

**DIRECTORATE FOR SCIENCE, TECHNOLOGY AND INDUSTRY  
STEEL COMMITTEE**

**DSTI/SU/SC(2007)28  
For Official Use**

**THE EUROPEAN STEEL MARKET SITUATION**

**17 May 2007**

*Presentation by Karl Tachelet, Director EUROFER, European Confederation of Iron & Steel Industries. Steel Committee meeting, 17 May 2007, Istanbul, Turkey.*

Anthony de Carvalho, Administrator, Structural Policy Division  
Tel: +(33-1) 45 24 93 77, Fax: +(33-1) 44 30 62 57; E-mail: [anthony.decarvalho@oecd.org](mailto:anthony.decarvalho@oecd.org)

**JT03227198**

## **OECD Steel Committee Meeting**

**Istanbul, 17th May 2007**

# **The European Steel Market Situation**

**Karl Tachelet**  
**Director Eurofer**  
European Confederation of Iron & Steel Industries

**EUROFER**  
European Confederation of Iron and Steel Industries

## ***The European Steel Market Situation***

### **Content**

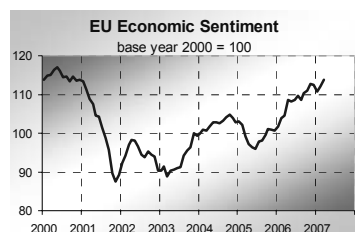
- **Macro-economic situation**
- **EU Steel Market:**
  - **Steel consuming sectors**
  - **Real and apparent consumption**
  - **EU imports and exports**
  - **Third country shares of total exports into EU**
  - **China share of total exports into EU**
  - **EU import share of EU market supply**

For the detailed Eurofer Report on the Economic and Steel Market Situation Q.I/2007 and forecast for Q.II-III/2007: <http://www.eurofer.org/marketReport/marketReport.pdf>

**EUROFER**  
European Confederation of Iron and Steel Industries

## Macro-economic situation

### EU Economy



- 2007: EU economy on solid footing, continuing the strong 2006 dynamics
- Latest surveys signal March EU economic sentiment on highest level since 6 years
- Business climate remains very supportive to investment spending
- Consumer confidence is improving, signalling rise in private consumption
- Unemployment across the EU is falling
- Germany will keep its role as growth engine
- Inflation broadly under control
- GDP growth 2007 revised upwards to 2.6% (2006: 2.8%)

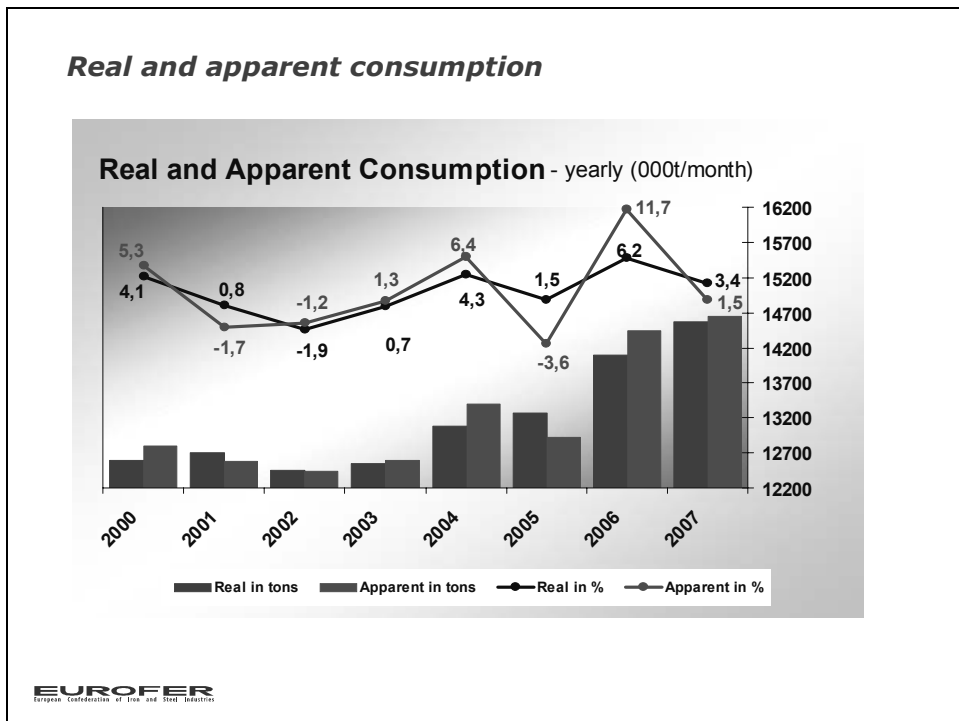
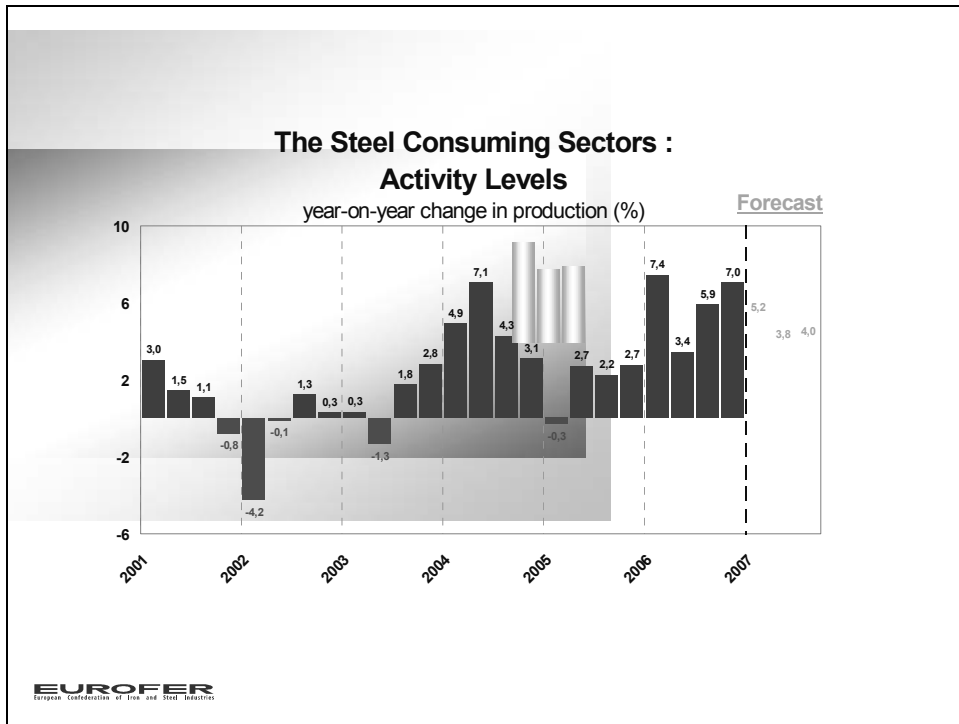
**EUROFER**  
European Confederation of Iron and Steel Industries

## Steel consuming sectors

### Development of the main steel consuming sectors

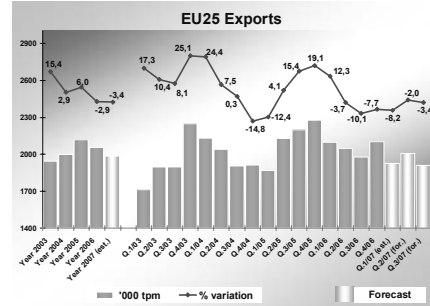
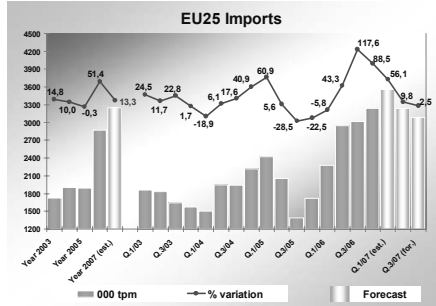
(% output change y-o-y)	% weight in total steel consumption of each sector	Year 2006	Q.I/2007	Q.II/2007	Q.III/2007	Year 2007
		Year 2005	Q.I/2006	Q.II/2006	Q.III/2006	Year 2006
Construction	24	5,3	8,3	3,1	3,7	4,1
Structural steelwork	10	9,2	7,6	6,0	6,4	6,0
Mechanical engineering	13	8,0	5,9	5,4	5,0	5,8
Automotive	18	2,5	1,1	1,0	2,9	2,2
Domestic appliances	4	8,5	5,1	4,4	5,4	6,1
Shipyards	1	2,8	5,1	6,0	2,6	4,0
Tubes	12	5,8	4,9	4,6	3,0	4,1
Metalware	13	6,3	5,6	5,0	4,4	4,6
Miscellaneous	5	4,4	3,8	3,5	3,1	3,0
<b>TOTAL</b>	<b>100</b>	<b>5,9</b>	<b>5,2</b>	<b>3,8</b>	<b>4,0</b>	<b>4,2</b>

**EUROFER**  
European Confederation of Iron and Steel Industries



### EU imports and exports

All products, All qualities

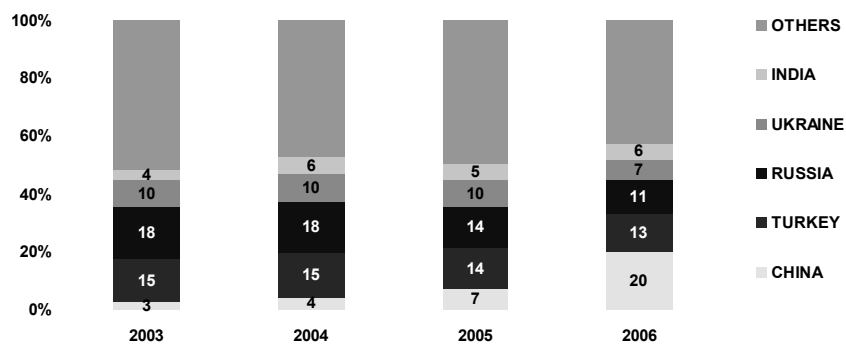


Changes in % (Estimates)	IMPORTS Third Countries	EXPORTS Third Countries	COMMUNITY DELIVERIES OF EU PRODUCERS
Year 2006 Year 2005	51,4 %	-2,9 %	7,2 %
Year 2007 (F) Year 2006	13,3 %	-3,4 %	-1,4 %

**EUROFER**  
European Confederation of Iron and Steel Industries

### Third country shares of total exports into the EU (%)

Finished products, All qualities



**EUROFER**  
European Confederation of Iron and Steel Industries

