

Current trends for the steel markets on industry restructuring

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Commodities We Cover



Iron Ore

Fines/Lumps | Pellets
Concentrates



Coal

Non Coking | Coking
Met Coke



Scrap & Metalics

Sponge Iron | Pig Iron
Melting Scrap | Rerolling Scrap
Mill Scale



Steel

Billet/Bloom/Ingot | Rebar |
Structure | Wire Rod | HRC |
HR Plate | HR Strip (Patra) | Pipes
CRC | GP | PPGI | Galvalume



Stainless Steel

Stainless Steel



Ferro Alloy

Manganese Ore | Chrome Ore
Silico Manganese | Ferro Manganese
Ferro Chrome | Ferro Silicon
Ferro Molybdenum | Ferro Vanadium



Non Ferrous

Aluminium | Copper | Zinc
Lead | Nickel | Tin



Ship Breaking

Ship Breaking



Graphite Electrode

Graphite Electrode

600+

Price Assessments

500+

Data Assessments

15,000+

Articles Published Yearly

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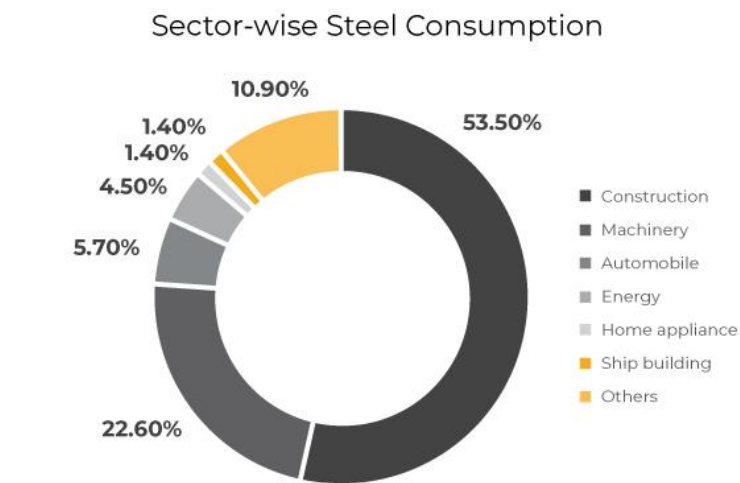
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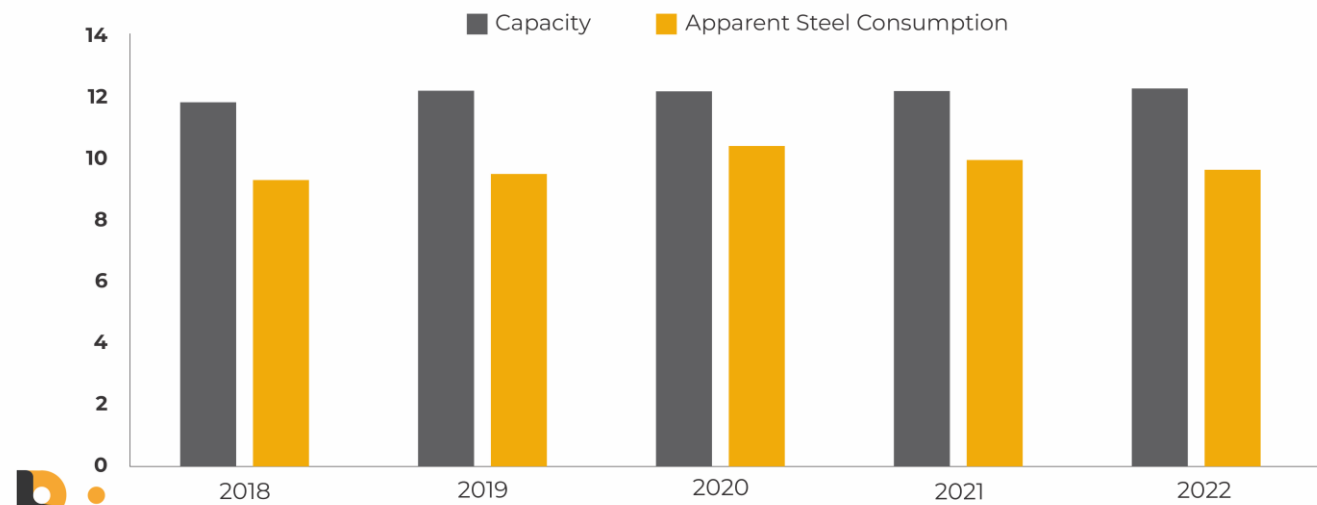
- ✓ China's steel capacity vs consumption: When will the matrix change ?
- ✓ China's construction steel demand seen weakening in 2023
- ✓ China's steel exports likely to hit seven-year high in 2023
- ✓ Is China getting an edge over India in steel exports?
- ✓ What to expect from Indian steel industry by 2030?
- ✓ How are Indian mills placed with supply and demand ?

China's steel capacity vs consumption: When will the matrix change ?

China's Sector-wise Steel Consumption



China's Steel Capacity vs Apparent Steel Consumption (2018-2022)





China's Steel and Economic Data (Jul'22-Aug'23)

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- ✓ China's real estate development investment seen dropping during Jan-Aug'23

- ✓ Auto production and sales were up, y-o-y up 7.4% and 8% respectively.

Manufacturing Investment Growth Rate (Cumulative)



Source: National Bureau of Statistics (NBS) | SteelMint

Infrastructure Investment Growth Rate (Cumulative)



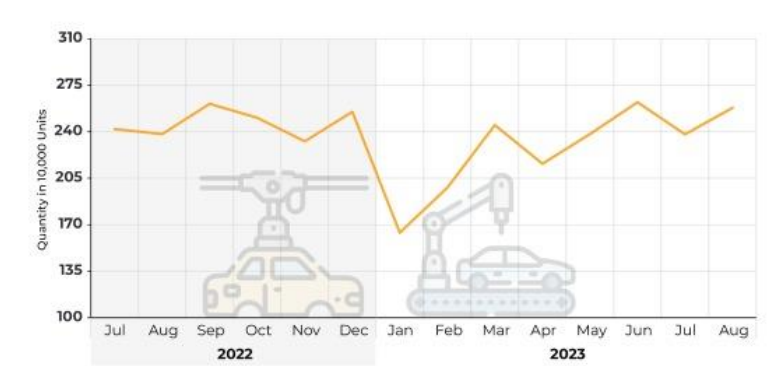
Source: National Bureau of Statistics (NBS) | SteelMint

Real Estate Development Growth Rate (Cumulative)



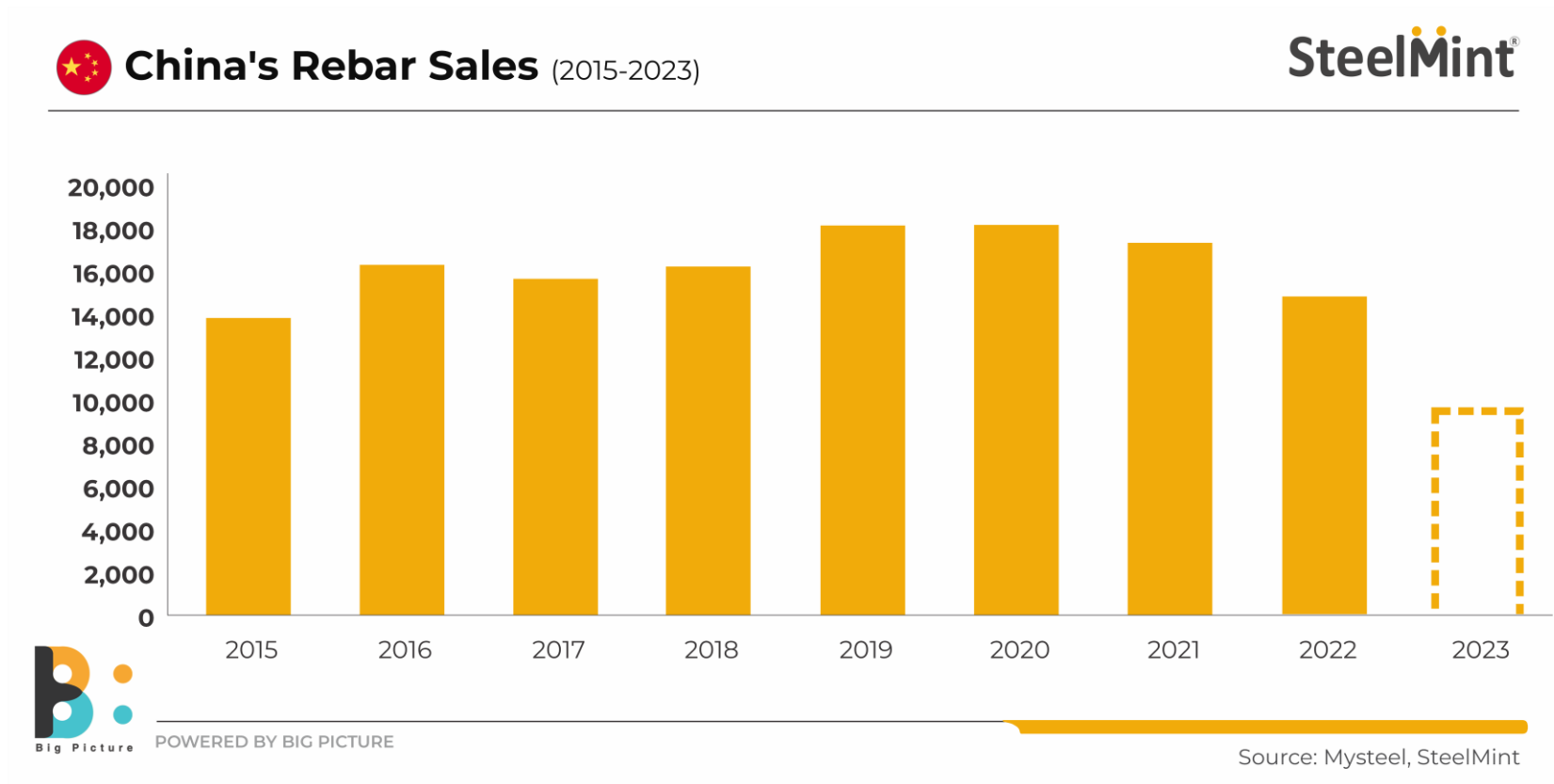
Source: National Bureau of Statistics (NBS) | SteelMint

Automobile Sales

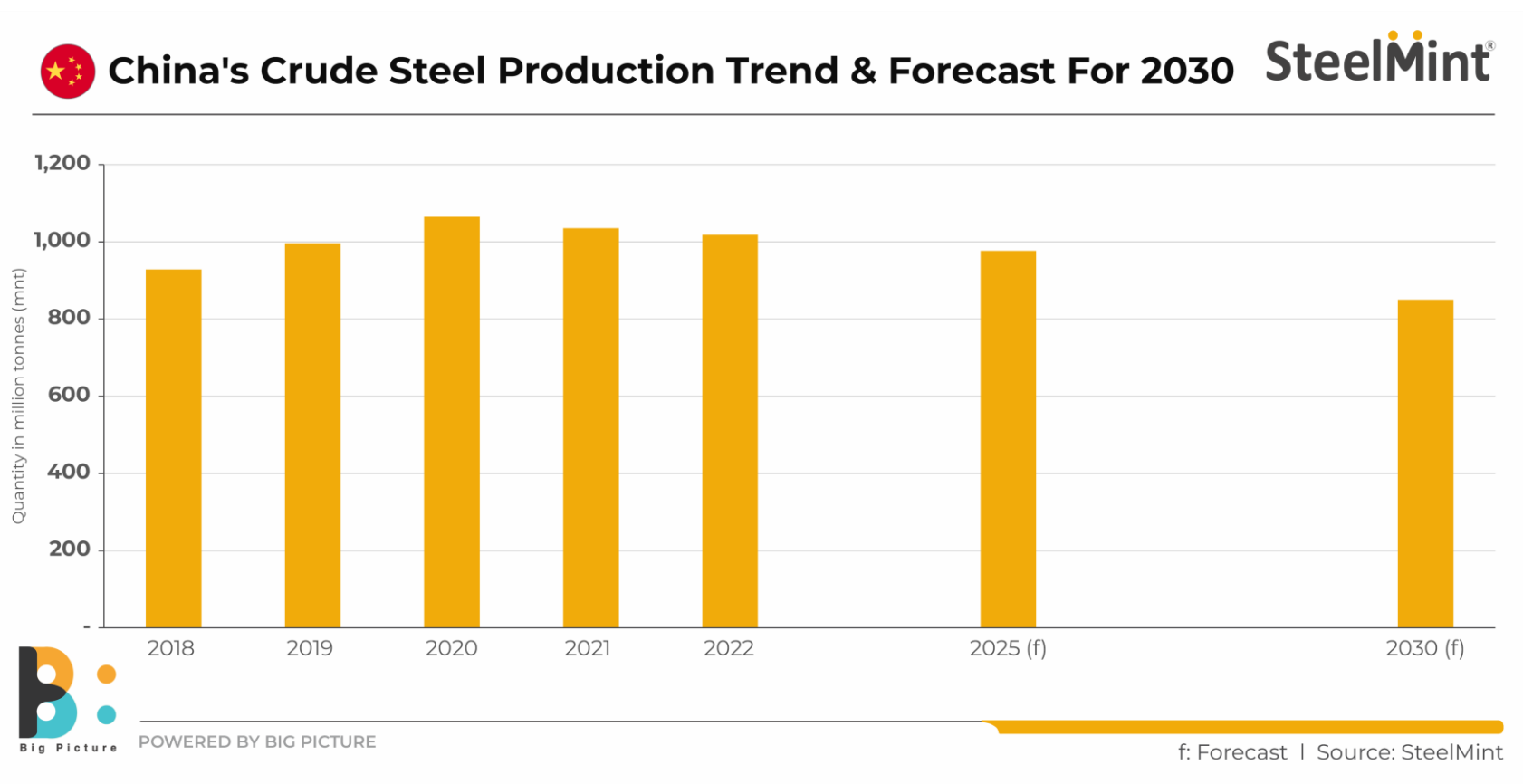


Source: China Association of Automobile Manufacturers (CAAM)

China's construction steel demand seen weakening in 2023



China's crude steel output likely to drop by 17% by 2030

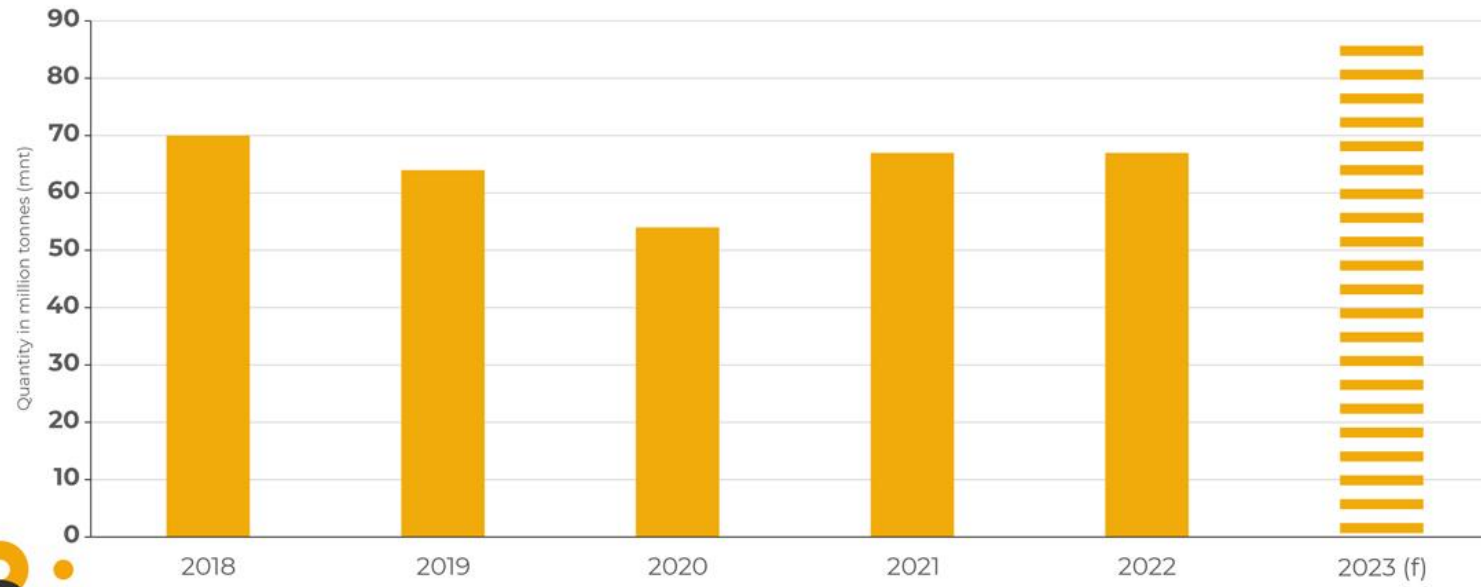


China steel exports likely to hit seven-year high in 2023



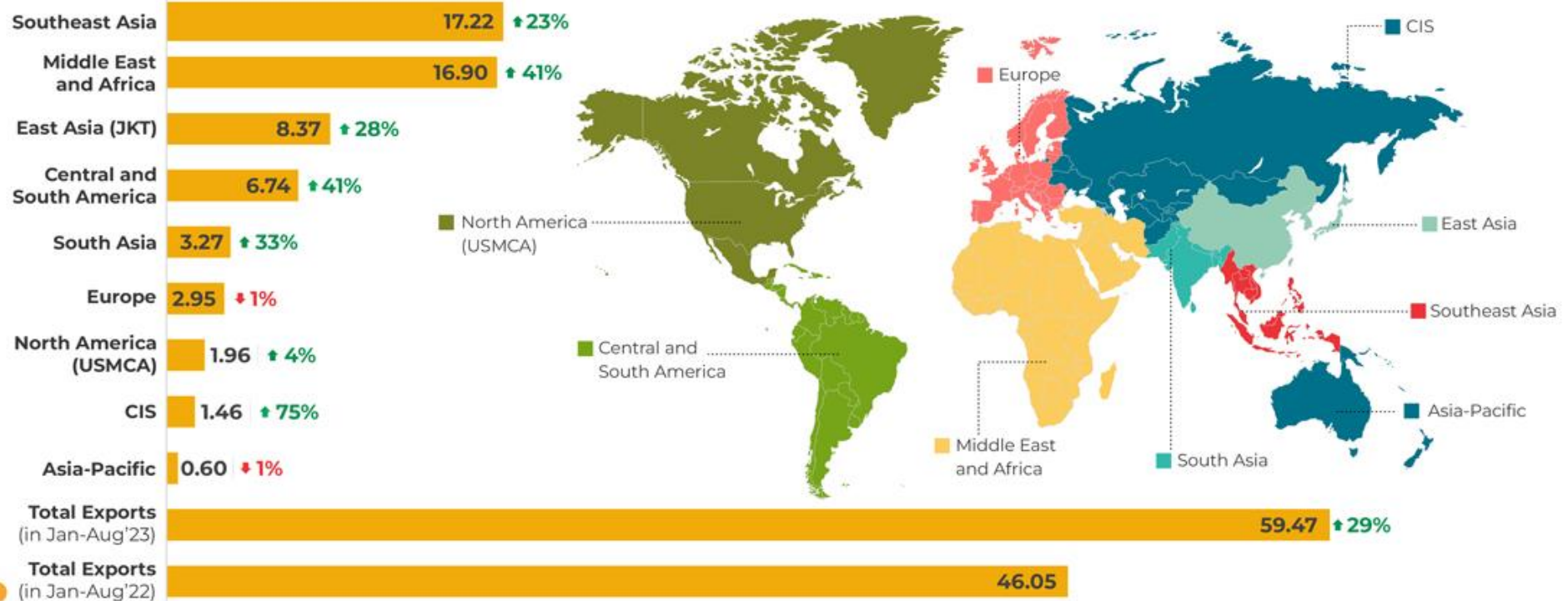
China's Steel Exports (2018-2023)

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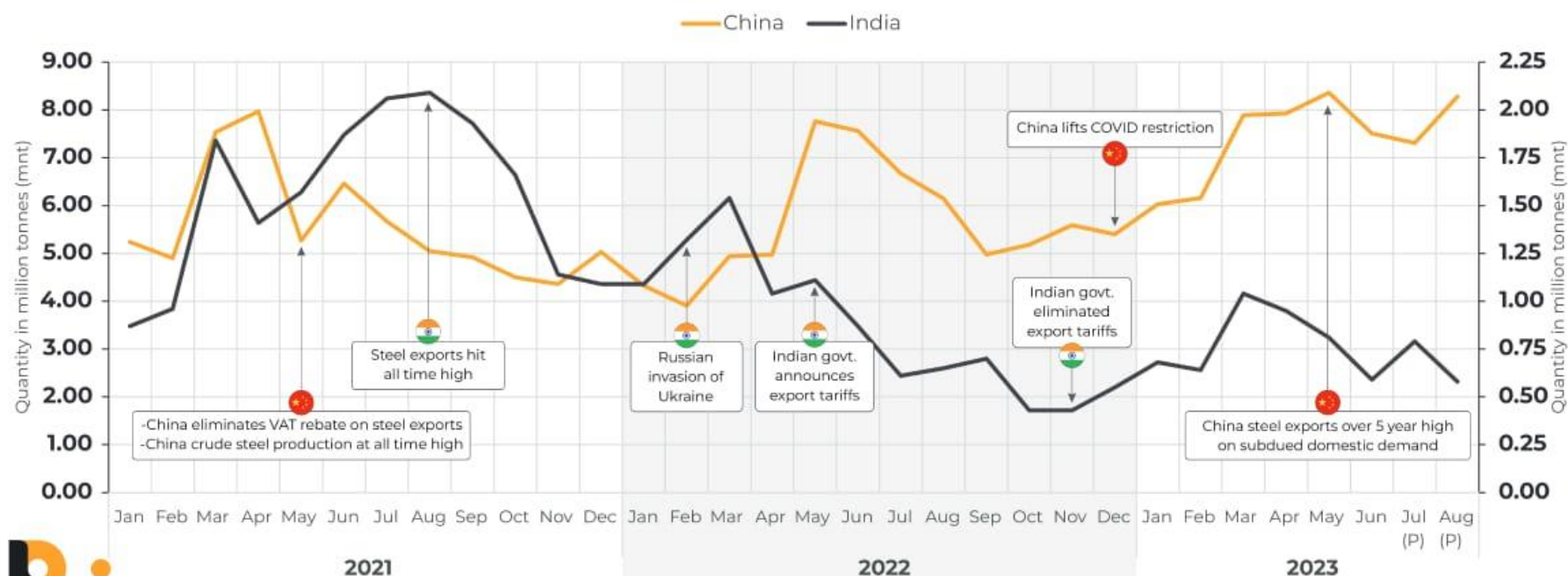
China's Region-wise Steel Exports in Jan-Aug'23

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Is China getting an edge over India in steel exports?

China vs India Monthly Steel Exports Comparison (Jan'21-Aug'23) SteelMint®



What to expect from Indian steel industry by 2030?

- ✓ Indian steel production will grow over 65% by 2030
- ✓ BF/BoF route share in steelmaking to increase
- ✓ Mills are eyeing to increase their scrap feed from 8% to 15% by 2030

Global Crude Steel Production

| Country | 2022 | 2030 [E] | % Change |
|----------------|-------|----------|----------|
| China | 1,018 | 850 | ↓ 17% |
| JKT | 176 | 190 | ↑ 8% |
| European Union | 136 | 170 | ↑ 25% |
| India | 125 | 212 | ↑ 70% |
| Americas | 170 | 195 | ↑ 15% |
| CIS | 83 | 100 | ↑ 20% |
| MENA | 102 | 130 | ↑ 27% |
| SEA/SW | 63 | 95 | ↑ 51% |
| Others | 11 | 13 | ↑ 19% |
| Totals | 1,885 | 1,955 | ↑ 4% |

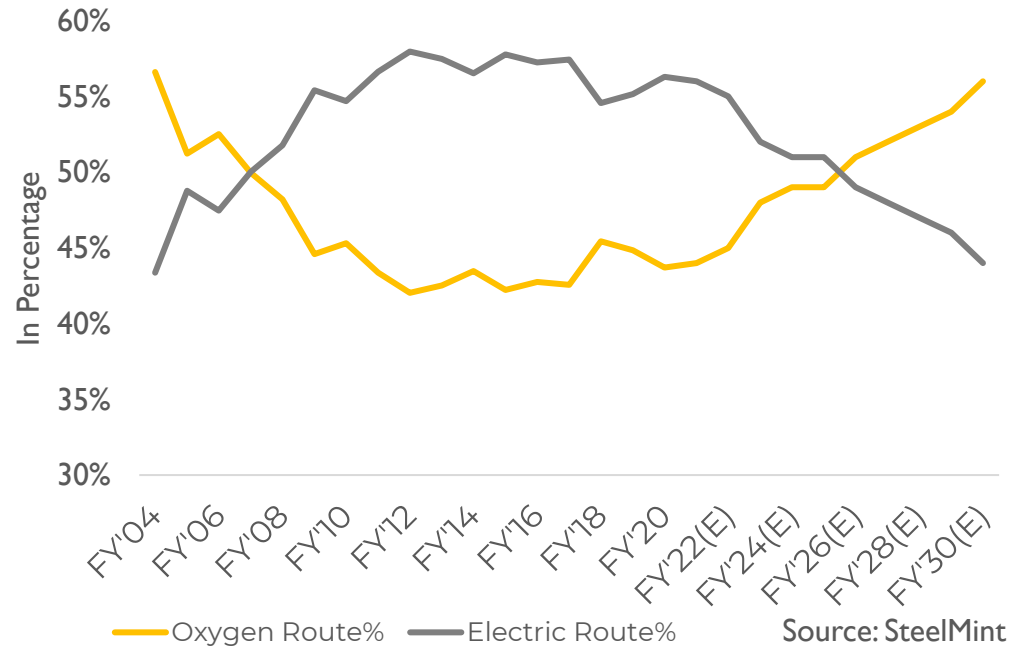
JKT: Japan, South Korea, Taiwan | Americas: North and South America | CIS: Commonwealth of Independent States

MENA: Middle East and North Africa | SEA: South East Asia | SW: South West

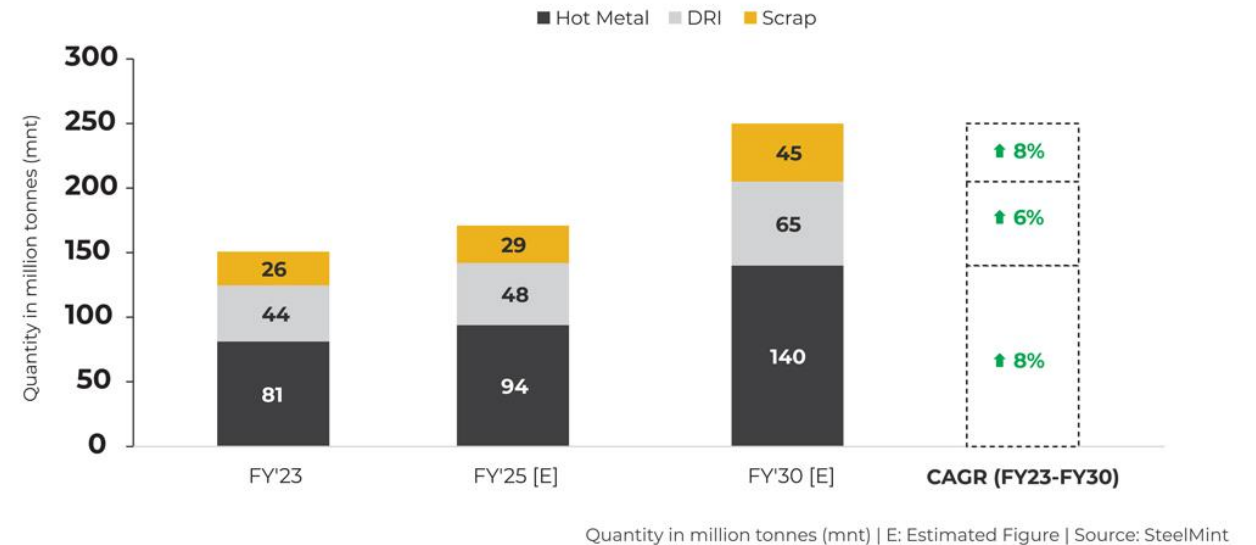
Quantity in million tonnes (mnt) | E: Estimated Figure | Source: WSA, SteelMint

How are Indian mills placed with supply and demand ?

India: Crude Steel Production Route Wise - FY'30



India's Steel Making Metallic Mix



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