

# EUROFER

THE EUROPEAN STEEL ASSOCIATION

## EUROPEAN STEEL IN FIGURES 2023



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# About

## **About the European steel industry**

The European steel industry is a world leader in innovation and environmental sustainability. It has a turnover of around €130 billion and directly employs about 306,000 highly-skilled people in the EU, producing on average 152 million tonnes of steel per year. More than 500 steel production sites across 22 EU Member States provide direct and indirect employment to millions more European citizens. Closely integrated with Europe's manufacturing and construction industries, steel is the backbone for development, growth and employment in Europe. Steel is the most versatile industrial material in the world. The thousands of different grades and types of steel developed by the industry make the modern world possible.

Steel is 100% recyclable and therefore is a fundamental part of the circular economy. As a basic engineering material, steel is also an essential factor in the development and deployment of innovative, CO<sub>2</sub>-mitigating technologies, improving resource efficiency and fostering sustainable development in Europe.

## **About EUROFER**

EUROFER AISBL is located in Brussels and was founded in 1976. It represents the entirety of steel production in the European Union. EUROFER members are steel companies and national steel federations throughout the EU. The major steel companies and national steel federation of Turkey and the United Kingdom are associate members.

The European Steel Association is recorded in the EU transparency register: 93038071152-83.

## About the European Steel in Figures 2023 guide

### Disclaimer

The European Steel in Figures guide is the European Steel Association's (EUROFER) annual statistical publication, which is created and issued free of charge. Now in its 15th edition, this publication gives an overview of the key statistical trends in the sector. The statistics presented here are for information only.

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**NOTE:** for the purpose of the European Steel in Figures Guide 2023, please note that since the 2022 edition, EU refers to EU27 instead of EU28, as from 1 January 2021 data for the UK has no longer been included in the EU aggregate subsequently to Brexit. For the sake of consistency, all historical data have been revised accordingly and now, when mentioned, EU aggregate data always refer to EU27.

# Employment & Economic Impact



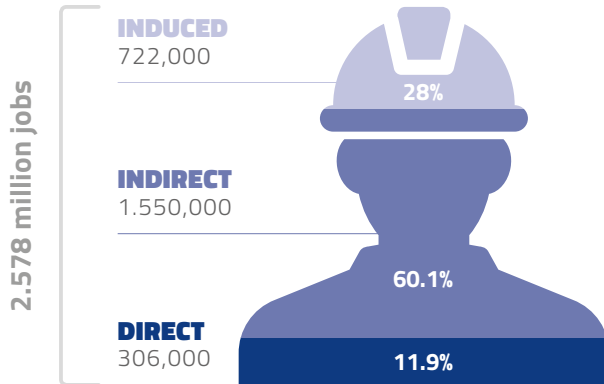
## Employment & GVA in the EU steel industry

### EMPLOYMENT

GRAPHIC • 2022

SOURCE: OXFORD ECONOMICS

The EU steel industry supports more than 2.5 million jobs



	'Type I' multiplier	'Type II' multiplier
Multiplier for GVA	4.5	6.0
Multiplier for jobs	5.9	8.4

The 'type I' multiplier is the ratio of direct plus indirect activity to direct activity.

The 'type II' multiplier is the ratio of total activity to direct activity.

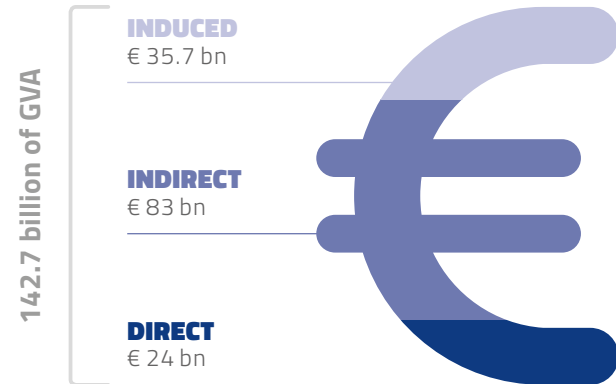
Direct, indirect & induced employment & GVA in the EU steel industry

### GROSS VALUE ADDED

GRAPHIC • 2022

SOURCE: OXFORD ECONOMICS

The EU steel industry creates around €143 billion of Gross Value Added



## Direct employment in the EU steel industry: by country

Employment by absolute numbers

### EMPLOYMENT IN THE EU STEEL INDUSTRY\*

TABLE ■ 2022

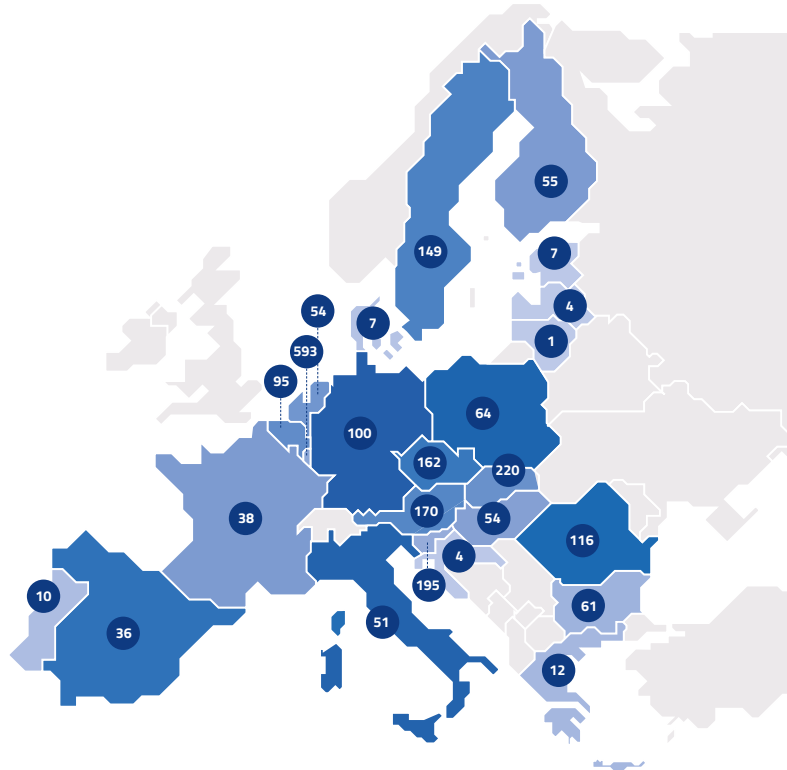
SOURCE: EUROFER  
(Steel Companies + National Steel Companies)

	2022	% shares 2022
1 GERMANY	80,200	26.2 %
2 ITALY	30,714	10.1 %
3 FRANCE	25,317	8.3 %
4 POLAND	23,950	7.8 %
5 ROMANIA	21,474	6.7 %
6 SPAIN	17,150	5.6 %
7 CZECH REPUBLIC	17,000	5.6 %
8 AUSTRIA	15,300	5.0 %
9 SWEDEN	14,673	4.8 %
10 BELGIUM	11,477	3.8 %
11 SLOVAKIA	11,045	3.6 %
12 NETHERLANDS	9,883	3.2 %
13 FINLAND	6,976	2.3 %
14 HUNGARY	5,300	1.7 %
15 SLOVENIA	4,100	1.3 %
16 BULGARIA	4,000	1.3 %
17 LUXEMBOURG	3,830	1.3 %
18 GREECE	1,595	0.5 %
19 PORTUGAL	1,000	0.3 %
20 DENMARK	426	0.1 %
21 CROATIA	180	0.1 %
22 ESTONIA	9	0.1 %
<b>TOTAL</b>	<b>305,599</b>	<b>100.0 %</b>

### EMPLOYMENT IN STEEL PER 100,000 PEOPLE

MAP ■ 2022

SOURCE: EUROFER



\* = Provisional



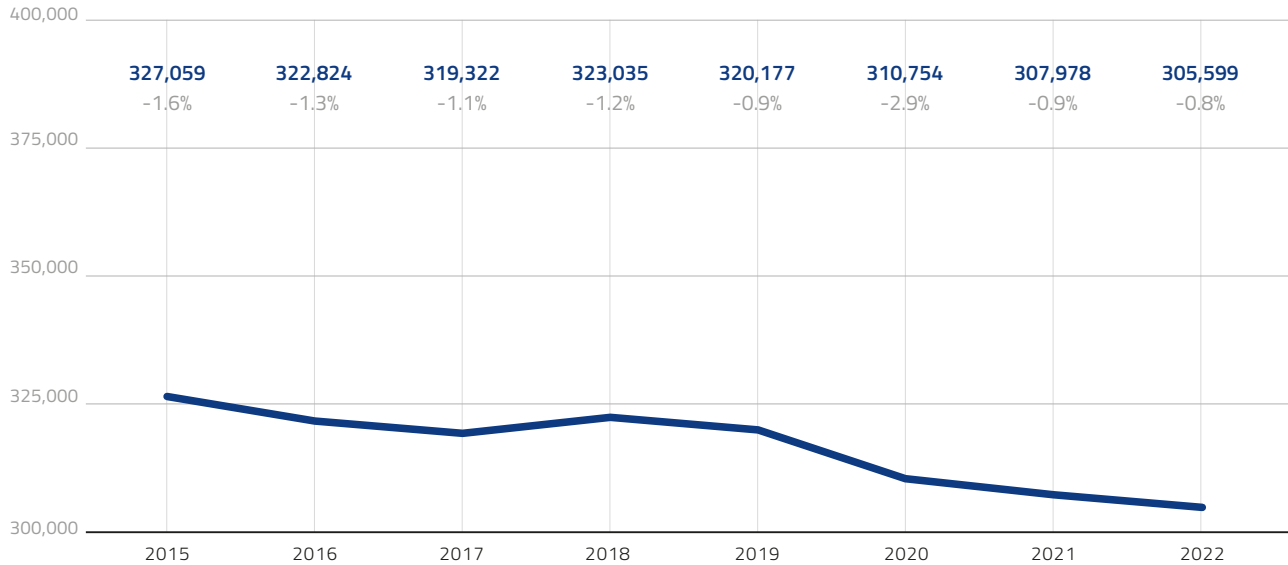
## Employment in the EU steel industry\*

Employment by absolute numbers

### EMPLOYMENT: EVOLUTION

GRAPH ■ 2015 – 2022

\*SOURCE: EUROFER (Steel Companies + National Steel Companies and Associations)



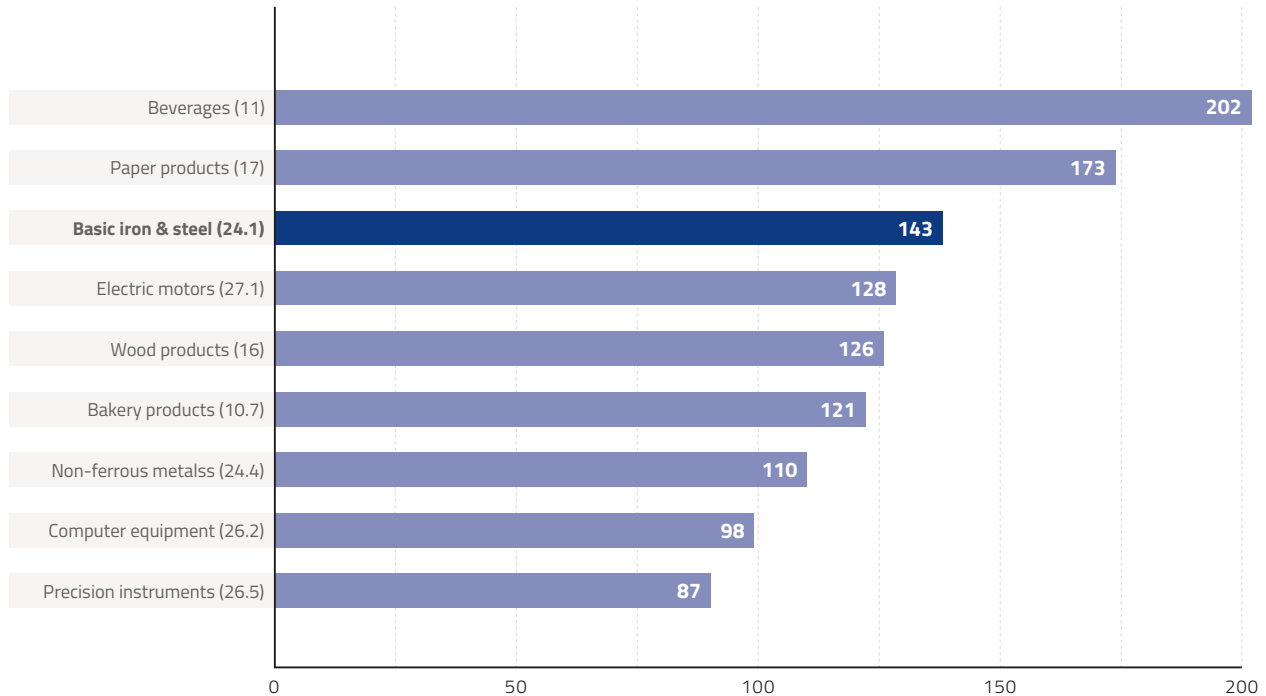
## Gross Value Added: Comparison

Value added • in € '000,000

### VALUE OF PRODUCTION COMPARED WITH OTHER EU INDUSTRIES

CHART • 2022

SOURCE: EUROSTAT – OXFORD ECONOMICS



# Production



## Crude steel production per region: World

All qualities ▪ in '000,000 metric tonnes

REGIONS IN DESCENDING ORDER OF  
CRUDE STEEL PRODUCTION TABLE ▪ 2022

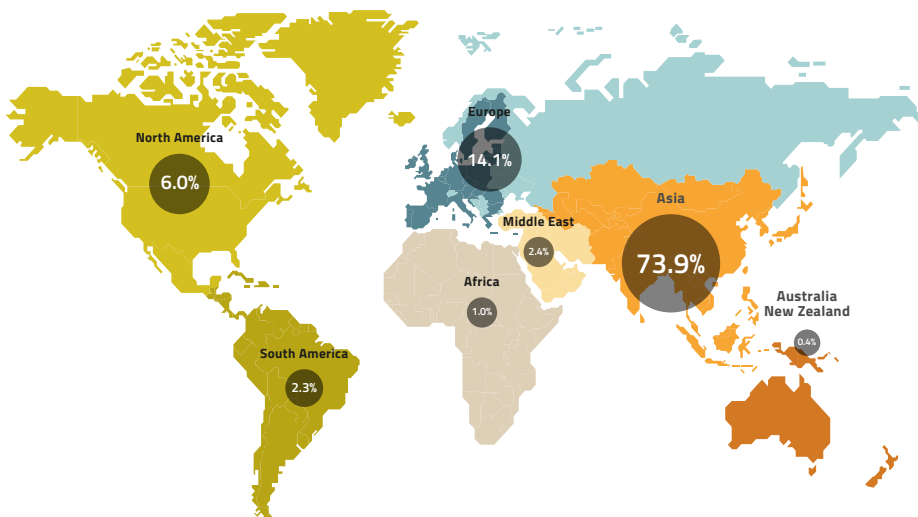
SOURCE: EUROFER

	% shares	
	2022	2022
<b>Asia</b>	<b>1392,1</b>	<b>73,9</b>
▶ of which China	1017	54,0
▶ of which India	125,1	6,6
▶ of which Japan	89,2	4,7
<b>Europe</b>	<b>266,7</b>	<b>14,1</b>
▶ of which EU27	136,3	7,2
▶ of which Ukraine & CIS	85,2	4,5
<b>North America</b>	<b>112,4</b>	<b>6,0</b>
of which United States	80,7	4,3
<b>South America</b>	<b>43,8</b>	<b>2,3</b>
<b>Middle East</b>	<b>44,5</b>	<b>2,4</b>
<b>Africa</b>	<b>18,9</b>	<b>1,0</b>
<b>Australia/New Zealand</b>	<b>6,7</b>	<b>0,4</b>
<b>WORLD</b>	<b>1885,0</b>	<b>100</b>

MAP OF STEEL PRODUCTION BY REGION

MAP ▪ 2022

SOURCE: EUROFER



PRODUCTION

Crude steel production per country: EU

All qualities ▪ in '000,000 metric tonnes

EU COUNTRIES IN DESCENDING ORDER OF CRUDE STEEL PRODUCTION

TABLE ▪ 2022

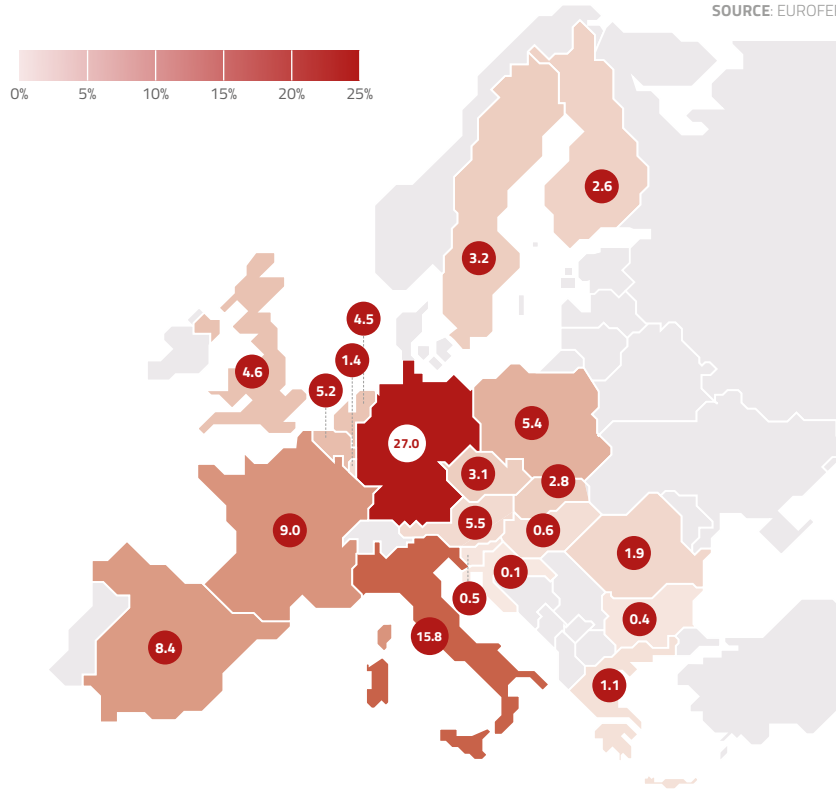
SOURCE: EUROFER

	2022	% shares 2022
1 GERMANY	36,849	27,0%
2 ITALY	21,599	15,8%
3 FRANCE	12,234	9,0%
4 SPAIN	11,464	8,4%
5 AUSTRIA	7,512	5,5%
6 POLAND	7,407	5,4%
7 BELGIUM	7,030	5,2%
8 NETHERLANDS	6,143	4,5%
9 SWEDEN	4,382	3,2%
10 CZECH REPUBLIC	4,262	3,1%
11 SLOVAKIA	3,872	2,8%
12 FINLAND	3,538	2,6%
13 ROMANIA	2,625	1,9%
14 LUXEMBOURG	1,875	1,4%
15 OTHERS	1,855	1,4%
16 GREECE	1,543	1,1%
17 HUNGARY	857	0,6%
18 SLOVENIA	623	0,5%
19 BULGARIA	482	0,4%
20 CROATIA	169	0,1%
<b>EU 27</b>	<b>136,321</b>	<b>100%</b>

EU COUNTRIES SHOWN BY RELATIVE SIZE OF CRUDE STEEL PRODUCTION

MAP ▪ 2022

SOURCE: EUROFER



## Crude steel production per country: EU

All qualities ▪ in '000,000 metric tonnes

## CRUDE STEEL OUTPUT PER COUNTRY

TABLE ▪ 2018 – 2022

SOURCE: EUROFER

	2018	2019	2020	2021	2022	% shares 2022
AUSTRIA	6,885	7,424	6,765	7,884	7,512	5,5%
BELGIUM	7,980	7,760	6,119	6,909	7,030	5,2%
BULGARIA	666	566	484	548	482	0,4%
CROATIA	136	69	45	185	169	0,1%
CZECH REPUBLIC	4,938	4,550	4,450	4,788	4,262	3,1%
FINLAND	4,146	3,473	3,498	4,340	3,538	2,6%
FRANCE	15,385	14,451	11,596	13,947	12,234	9%
GERMANY	42,435	39,627	35,679	40,066	36,849	27%
GREECE	1,467	1,350	1,308	1,498	1,543	1,1%
HUNGARY	1,989	1,769	1,513	1,127	857	0,6%
ITALY	24,496	23,190	20,379	24,412	21,599	15,8%
LUXEMBOURG	2,228	2,119	1,886	2,073	1,875	1,4%
NETHERLANDS	6,813	6,657	6,054	6,620	6,143	4,5%
POLAND	10,167	8,956	7,856	8,454	7,407	5,4%
ROMANIA	3,550	3,448	2,790	3,375	2,625	1,9%
SLOVAKIA	4,947	3,931	3,444	4,863	3,872	2,8%
SLOVENIA	692	669	623	701	623	0,5%
SPAIN	14,299	13,503	11,142	14,234	11,464	8,4%
SWEDEN	4,632	4,699	4,383	4,657	4,382	3,2%
OTHERS	2,215	2,033	2,203	1,953	1,855	1,4%
<b>EU 27</b>	<b>160,066</b>	<b>150,244</b>	<b>132,217</b>	<b>152,782</b>	<b>136,321</b>	<b>100%</b>

## EU crude steel production: by process

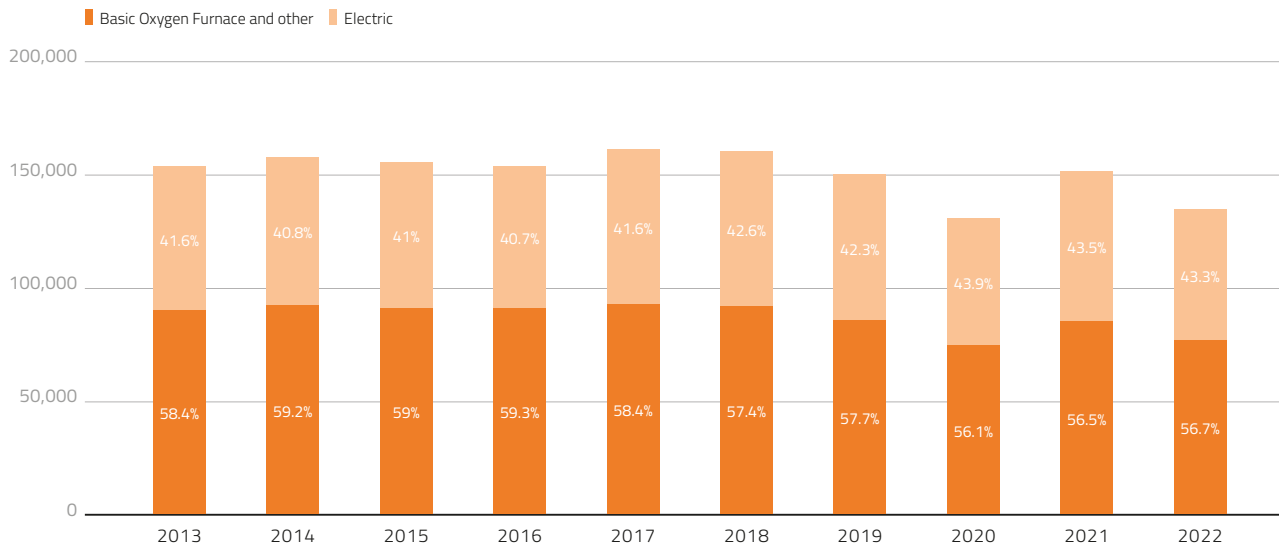
All qualities ▪ in '000,000 metric tonnes

### EU CRUDE STEEL OUTPUT BY PRODUCTION ROUTE

TABLE, CHART ▪ 2013 – 2022

SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% shares 2023
Basic Oxygen Furnace and other	90,191	92,946	91,526	91,489	93,928	91,937	86,655	74,189	86,261	77,310	56.7%
Electric	64,126	64,119	63,603	62,809	66,941	68,129	63,589	58,018	66,521	59,012	43.3%
<b>Total Crude Steel</b>	<b>154,318</b>	<b>157,065</b>	<b>155,129</b>	<b>154,298</b>	<b>160,869</b>	<b>160,066</b>	<b>150,244</b>	<b>132,217</b>	<b>152,782</b>	<b>136,321</b>	<b>100%</b>



## EU crude steel production: by quality

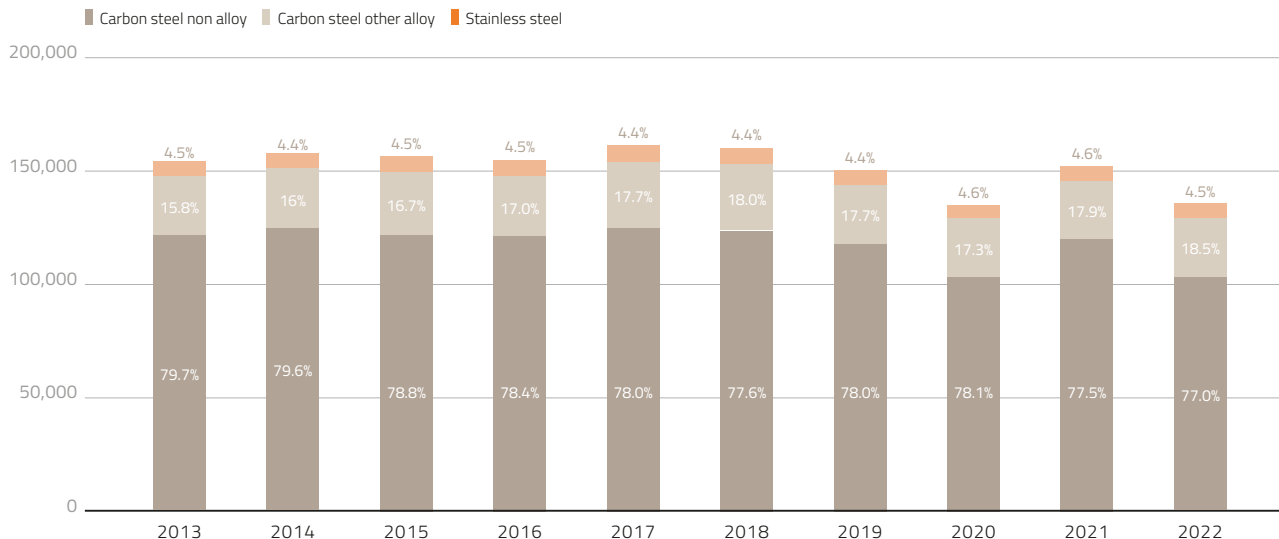
All qualities ▪ in '000,000 metric tonnes

### EU CRUDE STEEL OUTPUT BY QUALITY

TABLE, CHART ▪ 2013 – 2022

SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% shares 2022
Carbon steel non alloy	122,978	125,055	122,269	121,039	125,407	124,163	117,144	103,244	118,425	104,981	77.0%
Carbon steel other alloy	24,454	25,063	25,944	26,264	28,396	28,808	26,528	22,851	27,403	25,244	18.5%
Stainless steel	6,885	6,947	6,915	6,996	7,066	7,095	6,573	6,122	6,953	6,096	4.5%
<b>Total Crude Steel</b>	<b>154,318</b>	<b>157,065</b>	<b>155,129</b>	<b>154,298</b>	<b>160,869</b>	<b>160,066</b>	<b>150,244</b>	<b>132,217</b>	<b>152,782</b>	<b>136,321</b>	<b>100%</b>





## EU finished steel production: by product category

All qualities ■ in '000,000 metric tonnes

### EU TOTAL FINISHED STEEL PRODUCTION BY PRODUCT

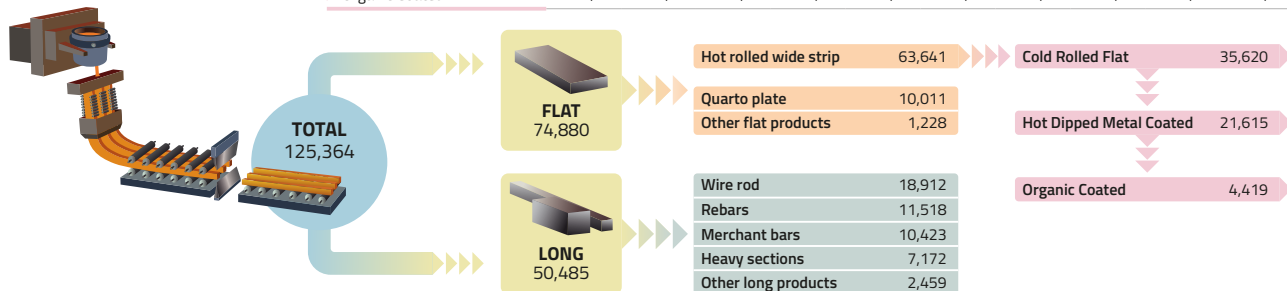
TABLE, CHART ■ 2013 – 2022

SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
<b>Total Hot Rolled</b>	<b>142,250</b>	<b>144,052</b>	<b>142,874</b>	<b>143,653</b>	<b>147,772</b>	<b>148,478</b>	<b>139,221</b>	<b>123,649</b>	<b>140,661</b>	<b>125,364</b>
▶ of which flat products	87,822	89,328	87,746	88,538	91,747	91,481	85,082	74,720	84,480	74,880
▶ Quarto Plate	10,245	10,860	10,350	10,383	10,994	11,024	10,109	9,137	10,142	10,011
▶ Hot Rolled Wide Strip	76,223	77,074	76,053	76,734	79,256	78,977	73,578	64,339	72,948	63,641
▶ Other flat products	1,354	1,395	1,344	1,422	1,498	1,480	1,395	1,244	1,389	1,228
▶ of which long products	54,428	54,723	55,128	55,115	56,025	56,997	54,139	48,929	56,182	50,485
▶ Wire Rod	19,123	19,192	19,776	19,510	20,479	21,067	20,175	18,386	21,721	18,912
▶ Rebars	12,871	12,708	12,454	12,852	12,195	12,320	12,457	11,321	12,157	11,518
▶ Merchant Bars	11,371	11,869	11,664	11,535	12,146	12,285	10,833	9,515	11,535	10,423
▶ Heavy Sections	8,073	8,024	8,210	8,573	8,568	8,605	8,013	7,172	8,087	7,172
▶ Other long products	2,990	2,931	3,025	2,646	2,636	2,719	2,662	2,535	2,682	2,459

#### Products obtained from upstream production – from Hot Rolled Wide Strip

▶ Cold Rolled Flat	41,213	42,357	42,616	43,551	44,641	43,643	41,320	36,058	41,282	35,620
▶ Hot Dipped	23,956	25,703	26,223	26,599	27,292	26,836	25,851	22,454	24,584	21,615
▶ Organic Coated	4,163	4,269	4,271	4,530	4,636	4,619	4,826	4,722	5,252	4,419



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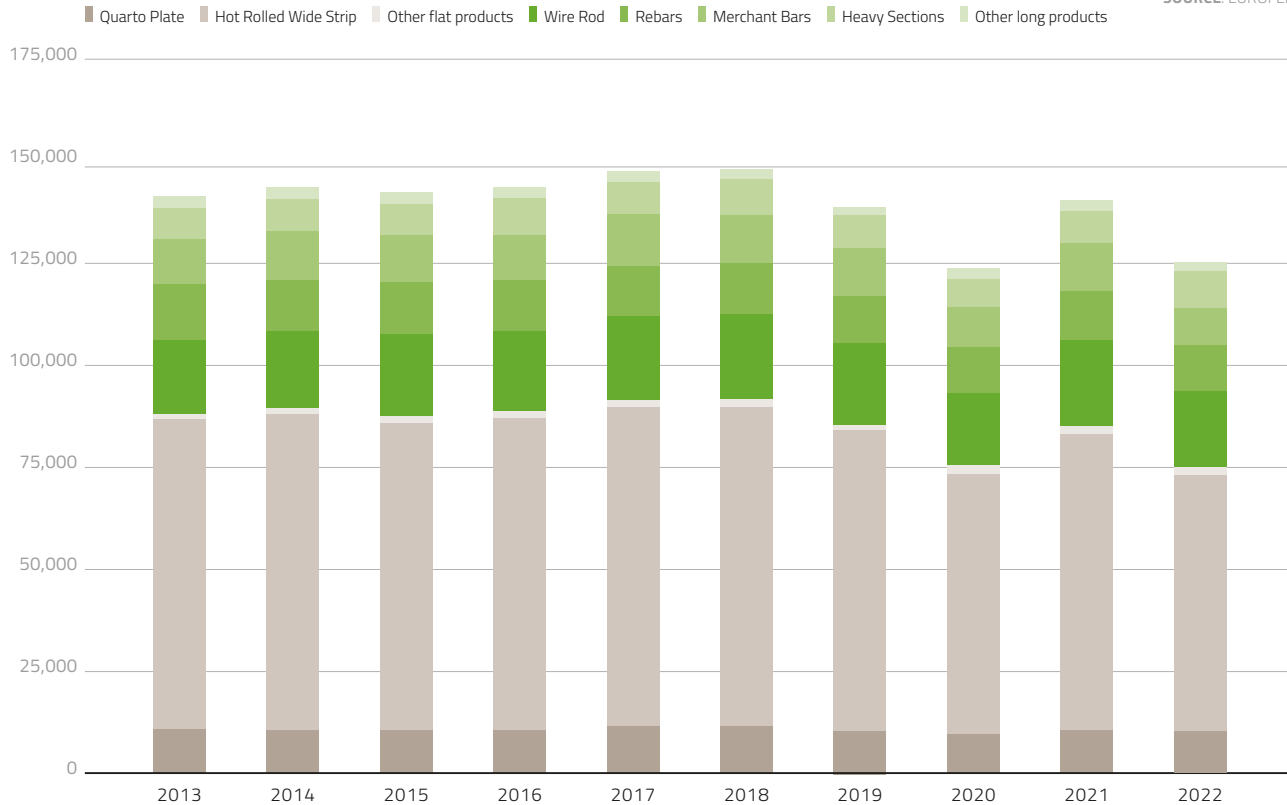
## EU Hot Rolled finished steel production: by product category

All qualities ▪ in '000,000 metric tonnes

### EU HOT ROLLED FINISHED STEEL PRODUCTION

CHART ▪ 2013 – 2022

SOURCE: EUROFER



# Map of steel production in Europe

Red: BF-BOF ■ Blue: EAF

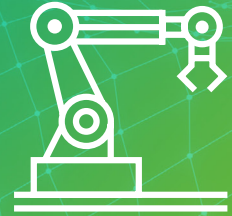
## PRIMARY AND SECONDARY STEEL PRODUCTION ACROSS THE EU

MAP • 2019

SOURCE: EUROFER



# Steel Use & Market Supply



## Consumption: Real & apparent steel consumption

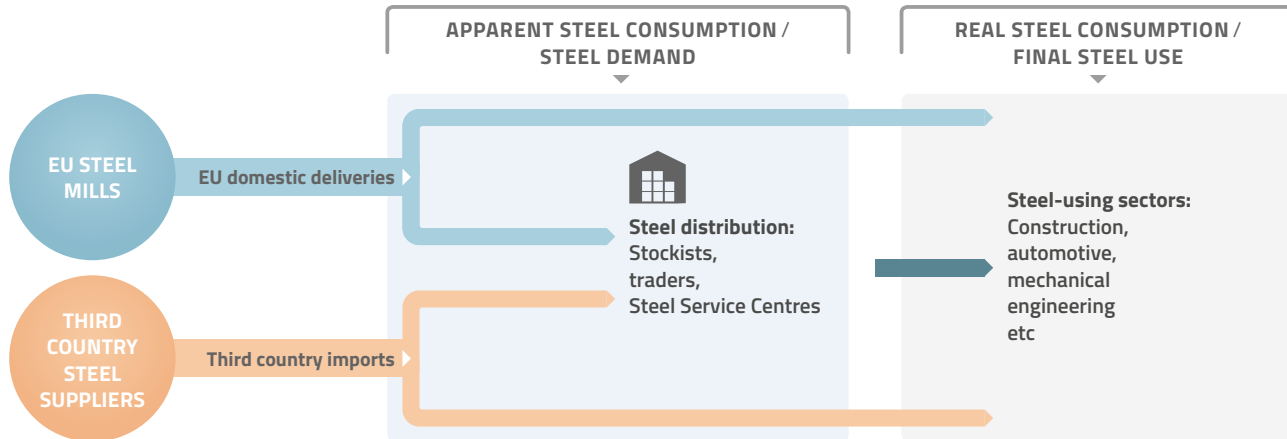
All products, all qualities ▪ in '000 metric tonnes

### ROUTES TO MARKET OR FINAL USE OF STEEL PRODUCTS

DIAGRAM

SOURCE: EUROFER

Steel used in the EU is a mix of domestic production & imports from third countries



EU steel mills and third country steel suppliers deliver steel products to the EU steel market.

The steel market has different levels. Steel products can be sold 'indirectly' to operators in steel distribution or sold 'directly' to **steel-using sectors**.

Operators in **steel distribution** include steel service centres, stockists and traders. They stock and sell products. Service centres and stockists provide additional services to **steel-using sectors** such as

cutting, slitting, drilling, bending, etc. Inventory levels in steel distribution vary over time, reflecting seasonal demand patterns and – to some extent – speculation.

**Apparent steel consumption** – often referred to as steel demand or market supply – is the total of all steel delivered to the steel market, including steel products that are being stocked rather than consumed immediately by the steel-using sectors.

**Real steel consumption** – or final steel use – is the quantity of steel that actually is consumed by steel using sectors in their production processes.

The difference between real and apparent steel consumption is the change in steel inventories over a given period.

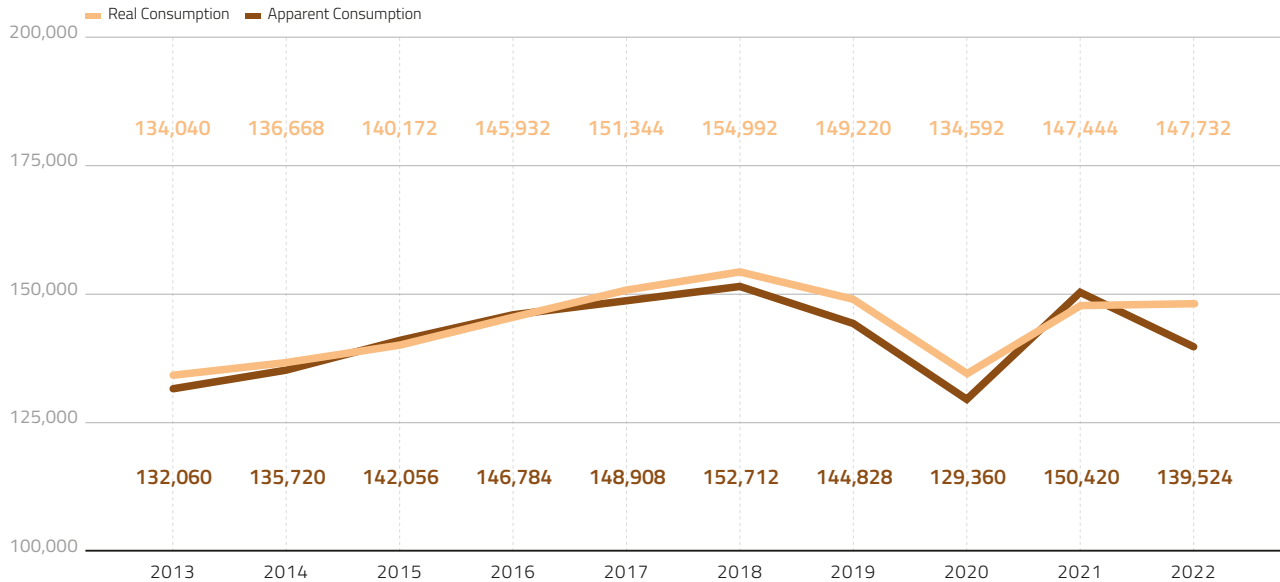
## Consumption: Real & apparent steel consumption

All products, all qualities ▪ in '000 metric tonnes

### REAL VS APPARENT CONSUMPTION

GRAPH ▪ 2013 – 2022

SOURCE: EUROFER



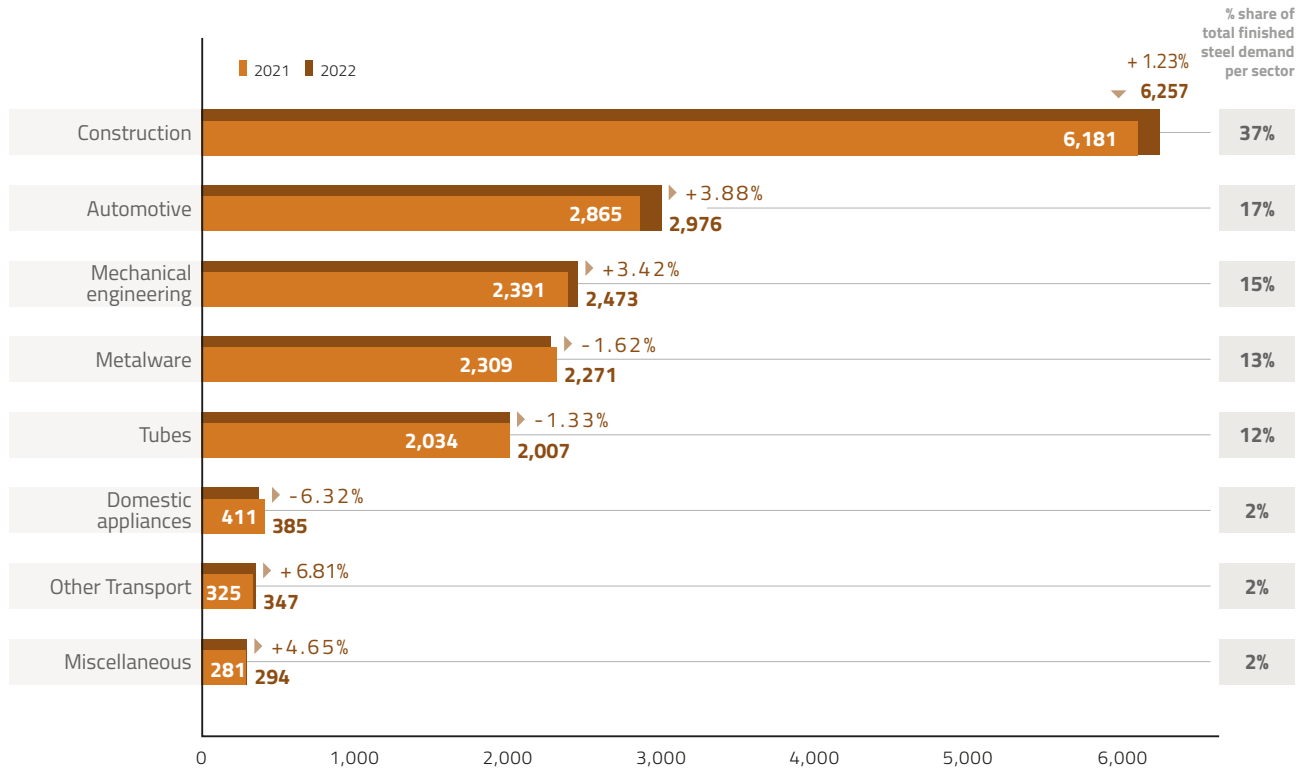
## Consumption: by sector of economic activity

All products, all qualities ▪ in '000 monthly metric tonnes

### STEEL CONSUMPTION PER STEEL-USING SECTOR

CHART ▪ 2021 – 2022

SOURCE: EUROFER



Note: Consumption by steel-using sector is calculated using the Steel-Weighted Industrial Production (SWIP) index, which is used to estimate changes in production activity in these sectors.

## Stock change

All products, all qualities ▪ in '000 metric tonnes

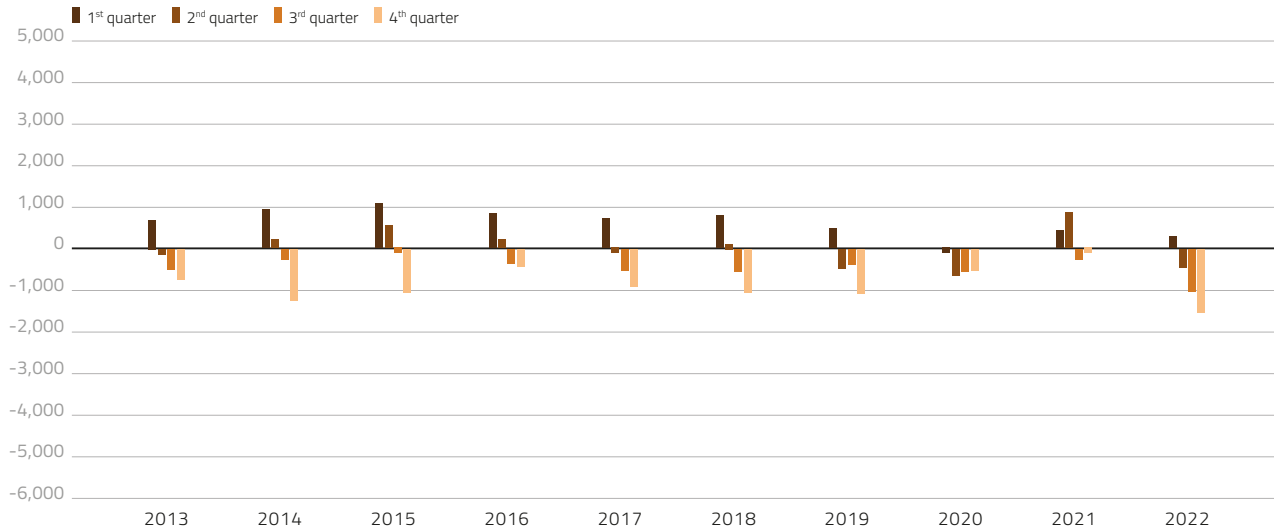
### STOCK CHANGE

TABLE ▪ 2013 – 2022

Changes in stock levels explain the difference between real & apparent steel consumption

SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
1 <sup>st</sup> quarter	693	972	1,093	859	727	808	489	-20	433	296
2 <sup>nd</sup> quarter	-107	207	582	213	-91	6	-479	-634	891	-471
3 <sup>rd</sup> quarter	-498	-260	-13	-369	-524	-544	-383	-561	-270	-1,016
4 <sup>th</sup> quarter	-747	-1,237	-1,034	-422	-922	-1,029	-1,091	-532	-65	-1,548



Consumption by steel-using sectors is calculated using the Steel-Weighted Industrial Production (SWIP) index, which is used to estimate changes in economic activity.



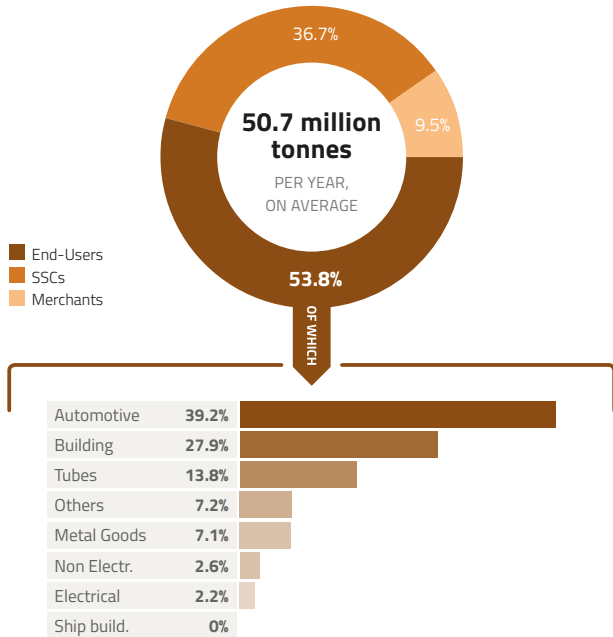
## Specific flat product deliveries: Strip mill products & quarto plate

Non-alloy and other alloy steels  
 ■ average 2018-2022

### EU STRIP MILL PRODUCT DELIVERIES GRAPHIC ■ 2018/2022

SOURCE: EUROFER

Strip mill products are flat products used in a variety of downstream applications.

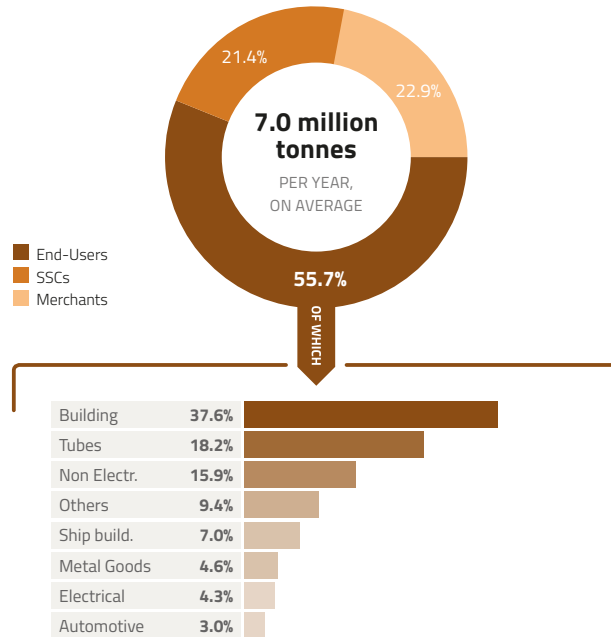


### EU QUARTO PLATE DELIVERIES GRAPHIC ■ 2018/2022

GRAPHIC ■ 2018/2022

SOURCE: EUROFER

Quarto plate is a thicker gauge of flat steel used in heavy applications.



## Market supply: Total flat products

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

### TOTAL FLAT PRODUCTS

TABLE ▪ 2013 – 2022

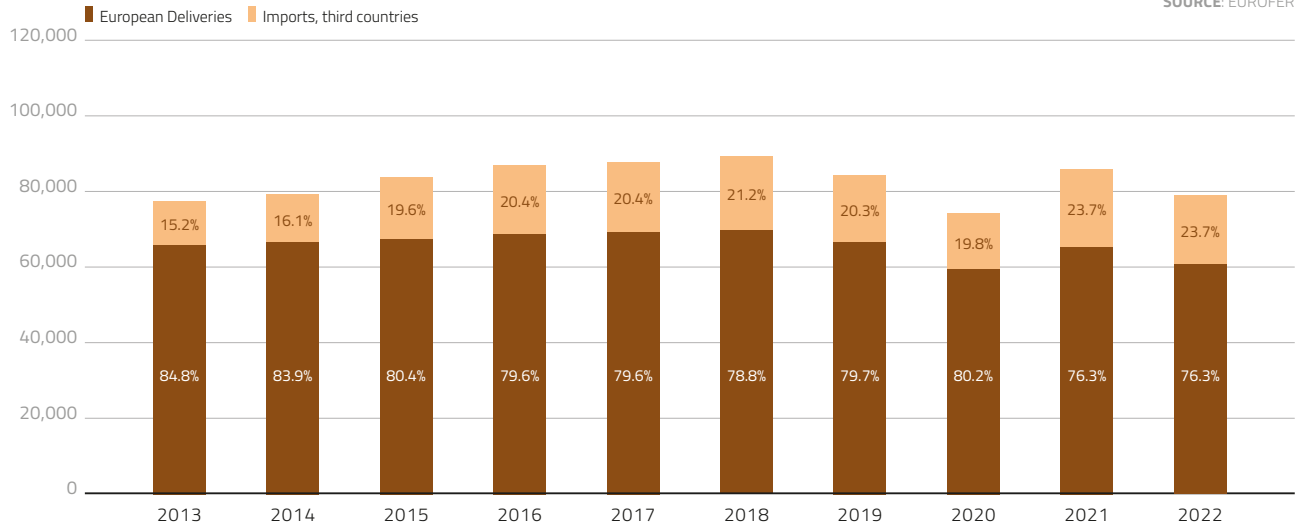
SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% shares 2022
European Deliveries	65,858	66,730	67,533	69,379	69,988	70,452	67,172	59,467	65,783	60,521	76.3%
Imports third countries	11,784	12,766	16,514	17,784	17,934	18,966	17,114	14,649	20,459	18,748	23.7%
<b>Market Supply</b>	<b>77,642</b>	<b>79,495</b>	<b>84,047</b>	<b>87,163</b>	<b>87,922</b>	<b>89,417</b>	<b>84,287</b>	<b>74,116</b>	<b>86,242</b>	<b>79,269</b>	<b>100%</b>

### TOTAL FLAT PRODUCTS

CHART ▪ 2013 – 2022

SOURCE: EUROFER



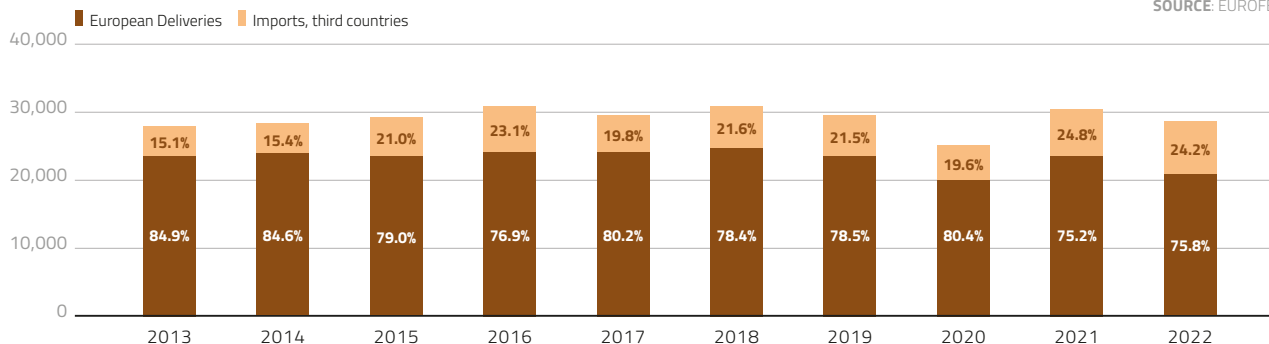
## Market supply: Hot rolled flat & cold rolled sheet

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

### HOT ROLLED FLAT PRODUCTS

CHART ▪ 2013 – 2022

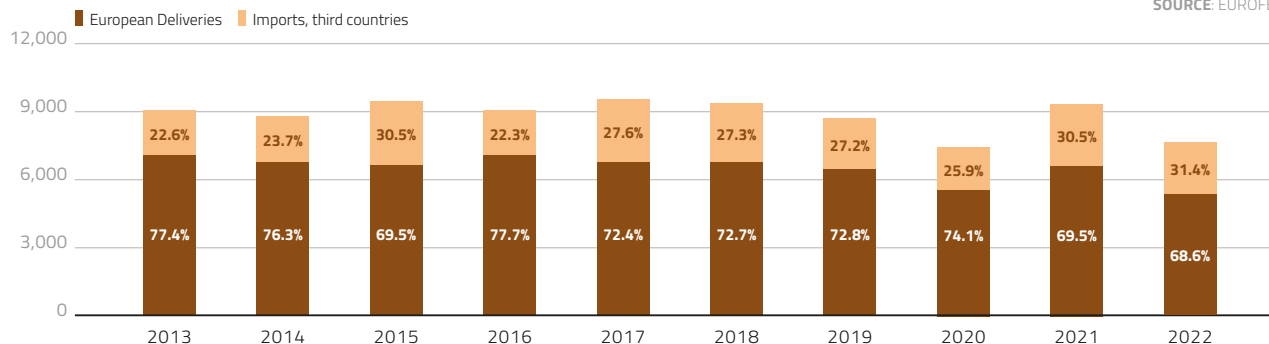
SOURCE: EUROFER



### COLD ROLLED SHEETS

CHART ▪ 2013 – 2022

SOURCE: EUROFER



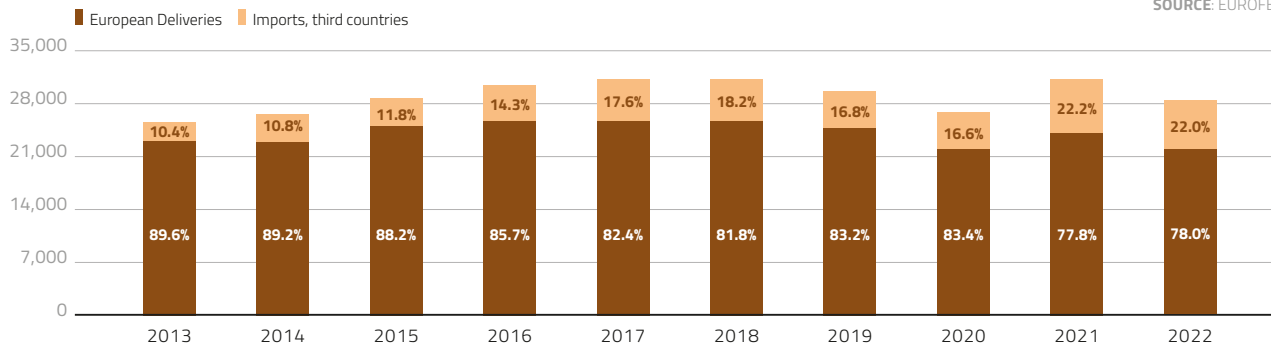
## Market supply: Coated sheets & quarto plate

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

### TOTAL COATED SHEETS

CHART ▪ 2013 – 2022

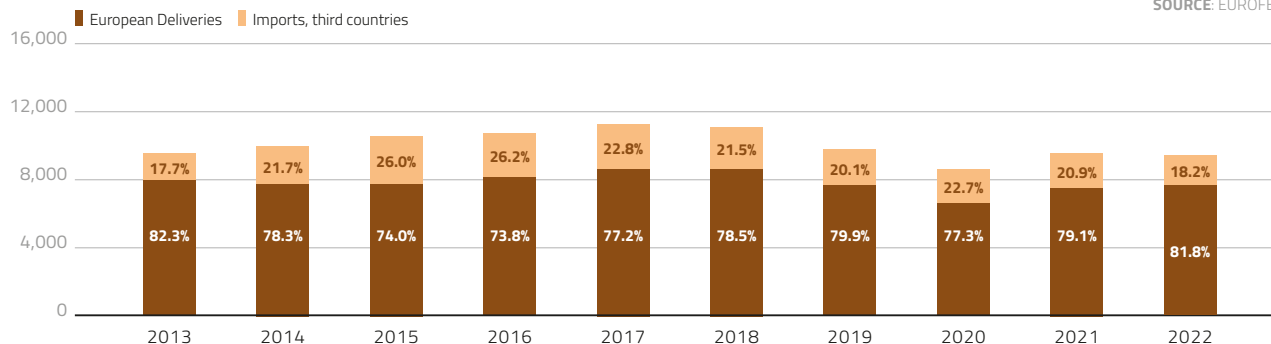
SOURCE: EUROFER



### QUARTO PLATE

CHART ▪ 2013 – 2022

SOURCE: EUROFER



## Market supply: Total long products

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

### TOTAL LONG PRODUCTS

TABLE ▪ 2013 – 2022

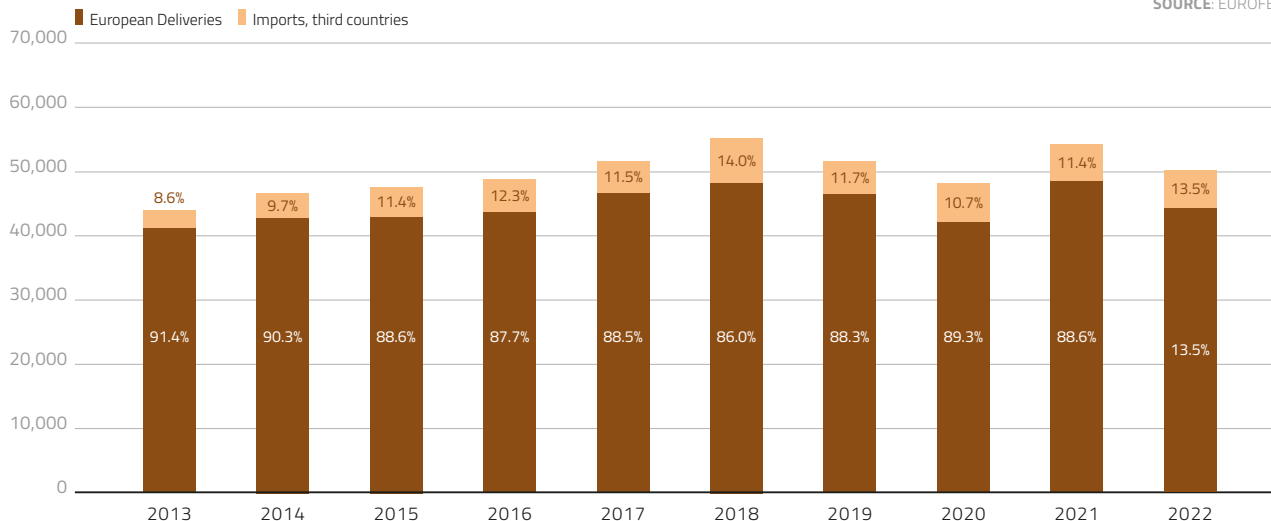
SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% shares 2022
European Deliveries	40,799	41,805	42,032	43,136	46,094	47,303	45,919	43,010	48,330	43,804	86.5%
Imports, third countries	3,825	4,503	5,404	6,029	6,000	7,707	6,096	5,136	6,206	6,858	13.5%
<b>Market Supply</b>	<b>46,235</b>	<b>44,624</b>	<b>46,308</b>	<b>47,436</b>	<b>49,165</b>	<b>52,093</b>	<b>55,034</b>	<b>52,034</b>	<b>48,167</b>	<b>54,655</b>	<b>100%</b>

### TOTAL LONG PRODUCTS

CHART ▪ 2013 – 2022

SOURCE: EUROFER



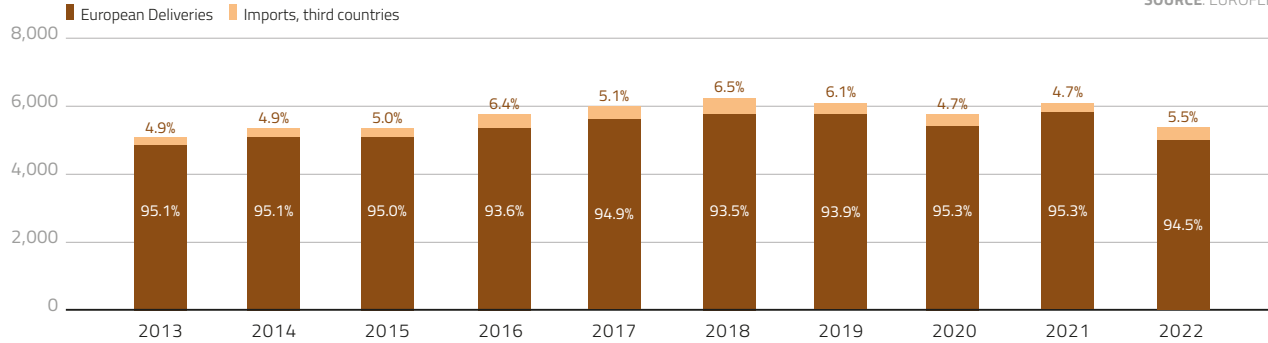
## Market supply: Beams & rebar

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

### BEAMS

CHART ▪ 2013 – 2022

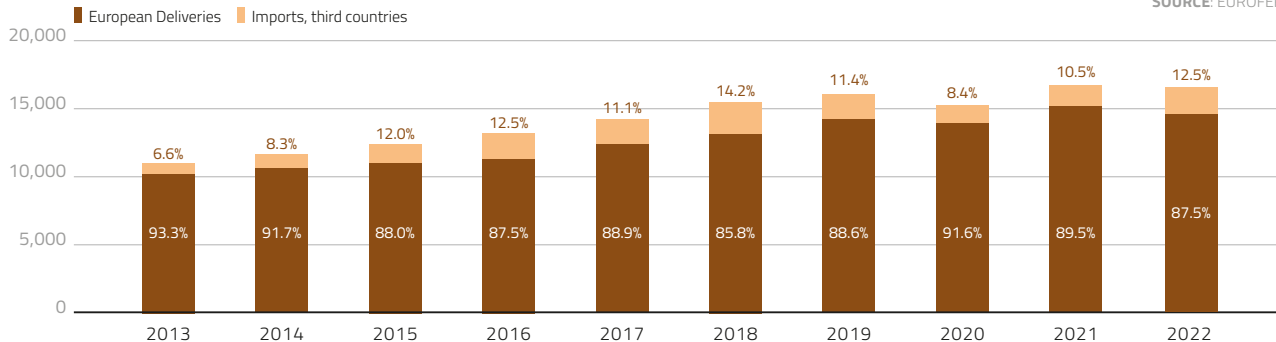
SOURCE: EUROFER



### REBAR, INCLUDING DEFORMED RODS

CHART ▪ 2013 – 2022

SOURCE: EUROFER



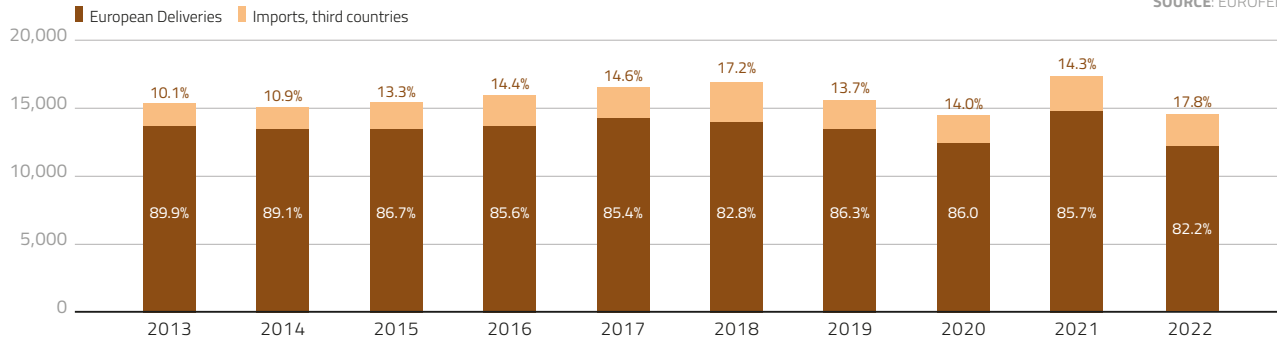
## Market supply: Wire rod & merchant bar

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

### WIRE ROD, EXCLUDING DEFORMED RODS

CHART ▪ 2013 – 2022

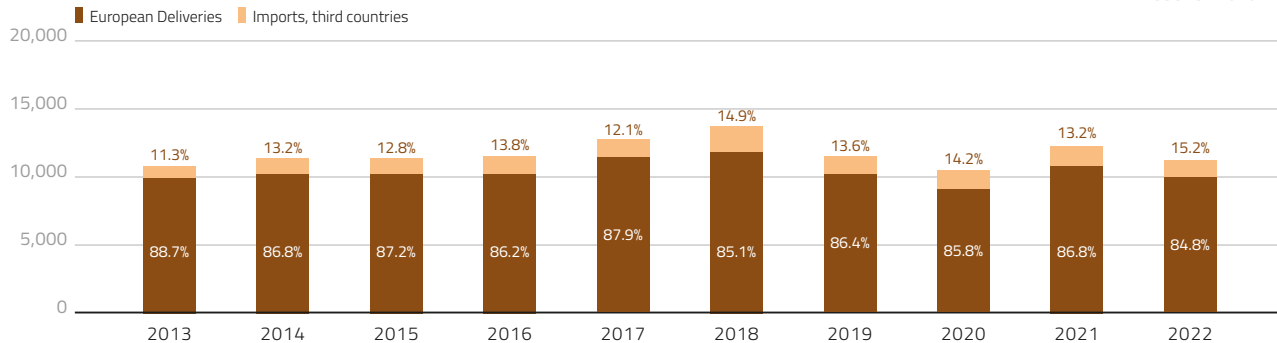
SOURCE: EUROFER



### MERCHANT BARS

CHART ▪ 2013 – 2022

SOURCE: EUROFER



# International Trade





## Imports into the EU: Total

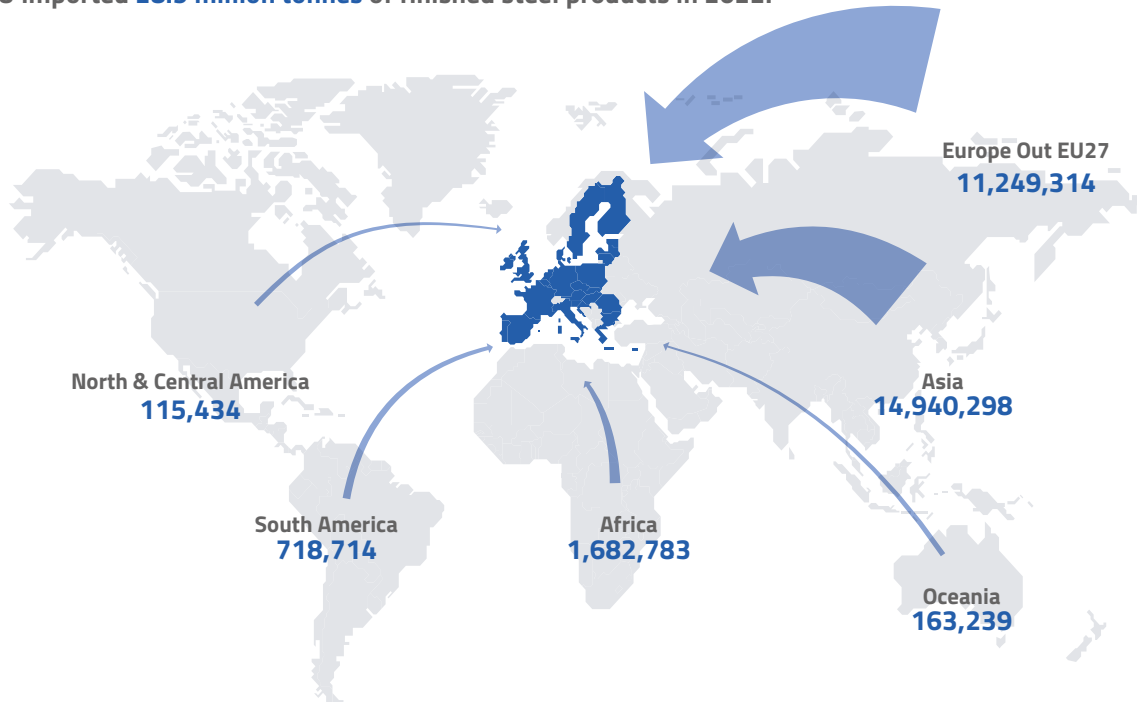
All qualities • in metric tonnes

### TOTAL IMPORTS INTO THE EU

MAP • 2022

SOURCE: EUROFER

The EU imported **28.9 million tonnes** of finished steel products in 2022.



## Imports into the EU: Total

All qualities ▪ in '000 metric tonnes

## TOTAL IMPORTS INTO THE EU

TABLE ▪ 2013 – 2022

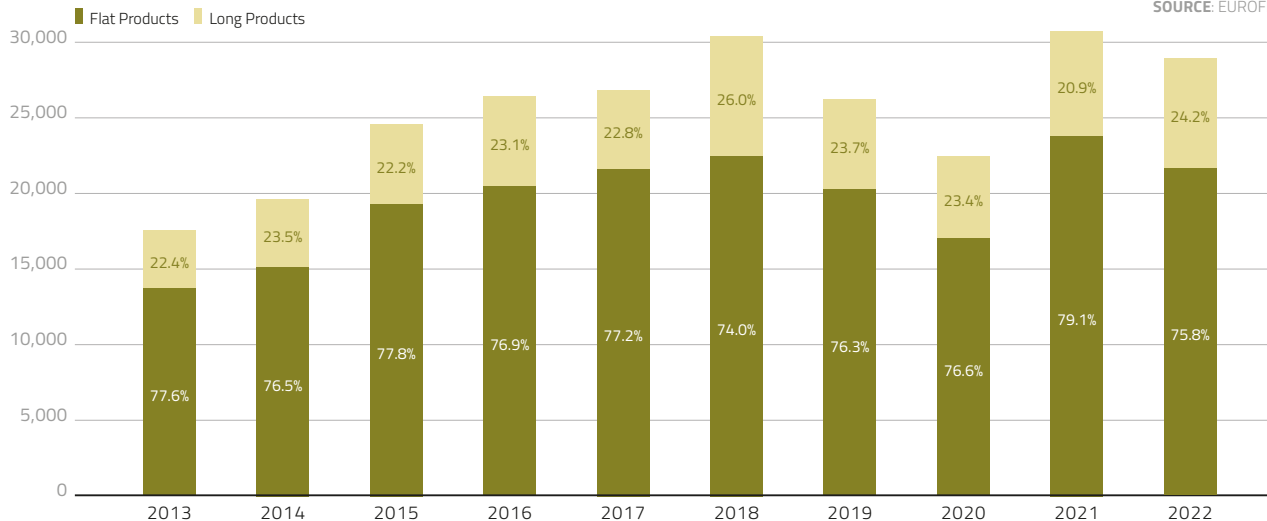
SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% shares 2022
Flat Products	13,624	15,167	19,327	20,543	207,82	22,348	20,115	17,166	23,987	21,895	75.8%
Long Products	3,942	4,650	5,526	6,157	6,130	7,865	6,234	5,247	6,340	7,007	24.2%
<b>Finished Products</b>	<b>17,566</b>	<b>19,817</b>	<b>2,4853</b>	<b>26,700</b>	<b>26,912</b>	<b>30,213</b>	<b>26,349</b>	<b>22,413</b>	<b>30,328</b>	<b>28,902</b>	<b>100%</b>

## TOTAL IMPORTS INTO THE EU

CHART ▪ 2013 – 2023

SOURCE: EUROFER



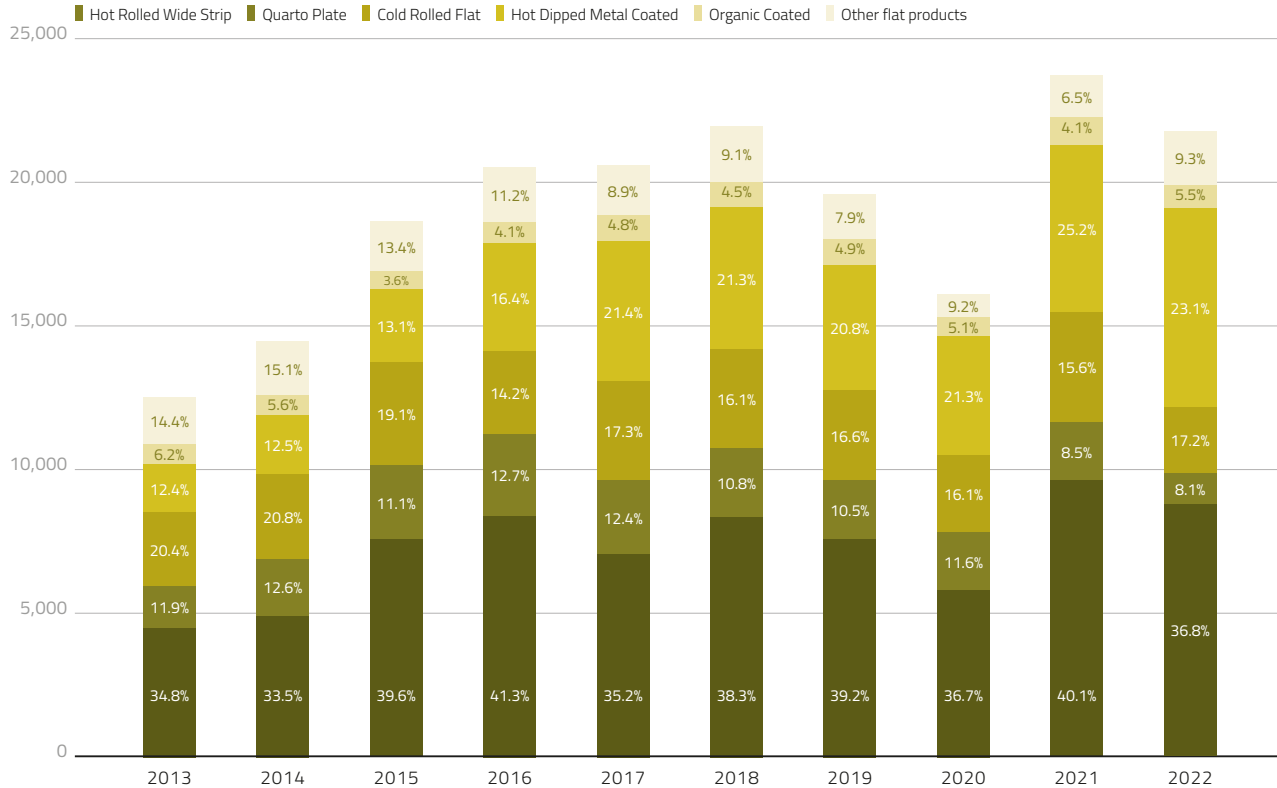
## Imports into the EU: Flat products

All qualities ▪ in '000 metric tonnes

### FLAT PRODUCT IMPORTS INTO THE EU BY PRODUCT

CHART ▪ 2013 – 2022

SOURCE: EUROFER



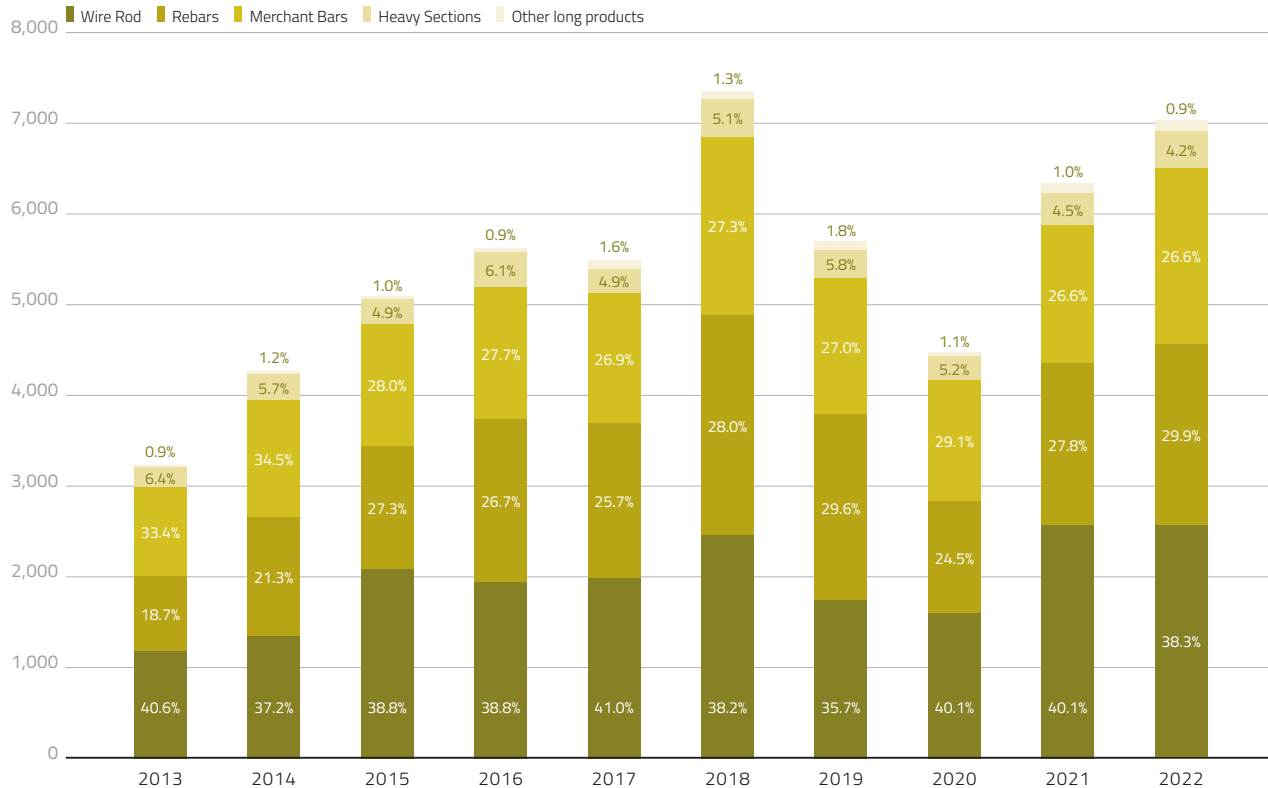
## Imports into the EU: Long products

All qualities ▪ in '000 metric tonnes

### LONG PRODUCT IMPORTS INTO THE EU BY PRODUCT

CHART ▪ 2013 – 2022

SOURCE: EUROFER



## Imports: Top 10 countries of origin

All qualities ▪ in '000 metric tonnes

TOP 10 IMPORTS OF ALL FINISHED PRODUCTS RANKED BY COUNTRY OF ORIGIN

TABLE ▪ 2013 – 2022

SOURCE: EUROFER

Countries ranked according to their 2021 order

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
TURKEY	1,645	1,254	1,295	2,044	3,420	5,833	5,472	3,876	4,588	4,331
SOUTH KOREA	1,294	1,397	1,897	2,523	2,884	3,194	2,683	2,622	2,286	2,964
INDIA	1,157	1,391	1,140	1,822	3,568	2,670	2,123	1,872	3,536	2,683
CHINA	2,737	3,855	6,170	5,249	3,110	2,781	2,348	1,182	1,442	2,525
TAIWAN	529	636	412	705	1,062	1,511	1,220	951	1,700	2,149
VIETNAM	34	30	43	45	279	495	425	285	1,583	1,552
JAPAN	97	140	135	283	151	197	188	252	854	1,461
UKRAINE	1,991	2,215	2,500	2,942	2,110	1,821	1,718	1,600	2,543	1,264
RUSSIA	2,530	2,536	3,292	3,369	2,330	3,582	2,914	3,133	3,727	1,208
EGYPT	158	200	37	84	572	453	208	347	955	787
OTHERS	5,394	6,163	7,932	7,634	7,426	7,676	7,050	6,293	7,114	7,978
<b>TOTAL</b>	<b>17,566</b>	<b>19,817</b>	<b>24,853</b>	<b>26,700</b>	<b>26,912</b>	<b>30,213</b>	<b>26,349</b>	<b>22,413</b>	<b>30,328</b>	<b>28,902</b>

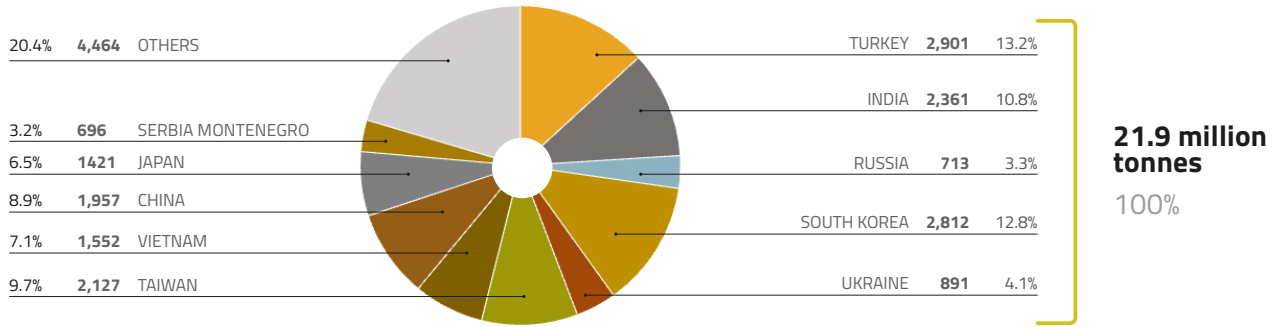
## Imports: Top 10 countries of origin by product category

All qualities ▪ in '000 metric tonnes

### TOP 10 FLAT PRODUCTS IMPORTS

CHART ▪ 2022

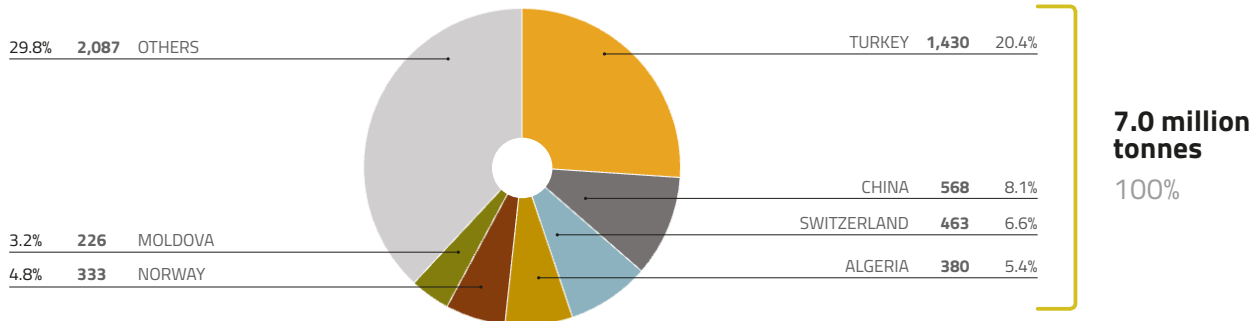
SOURCE: EUROFER



### TOP 10 LONG PRODUCT IMPORTS

CHART ▪ 2022

SOURCE: EUROFER



## Exports into the EU: Total

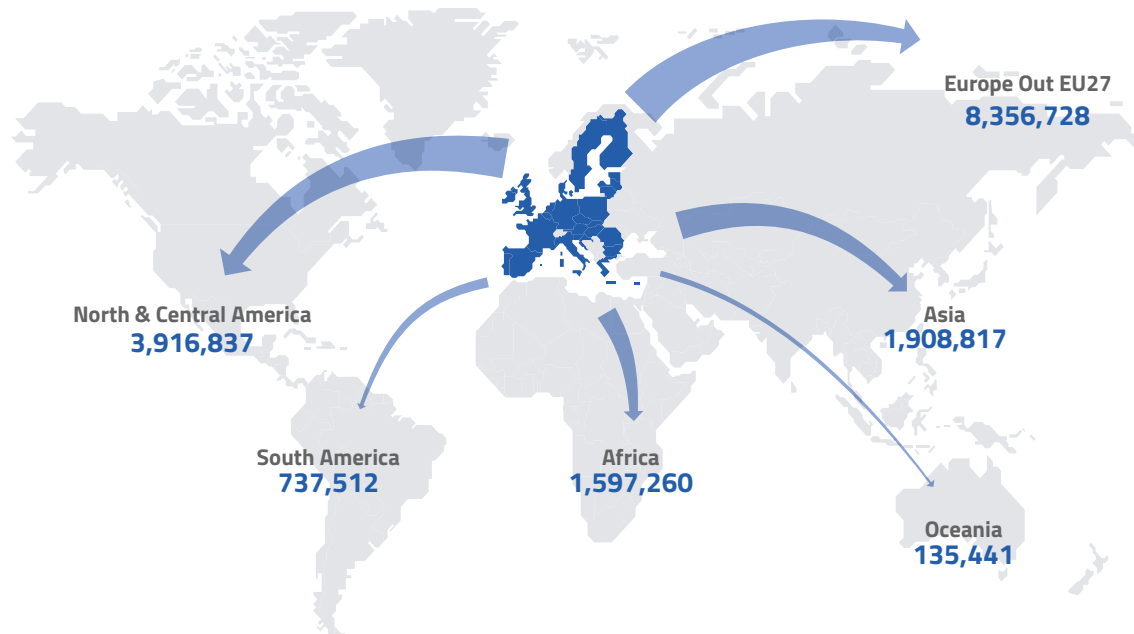
All qualities • in metric tonnes

### TOTAL EXPORTS INTO THE EU

MAP • 2022

SOURCE: EUROFER

The EU exported **16.6 million tonnes** of finished steel products in 2022.



## Exports from the EU: Total

All qualities ▪ in '000 metric tonnes

## TOTAL EXPORTS FROM THE EU

TABLE ▪ 2013 – 2022

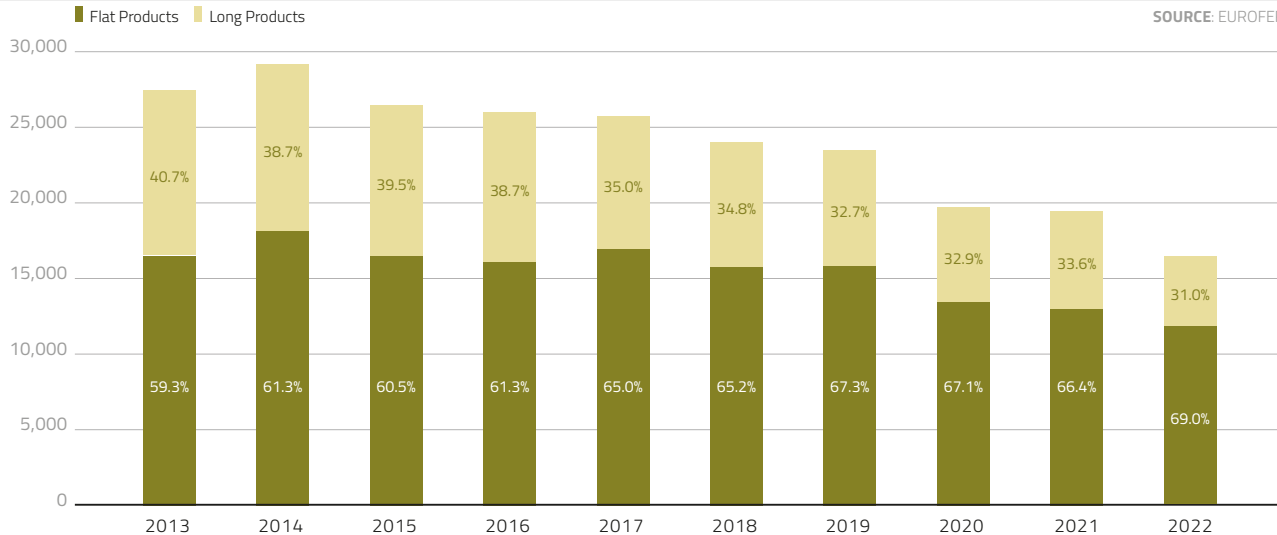
SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% shares 2022
Flat Products	16,952	17,993	16,789	16,475	17,079	15,769	16,029	13,342	12,901	11,550	69.0%
Long Products	11,633	11,376	10,939	10,394	9,182	8,402	7,794	6,539	6,539	5,106	31.0%
<b>Finished Products</b>	<b>28,586</b>	<b>29,369</b>	<b>27,728</b>	<b>26,869</b>	<b>26,261</b>	<b>24,170</b>	<b>23,823</b>	<b>19,881</b>	<b>19,439</b>	<b>16,656</b>	<b>100%</b>

## TOTAL EXPORTS FROM THE EU

CHART ▪ 2013 – 2022

SOURCE: EUROFER





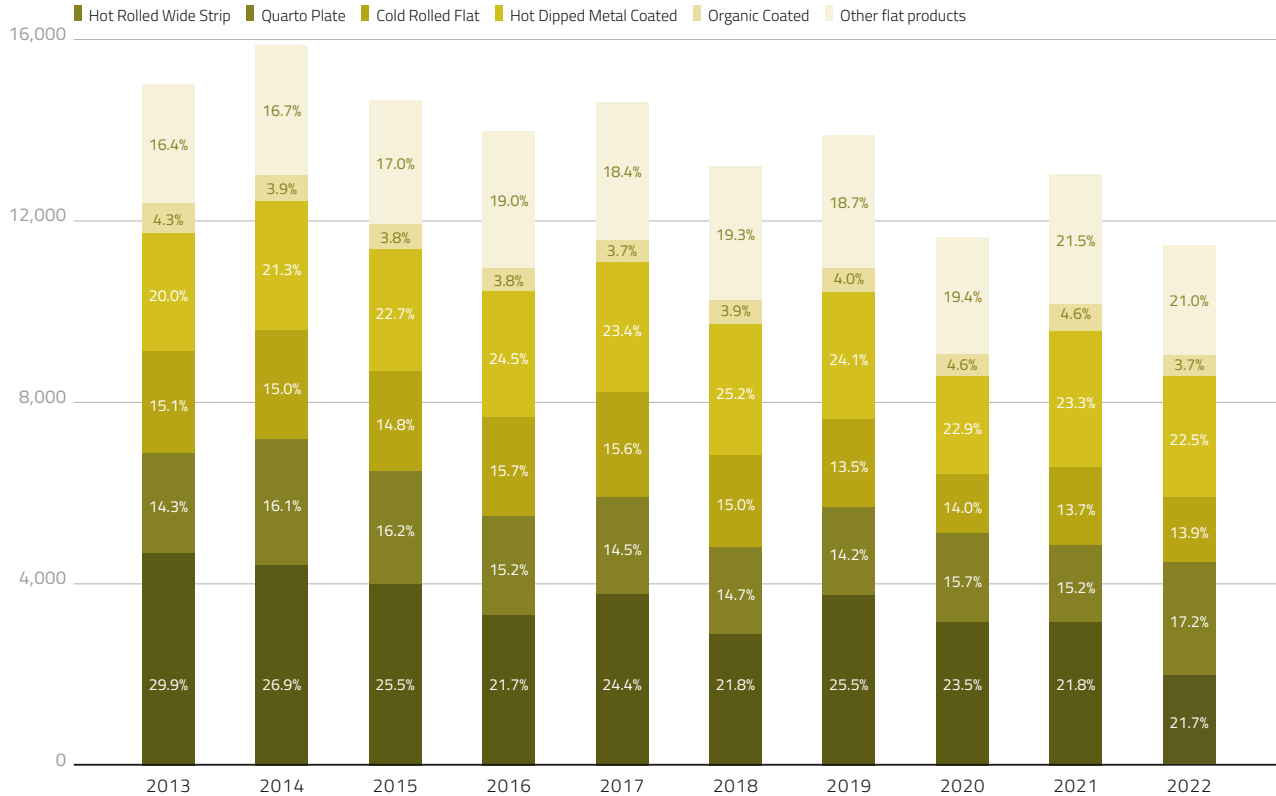
## Exports from the EU: Flat products

All qualities ▪ in '000 metric tonnes

## FLAT PRODUCT EXPORTS FROM THE EU BY PRODUCT

CHART ▪ 2013 – 2022

SOURCE: EUROFER



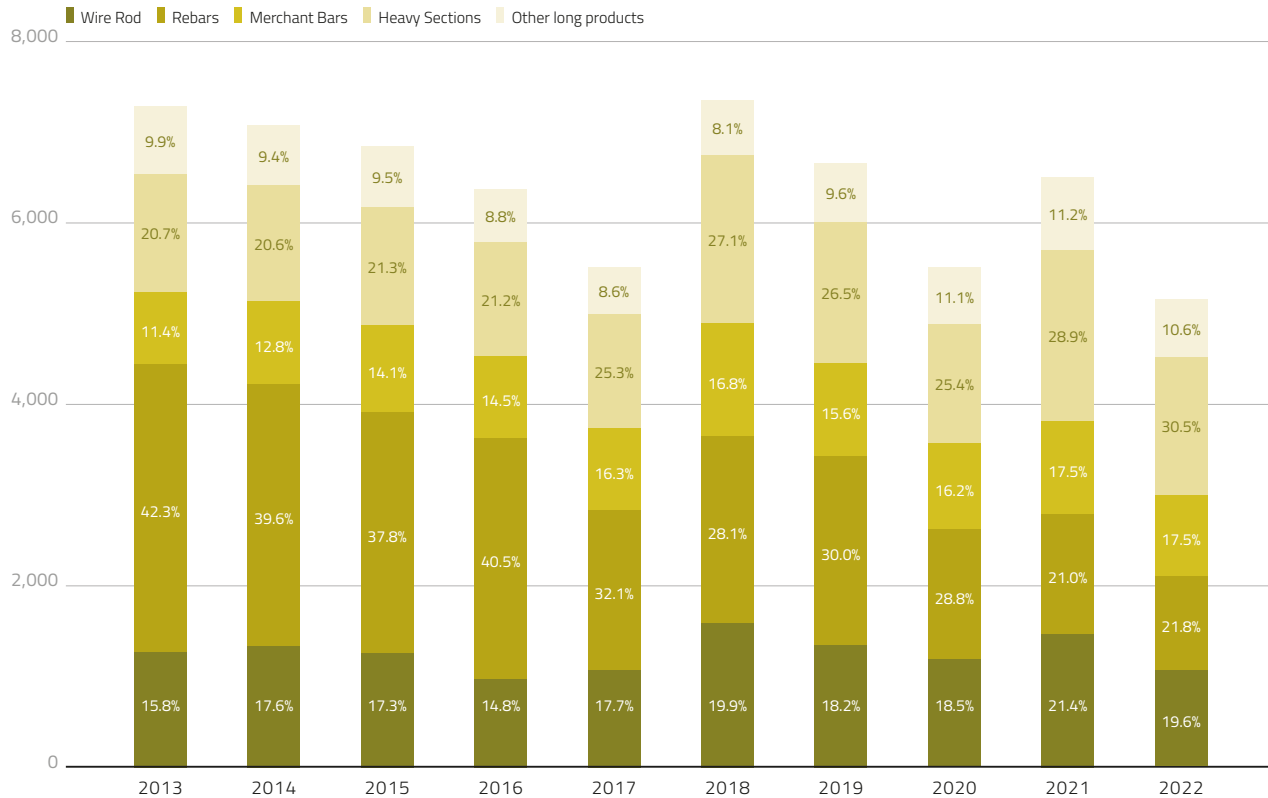
## Exports from the EU: Long products

All qualities ▪ in '000 metric tonnes

## LONG PRODUCT EXPORTS FROM THE EU BY PRODUCT

CHART ▪ 2013 – 2022

SOURCE: EUROFER



## Export destinations: Top 10 countries

All qualities ▪ in '000 metric tonnes

## TOP 10 EXPORTERS DESTINATIONS FOR ALL FINISHED PRODUCTS

TABLE ▪ 2013 – 2022

SOURCE: EUROFER

Countries ranked according to their 2021 order

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
TURKEY	4,411	3,923	4,152	3,936	4,458	3,023	3,656	3,186	2,962	2,488
U.S.A.	2,742	3,581	3,255	3,044	3,224	3,276	2,473	1,647	2,229	2,370
SWITZERLAND	1,876	1,828	1,704	1,838	1,886	1,871	1,702	1,554	1,701	1,543
MEXICO	790	716	577	730	870	1,197	1,012	961	1,230	914
CHINA	916	1,059	882	992	1,120	1,085	887	1,042	842	551
CANADA	394	551	745	619	531	664	713	732	723	539
EGYPT	331	320	425	465	475	537	596	643	495	460
BRAZIL	376	401	336	171	439	390	254	238	283	424
NORWAY	452	487	435	519	483	480	461	415	441	410
INDIA	555	637	641	722	429	472	443	411	417	381
OTHERS	15,743	15,866	14,576	13,833	12,346	11,175	11,626	9,052	8,116	6,576
<b>TOTAL</b>	<b>28,586</b>	<b>29,369</b>	<b>27,728</b>	<b>26,869</b>	<b>26,261</b>	<b>24,170</b>	<b>23,823</b>	<b>19,881</b>	<b>19,439</b>	<b>16,656</b>

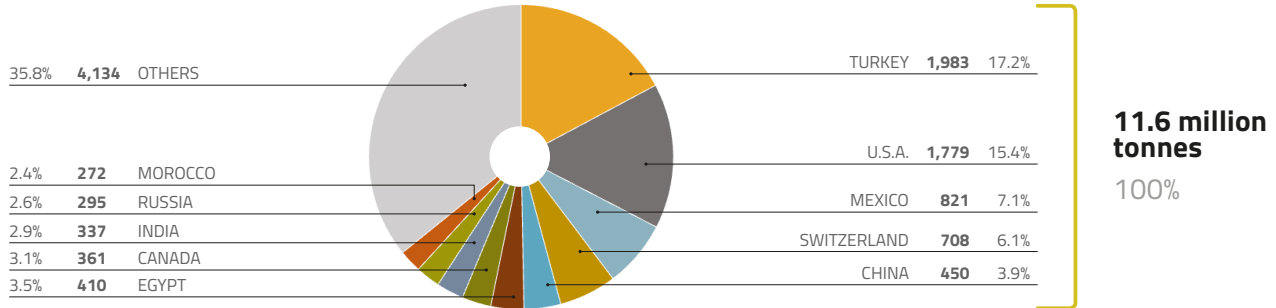
## Export destinations: By product category

All qualities ▪ in '000 metric tonnes

### TOP FLAT PRODUCT EXPORT DESTINATIONS

CHART ▪ 2022

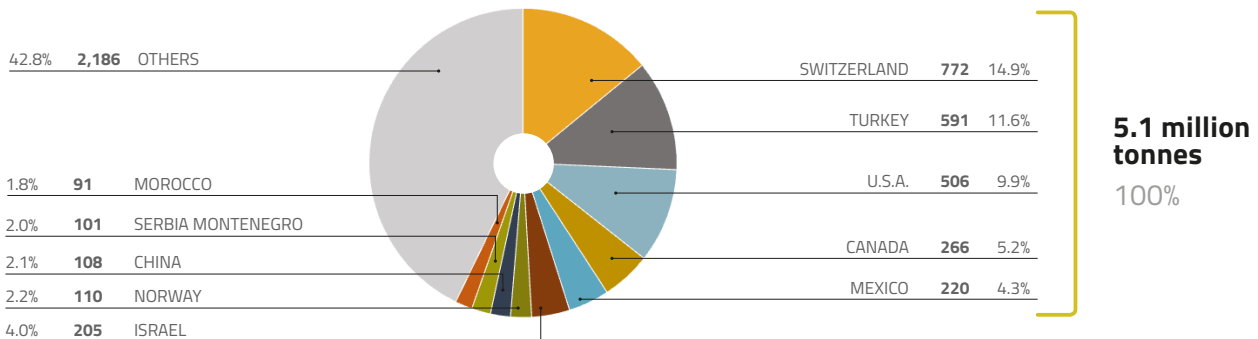
SOURCE: EUROFER



### TOP LONG PRODUCT EXPORT DESTINATIONS

CHART ▪ 2022

SOURCE: EUROFER



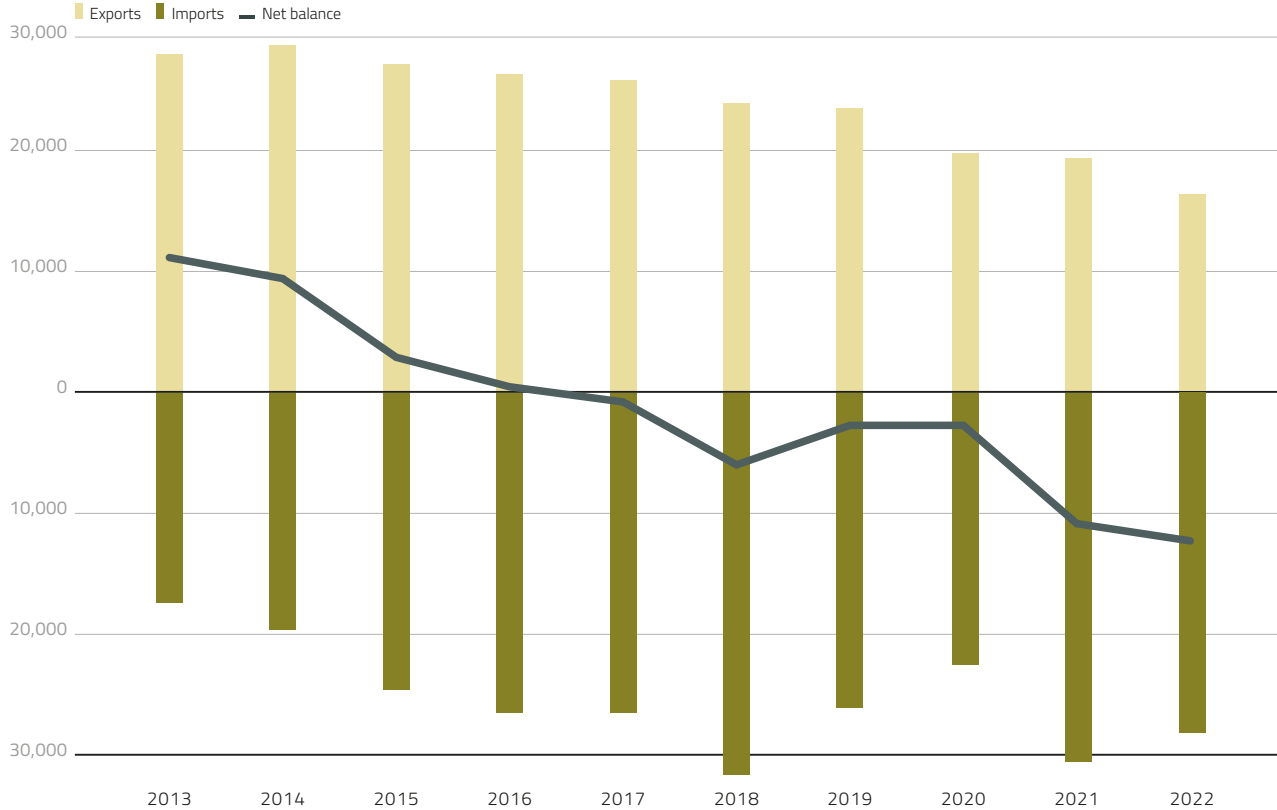
## EU trade balance: by volume

All qualities ▪ in '000 metric tonnes

### FINISHED PRODUCTS NET TRADE BALANCE BY VOLUME

CHART ▪ 2013 – 2022

SOURCE: EUROFER



# Stainless Steel



## Stainless steel market supply: Total flat products

In '000 metric tonnes

## TOTAL STAINLESS FLAT PRODUCT DELIVERIES BY SOURCE

TABLE ■ 2013 – 2022

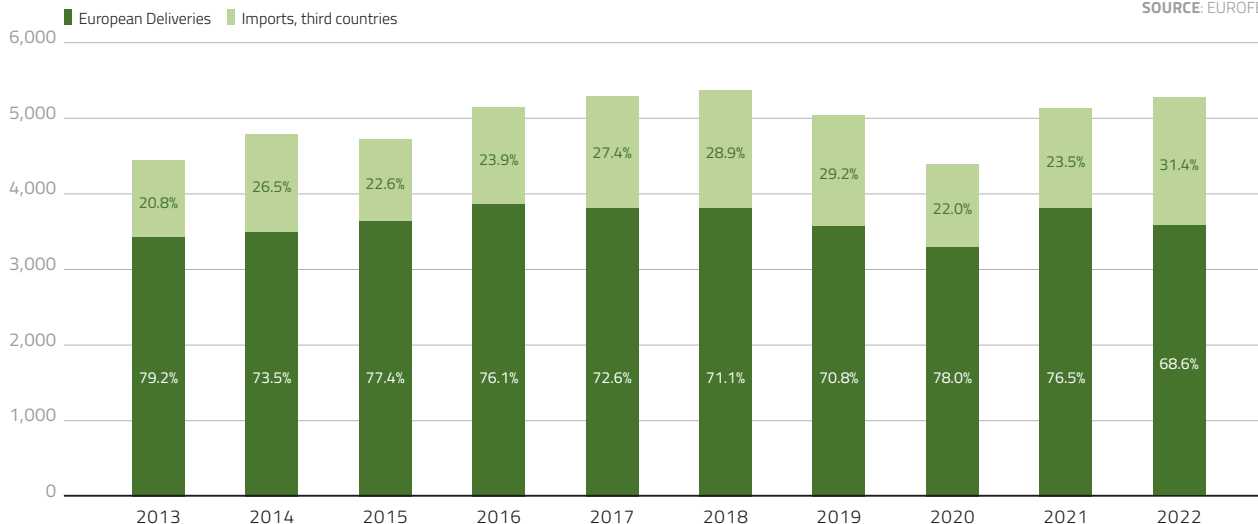
SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% shares 2022
European Deliveries	3,394	3,479	3,607	3,900	3,797	3,762	3,577	3,406	3,946	3,570	68.6%
Imports, Third Countries	891	1,257	1,053	1,224	1,434	1,527	1,474	964	1,213	1,632	31.4%
<b>Market Supply</b>	<b>4,285</b>	<b>4,736</b>	<b>4,660</b>	<b>5,124</b>	<b>5,231</b>	<b>5,289</b>	<b>5,051</b>	<b>4,372</b>	<b>5,159</b>	<b>5,202</b>	<b>100%</b>

## TOTAL STAINLESS FLAT PRODUCT DELIVERIES BY SOURCE

CHART ■ 2012 – 2021

SOURCE: EUROFER



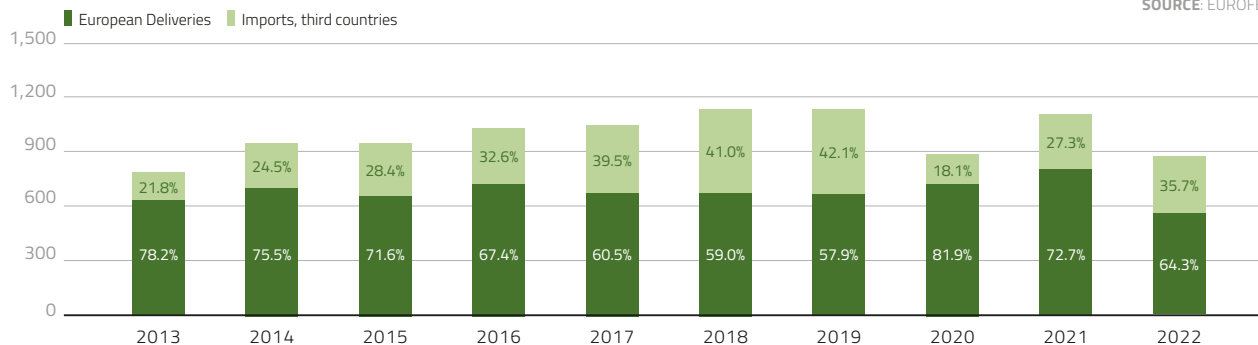
## Stainless steel market supply: Hot rolled strip mill & plates

In '000 metric tonnes

### HOT ROLLED STRIP MILL PRODUCTS

CHART ■ 2013 – 2022

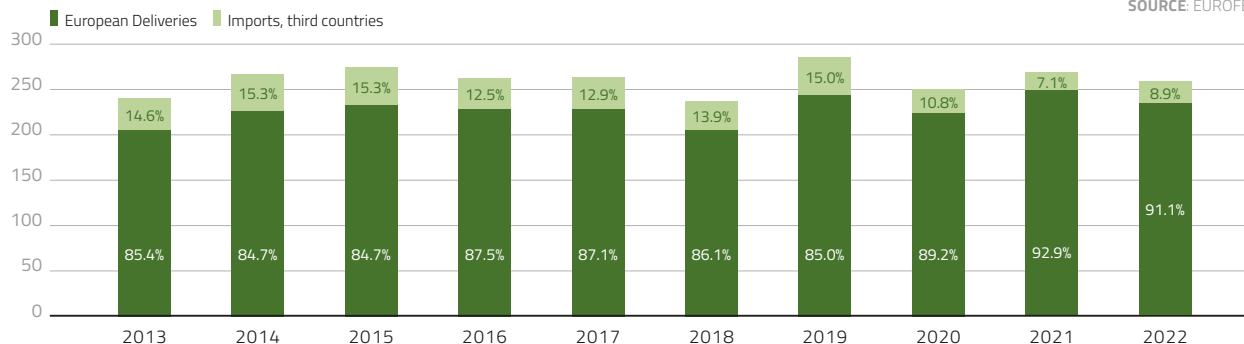
SOURCE: EUROFER



### PLATES

CHART ■ 2013 – 2022

SOURCE: EUROFER





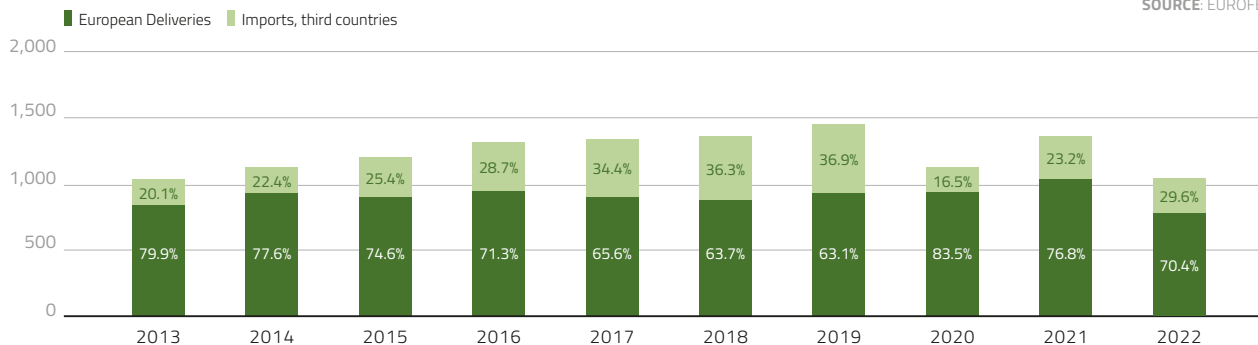
## Stainless steel market supply: Hot & cold rolled flat

In '000 metric tonnes

### HOT ROLLED FLAT PRODUCTS

CHART ■ 2013 – 2022

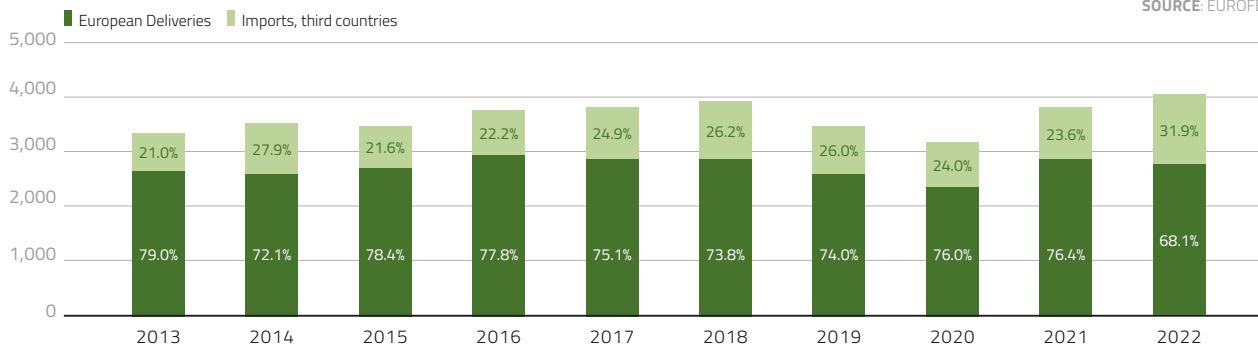
SOURCE: EUROFER



### COLD ROLLED FLAT PRODUCTS

CHART ■ 2013 – 2022

SOURCE: EUROFER



## Stainless steel market supply: Long products

In '000 metric tonnes

### TOTAL STAINLESS LONG PRODUCT DELIVERIES BY SOURCE

TABLE ■ 2013 – 2022

SOURCE: EUROFER

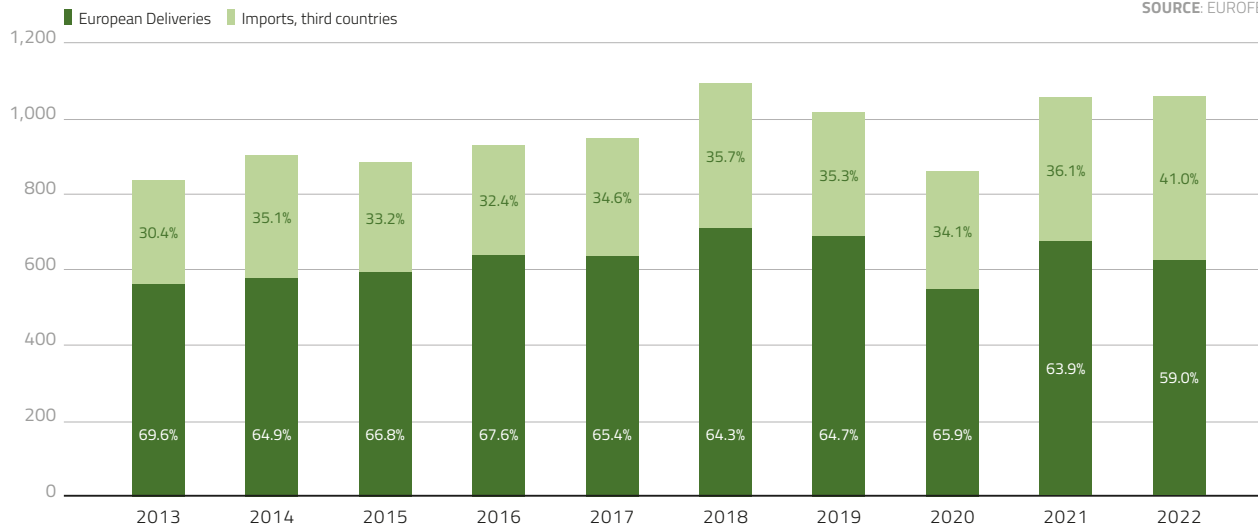
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% shares 2022
European Deliveries	577	587	594	633	624	709	657	573	672	623	59.0%
Imports, Third Countries*	252	318	295	304	330	394	359	296	380	433	41.0%
<b>Market Supply</b>	<b>829</b>	<b>905</b>	<b>889</b>	<b>937</b>	<b>954</b>	<b>1,103</b>	<b>1,016</b>	<b>869</b>	<b>1,052</b>	<b>1,056</b>	<b>100%</b>

\* including Bright Bars and Wires

### TOTAL STAINLESS LONG PRODUCT DELIVERIES BY SOURCE

CHART ■ 2013 – 2022

SOURCE: EUROFER

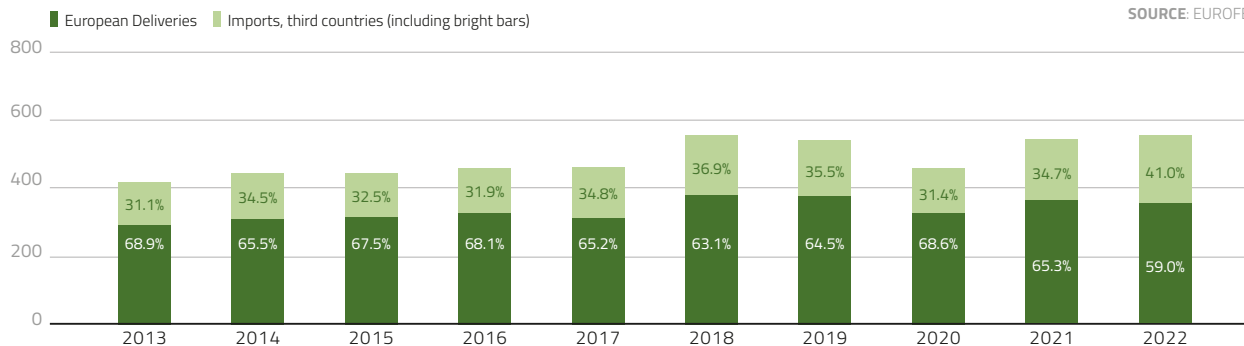


## Stainless steel market supply: Hot rolled bars & sections and wire rod

In '000 metric tonnes

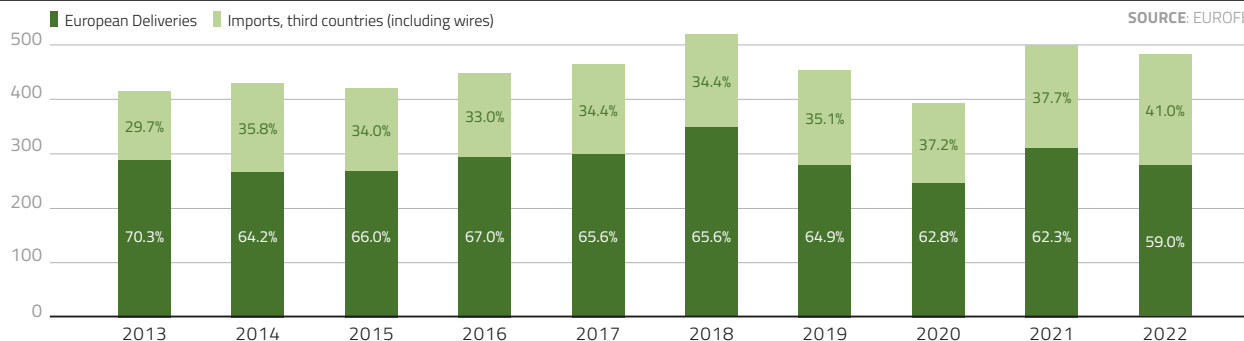
### HOT ROLLED BARS & SECTIONS

CHART ■ 2013 – 2022



### WIRE ROD

CHART ■ 2013 – 2022



## Imports into the EU: Total stainless steel

In '000 metric tonnes

## IMPORTS OF FINISHED STAINLESS STEELS BY PRODUCT

TABLE ■ 2013 – 2022

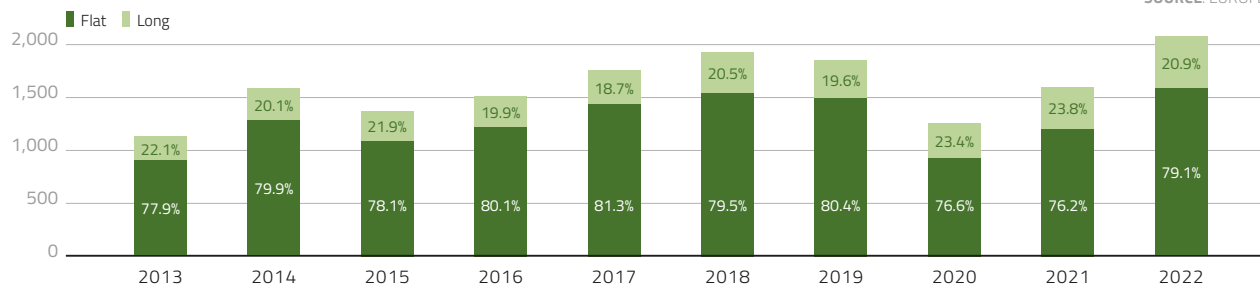
SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
<b>Finished Products</b>	<b>1,144</b>	<b>1,574</b>	<b>1,348</b>	<b>1,528</b>	<b>1,764</b>	<b>1,921</b>	<b>1,833</b>	<b>1,259</b>	<b>1,592</b>	<b>2,064</b>
▶ of which flat products	891	1,257	1,053	1,224	1,434	1,527	1,474	964	1,213	1,632
▶ Hot Rolled sheets and strips	140	183	216	305	378	400	431	122	254	264
▶ Plates	35	41	42	33	34	33	43	27	19	23
▶ Cold Rolled Flat	684	991	747	839	962	1,024	929	776	894	1,299
▶ of which long products	253	317	295	304	330	394	359	295	379	432
▶ Wire Rod	63	81	68	71	75	87	71	61	71	85
▶ Merchant Bars	54	66	54	57	55	70	66	50	62	71
▶ Bright Bars	75	95	97	97	111	143	133	100	128	162
▶ Drawn Wires	60	76	76	79	89	94	89	85	119	115
▶ Flat	77,9%	79,9%	78,1%	80,1%	81,3%	79,5%	80,4%	76,6%	76,2%	79,1%
▶ Long	22,1%	20,1%	21,9%	19,9%	18,7%	20,5%	19,6%	23,4%	23,8%	20,9%

## IMPORTS OF FINISHED STAINLESS STEELS BY PRODUCT CATEGORY

CHART ■ 2013 – 2022

SOURCE: EUROFER



## Exports from the EU: Total stainless steel

In '000 metric tonnes

## EXPORTS OF FINISHED STAINLESS STEELS BY PRODUCT

TABLE ■ 2013 – 2022

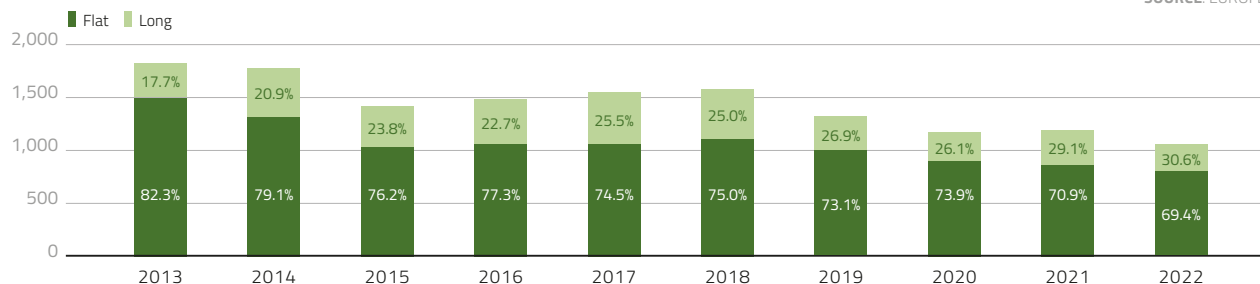
SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
<b>Finished Products</b>	<b>1,832</b>	<b>1,711</b>	<b>1,473</b>	<b>1,499</b>	<b>1,563</b>	<b>1,588</b>	<b>1,382</b>	<b>1,223</b>	<b>1,253</b>	<b>1,154</b>
▶ of which flat products	1,508	1,352	1,122	1,159	1,165	1,192	1,010	905	890	801
▶ Hot Rolled sheets and strips	448	308	194	205	230	244	164	118	124	113
▶ Plates	90	114	107	99	91	105	99	90	74	79
▶ Cold Rolled Flat	834	806	715	745	734	727	640	612	600	522
▶ of which long products	324	359	351	340	398	396	372	318	363	353
▶ Wire Rod	63	68	68	67	80	75	74	58	80	80
▶ Merchant Bars	70	79	75	74	91	90	93	79	86	84
▶ Bright Bars	159	180	177	170	197	198	176	155	167	161
▶ Drawn Wires	31	31	31	29	30	34	29	26	31	28
▶ Flat	82,3%	79,0%	76,2%	77,3%	74,5%	75,1%	73,1%	74,0%	71,0%	69,4%
▶ Long	17,7%	21,0%	23,8%	22,7%	25,5%	24,9%	26,9%	26,0%	29,0%	30,6%

## EXPORTS OF FINISHED STAINLESS STEEL BY PRODUCT CATEGORY

TABLE ■ 2013 – 2022

SOURCE: EUROFER



## EU Trade balance: by volume

In '000 metric tonnes

### NET TRADE BALANCE BY VOLUME

CHART ■ 2013 – 2022

SOURCE: EUROFER



# Sustainability



## Imports into the EU: scrap steel

In '000 metric tonnes

### IMPORTS OF SCRAP INTO THE EU

TABLE ■ 2013 – 2022

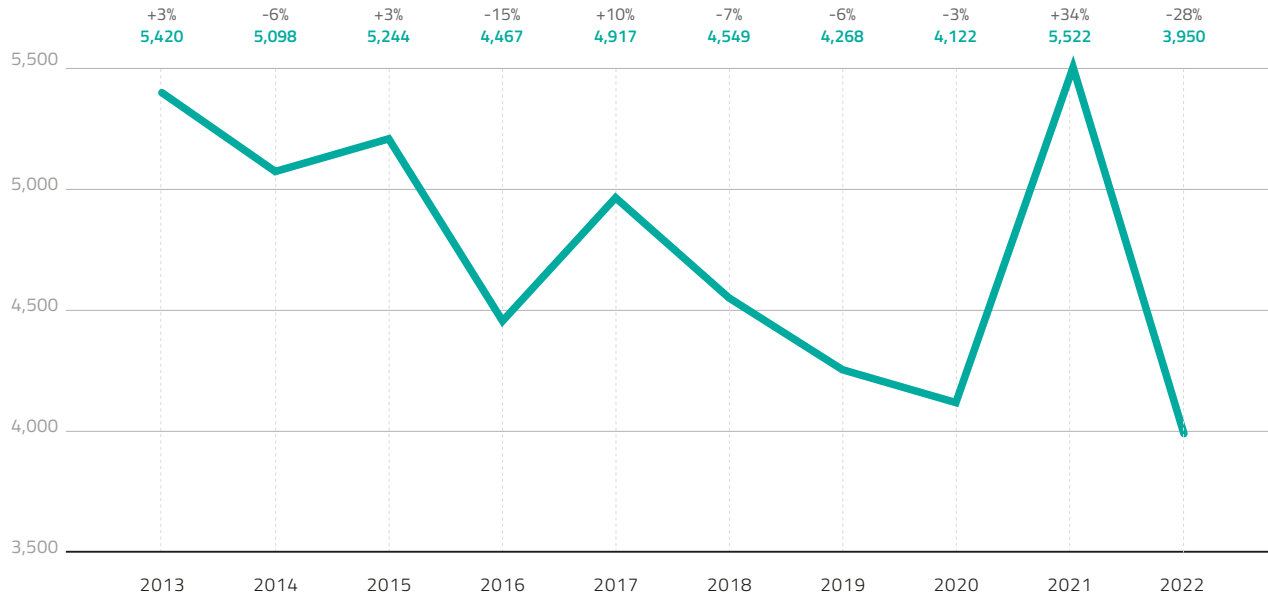
SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Imports Comext	5,420	5,098	5,244	4,467	4,917	4,549	4,268	4,122	5,522	3,950

### IMPORTS OF SCRAP INTO THE EU

CHART ■ 2013 – 2022

SOURCE: EUROFER





## Exports from the EU: scrap steel

In '000 metric tonnes

### EXPORTS OF SCRAP FROM THE EU

TABLE ■ 2013 – 2022

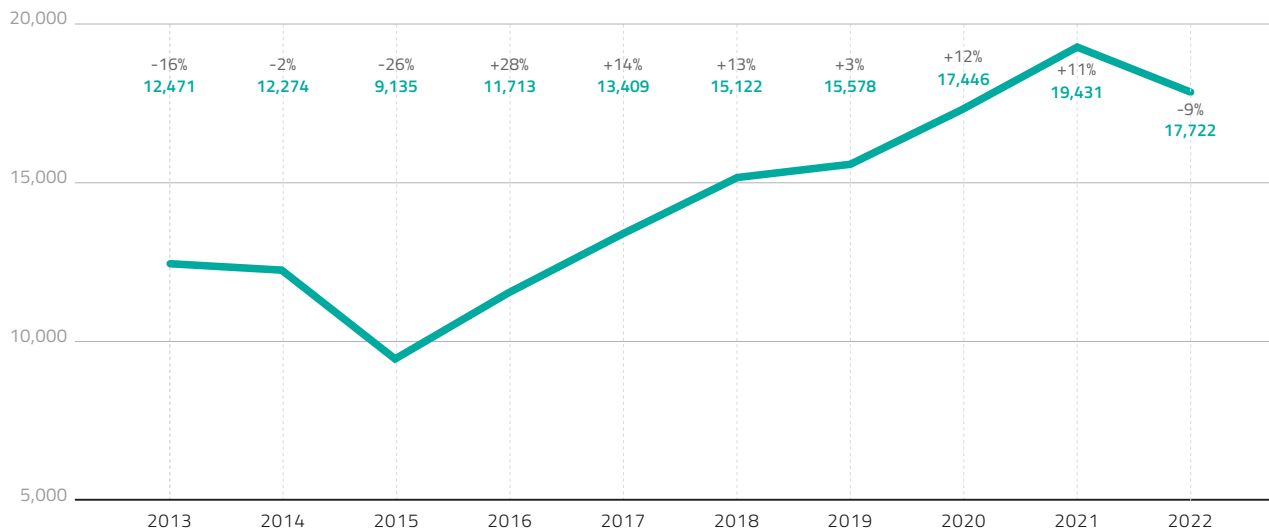
SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Imports Comext	12,471	12,274	9,135	11,713	13,409	15,122	15,578	17,446	19,431	17,722

### EXPORTS OF SCRAP FROM THE EU

GRAPH ■ 2013 – 2022

SOURCE: EUROFER



## Consumption & net export: scrap

In '000 metric tonnes

### CONSUMPTION & NET EXPORT OF SCRAP STEEL

TABLE ■ 2013 – 2022

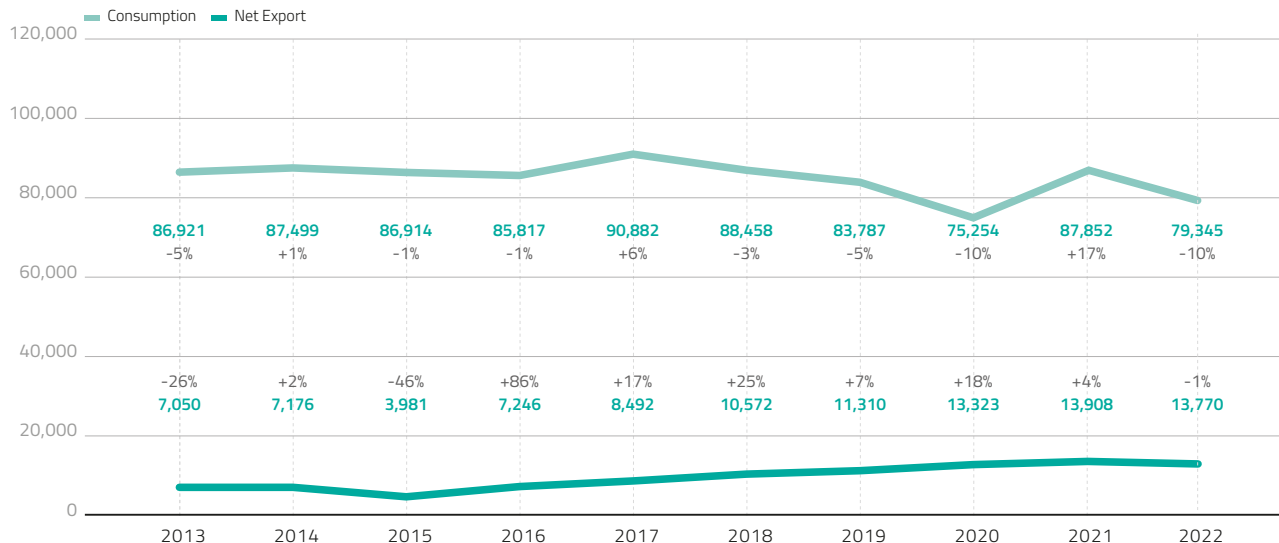
SOURCE: EUROFER

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Consumption Total	86,921	87,499	86,914	85,817	90,882	88,458	83,787	75,254	87,852	79,345
Net Export	7,050	7,176	3,981	7,246	8,492	10,572	11,310	13,323	13,908	13,770

### CONSUMPTION & NET EXPORT OF SCRAP STEEL

GRAPH ■ 2013 – 2022

SOURCE: EUROFER



# References & Definitions

## Definitions according to NACE Rev.2

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### ▶ **Building & Civil Engineering**

- 41 Construction of buildings
- 42 Civil engineering
- 43 Specialised construction activities
- 25.1 Manufacture of metal structures and part of structures
- 25.2 Manufacture of tanks, generators, radiators, boilers

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### ▶ **Mechanical Engineering**

- 28 Manufacture of machinery and equipment
- 27.1 Manufacture of electric motors, generators, transformers
- 25.3 Manufacture of steam generators, except central heating hot water boilers

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### ▶ **Automotive**

- 29 Manufacture of motor vehicles and trailers

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### ▶ **Domestic Appliances**

- 27.51 Manufacture of electric domestic appliances

### ▶ **Other Transport Equipment**

- 30 Manufacture of other transport equipment
- 30.1 Building and repair of ships
- 30.2 Manufacture of railway locomotives and rolling stock
- 30.91 Manufacture of motorcycles

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### ▶ **Steel Tubes**

- 24.2 Manufacture of steel tubes

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### ▶ **Metal Goods**

- 25 Manufacture of fabricated metal products excluding 25.1-25.2-25.3

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### ▶ **Other sectors**

- 26 Manufacture of computer, electronic and optical products
- 27 Manufacture of electric motors, generators, transformers and electricity distribution and control apparatus excluding 27.1 and 27.5

## EU steel market definitions

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### **SWIP**

abbreviation for Steel Weighted Industrial Production index. used as a proxy for real steel consumption. Activity in the steel-using sectors is weighted with the relative share of each sector in total steel consumed by all sectors.

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### **Real steel consumption**

consumption of all steel products used by the steel-using sectors in their production processes, also referred to as “final use” of steel products.

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### **Apparent steel consumption**

also referred to as “steel demand”. It concerns the supply of all steel products delivered to the EU27 market by domestic producers in the EU or third country exporters. If apparent consumption exceeds real steel consumption, the surplus is stocked in the distribution chain. If apparent consumption is less than real steel consumption, inventories are being withdrawn. In formula: total deliveries + imports from third countries – exports to third countries – steel industry receipts.

### **Steel industry receipts**

deliveries for further processing from within the steel industry itself – subtracted to avoid double-counting of steel consumption.

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### **Narrow definition**

EUROFER applies the so-called “narrow definition” which excludes steel tubes and first transformation products from the product scope used for calculating steel consumption. Hence, the steel tube sector is a steel-using sector under this definition.

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### **Steel intensity**

the ratio of real steel consumption to steel weighted production in the steel-using sectors. This reflects the usually slightly negative impact on consumption of innovation in steel products, inter-material substitution, improvements in process efficiency and design, etc.

## EUROPEAN STEEL IN FIGURES 2023

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