



ITEM 6: LATEST DEVELOPMENTS IN STEELMAKING CAPACITY: INTERIM REPORT

85th session of the Steel Committee

Paris, September 18, 2018

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Outline

- 1. Release of the recent steelmaking capacity portal site**
- 2. Global summary of steelmaking capacity developments**
- 3. Capacity developments by region**
- 4. Global crude steelmaking capacity and crude steel production**
- 5. Cross-border investments**



1. Release of the recent steelmaking capacity portal site

The recent edition of the steelmaking capacity database and document [DSTI/SC(2018)2] are available at the OECD Steelmaking Capacity Portal

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Steelmaking capacity ⁱ

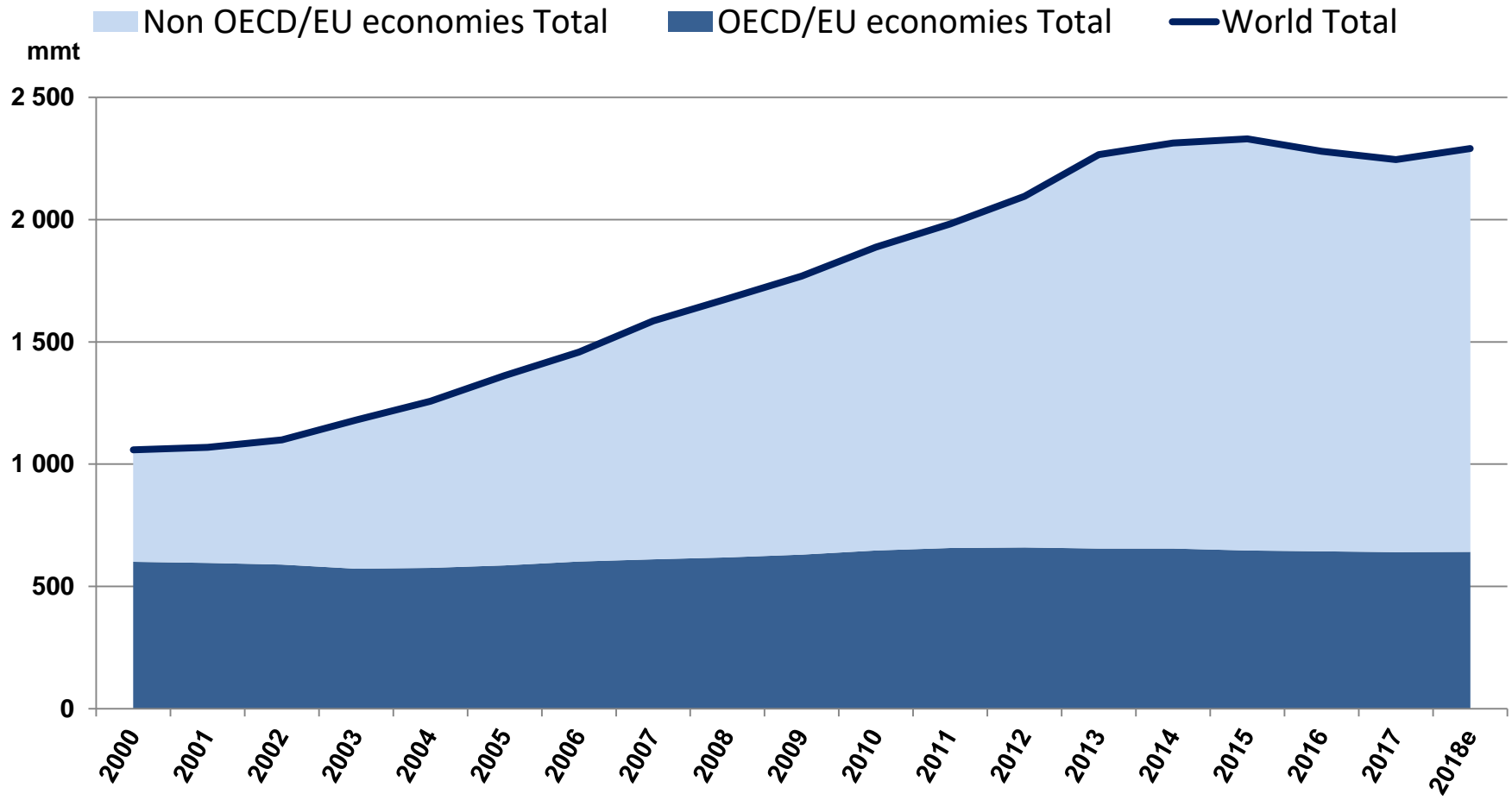
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	2018																		
	Nominal crude steelmaking capacity																		
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	
	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	▲▼	
→ Economy																			
Australia ⁱ	8.1	8.1	8.1	8.1	8.1	8.1	8.1	8.1	8.1	8.1	8.1	8.1	5.4	5.4	5.4	5.4	5.4	5.4	
Canada ⁱ	17	16.5	17	17	17	17	19	19	20.5	20.5	20.5	20.5	20.5	20.5	20.7	20.7	20.7	20.7	
Chile ⁱ	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	
Israel ⁱ	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	
Japan ⁱ	146.9	145.8	144.8	120.5	120.8	124.1	128.7	129.6	129.8	129.9	132.4	132.4	131	131.2	131.1	130.5	129.6	128.2	
Korea ⁱ	49.7	49.9	52	52	53	53.2	56.4	57.2	60.1	64.2	76.5	81.9	80.4	86	85.9	85.5	85.5	85.5	
Mexico ⁱ	19	19	19	19	19	19	21	21.5	21.5	21.5	21.5	21.5	22.5	24	24	25.2	25.6	25.6	
New Zealand ⁱ	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	
Norway ⁱ	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	
Switzerland ⁱ	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.4	
Turkey ⁱ	19.8	20.8	21.9	22.9	23.6	25.1	27.7	32	34.1	38.3	42.7	47.1	49	49.2	49.4	47.4	47.4	48.9	
United States ⁱ	116	112	102	109	109.5	113	114.5	113.4	113.4	114.7	115.1	116.5	118	113.5	113.5	111.3	112.3	112.6	
European Union (28 countries) ⁱ	228.1	228.1	228.7	228.7	228.8	231	233.1	236.7	240	239	237.2	237.6	238.5	231.6	229.6	225.6	220.6	217.7	
NAFTA ⁱ	152	147.5	138	145	145.5	149	154.5	153.9	155.4	156.7	157.1	158.5	161	158	158.2	157.2	158.5	158.9	
OECD - Europe ⁱ	238.5	239.6	241.2	242	242.8	246.5	251	258.6	264	269.1	271.4	276.2	281.8	275.1	273.3	267.3	262.3	260.9	

Notes: The database and document [DSTI/SC(2018)2/FINAL] are based on the discussion in March 2018. Please see the the OECD Steelmaking Capacity Portal <http://www.oecd.org/industry/steelcapacity.htm>



2. Global summary of steelmaking capacity developments – in levels

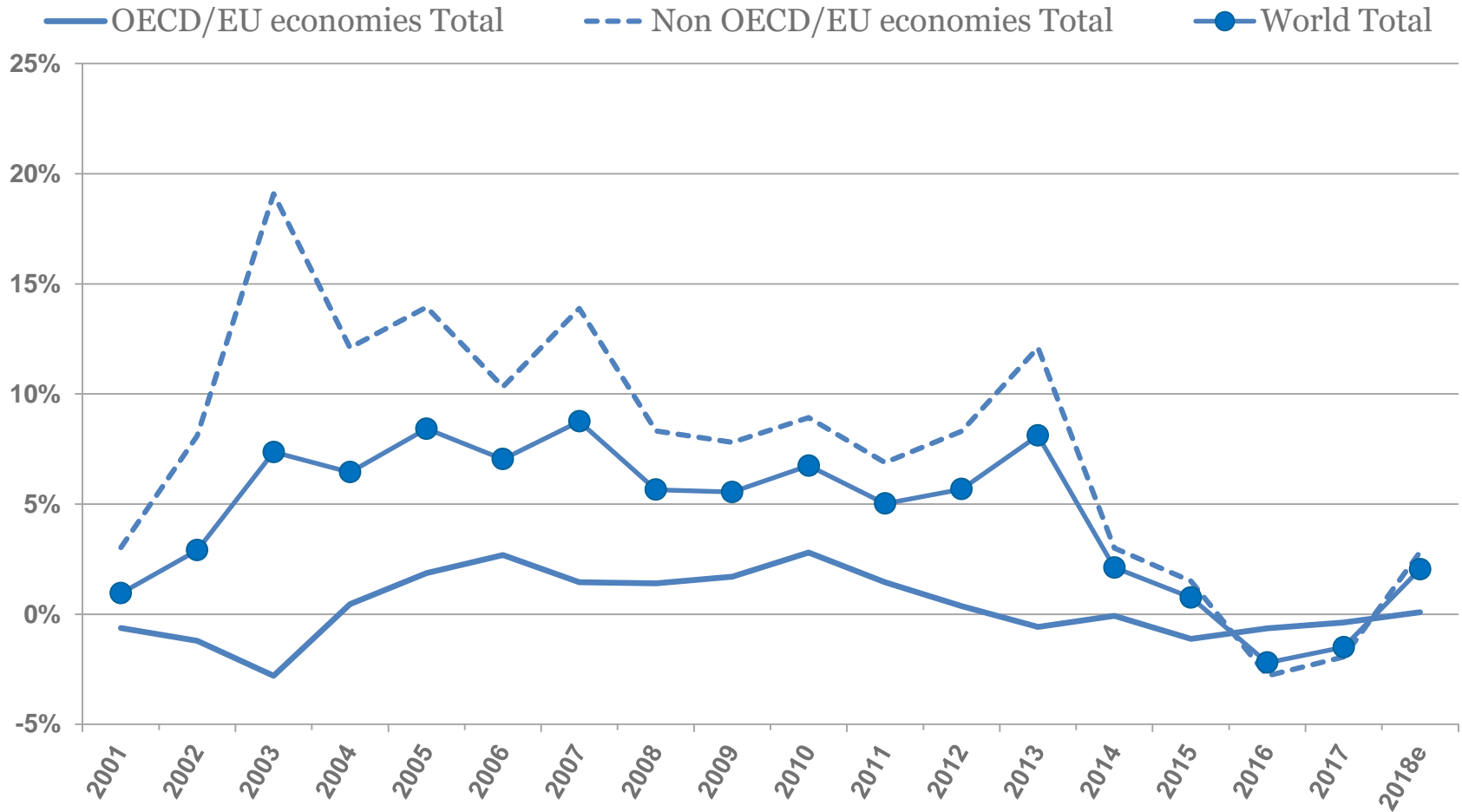


Notes: Capacity data reflects all information on changes up to June 2018. The letter “e” denotes estimate based on information from the first half of the year.

Source: OECD Secretariat calculations



2. Global summary of steelmaking capacity developments – annual % change



Notes: Capacity data reflects all information on changes up to June 2018. The letter “e” denotes estimate based on information from the first half of the year.

Source: OECD Secretariat calculations



3.Capacity developments by region

Current nominal capacity and potential gross capacity additions by region

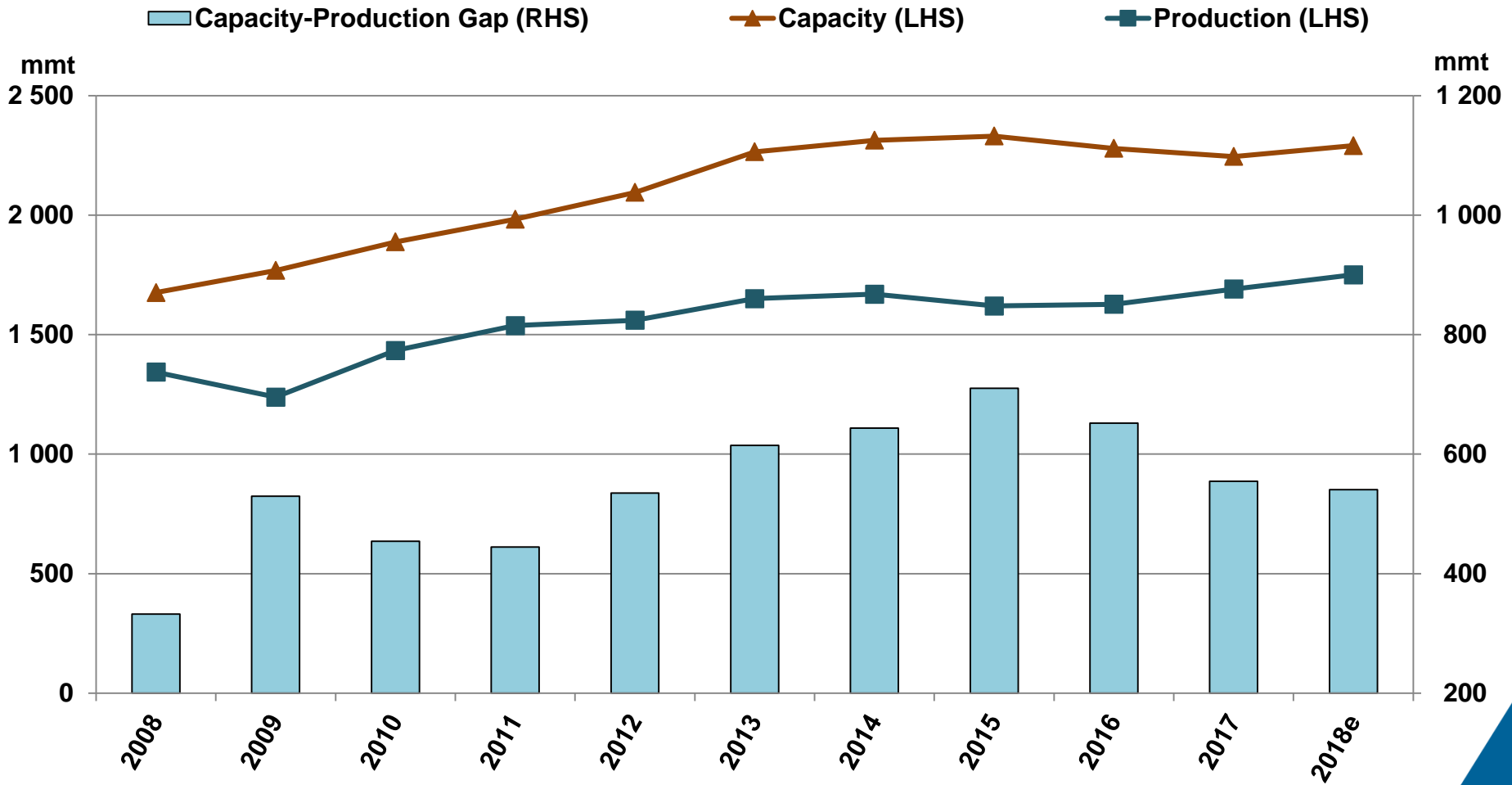
	Existing nominal capacity(mmt)	Estimates of nominal capacity (mmt)	% change expected	Potential gross capacity additions in 2019-21(mmt)	
	2017	2018 (A)	2018-2017	Underway (B)	Planned (C)
Asia	1 486.4	1 504.7	1.2%	19.8	10.0
CIS	144.9	146.9	1.3%	0.2	0.0
Latin America	75.9	78.0	2.8%	0.2	0.6
Middle East	63.7	81.6	28.0%	11.4	5.4
Africa	37.5	42.5	13.4%	0.9	2.0
Europe	275.2	275.2	0.0%	4.1	1.0
NAFTA	154.9	155.5	0.4%	0.3	0.3
Oceania	6.4	6.4	0.0%	0.0	0.0
OECD/EU economies Total	640.8	641.4	0.1%	4.4	1.3
Non OECD/EU economies Total	1 604.1	1 649.3	2.8%	32.4	18.0
World Total	2 244.9	2 290.7	2.0%	36.8	19.3

Notes: Capacity data reflects all information on changes up to June 2018.

Source: OECD Secretariat calculations



4. Global crude steelmaking capacity and crude steel production - Capacity-Production gap

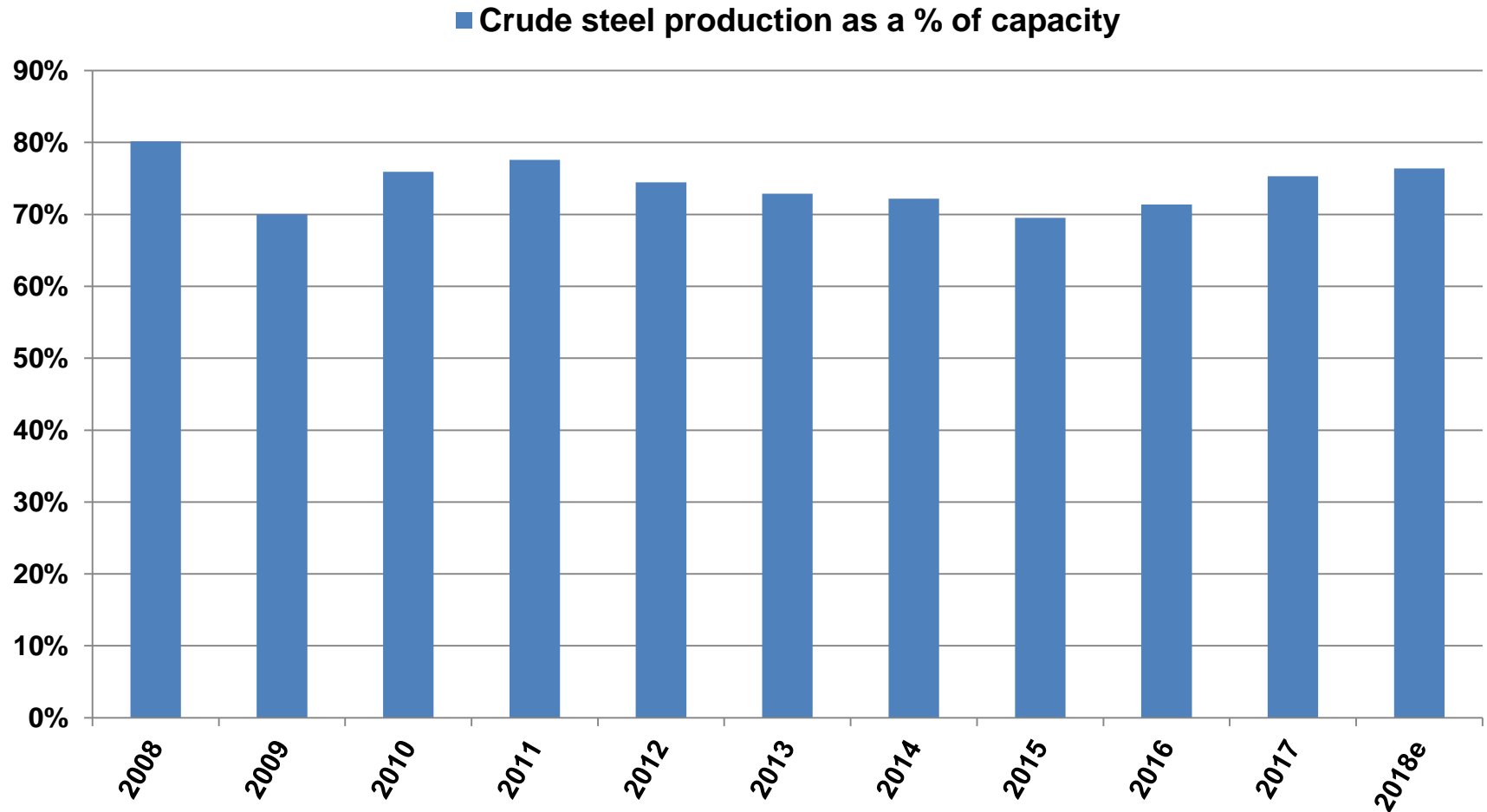


Notes: Capacity data reflects all information on changes up to June 2018. An assumption of annual production data for 2018 is made by applying the y-o-y growth rate for the first five months of 2018 to the annual figure from 2017. The letter “e” denotes estimate based on available information from the first half of the year.

Source: OECD for capacity and worldsteel for production



4. Global crude steelmaking capacity and crude steel production - Crude steel production as a % of capacity



Notes: Capacity data reflects all information on changes up to June 2018. An assumption of annual production data for 2018 is made by applying the y-o-y growth rate for the first five months of 2018 to the annual figure from 2017. The letter “e” denotes estimate based on available information from the first half of the year.

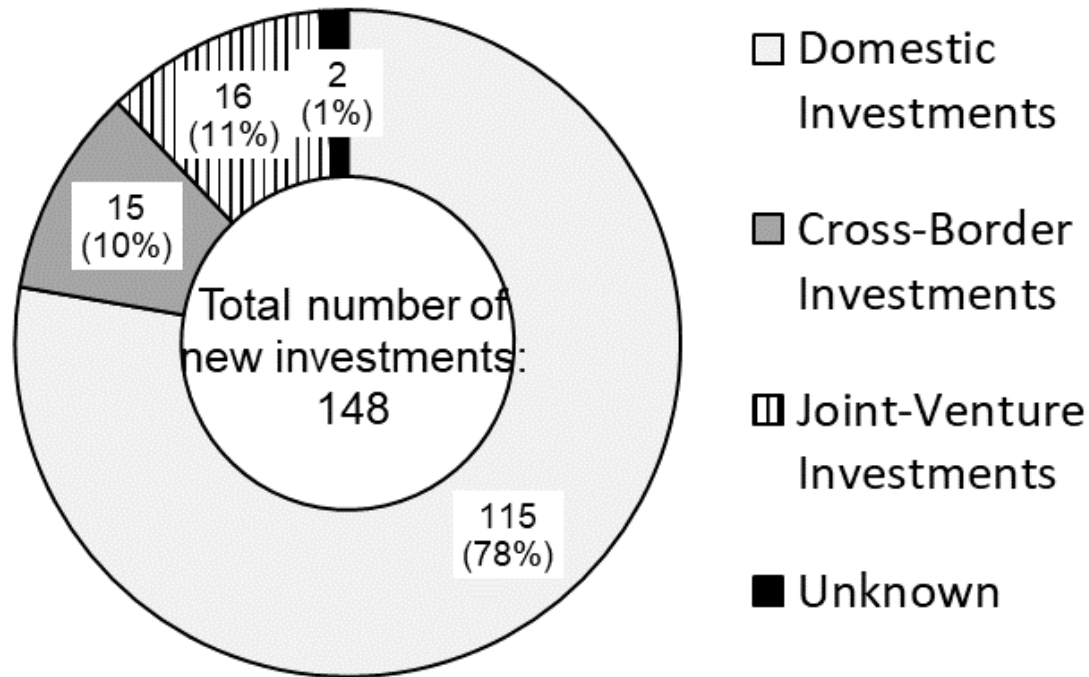
Source: OECD for capacity and worldsteel for production



5. Cross-border investments

– Location of investments

Domestic, cross-border and joint-venture investments in new steelmaking capacity projects



Notes: This includes all new investment projects that are underway or planned, and which are scheduled to become operational in 2018 or later — including projects that have started operation in 2018, as well as projects for which the start date is not available. It does not include cancelled projects. A cross-border investment represents an investment that is based wholly on one or several foreign investors. A joint-venture, on the other hand, involves both a foreign investor and a domestic counterpart. Please see Annex A. of the interim report [DSTI/SC(2018)10] for details on the plant-level investments and their respective investors/owners. The Secretariat welcomes any comments and corrections to the data in the document.

Source: OECD Secretariat calculations



5. Cross-border investments

– Location of investments

Domestic, cross-border and joint-venture investments in new steelmaking capacity projects by location (Total number of new investments : 148)

Location of Investments	Domestic Investments	Cross-Border Investments	Joint-Venture Investments	Unknown
Asia	38	8	8	0
CIS	13	3	1	1
Latin America	6	0	2	0
Middle East	46	1	1	1
Africa	3	1	4	0
Europe	6	2	0	0
NAFTA	3	0	0	0
Oceania	0	0	0	0
World Total	115	15	16	2

Notes: This table includes all new investment projects that are underway or planned, and which are scheduled to become operational in 2018 or later – including projects that have started operation in 2018, as well as projects for which the start date is not available. It does not include cancelled projects. A cross-border investment represents an investment that is based wholly on one or several foreign investors. A joint-venture, on the other hand, involves both a foreign investor and a domestic counterpart. Please see Annex A. of the interim report [DSTI/SC(2018)10] for details on the plant-level investments and their respective investors/owners. The Secretariat welcomes any comments and corrections to the data in the document.

Source: OECD Secretariat calculations



Thank you for your attention