

# European Steel in Figures

# 2021

DATA COVERING 2020

The European Steel Association  
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# European Steel in Figures 2021

**Axel Eggert**, Director General  
The European Steel Association (EUROFER)

Welcome to the thirteenth edition of the European Steel Association's (EUROFER) European Steel in Figures guide. European Steel in Figures 2021 includes data up to, and including full year 2020 for EU28.

To some extent, the numbers in this guide reflect the shock and tentative recovery experienced by the European steel sector in 2020 – largely as a result of the COVID pandemic. However, as they are full year figures, they do not tell the whole picture. For instance, direct employment at the end of 2020 was 326,500 – but at the peak of the crisis, up to 45% of the workforce had either been laid off or put on short time working.

Crude steel production for the year was down from 2019's 157.5 million to 139.3 million tonnes in 2020, but this hides the halving of production volumes in the second quarter. Order volumes collapsed, but yearly apparent consumption was 136 million, down sharply (-11.1%) for the year – but this hides the record-breaking 25% year-on-year drop in the second quarter.

All this to say that European Steel in Figures 2021 is only a partial guide to the European steel sector's performance in 2020. For more granular information on quarterly performance, consult EUROFER's *Economic and steel market outlook reports*, available on our website.

Even though the picture is only partial, it is clear that 2020 was one of the worst years in the history of the European steel industry. Though not as sharp a drop as the fall recorded in the wake of the financial crisis in 2008-2009 (-30%), the decline (-12.1%) in production in 2020 continues a trend of poor market conditions dating back to mid-2018.

This is part of a longer-term movement, with the Compound Annual Growth Rate (CAGR) of the European steel sector a disappointing -2.7% for the period 2008-2020.

The first five months of 2021 have shown improved conditions, but there is a long way to go for stability to return to the sector, as the figures herein attest.

Nevertheless, these statistics give a good overview of the European steel industry today. Awareness of the employment, production, demand and trade challenges the sector is facing help guide us and policy makers in making the right decisions. These will – hopefully – ensure that the recovery from the lows of 2020 rebuilds value and supports the EU steel sector on its pathway to decarbonisation.

With this in mind, I hope you enjoy using European Steel in Figures 2021.

JUNE 2021

# About

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## About the European steel industry

The European steel industry is a world leader in innovation and environmental sustainability. It directly employs 326,500 highly-skilled people and through indirect and induced effects supports the jobs of up to 2.6 million in total. The sector produces on average 160 million tonnes of steel per year at more than 500 steel production sites across 22 EU member states. 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

The European Steel Association (EUROFER) AISBL represents EU steel production. Founded in 1976, EUROFER's headquarters is located in Brussels. It is the voice of the European steel industry to policy makers, civil society and relevant stakeholders.

EUROFER's members are steel companies and national steel federations based throughout the EU. The national steel federation and major steel companies of Turkey are also associate members.

## About the European Steel in Figures 2021 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 13th edition, this publication gives an overview of the key statistical trends in the sector. The statistics presented here are for information only.

EUROFER has endeavoured to replicate data as accurately as possible and to attribute sources correctly. EUROFER is not responsible for any mistakes or errors in the presentation of the information, nor in the underlying data used in its creation. EUROFER is not liable, and cannot be held responsible in any way, for analyses or decisions based upon the data held within this publication. NOTE: for the purpose of the European Steel in Figures Guide 2021, EU refers to EU28 unless otherwise specified, as the data is for 2020, and the UK only left the single market effective 1 February 2020.



# Employment & economic impact

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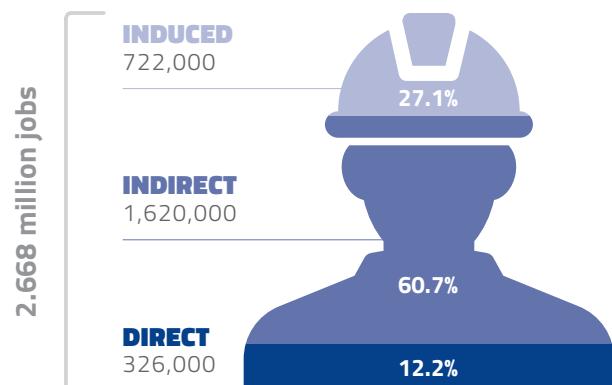
# Employment & GVA in the EU steel industry

## EMPLOYMENT

GRAPHIC • 2020

SOURCE: OXFORD ECONOMICS

The EU steel industry supports over 2.6 million jobs



	'Type I' multiplier	'Type II' multiplier
Multiplier for GVA	4.4	5.8
Multiplier for jobs	5.8	7.9

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

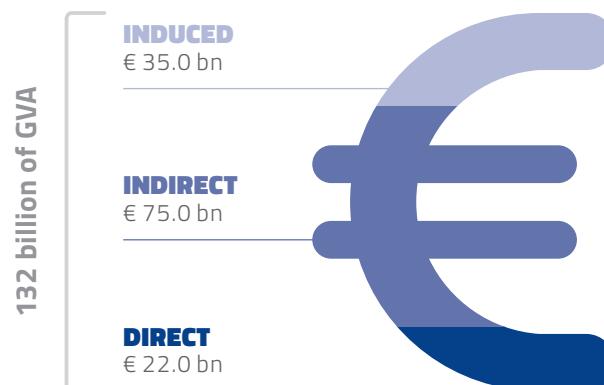
The 'type II' multiplier is the ratio of total activity to direct activity.

## GROSS VALUE ADDED

GRAPHIC • 2020

SOURCE: OXFORD ECONOMICS

The EU steel industry creates around €132 billion of Gross Value Added



# Direct employment in the EU steel industry: by country

Employment by absolute numbers

## EMPLOYMENT PER COUNTRY

### IN DESCENDING ORDER TABLE ▪ 2020

SOURCE: EUROFER

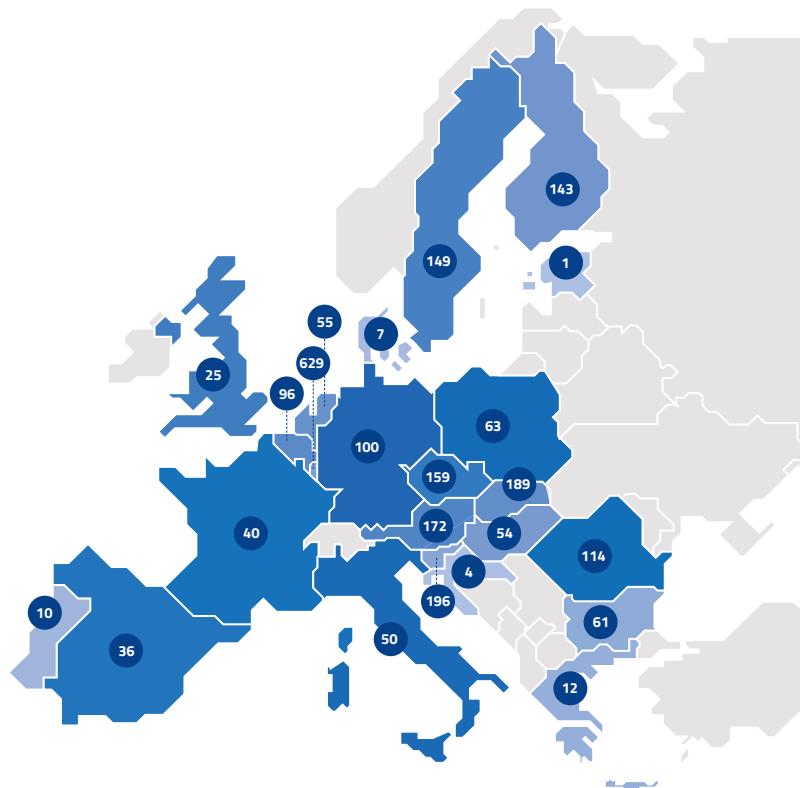
(steel companies + national steel companies)

	2020	% shares
1 GERMANY	83,200	25.5 %
2 ITALY	30,389	9.3 %
3 FRANCE	26,500	8.1 %
4 POLAND	24,000	7.4 %
5 ROMANIA	22,000	6.7 %
6 SPAIN*	17,150	5.3 %
7 CZECH REPUBLIC	17,000	5.2 %
8 UNITED KINGDOM	16,427	5.0 %
9 SWEDEN	15,300	4.7 %
10 AUSTRIA	15,300	4.7 %
11 BELGIUM	11,073	3.4 %
12 SLOVAKIA	10,300	3.2 %
13 NETHERLANDS	9,460	2.9 %
14 FINLAND	7,900	2.4 %
15 HUNGARY	5,300	1.6 %
16 BULGARIA	4,250	1.3 %
17 SLOVENIA	4,100	1.3 %
18 LUXEMBOURG*	3,900	1.2 %
19 GREECE	1,298	0.4 %
20 PORTUGAL	1,000	0.3 %
21 DENMARK	426	0.1 %
22 CROATIA	180	0.1 %
23 ESTONIA	9	0.0 %
<b>TOTAL</b>	<b>326,462</b>	<b>100,0 %</b>

## EMPLOYMENT IN STEEL PER 100,000 POPULATION

MAP ▪ 2020

SOURCE: EUROFER



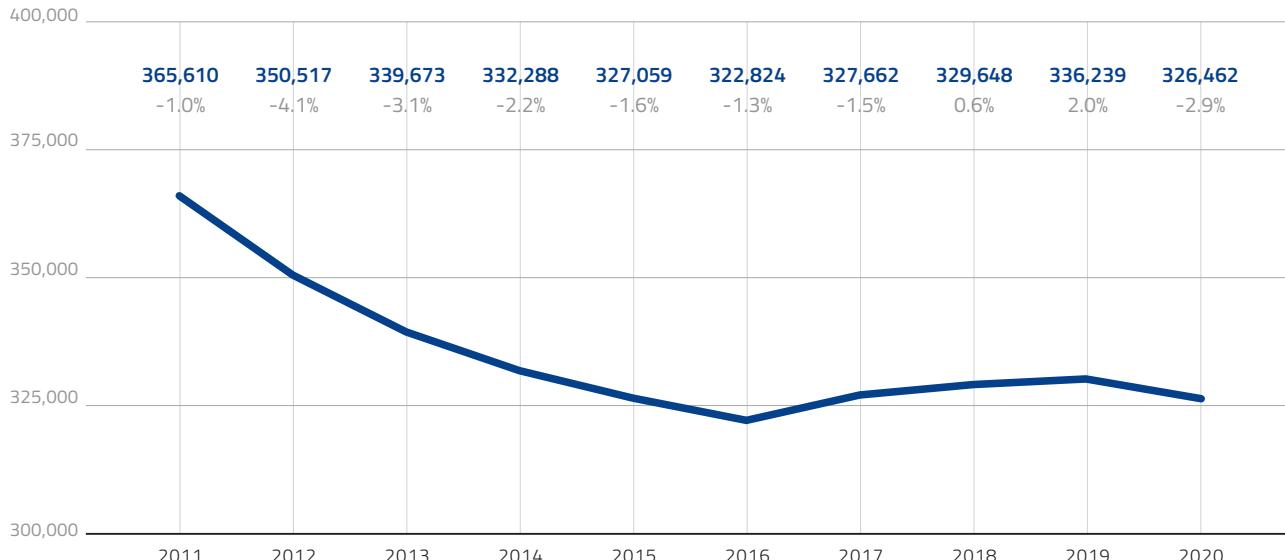
# Direct employment in the EU steel industry: by country

Employment by absolute numbers

## EMPLOYMENT: EVOLUTION

GRAPH ▪ 2011-2020

SOURCE: EUROFER (steel companies + national steel companies and associations)



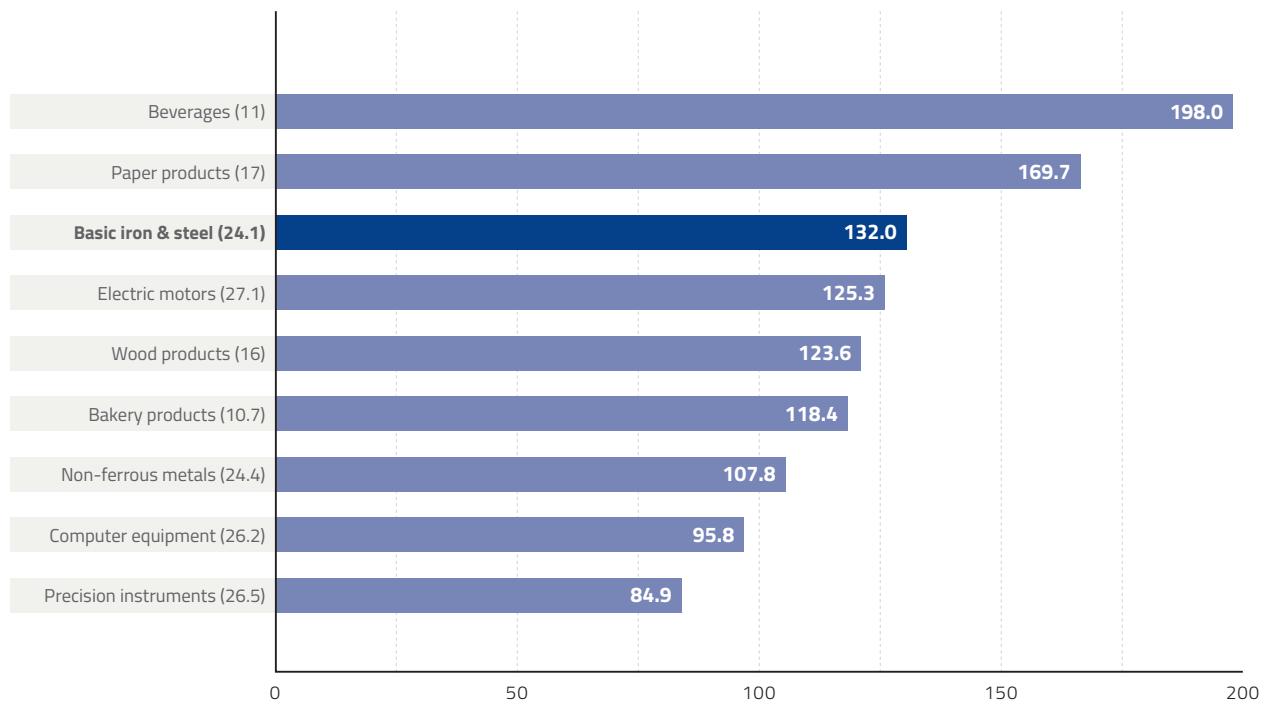
# Gross Value Added: Comparison

Value added • in € '000,000

CHART • 2020

VALUE OF PRODUCTION COMPARED WITH OTHER EU INDUSTRIES

SOURCE: EUROSTAT – OXFORD ECONOMICS





# Production

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# Crude steel production per region: World

All qualities ▪ in '000,000 metric tonnes

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## REGIONS IN DESCENDING ORDER OF

### CRUDE STEEL PRODUCTION TABLE ▪ 2020

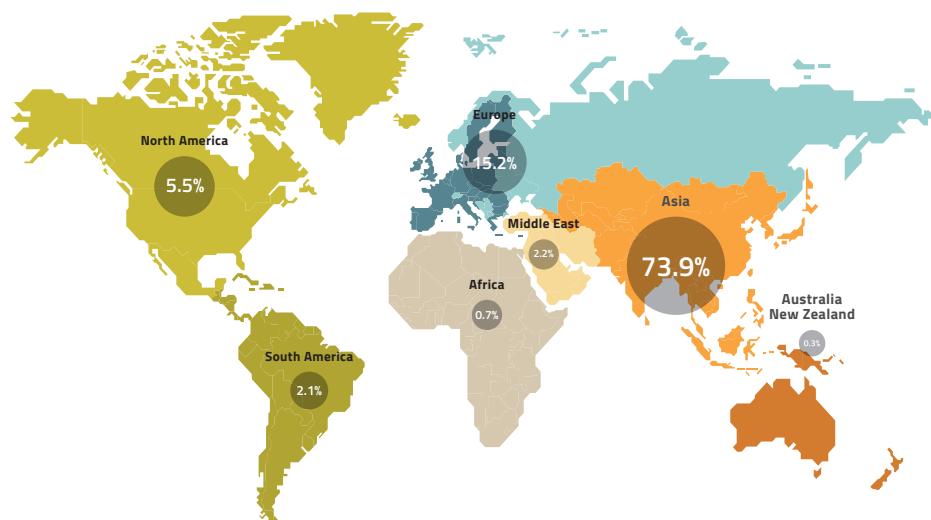
SOURCE: EUROFER

	2020	% shares 2020
<b>Asia</b>	<b>1,351.3</b>	<b>73.9%</b>
► of which China	1,054.7	57.7%
► of which India	100.3	5.5%
► of which Japan	83.2	4.6%
<b>Europe</b>	<b>278.1</b>	<b>15.2%</b>
► of which European Union	139.3	7.6%
► of which CIS	100	5.5%
<b>North America</b>	<b>101</b>	<b>5.5%</b>
of which United States	72.7	4.0%
<b>South America</b>	<b>38.2</b>	<b>2.1%</b>
<b>Middle East</b>	<b>40.7</b>	<b>2.2%</b>
<b>Africa</b>	<b>12.6</b>	<b>0.7%</b>
<b>Australia/New Zealand</b>	<b>6.1</b>	<b>0.3%</b>
<b>WORLD</b>	<b>1,828.2</b>	<b>100%</b>

## MAP OF STEEL PRODUCTION BY REGION

MAP ▪ 2020

SOURCE: EUROFER



# Crude steel production per country: EU

All qualities • in '000 metric tonnes

## EU COUNTRIES IN DESCENDING ORDER OF CRUDE STEEL PRODUCTION

TABLE ▪ 2020

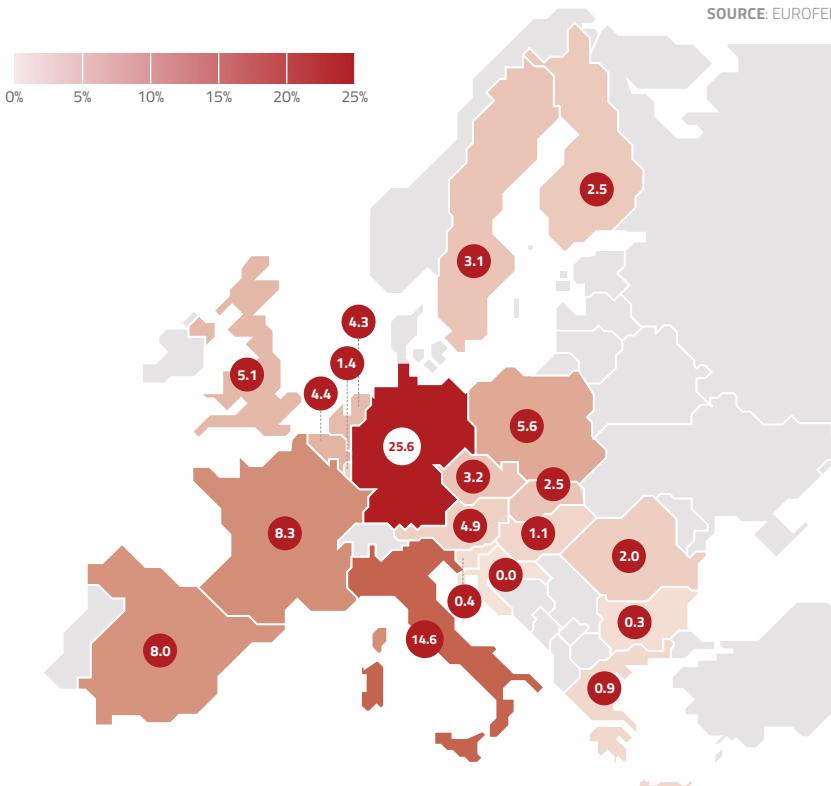
SOURCE: EUROFER

	2020	% shares 2020
1 GERMANY	35,658	25.6%
2 ITALY	20,379	14.6%
3 FRANCE	11,596	8.3%
4 SPAIN	11,142	8.0%
5 POLAND	7,856	5.6%
6 UNITED KINGDOM	7,099	5.1%
7 AUSTRIA	6,765	4.9%
8 BELGIUM	6,119	4.4%
9 NETHERLANDS	6,054	4.3%
10 CZECH REPUBLIC	4,450	3.2%
11 SWEDEN	4,383	3.1%
12 FINLAND	3,498	2.5%
13 SLOVAKIA	3,444	2.5%
14 ROMANIA	2,790	2.0%
15 OTHERS	2,203	1.6%
16 LUXEMBOURG	1,886	1.4%
17 HUNGARY	1,513	1.1%
18 GREECE	1,308	0.9%
19 SLOVENIA	623	0.4%
20 BULGARIA	484	0.3%
21 CROATIA	45	0.0%
<b>TOTAL</b>	<b>139,295</b>	<b>100%</b>

## EU COUNTRIES SHOWN BY RELATIVE SIZE OF CRUDE STEEL PRODUCTION

MAP ▪ 2020

SOURCE: EUROFER



# Crude steel production per country: EU

All qualities • in '000 metric tonnes

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CRUDE STEEL OUTPUT PER COUNTRY

TABLE ▪ 2016 – 2020

SOURCE: EUROFER

	2016	2017	2018	2019	2020	% shares 2020
AUSTRIA	7,438	8,135	6,885	7,424	6,765	4.9%
BELGIUM	7,687	7,842	7,980	7,760	6,119	4.4%
BULGARIA	527	652	666	566	484	0.3%
CROATIA	0	0	136	69	45	0.0%
CZECH REPUBLIC	5,305	4,686	4,938	4,550	4,450	3.2%
FINLAND	4,101	4,003	4,146	3,473	3,498	2.5%
FRANCE	14,413	15,506	15,385	14,451	11,596	8.3%
GERMANY	42,080	43,297	42,435	39,627	35,658	25.6%
GREECE	1,158	1,359	1,467	1,350	1,308	0.9%
HUNGARY	1,279	1,901	1,989	1,769	1,513	1.1%
ITALY	23,373	24,068	24,532	23,190	20,379	14.6%
LUXEMBOURG	2,175	2,172	2,228	2,119	1,886	1.4%
NETHERLANDS	6,917	6,781	6,813	6,657	6,054	4.3%
POLAND	8,940	10,332	10,167	8,956	7,856	5.6%
ROMANIA	3,276	3,361	3,550	3,448	2,790	2.0%
SLOVAKIA	4,808	4,980	4,947	3,931	3,444	2.5%
SLOVENIA	644	673	692	669	623	0.4%
SPAIN	13,643	14,434	14,299	13,503	11,142	8.0%
SWEDEN	4,595	4,692	4,632	4,699	4,383	3.1%
UNITED KINGDOM	7,635	7,492	7,268	7,218	7,099	5.1%
OTHERS	1,998	2,056	2,215	2,033	2,203	1.6%
<b>TOTAL</b>	<b>161,993</b>	<b>168,422</b>	<b>167,370</b>	<b>157,463</b>	<b>139,285</b>	<b>100%</b>

# EU crude steel production: by process

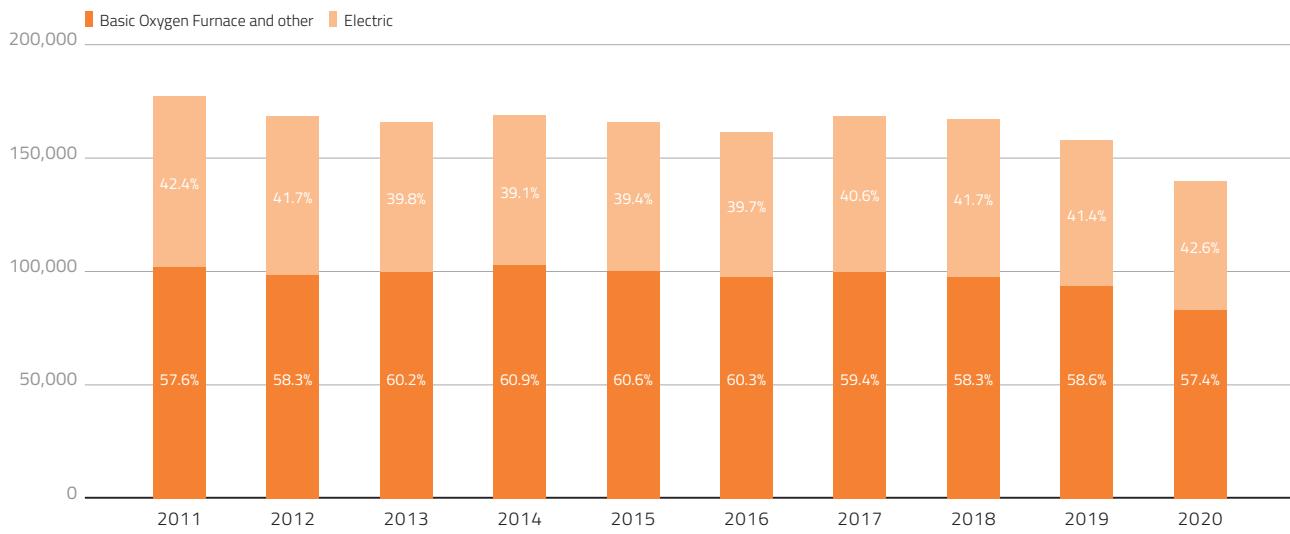
All qualities • in '000 metric tonnes

EU CRUDE STEEL OUTPUT BY PRODUCTION ROUTE

TABLE, CHART • 2011 – 2020

SOURCE: EUROFER

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	% shares 2020
Basic Oxygen Furnace and other	102,371	98,316	100,106	103,024	100,577	97,642	99,925	97,588	92,343	79,905	57.4%
Electric	75,204	70,266	66,069	66,074	65,458	64,291	68,437	69,745	65,120	59,380	42.6%
Total Crude Steel	177,576	168,583	166,175	169,098	166,035	161,933	168,362	167,333	157,463	139,285	100%



# EU crude steel production: by quality

All qualities • in '000 metric tonnes

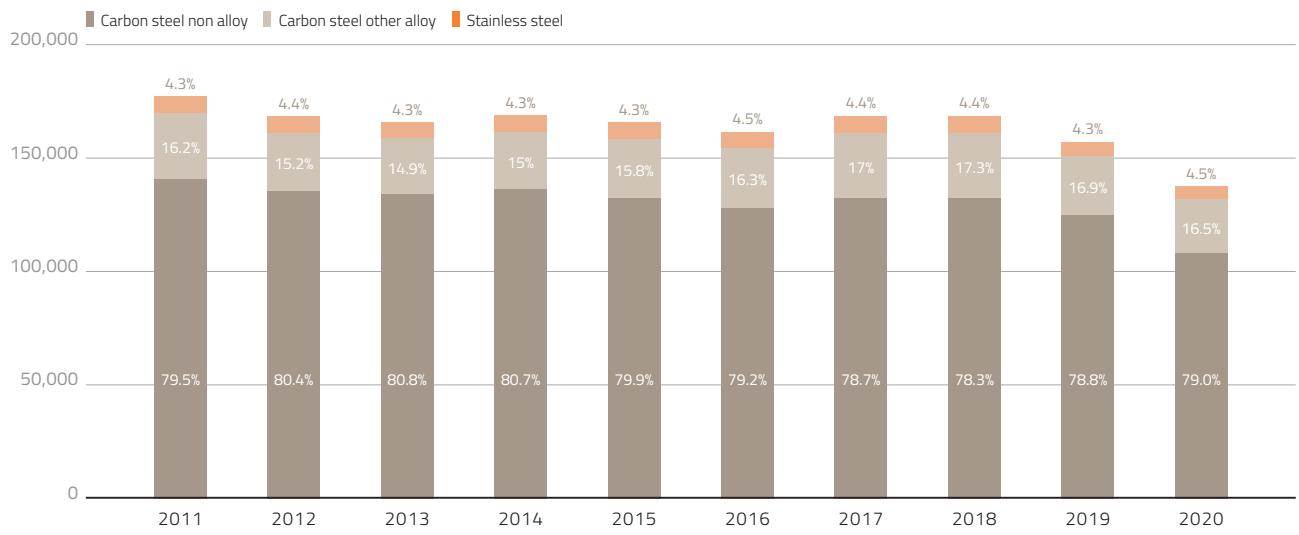
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EU CRUDE STEEL OUTPUT BY QUALITY

TABLE, CHART • 2011 – 2020

SOURCE: EUROFER

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	% shares 2019
Carbon steel non alloy	141,204	135,559	134,281	136,472	132,673	128,270	132,439	130,976	124,017	110,057	79.0%
Carbon steel other alloy	28,812	25,566	24,753	25,384	26,200	26,384	28,545	28,952	26,640	22,929	16.5%
Stainless steel	7,559	7,458	7,142	7,242	7,163	7,279	7,377	7,405	6,805	6,309	4.5%
<b>Total Crude Steel</b>	<b>177,576</b>	<b>168,583</b>	<b>166,175</b>	<b>169,098</b>	<b>166,035</b>	<b>161,933</b>	<b>168,362</b>	<b>167,333</b>	<b>157,463</b>	<b>139,295</b>	<b>100%</b>



# EU finished steel production: by product category

All qualities • in '000 metric tonnes

## EU TOTAL FINISHED STEEL PRODUCTION BY PRODUCT

TABLE, CHART ▪ 2011 – 2020

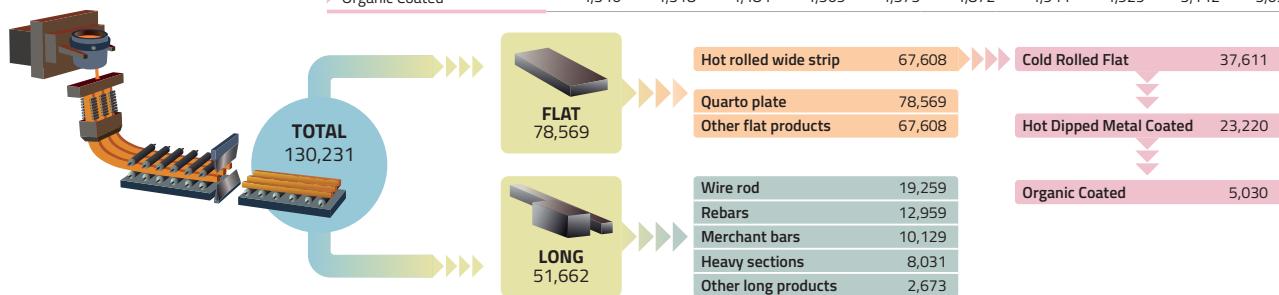
SOURCE: EUROFER

**NOTE:** Downstream processing converts some HRWS into CRF, and some CRF into Hot Dipped and some Hot Dipped into Organic Coated. Downstream processing uses both domestic and imported steel. Production totals may thus not add up precisely.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
<b>Total Hot Rolled</b>	<b>161,068</b>	<b>152,412</b>	<b>150,303</b>	<b>152,200</b>	<b>150,862</b>	<b>150,333</b>	<b>154,102</b>	<b>154,956</b>	<b>145,652</b>	<b>130,231</b>
► of which flat products	97,095	92,592	92,835	94,380	92,465	92,280	95,554	95,268	88,793	78,569
► Quarto Plate	13,187	12,350	11,021	11,595	10,963	10,580	11,207	11,249	10,331	9,378
► Hot Rolled Wide Strip	82,151	78,719	80,358	81,281	80,024	80,015	82,535	82,184	76,761	67,608
► Other flat products	1,756	1,523	1,456	1,504	1,477	1,686	1,812	1,836	1,700	1,583
► of which long products	63,973	59,820	57,468	57,819	58,398	58,052	58,548	59,687	56,859	51,662
► Wire Rod	22,452	20,652	20,138	20,159	20,843	20,389	21,184	21,830	20,907	19,259
► Rebars	15,037	14,644	13,172	13,020	12,762	13,230	12,521	12,616	12,777	11,570
► Merchant Bars	14,154	12,230	12,394	12,895	12,603	12,167	12,751	12,995	11,526	10,129
► Heavy Sections	9,292	9,276	8,560	8,570	8,885	9,425	9,304	9,357	8,8814	8,031
► Other long products	3,038	3,018	3,204	3,175	3,304	2,841	2,789	2,889	2,834	2,673

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

► Cold Rolled Flat	44,472	42,414	43,502	44,649	44,780	45,321	46,426	45,487	43,003	37,611
► Hot Dipped	24,805	23,992	25,009	26,786	27,299	27,398	28,116	27,691	26,692	23,220
► Organic Coated	4,346	4,318	4,484	4,569	4,575	4,872	4,944	4,929	5,142	5,030



# EU Hot Rolled finished steel production: by product category

All qualities • in '000 metric tonnes

## EU HOT ROLLED FINISHED STEEL PRODUCTION

CHART • 2011 – 2020

SOURCE: EUROFER

■ Quarto Plate ■ Hot Rolled Wide Strip ■ Other flat products ■ Wire Rod ■ Rebars ■ Merchant Bars ■ Heavy Sections ■ Other long products

175,000

150,000

125,000

100,000

75,000

50,000

25,000

0

2011

2012

2013

2014

2015

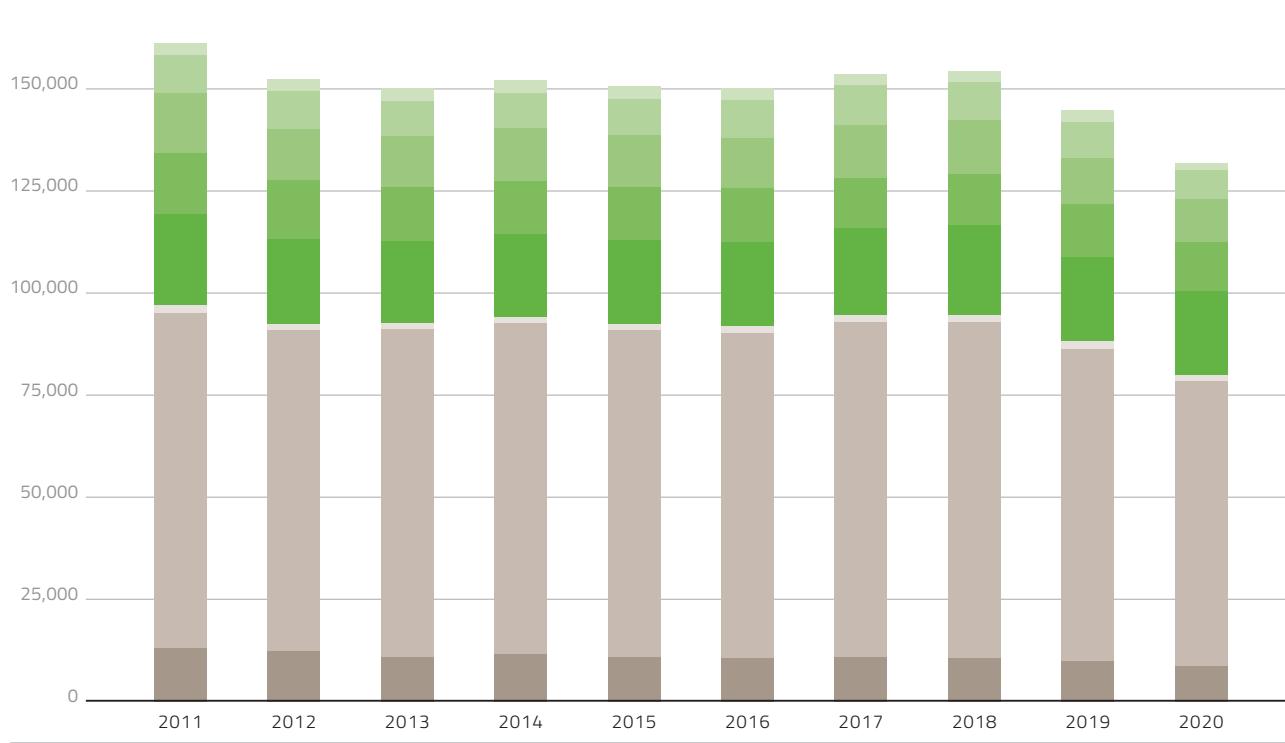
2016

2017

2018

2019

2020

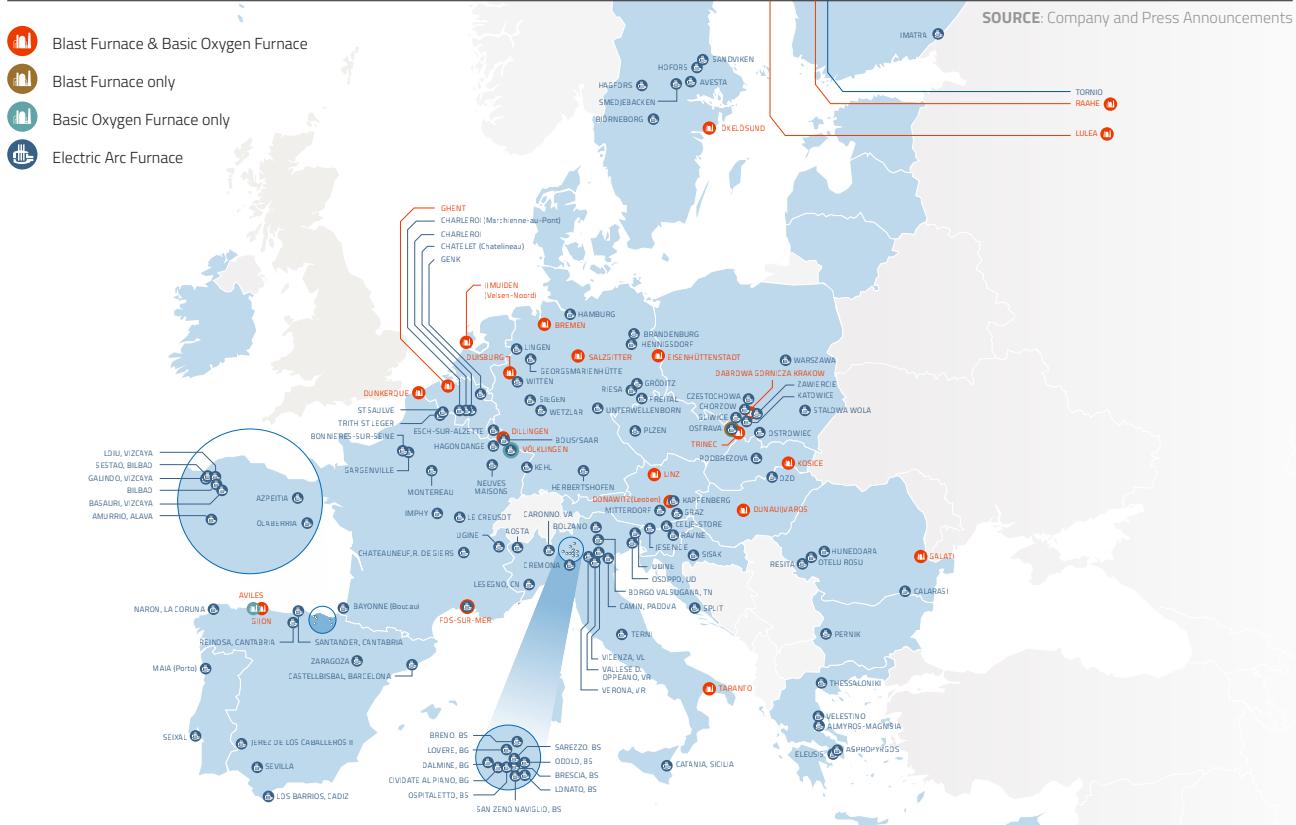


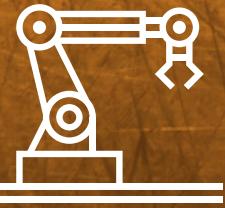
# Map of steel production in Europe

Red: BF-BOF ■ Blue: EAF

## PRIMARY AND SECONDARY STEEL PRODUCTION ACROSS THE EU

MAP • 2020





# Steel use & market supply

Steel use &  
market supply

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# Consumption: Real and apparent steel consumption

All products, all qualities

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## 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.

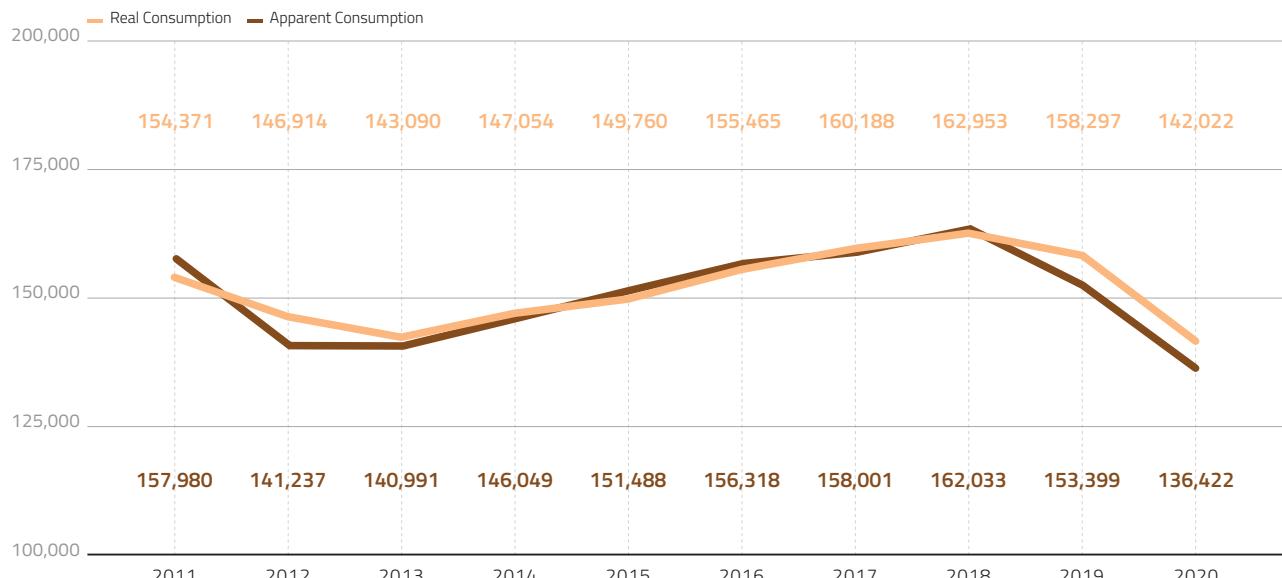
# Consumption: Real & apparent steel consumption

All products, all qualities • in '000 metric tonnes

## REAL VS APPARENT CONSUMPTION

GRAPH • 2011 – 2020

SOURCE: EUROFER



# Consumption: by sector of economic activity

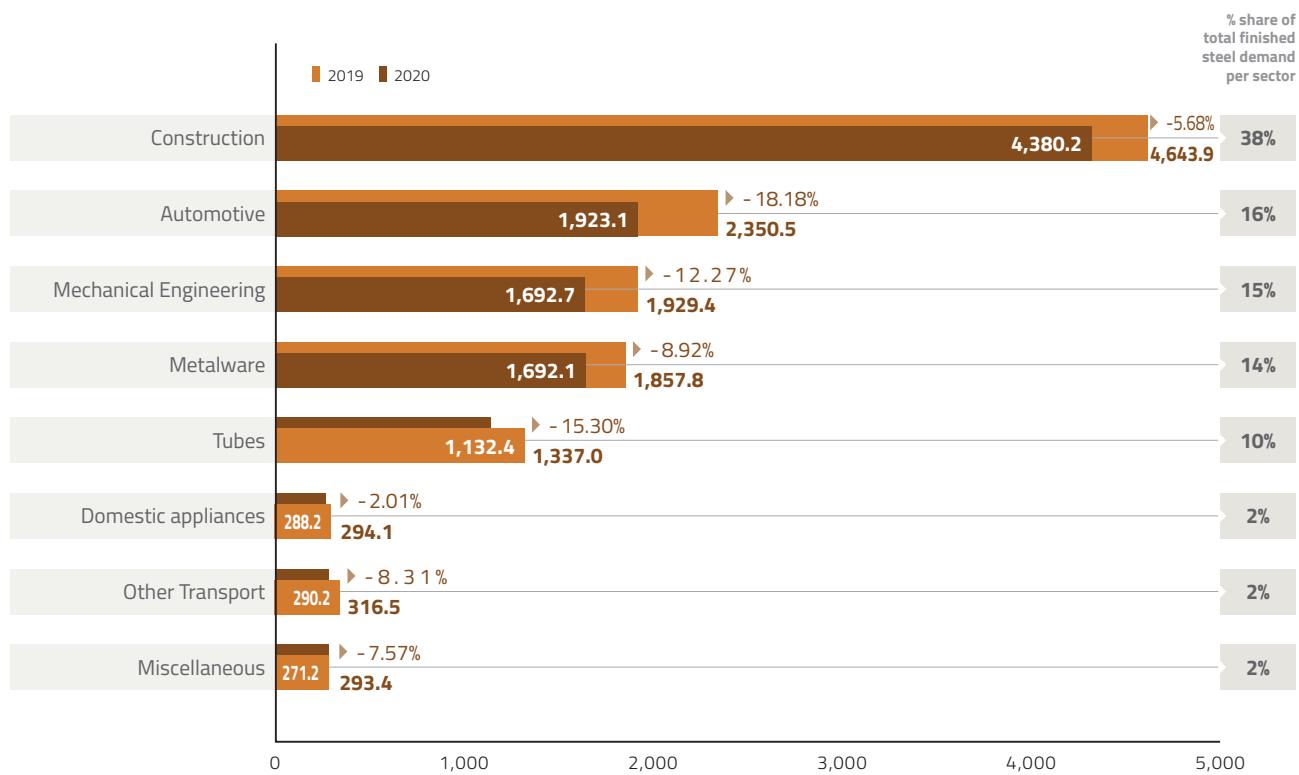
All products, all qualities ▪ in '000 monthly metric tonnes

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## STEEL CONSUMPTION PER STEEL-USING SECTOR

CHART ▪ 2019 – 2020

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

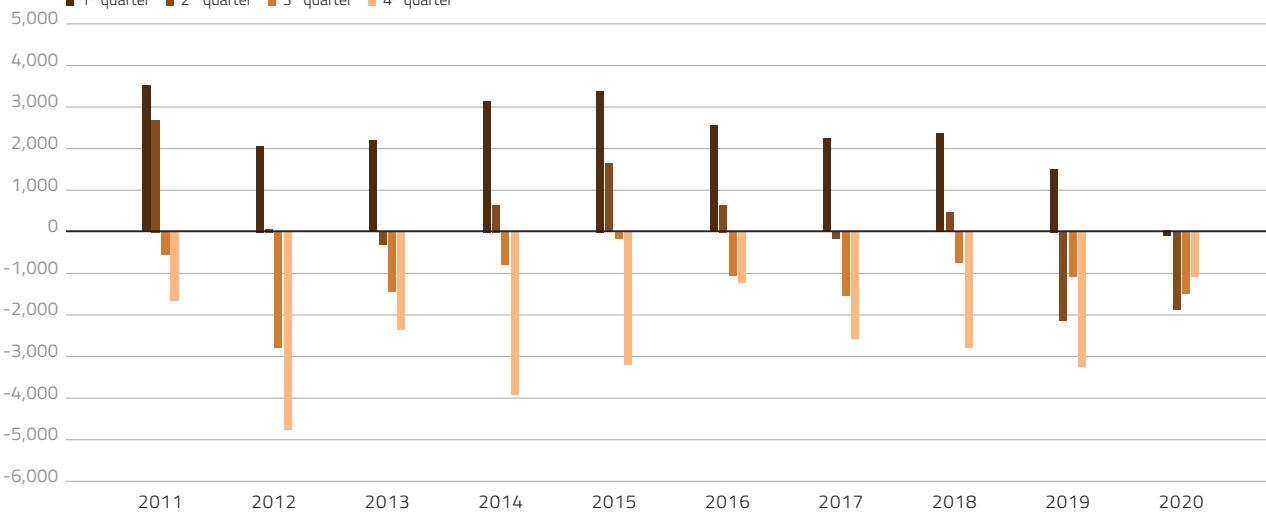
TABLE ▪ 2011 – 2020

SOURCE: EUROFER

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

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2019
1 <sup>st</sup> quarter	4,784	2,009	2,233	3,141	3,392	2,569	2,237	2,366	1,587	-86
2 <sup>nd</sup> quarter	3,385	39	-342	669	1,695	685	-248	405	-2,180	-2,861
3 <sup>rd</sup> quarter	-518	-2,890	-1,595	-840	-170	-1,098	-1,547	-876	-1,103	-1,549
4 <sup>th</sup> quarter	-4,042	-4,835	-2,395	-3,974	-3,190	-1,303	-2,629	-2,814	-3,202	-1,105

■ 1<sup>st</sup> quarter ■ 2<sup>nd</sup> quarter ■ 3<sup>rd</sup> quarter ■ 4<sup>th</sup> quarter



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

### EU STRIP MILL PRODUCT DELIVERIES

GRAPHIC • 2016/2020

SOURCE: EUROFER

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

**56.9 million tonnes**  
PER YEAR,  
ON AVERAGE

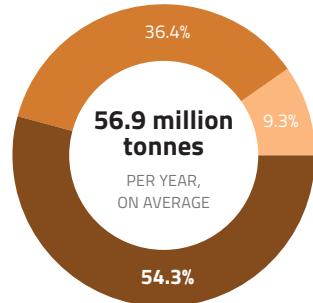
36.4%

9.3%

54.3%

OF WHICH

- End-Users
- SSCs
- Merchants



Automotive	40.7%
Building	26.7%
Tubes	15.3%
Metal Goods	6.8%
Others	5.9%
Non Electr.	2.6%
Electrical	2%
Ship build.	0%

### EU QUARTO PLATE DELIVERIES

GRAPHIC • 2016/2020

SOURCE: EUROFER

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

**7.8 million tonnes**  
PER YEAR,  
ON AVERAGE

23.1%

21.8%

55.1%

OF WHICH

- End-Users
- SSCs
- Merchants

Building	34.6%
Tubes	22.4%
Non Electr.	15%
Others	8.8%
Ship build.	7.8%
Metal Goods	4.6%
Electrical	4.2%
Automotive	2.6%

# Market supply: Total flat products

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

TOTAL FLAT PRODUCTS

TABLE ▪ 2011 – 2020

SOURCE: EUROFER

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	% shares 2020
European Deliveries	75,617	71,774	72,248	73,119	73,726	74,831	75,538	76,026	72,352	63,870	81.9%
Imports third countries	14,213	9,701	10,705	12,039	15,819	17,790	17,752	18,533	16,662	14,102	18.1%
Market Supply	89,830	81,475	82,953	85,158	89,545	92,621	93,290	94,559	89,014	77,972	100%

TOTAL FLAT PRODUCTS

CHART ▪ 2011 – 2020

SOURCE: EUROFER

■ European Deliveries ■ Imports, third countries

120,000

100,000

80,000

60,000

40,000

20,000

0

2011

2012

2013

2014

2015

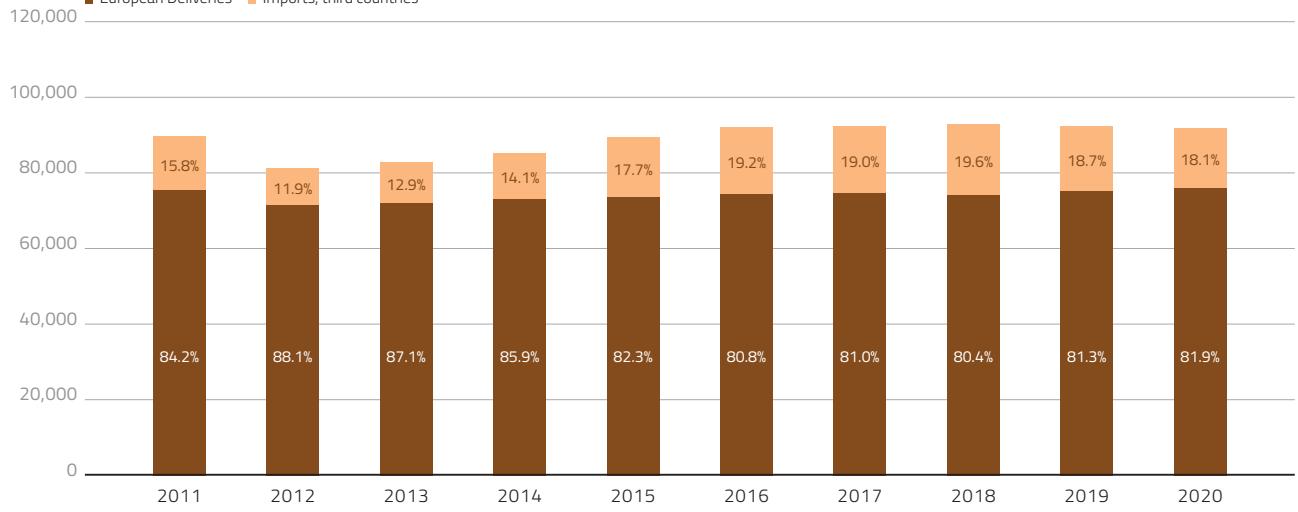
2016

2017

2018

2019

2020



# Market supply: Hot rolled flat & cold rolled sheet

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

## HOT ROLLED FLAT PRODUCTS

CHART • 2011 – 2020

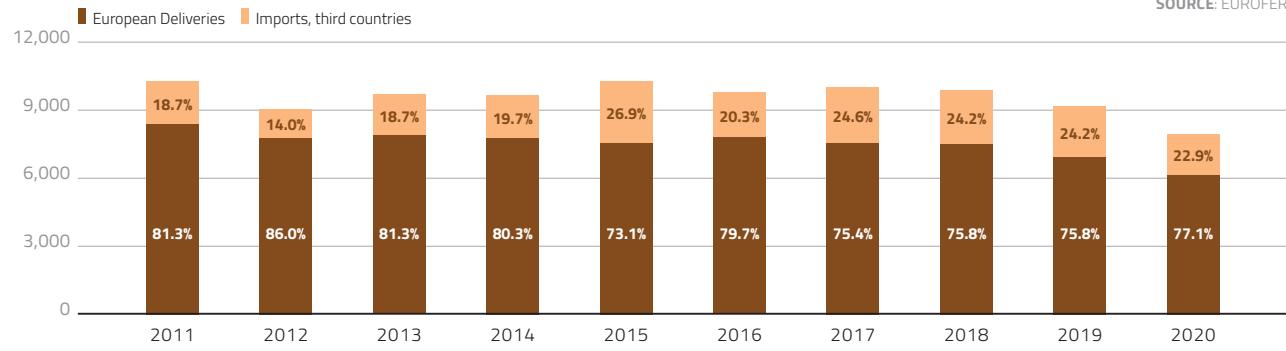
SOURCE: EUROFER



## COLD ROLLED SHEETS

CHART • 2011 – 2020

SOURCE: EUROFER



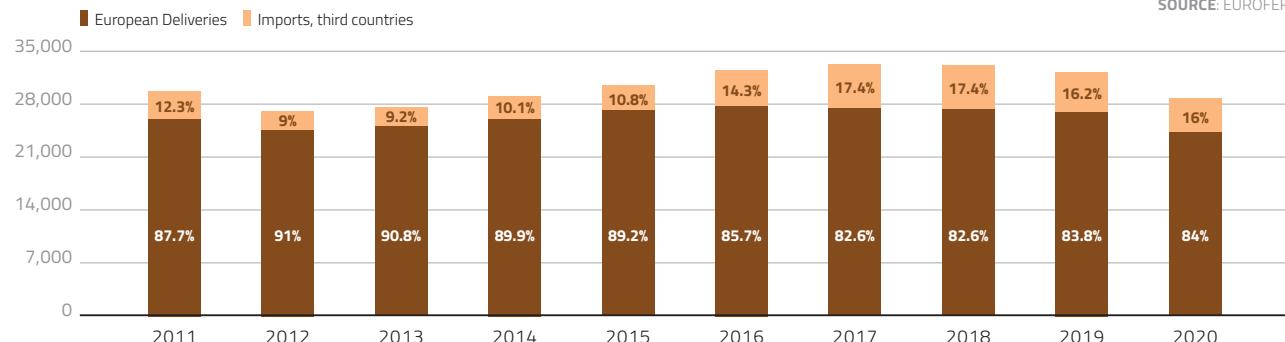
# Market supply: Coated sheets & quarto plate

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

## TOTAL COATED SHEETS

CHART • 2011 - 2020

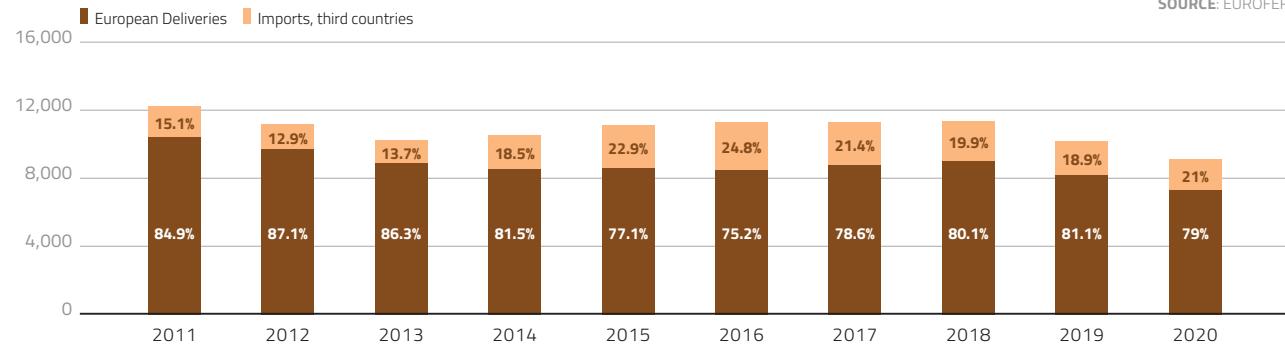
SOURCE: EUROFER



## QUARTO PLATE

CHART • 2011 – 2020

SOURCE: EUROFER



# Market supply: Total long products

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

32

TOTAL LONG PRODUCTS

TABLE ▪ 2011 – 2020

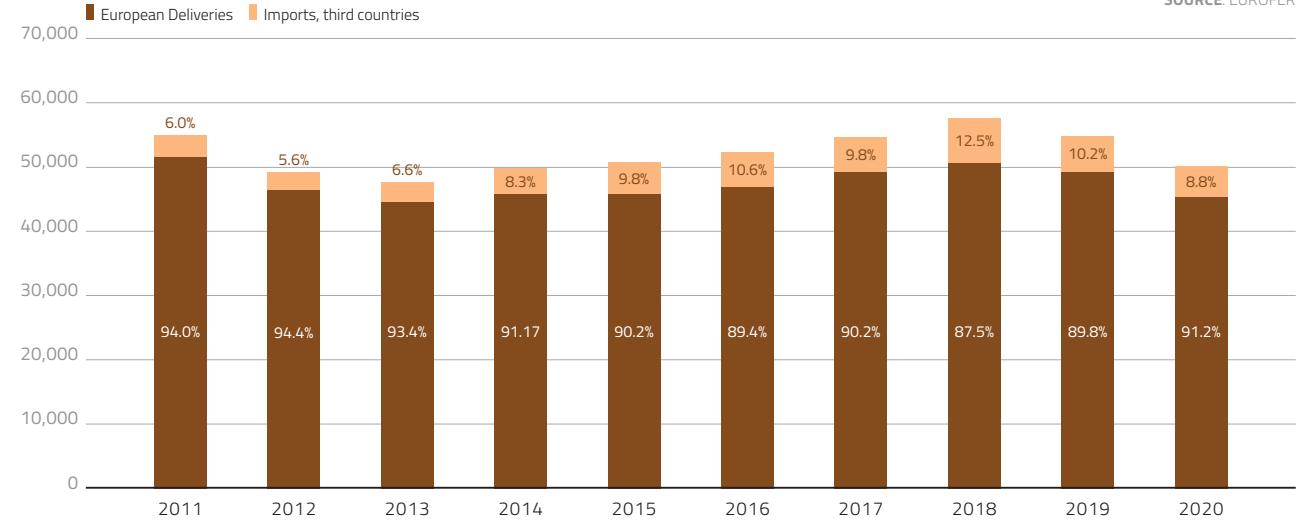
SOURCE: EUROFER

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	% shares 2020
European Deliveries	51,698	46,584	44,614	45,827	45,886	46,679	49,330	50,492	49,187	45,985	91.2%
Imports, third countries	3,297	2,738	3,144	4,146	4,993	5,525	5,388	7,196	5,569	4,443	8.8%
Market Supply	54,995	49,322	47,758	49,973	50,879	52,204	54,718	57,688	54,756	50,428	100%

TOTAL LONG PRODUCTS

CHART ▪ 2011 – 2020

SOURCE: EUROFER



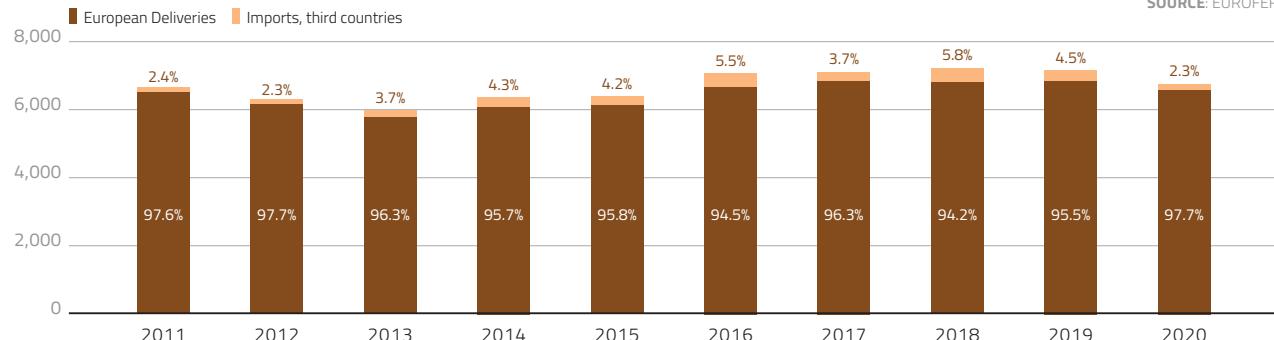
# Market supply: Beams & rebar

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

## BEAMS

CHART • 2011 – 2020

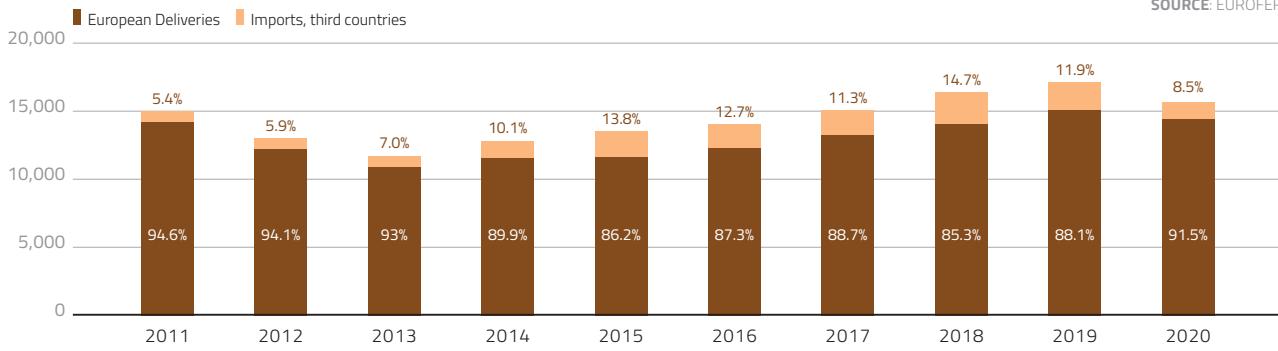
SOURCE: EUROFER



## REBAR, INCLUDING DEFORMED RODS

CHART • 2011 – 2020

SOURCE: EUROFER



# Market supply: Wire rod & merchant bar

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

34

## WIRE ROD, EXCLUDING DEFORMED RODS

CHART • 2011 – 2020

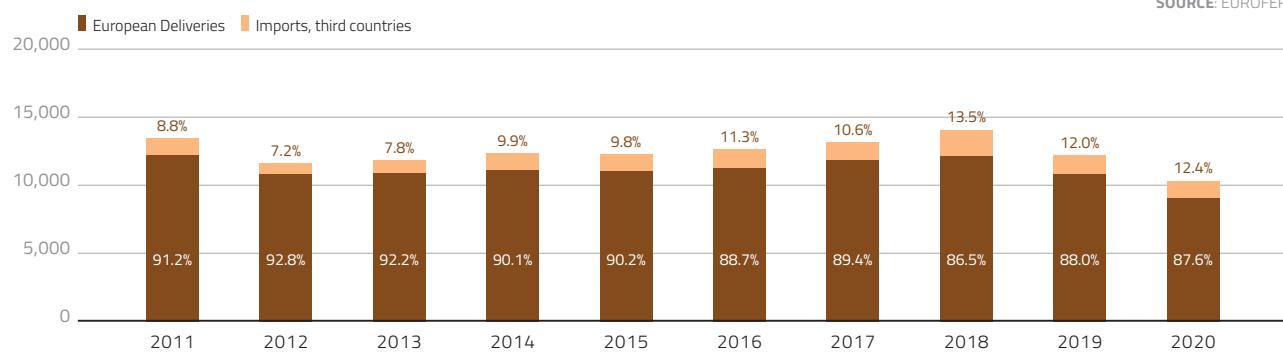
SOURCE: EUROFER



## MERCHANT BARS

CHART • 2011 – 2020

SOURCE: EUROFER







# International trade

EUROPEAN STEEL IN FIGURES **2021**

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# Imports into the EU: Total

All qualities • in metric tonnes

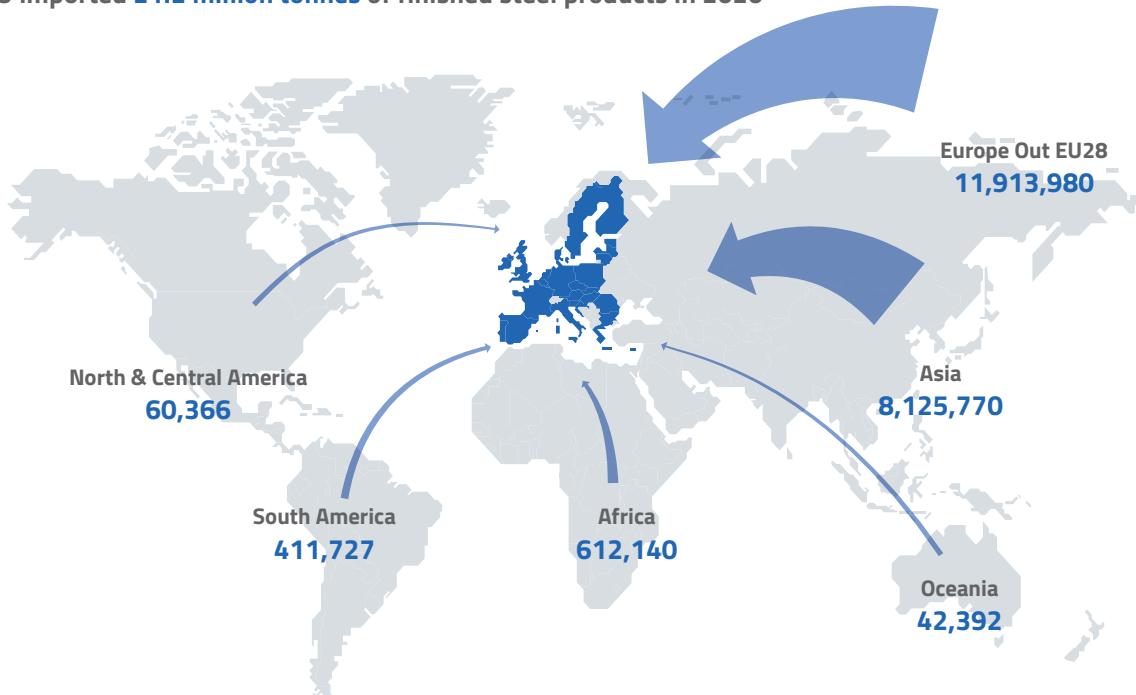
38

TOTAL IMPORTS INTO THE EU

MAP • 2020

SOURCE: EUROFER

The EU imported **21.2 million tonnes** of finished steel products in 2020



# Imports into the EU: Total

All qualities • in '000 metric tonnes

TOTAL IMPORTS INTO THE EU

TABLE • 2011 – 2020

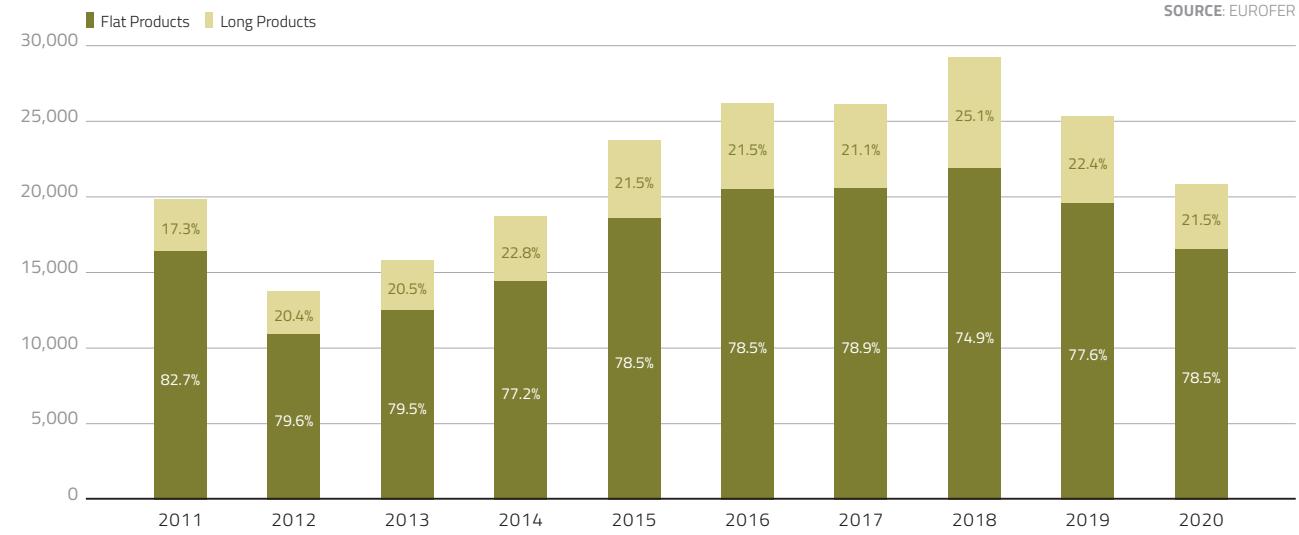
SOURCE: EUROFER

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	% shares 2020
Flat Products	16,426	11,005	12,563	14,475	18,676	20,556	20,615	21,937	19,676	16,635	78,5%
Long Products	3,434	2,827	3,244	4,277	5,101	5,638	5,503	7,341	5,696	4,545	21,5%
Finished Products	19,860	13,833	15,807	18,753	23,777	26,194	26,118	29,277	25,371	21,180	100%

TOTAL IMPORTS INTO THE EU

CHART • 2011 – 2020

SOURCE: EUROFER



# Imports into the EU: Flat products

All qualities • in '000 metric tonnes

40

## FLAT PRODUCT IMPORTS INTO THE EU BY PRODUCT

CHART • 2011 – 2020

SOURCE: EUROFER

Hot Rolled Wide Strip  
  Quarto Plate  
  Cold Rolled Flat  
  Hot Dipped Metal Coated  
  Organic Coated  
  Other flat products

25,000

20,000

15,000

10,000

5,000

0

Year	Hot Rolled Wide Strip (%)	Quarto Plate (%)	Cold Rolled Flat (%)	Hot Dipped Metal Coated (%)	Organic Coated (%)	Other flat products (%)
2011	39.4%	11.5%	15.8%	13.4%	7.6%	12.2%
2012	34.4%	12.9%	16.8%	13.4%	7.9%	14.7%
2013	35.9%	11.6%	20.3%	13.6%	5.4%	13.2%
2014	34.1%	13.8%	20.3%	14%	5%	12.8%
2015	40.6%	13.9%	19.1%	13.7%	3.3%	9.4%
2016	40.9%	13.8%	13.9%	18.5%	3.6%	9.3%
2017	34.3%	12.4%	16.8%	23.7%	4.5%	8.3%
2018	38.1%	10.8%	15.8%	22.5%	4.1%	8.8%
2019	38.7%	10.3%	16.2%	22.2%	4.8%	7.9%
2020	35.6%	11.7%	15.8%	22.9%	4.8%	8.9%

# Imports into the EU: Long products

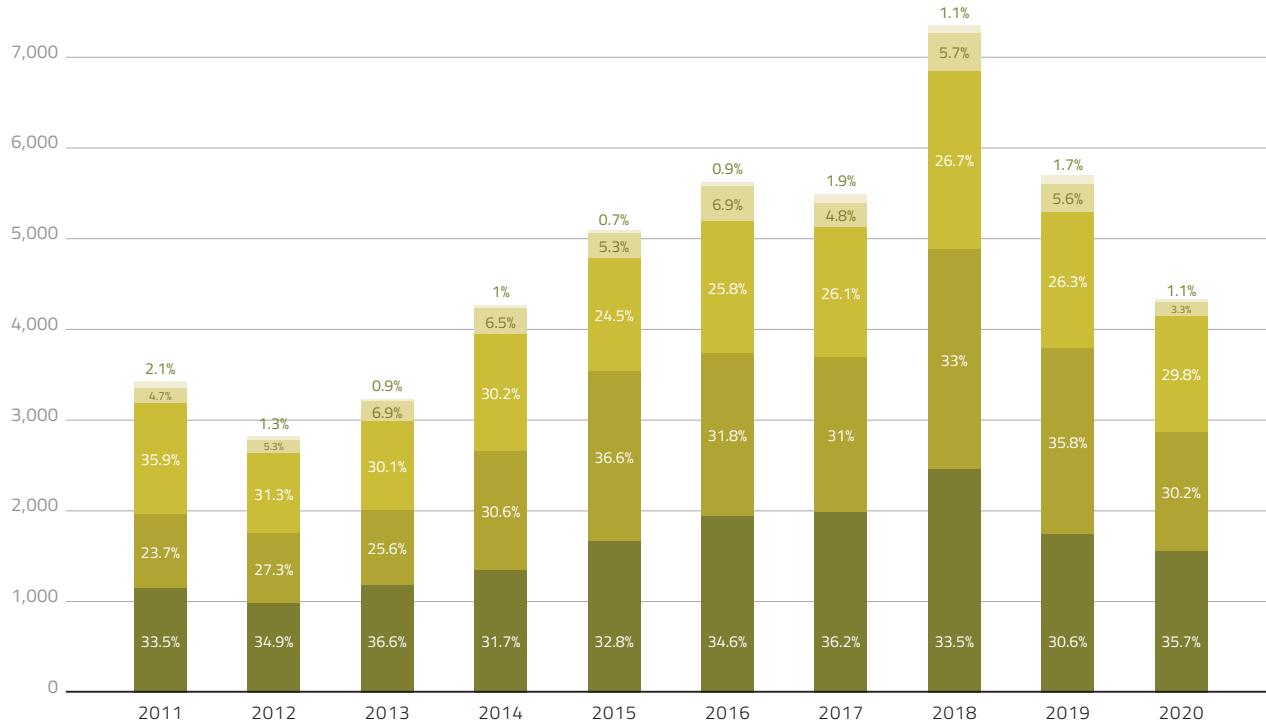
All qualities • in '000 metric tonnes

CHART • 2011 – 2020

SOURCE: EUROFER

## LONG PRODUCT IMPORTS INTO THE EU BY PRODUCT

8,000  
Wire Rod    Rebars    Merchant Bars    Heavy Sections    Other long products



# Imports: top 10 countries of origin

All qualities • in '000 metric tonnes

42

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

TABLE ▪ 2011 – 2020

SOURCE: EUROFER

Countries ranked according to their 2020 order

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
TURKEY	2,110	1,008	1,824	1,479	1,467	2,276	3,741	6,168	5,819	3,984
RUSSIA	2,141	2,456	2,706	2,765	3,490	3,541	2,404	3,698	3,039	3,213
SOUTH KOREA	1,410	1,203	1,391	1,519	2,021	2,725	3,131	3,423	2,959	2,874
CHINA	1,208	967	1,215	1,517	1,155	1,912	3,755	2,781	2,219	1,961
INDIA	2,807	1,839	2,050	2,278	2,532	3,072	2,209	1,945	1,808	1,661
UKRAINE	4,174	2,719	3,013	4,507	6,899	5,667	3,441	2,827	2,406	1,208
TAIWAN	551	356	583	681	454	779	1,231	1,749	1,338	1,043
SERBIA	851	227	196	280	580	582	775	1,072	1,122	796
BELARUS	252	271	235	349	740	709	527	528	616	656
SWITZERLAND	669	632	642	605	657	602	645	635	495	484
OTHERS	3,687	2,155	1,952	2,773	3,782	4,329	4,259	4,451	3,553	3,300
<b>TOTAL</b>	<b>19,860</b>	<b>13,833</b>	<b>15,807</b>	<b>18,753</b>	<b>23,777</b>	<b>26,194</b>	<b>26,118</b>	<b>29,277</b>	<b>25,371</b>	<b>21,180</b>

# Imports: Top 10 countries of origin by product category

All qualities • in '000 metric tonnes

## TOP 10 FLAT PRODUCTS IMPORTS

9.6% 1,600 OTHERS

2.0% 340 VIETNAM

2.2% 372 BRAZIL

4.7% 782 SERBIA

5.7% 943 CHINA

6.2% 1,026 TAIWAN

8% 1,326 UKRAINE

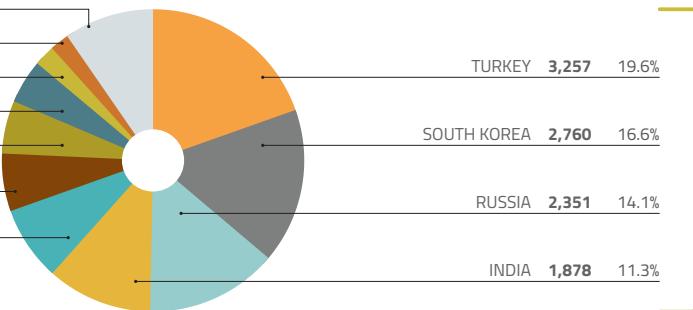


CHART • 2020

SOURCE: EUROFER

**16.6 million tonnes**

100%

## TOP 10 LONG PRODUCT IMPORTS

8.1% 366 OTHERS

2.5% 114 SOUTH KOREA

4.3% 195 BOSNIE-HERZEGOVINE

5.8% 265 CHINA

5.9% 270 MOLDOVA

7.4% 335 UKRAINE

7.8% 353 NORWAY

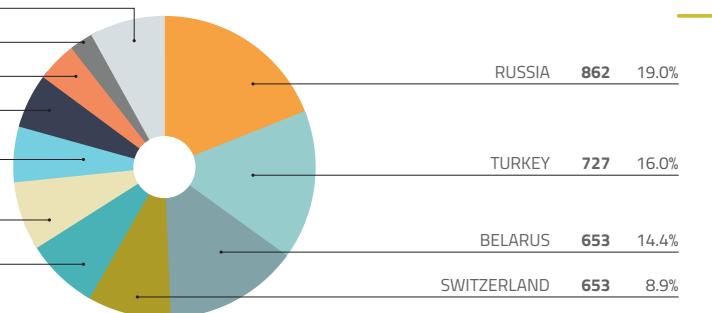


CHART • 2020

SOURCE: EUROFER

**4.5 million tonnes**

100%

# Exports into the EU: Total

All qualities • in metric tonnes

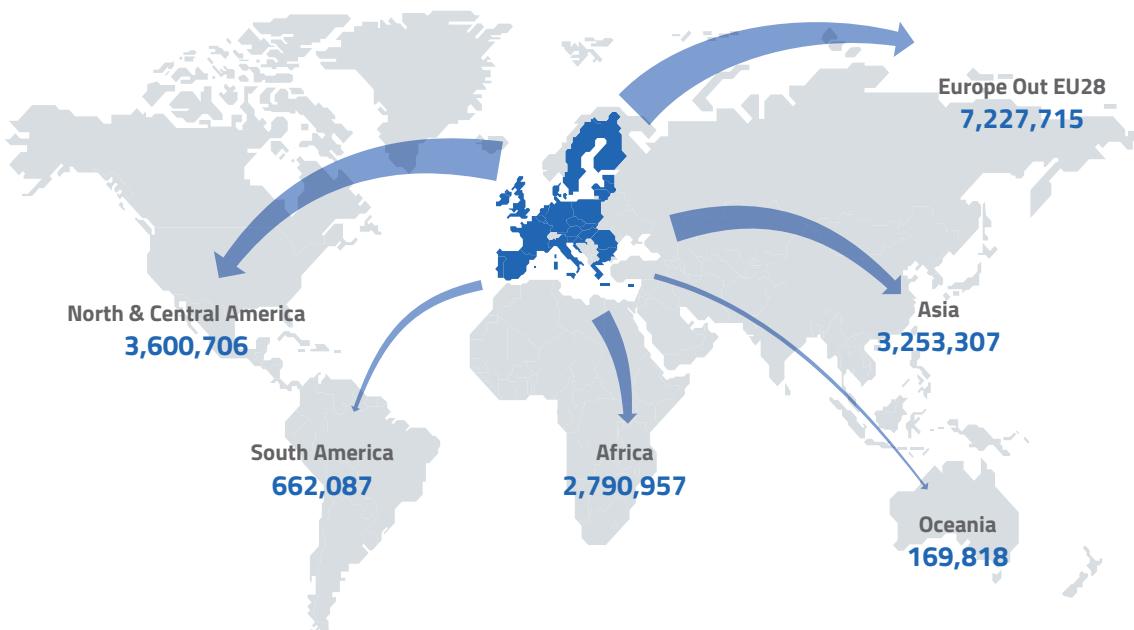
44

TOTAL EXPORTS INTO THE EU

MAP • 2020

SOURCE: EUROFER

The EU exported **17.7 million tonnes** of finished steel products in 2020



# Exports from the EU: Total

All qualities • in '000 metric tonnes

## TOTAL EXPORTS FROM THE EU

TABLE • 2011 – 2020

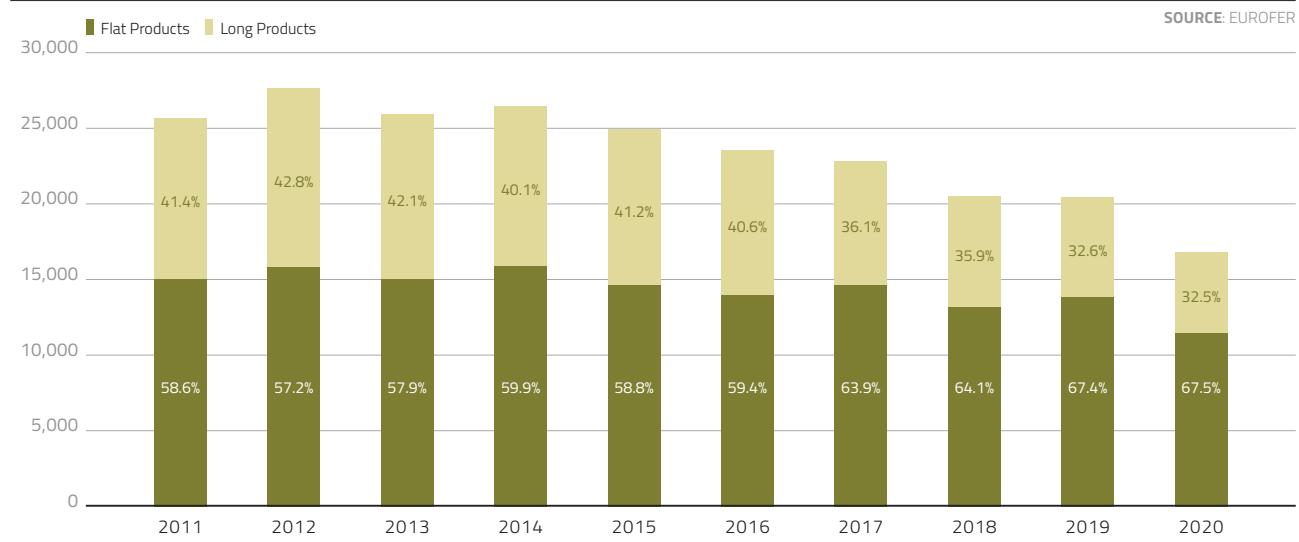
SOURCE: EUROFER

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	% shares 2020
Flat Products	15,090	15,830	15,050	15,906	14,676	14,005	14,634	13,188	13,792	11,956	67.5%
Long Products	10,661	11,857	10,932	10,627	10,281	9,578	8,266	7,376	6,677	5,750	32.5%
Finished Products	25,751	27,687	25,983	26,533	24,957	23,583	22,901	20,563	20,468	17,706	100%

## TOTAL EXPORTS FROM THE EU

CHART • 2011 – 2020

SOURCE: EUROFER



# Exports from the EU: Flat products

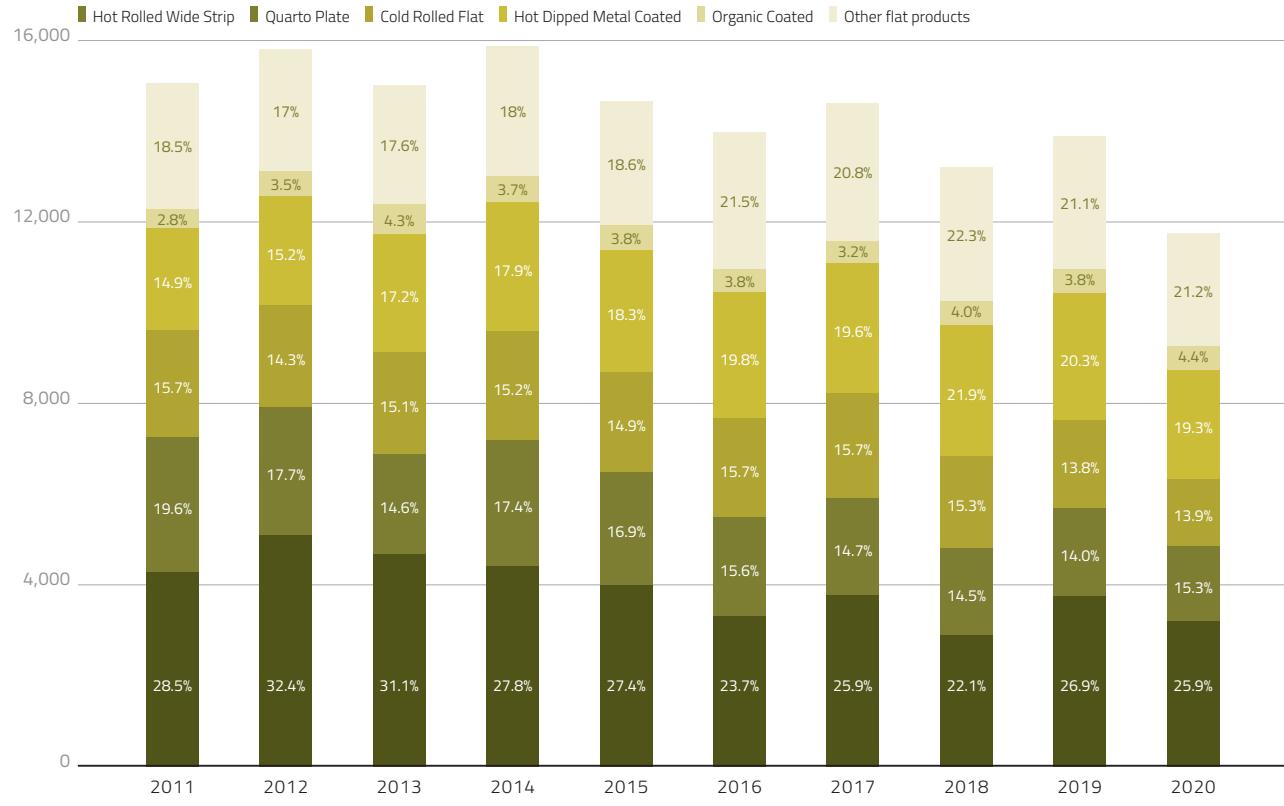
All qualities • in '000 metric tonnes

46

## FLAT PRODUCT EXPORTS FROM THE EU BY PRODUCT

CHART • 2011 – 2020

SOURCE: EUROFER



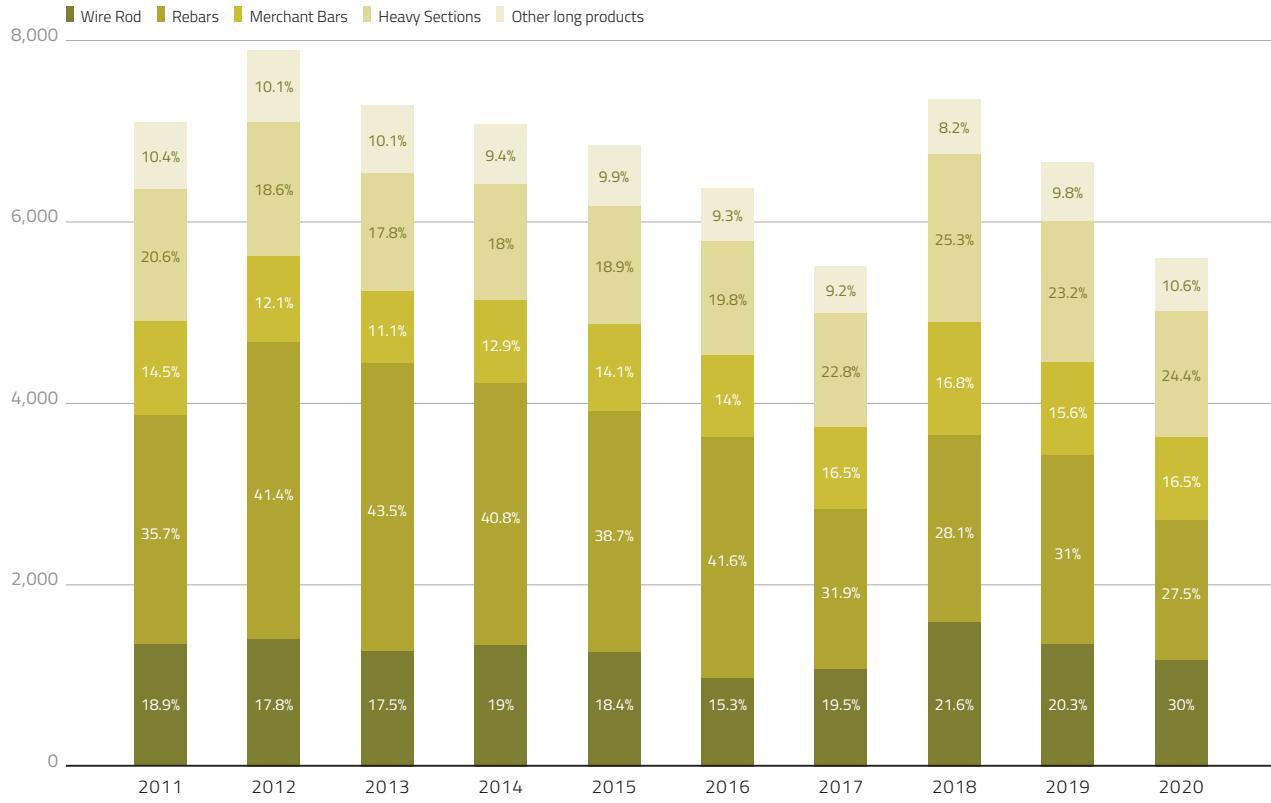
# Exports from the EU: Long products

All qualities • in '000 metric tonnes

LONG PRODUCT EXPORTS FROM THE EU BY PRODUCT

CHART • 2011 – 2020

SOURCE: EUROFER



# Export destinations: Top 10 countries

All qualities • in '000 metric tonnes

48

TOP 10 EXPORTERS DESTINATIONS FOR ALL FINISHED PRODUCTS

TABLE ▪ 2011 – 2020

SOURCE: EUROFER

Countries ranked according to their 2018 order

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
TURKEY	3,959	4,279	4,546	4,090	4,370	4,287	4,668	3,197	3,898	3,399
U.S.A.	2,490	2,840	2,961	4,124	3,760	3,229	3,397	3,373	2,537	1,720
SWITZERLAND	1,996	1,917	1,883	1,834	1,709	1,842	1,890	1,877	1,708	1,568
ALGERIA	3,492	4,489	4,574	4,978	4,419	3,586	1,663	934	1,275	719
MEXICO	869	988	794	756	604	745	897	1,227	1,026	982
CHINA	962	896	958	1,104	906	1,014	1,140	1,106	906	1,060
CANADA	615	555	448	648	805	667	602	714	757	793
RUSSIA	1,003	995	946	930	588	503	955	559	620	387
MOROCCO	498	620	793	642	598	677	642	598	613	524
EGYPT	257	445	334	325	428	469	481	542	601	696
OTHERS	9,610	9,663	7,746	7,102	6,770	6,564	6,566	6,436	6,527	5,858
TOTAL	25,751	27,687	25,983	26,533	24,957	23,583	22,901	20,563	20,468	17,706

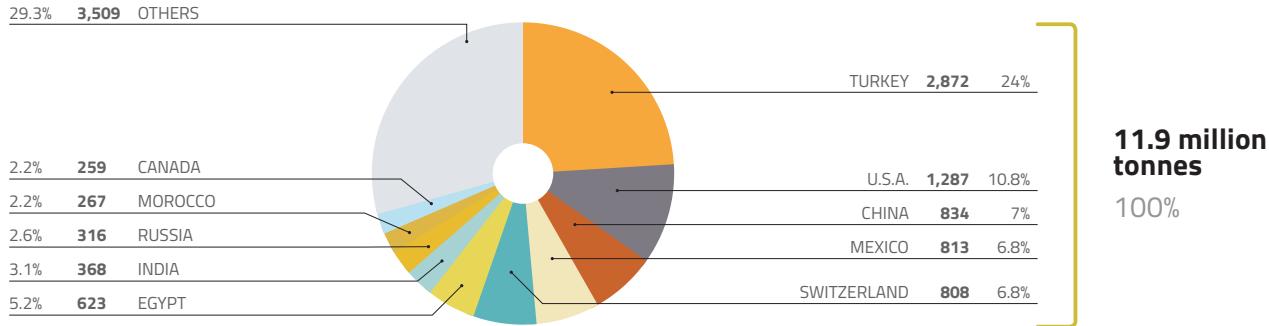
# Export destinations: by product category

All qualities • in '000 metric tonnes

## TOP FLAT PRODUCT EXPORT DESTINATIONS

CHART • 2020

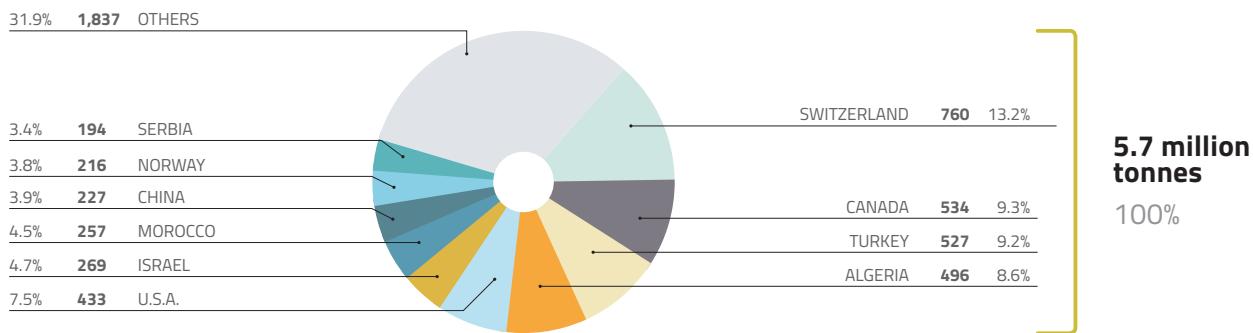
SOURCE: EUROFER



## TOP LONG PRODUCT EXPORT DESTINATIONS

CHART • 2020

SOURCE: EUROFER



# EU trade balance: by volume

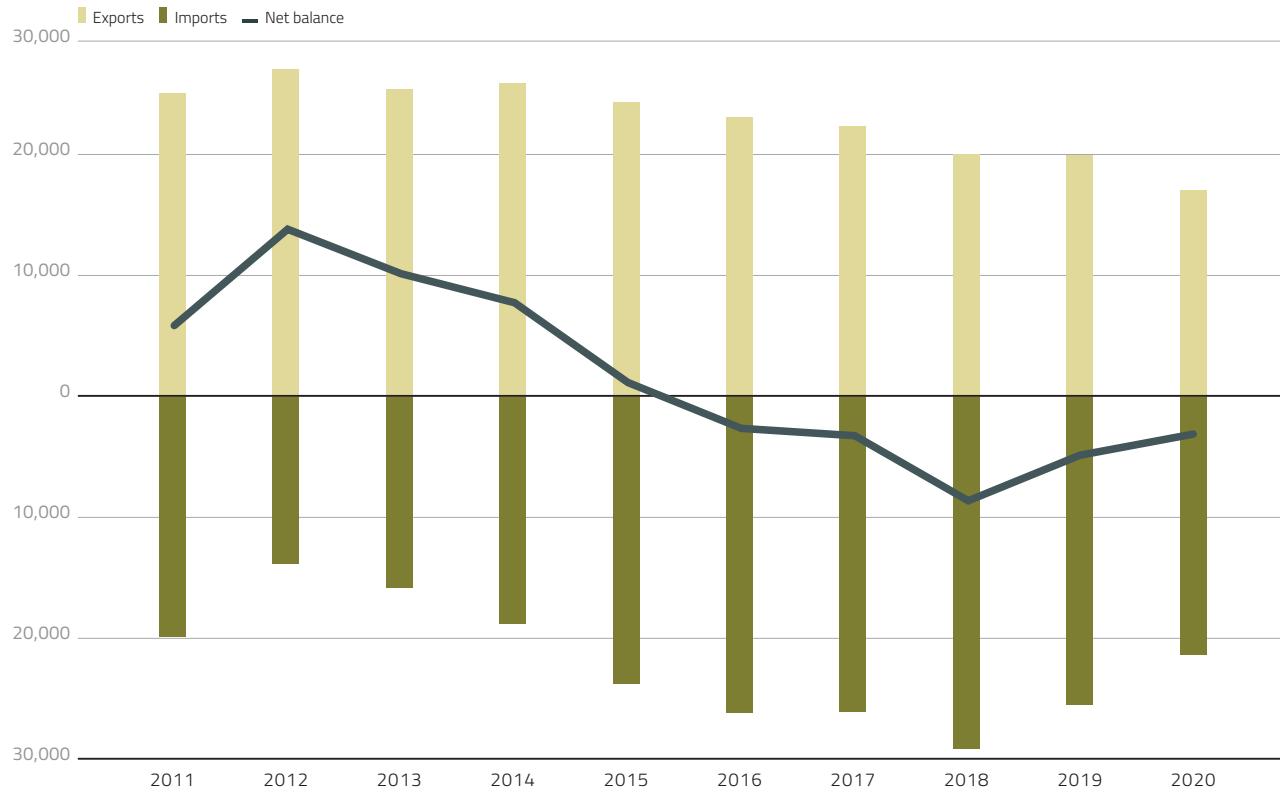
All qualities • in '000 metric tonnes

50

FINISHED PRODUCTS NET TRADE BALANCE BY VOLUME

CHART • 2011 – 2020

SOURCE: EUROFER





# Stainless steel

EUROPEAN STEEL IN FIGURES **2021**

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# Stainless steel market supply: Total flat products

In '000 metric tonnes

53

TOTAL STAINLESS FLAT PRODUCT DELIVERIES BY SOURCE

TABLE ▪ 2011 – 2020

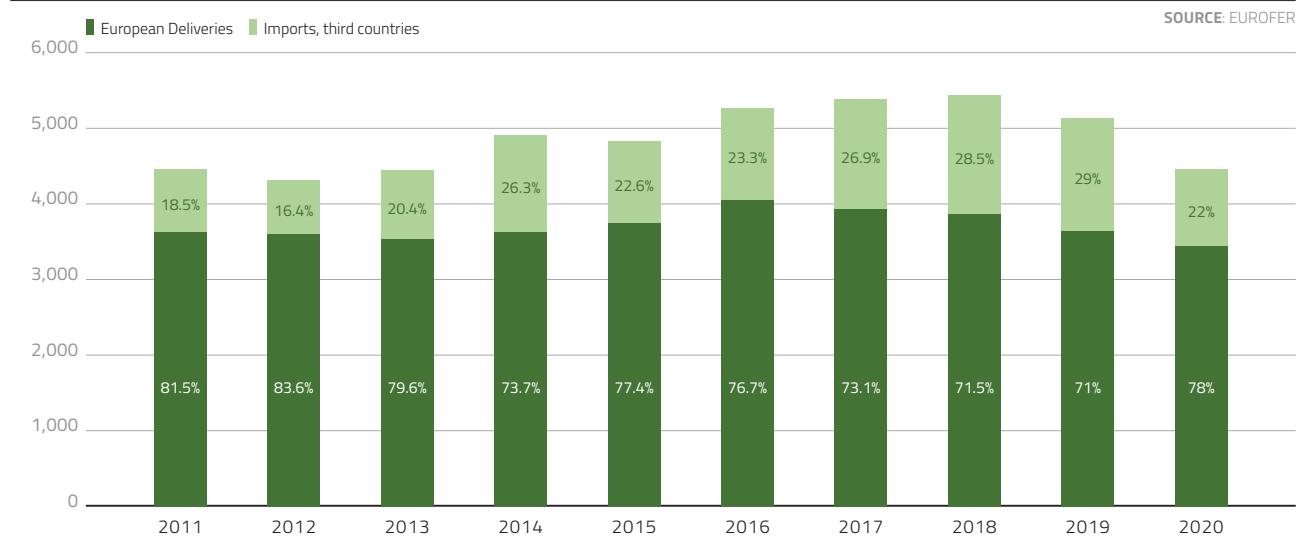
SOURCE: EUROFER

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	% shares 2020
European Deliveries	3,637	3,608	3,541	3,629	3,748	4,052	3,940	3,905	3,649	3,460	78.0%
Imports, Third Countries	824	710	909	1,292	1,096	1,230	1,447	1,548	1,486	977	22.0%
Market Supply	4,462	4,318	4,450	4,921	4,844	5,282	5,387	5,452	5,135	4,437	100%

TOTAL STAINLESS FLAT PRODUCT DELIVERIES BY SOURCE

CHART ▪ 2011 – 2020

SOURCE: EUROFER



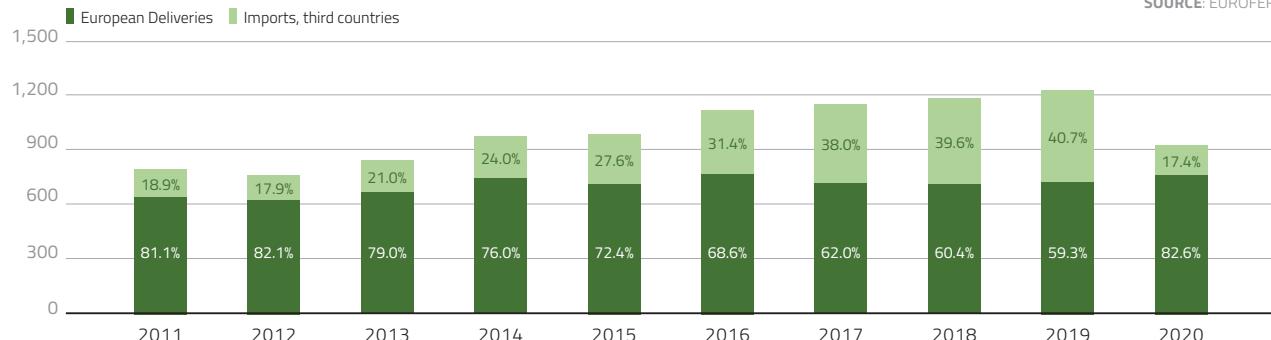
# Stainless steel market supply: Hot rolled strip mill & plates

In '000 metric tonnes

## HOT ROLLED STRIP MILL PRODUCTS

CHART ▪ 2011 – 2020

SOURCE: EUROFER



## PLATES

CHART ▪ 2011 – 2020

SOURCE: EUROFER



# Stainless steel market supply: Hot & cold rolled flat

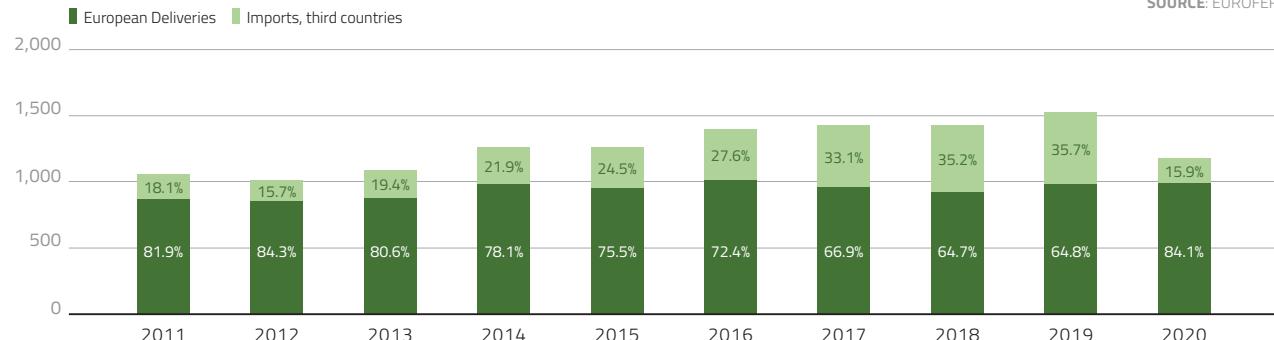
In '000 metric tonnes

55

## HOT ROLLED FLAT PRODUCTS

CHART ▪ 2011 – 2020

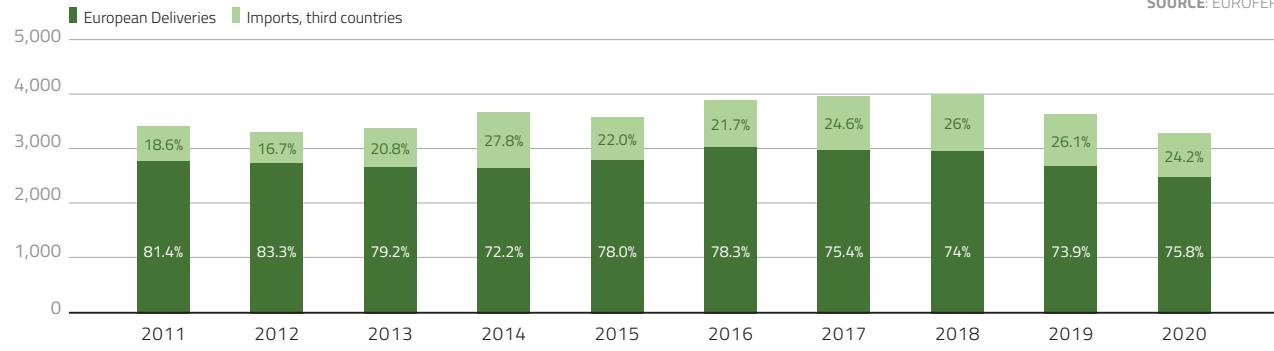
SOURCE: EUROFER



## COLD ROLLED FLAT PRODUCTS

CHART ▪ 2011 – 2020

SOURCE: EUROFER



# Stainless steel market supply: Long products

In '000 metric tonnes

TOTAL STAINLESS LONG PRODUCT DELIVERIES BY SOURCE

TABLE ▪ 2011 – 2020

SOURCE: EUROFER

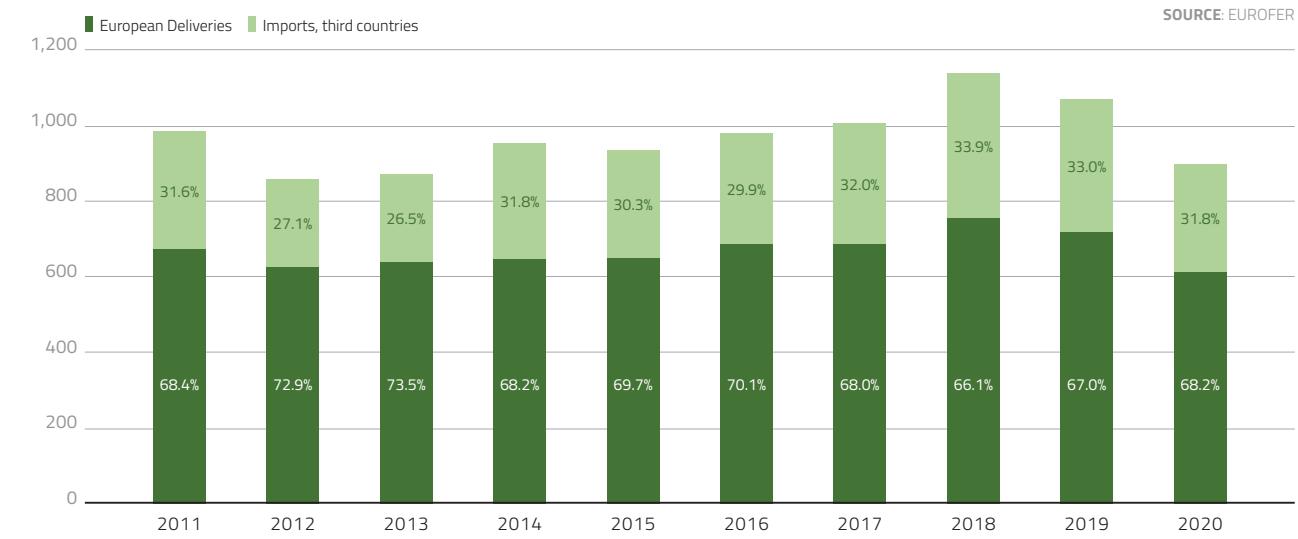
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	% shares 2020
European Deliveries	670	623	637	651	651	685	681	755	708	612	68.2%
Imports, Third Countries*	309	232	230	303	283	292	320	385	352	285	31.8%
Market Supply	979	855	867	954	934	977	1,001	1,140	1,060	897	100%

\* including Bright Bars and Wires

TOTAL STAINLESS LONG PRODUCT DELIVERIES BY SOURCE

CHART ▪ 2011 – 2020

SOURCE: EUROFER



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

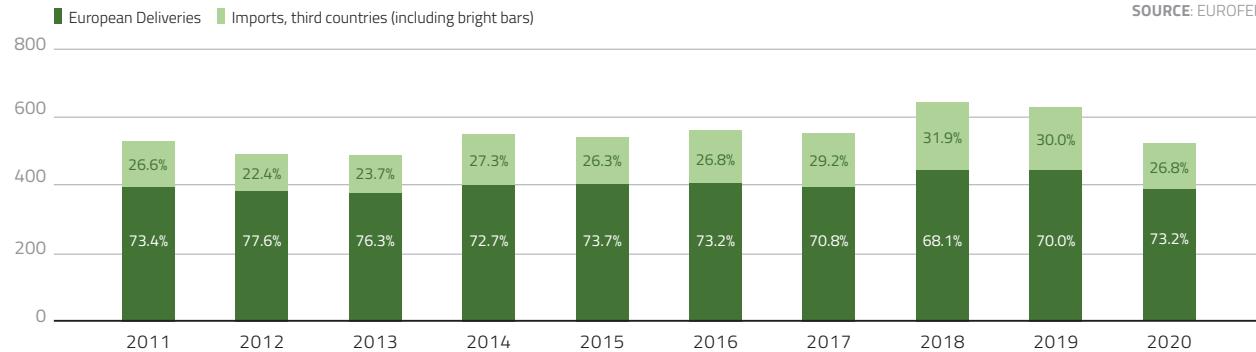
In '000 metric tonnes

57

## HOT ROLLED BARS & SECTIONS

CHART ▪ 2011 – 2020

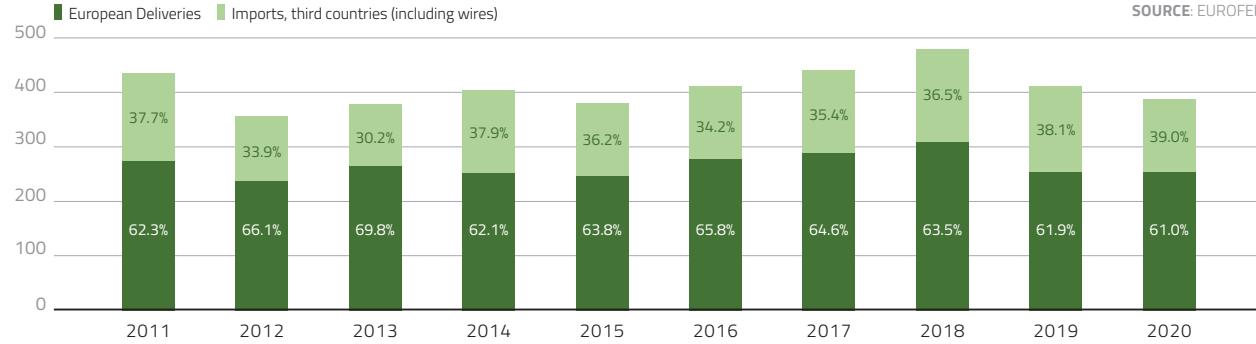
SOURCE: EUROFER



## WIRE ROD

CHART ▪ 2011 – 2020

SOURCE: EUROFER



# Imports into the EU: Total stainless steel

In '000 metric tonnes

## IMPORTS OF FINISHED STAINLESS STEELS BY PRODUCT

TABLE ▪ 2011 – 2020

SOURCE: EUROFER

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
<b>Finished Products</b>	<b>1,133</b>	<b>943</b>	<b>1,139</b>	<b>1,595</b>	<b>1,379</b>	<b>1,522</b>	<b>1,767</b>	<b>1,934</b>	<b>1,838</b>	<b>1,261</b>
► of which flat products	824	710	909	1,292	1,096	1,230	1,447	1,548	1,486	977
► Hot Rolled sheets and strips	126	110	136	182	215	302	377	398	427	119
► Plates	39	23	34	40	38	31	33	33	43	27
► Cold Rolled Flat	635	552	698	1,019	788	846	976	1,045	943	789
► of which long products	309	232	230	303	283	292	320	386	352	285
► Wire Rod	92	51	52	71	58	59	63	77	62	53
► Merchant Bars	45	39	48	60	50	54	52	68	64	49
► Bright Bars	98	72	67	90	94	95	110	140	129	93
► Drawn Wires	75	71	63	83	82	85	95	101	97	90
► Flat	72.7%	75.3%	79.8%	81.0%	79.5%	80.8%	81.9%	80.1%	80.8%	77.5%
► Long	27.3%	24.7%	20.2%	19.0%	20.5%	19.2%	18.1%	19.9%	19.2%	22.5%

## IMPORTS OF FINISHED STAINLESS STEELS BY PRODUCT CATEGORY

CHART ▪ 2011 – 2020

SOURCE: EUROFER



# Exports from the EU: Total stainless steel

In '000 metric tonnes

59

## EXPORTS OF FINISHED STAINLESS STEELS BY PRODUCT

TABLE ▪ 2011 – 2020

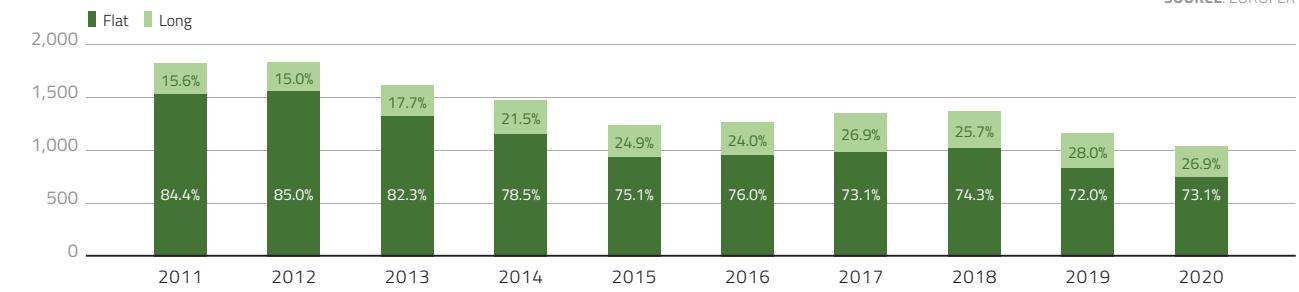
SOURCE: EUROFER

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
<b>Finished Products</b>	<b>1,830</b>	<b>1,844</b>	<b>1,620</b>	<b>1,481</b>	<b>1,251</b>	<b>1,271</b>	<b>1,355</b>	<b>1,371</b>	<b>1,177</b>	<b>1,047</b>
► of which flat products	1,541	1,568	1,333	1,163	939	966	990	1,017	848	765
► Hot Rolled sheets and strips	570	635	434	292	180	197	226	240	158	114
► Plates	88	85	80	104	99	91	82	96	89	82
► Cold Rolled Flat	754	713	708	667	579	596	595	592	516	504
► of which long products	288	276	288	317	312	305	365	352	329	283
► Wire Rod	67	65	68	73	71	70	84	78	76	61
► Merchant Bars	56	55	64	73	67	67	86	83	86	75
► Bright Bars	140	132	130	146	147	143	169	164	142	125
► Drawn Wires	25	24	26	25	26	25	25	28	25	22
► Flat	84.4%	85.0%	82.3%	78.5%	75.1%	76.0%	73.1%	74.3%	72.0%	73.1%
► Long	15.6%	15.0%	17.7%	21.5%	24.9%	24.0%	26.9%	25.7%	18.6%	14.9%

## EXPORTS OF FINISHED STAINLESS STEEL BY PRODUCT CATEGORY

TABLE ▪ 2011 – 2020

SOURCE: EUROFER



# EU Trade balance: by volume

In '000 metric tonnes

## NET TRADE BALANCE BY VOLUME

CHART ▪ 2011 – 2020

SOURCE: EUROFER





# Sustainability

EUROPEAN STEEL IN FIGURES **2021**

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# Imports into the EU: scrap steel

In '000 metric tonnes

63

## IMPORTS OF SCRAP INTO THE EU

TABLE ▪ 2011 – 2020

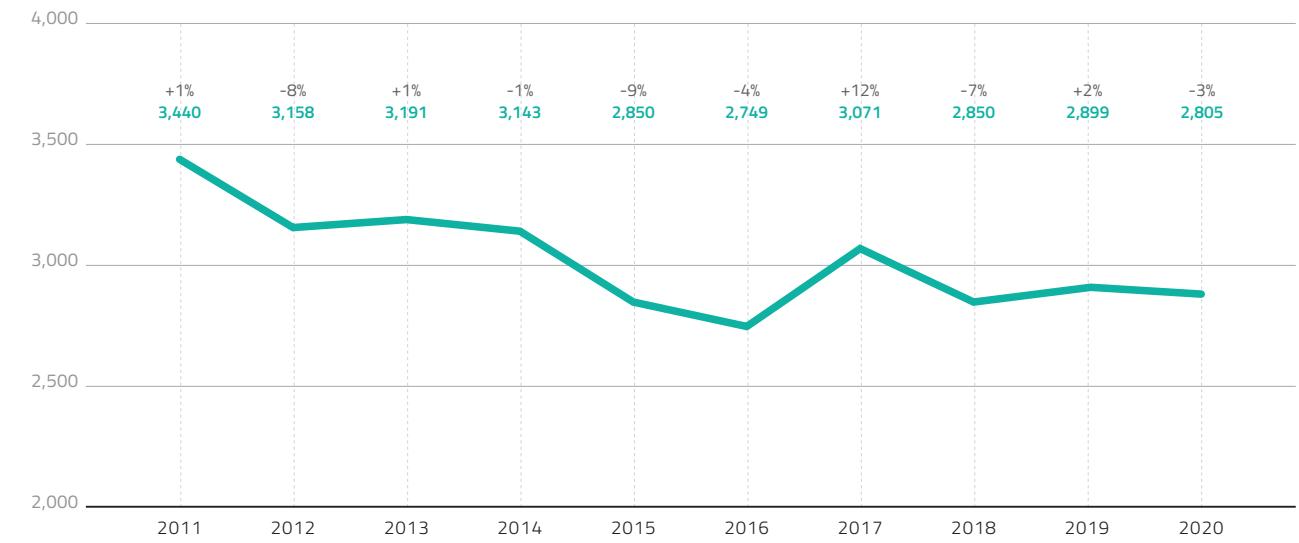
SOURCE: EUROFER

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Imports Comext	3,440	3,158	3,191	3,143	2,850	2,749	3,071	2,850	2,899	2,805

## IMPORTS OF SCRAP INTO THE EU

CHART ▪ 2011 – 2020

SOURCE: EUROFER



# Exports from the EU: scrap steel

In '000 metric tonnes

## EXPORTS OF SCRAP FROM THE EU

TABLE ▪ 2011 – 2020

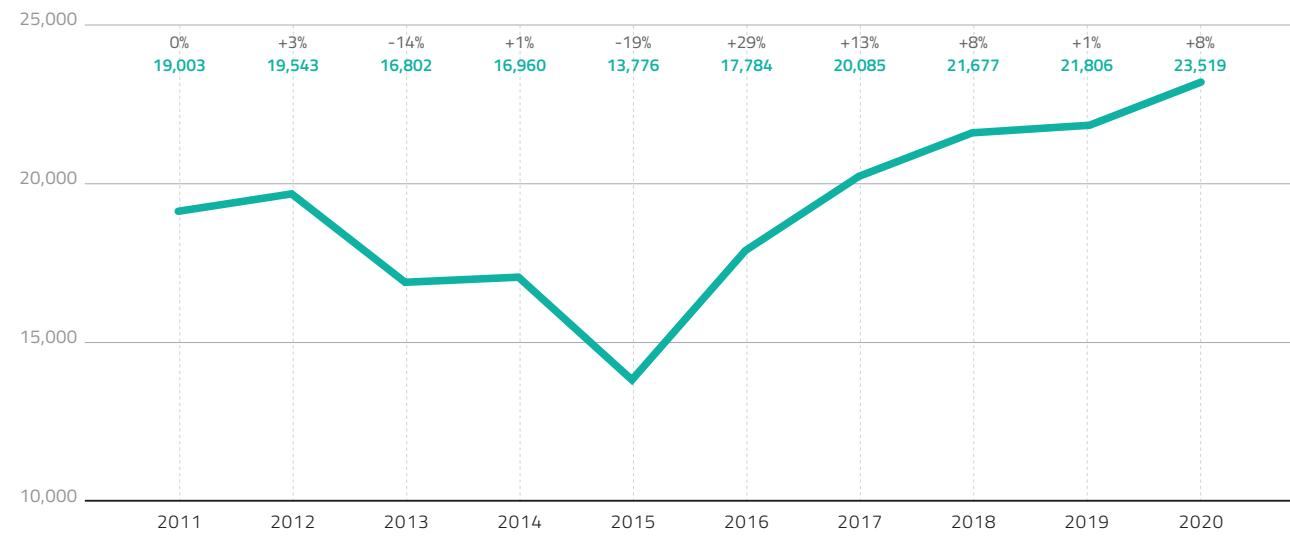
SOURCE: EUROFER

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Imports Comext	19,003	19,543	16,802	16,960	13,776	17,784	20,085	21,677	21,806	23,519

## EXPORTS OF SCRAP FROM THE EU

GRAPH ▪ 2011 – 2020

SOURCE: EUROFER



# Consumption & net export: scrap

In '000 metric tonnes

65

## CONSUMPTION & NET EXPORT OF SCRAP STEEL

TABLE ▪ 2011 – 2020

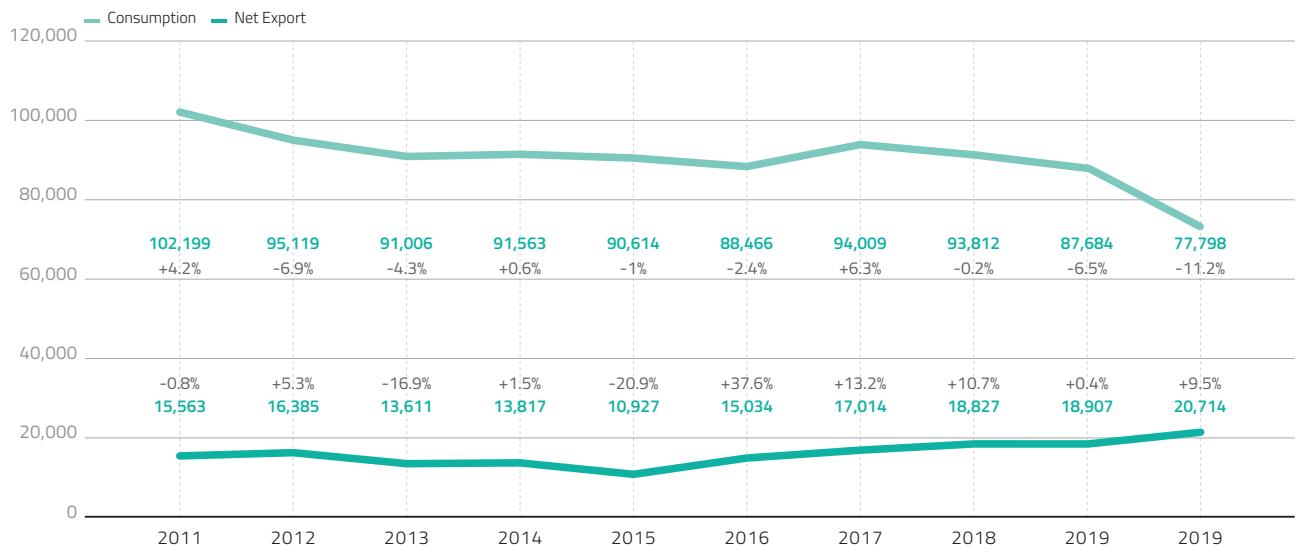
SOURCE: EUROFER

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Consumption Total	102,199	95,119	91,006	91,563	90,614	88,466	94,009	93,812	87,684	77,798
Net Export	15,563	16,385	13,611	13,817	10,927	15,034	17,014	18,827	18,907	20,714

## CONSUMPTION & NET EXPORT OF SCRAP STEEL

GRAPH ▪ 2011 – 2020

SOURCE: EUROFER



# Slag production and use

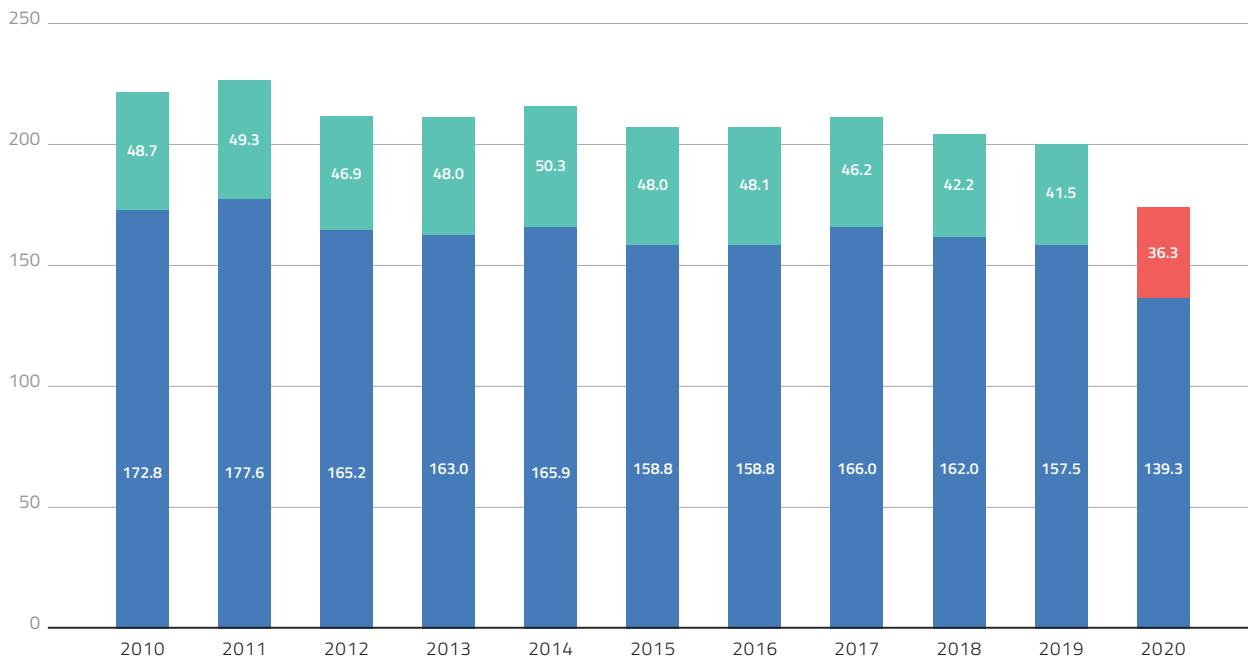
In 000,000 metric tonnes

## SLAG PRODUCTION IN THE EU

CHART ▪ 2010 – 2020

SOURCE: EUROSLAG, calculations by EUROFER

Total slag Steel production Estimated total slag

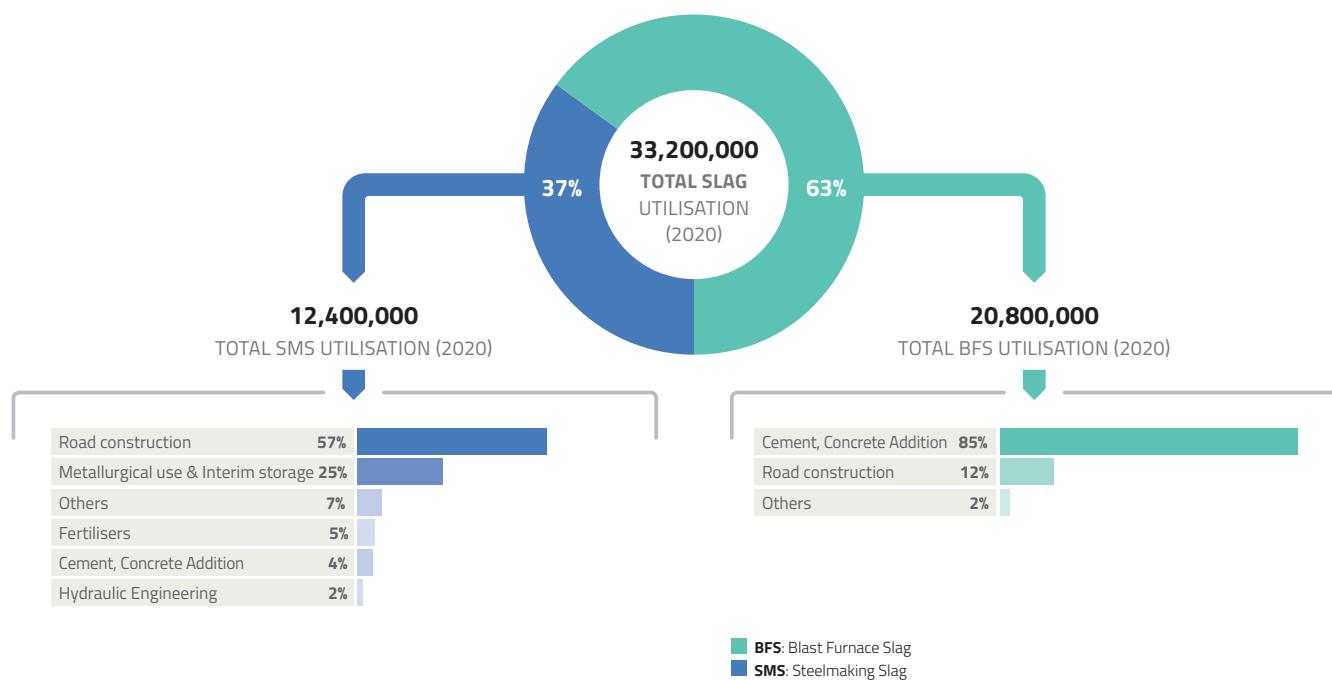


# Slag production and use

## USE OF SLAG IN DOWNSTREAM INDUSTRIES

CHART • 2020

SOURCE: EUROS LAG, calculations by EUROFER



**NOTE:** Data does not cover all EU steel production; Not comparable to the figures in European Steel in Figures 2020

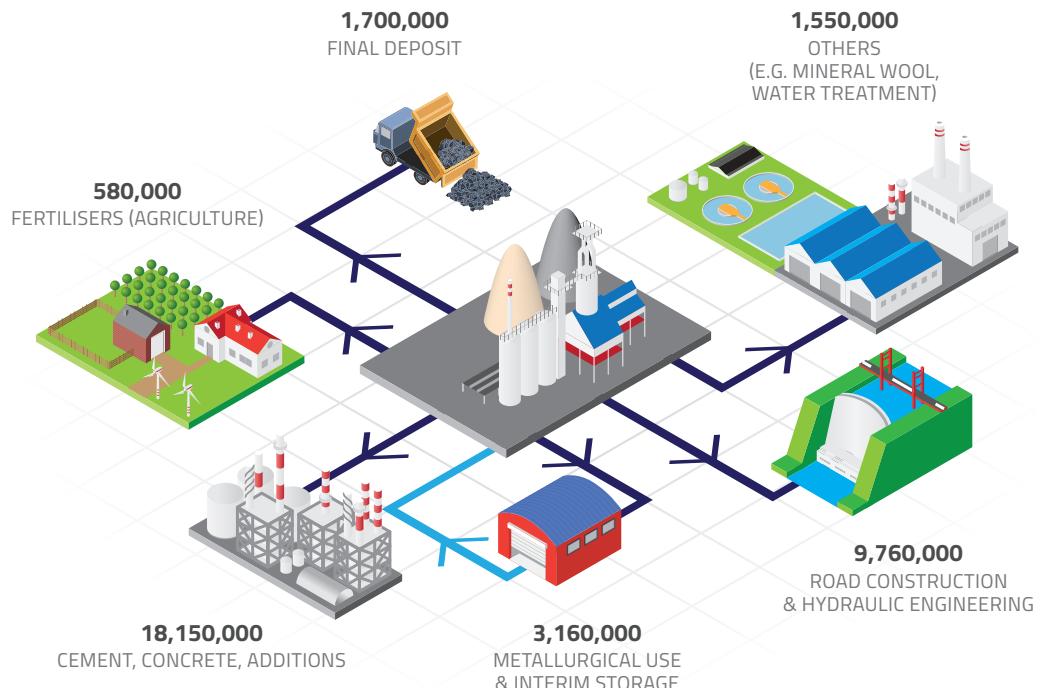
# Slag production and use

In metric tonnes

## USAGE PATHS OF SLAG IN SYNERGISTIC SECTORS

ISOMETRIC DIAGRAM • 2020

DATA SOURCE: EUROS LAG – DESIGN SOURCE: EUROFER



**NOTE:** Data does not cover all EU steel production; Not comparable to the figures in European Steel in Figures 2020. This data includes 'interim storage' and 'final deposit'.

# 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
- 

### ► 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
- 

### ► Automotive

- 29 Manufacture of motor vehicles and trailers
- 

### ► 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
- 

### ► Steel Tubes

- 24.2 Manufacture of steel tubes
- 

### ► Metal Goods

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

### ► 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
-

# References & definitions

## 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 EU28 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

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### 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.

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**EUROFER**  
THE EUROPEAN STEEL ASSOCIATION

**EUROFER** AISBL

Avenue de Cortenbergh, 172  
B-1000 Brussels  
+32 (2) 738 79 20  
[mail@eurofer.eu](mailto:mail@eurofer.eu)

[www.eurofer.eu](http://www.eurofer.eu)

