THE STRUCTURE OF STEEL EXPORTS: 2007-2013

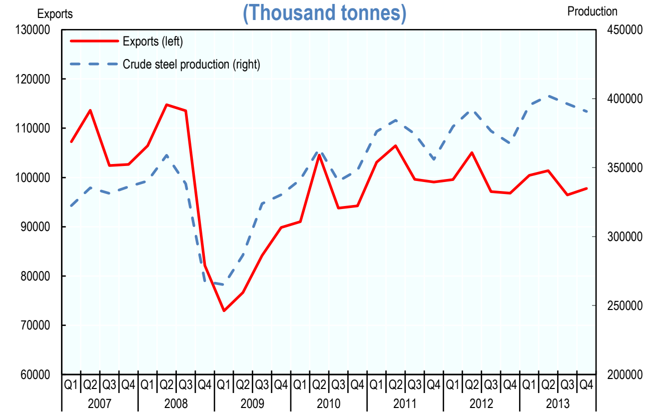
DSTI/SU/SC(2014)6

76th Steel Committee Meeting
Paris, 5-6 June 2014

OECD
BETTER POLICIES FOR BETTER LIVES

Global steel exports have fluctuated widely

Global steel exports and production, 2007 and 2013
(Thousand tonnes)



Note: World export data usually include intra-EU trade, which is the case in this graph. Some of the global export weakness observed since 2012 can be explained by weak internal demand in the EU, which has reduced internal trade within the single market.
Sources: Iron and Steel Statistics Bureau and the World Steel Association.

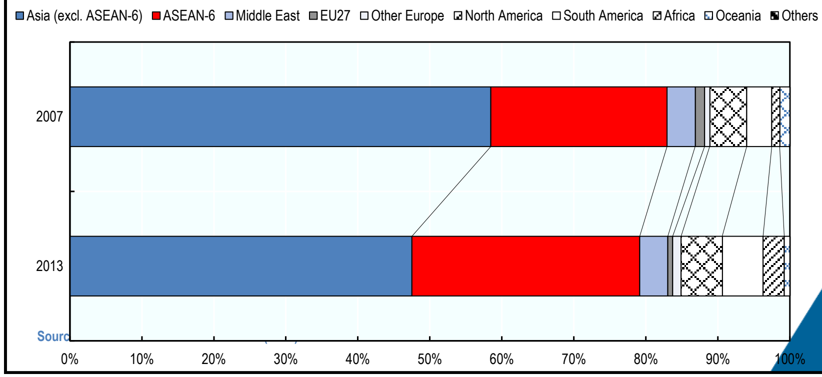
The ten largest steel-exporting economies in 2013

Position 2013	Economy	2007 (A)	2012 (B)	2013 (C)	Changes (C-A)	(C-B)	(C/A %)	(C/B %)
1	China	67.9	54.5	61.3	-6.6	6.7	-9.7	12.4
2	Japan	36.2	41.4	42.4	6.2	1.0	17.3	2.5
3	EU27	33.5	39.4	36.8	3.3	-2.6	9.9	-6.6
4	Korea	18.9	30.1	28.8	10.0	-1.3	53.0	-4.3
5	Ukraine	30.3	24.1	24.7	-5.6	0.6	-18.4	2.4
6	Russia	29.6	26.7	23.6	-6.0	-3.0	-20.2	-11.4
7	Turkey	15.3	18.6	17.2	1.9	-1.4	12.2	-7.3
8	USA	10.7	13.3	12.3	1.6	-1.0	15.1	-7.8
9	Chinese Taipei	11.1	10.5	11.6	0.5	1.0	4.1	9.7
10	India	6.3	7.7	9.7	3.3	1.9	52.9	24.9
Total		259.7	266.4	268.4	8.7	2.0	3.3	0.7

Note: Includes all items in Harmonized System Nomenclature from 7206 to 7229 and 7301, 7302, 7304, 7305, 7306 and from 7307.21 to 7307.99. EU data refer to external trade.
Source: Iron and Steel Statistics Bureau (ISSB).

The ASEAN region a growing market for exporters in East Asia

Japanese steel exports by market destination



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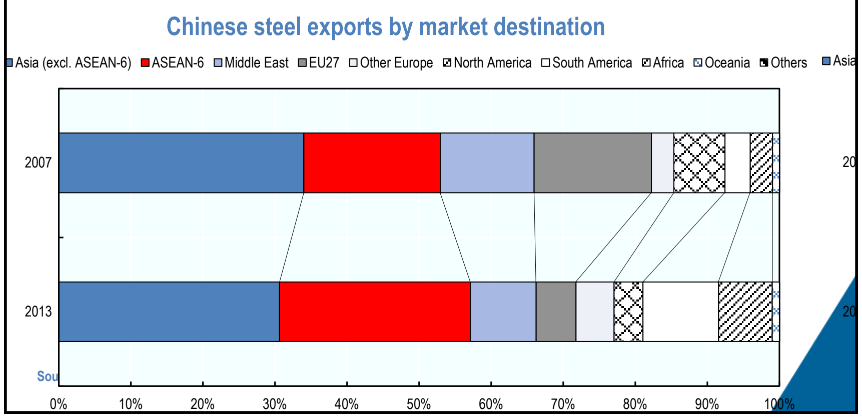
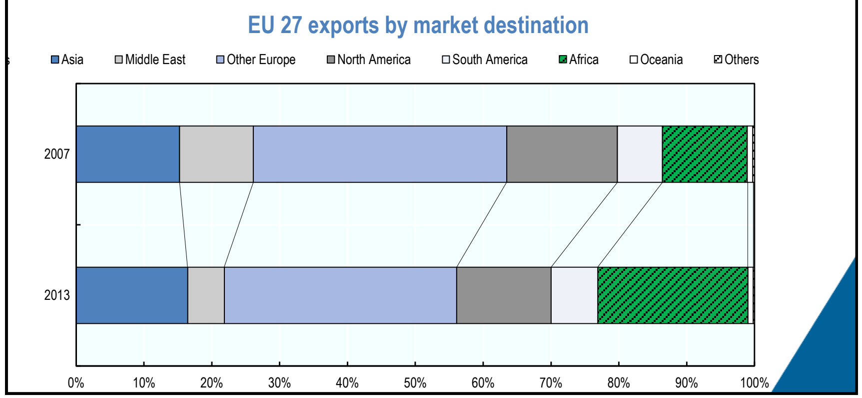
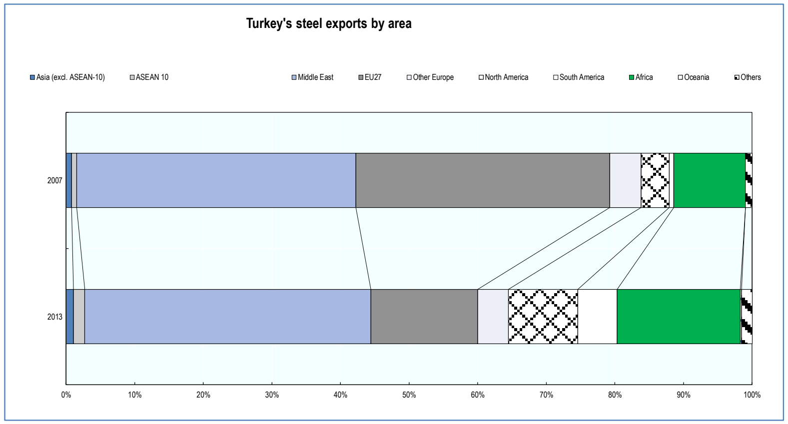
The ASEAN region a growing market for exporters in East Asia



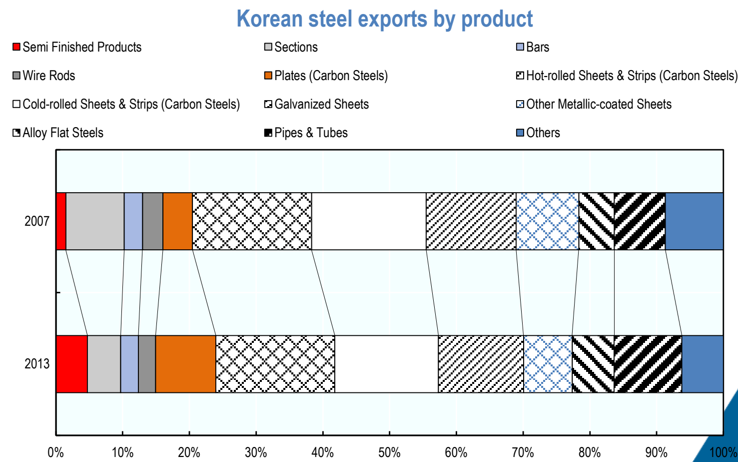
Northern Africa has increased its share in EU exports



Turkey's exports heading more towards northern African and the Middle East



Korea and Chinese Taipei: Exports increase in line with capacity expansion-



Shifts in steel export specialisation

- See significant shifts in specialisation, with some emerging economies "moving up the value chain"
- We don't know what is causing these shifts
- Patterns of specialisation may be linked with:
  - Market and competitiveness factors
  - Government measures and policies
- – Useful to link export specialisation to the Committee's work on capacity and government support measures

Source: Iron and Steel Statistics Bureau (ISSB).

Concluding remarks

- The Steel Committee would be to identify the policy and market factors that explain export patterns and revealed comparative advantages across major steel-producing economies.

- It would also be useful to link export developments and trade specialisation patterns to the Committee's work on steelmaking capacity.