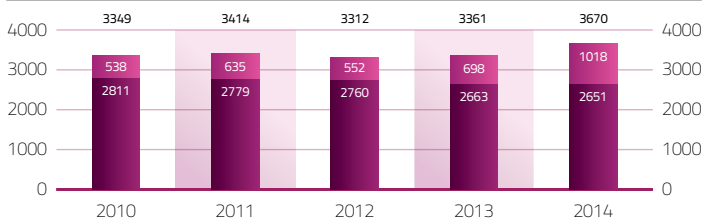
QUARTO PLATES



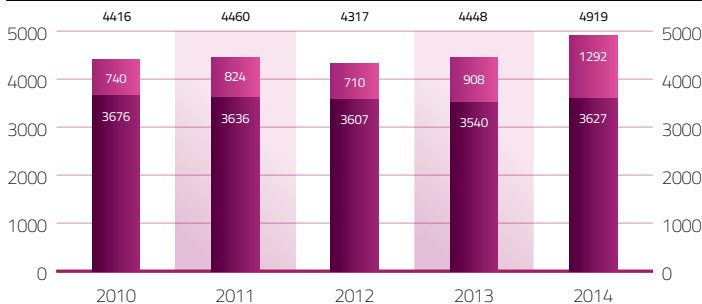
TOTAL HOT ROLLED FLAT PRODUCTS



COLD ROLLED FLAT PRODUCTS



TOTAL STAINLESS STEEL FLAT PRODUCTS

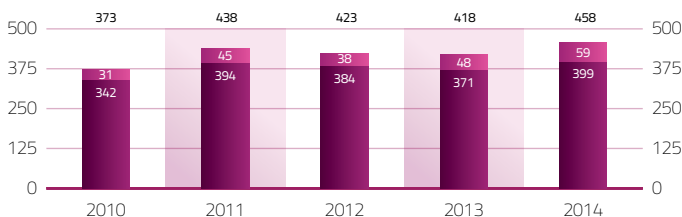


STAINLESS STEEL - MARKET SUPPLY 17

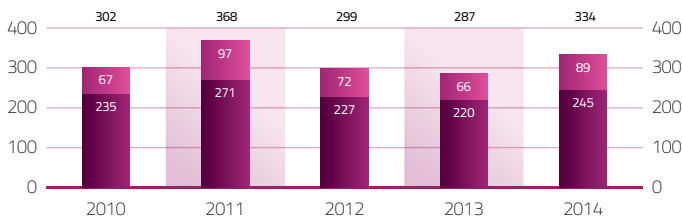
in '000 metric tonnes

European Deliveries Imports third countries

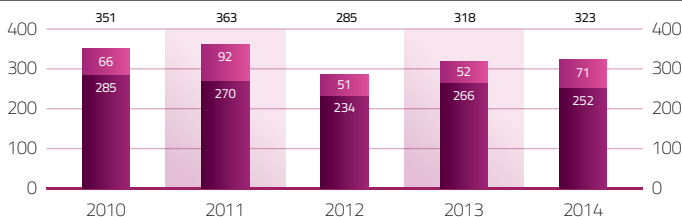
HOT ROLLED BARS AND SECTIONS



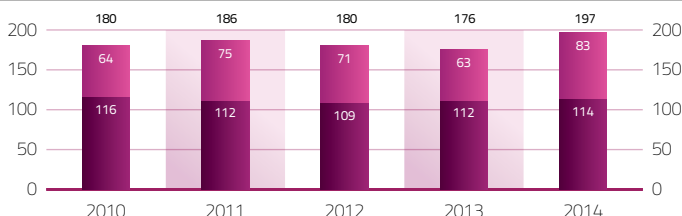
BRIGHT BARS



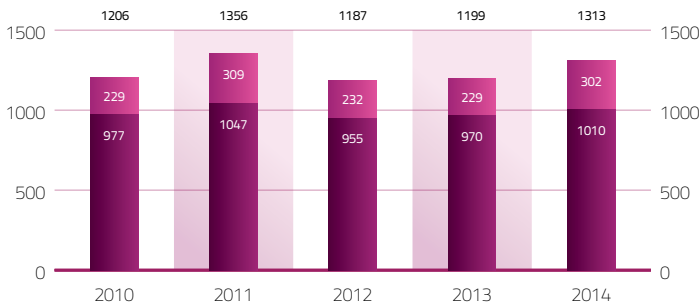
WIRE ROD



DRAWN WIRES



TOTAL STAINLESS STEEL LONG PRODUCTS



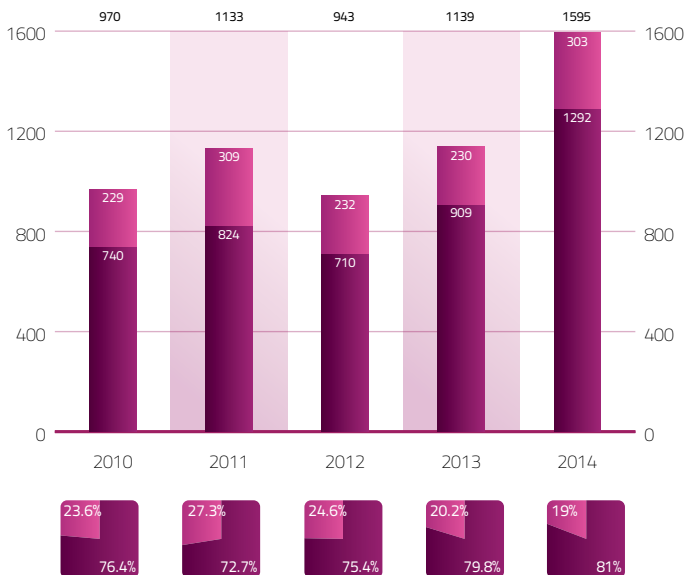
Including 1st transformation

Flat Long

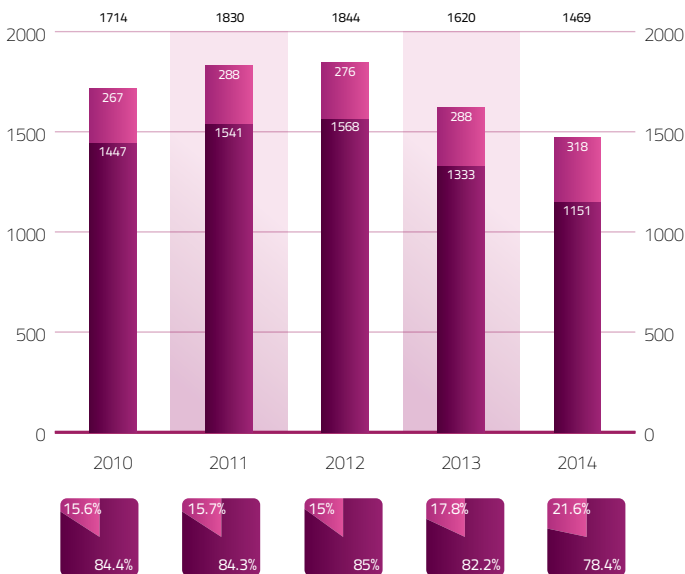
in '000 metric tonnes

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

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>

FNSteel Group
<http://www.fnsteel.eu>

Georgsmarienhütte
<http://www.gmh.de>

Groupeement de la Sidérurgie – GSV
<http://www.steelbel.be>

Halyvourgiki
<http://www.halyvourgiki.com>

Hellenic Steelmakers' Union – ENXE

Helliniki Halyvourgia
<http://www.hlv.gr>

Hutnictvi Železa
<http://www.hz.cz>

Hutnicza Izba Przemysłowa-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>

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>

Officine Tecnosider
<http://www.officinetecnosider.it>

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

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

Riva Forni Elettrici
<http://www.rivafe.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 Producatorilor de Otel din Romania – 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>

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

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



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