



**Intesco  
Research  
Group**

# WORLD MARKET OF IRON AND STEEL INDUSTRY. RUSSIAN MARKET OF IRON AND STEEL INDUSTRY



MOSCOW 2012

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## **ABOUT INTESCO RESEARCH GROUP**



## RESEARCH METHODOLOGY

**Subject of research:**

RUSSIAN AND WORLD MARKET OF IRON AND STEEL INDUSTRY

**Goal of research:**

EVALUATION OF MARKET CONDITIONS AND FORECAST OF ITS DEVELOPMENT FOR 2012-2014

**Region of research:**

RUSSIA

**Basic units of research:**

WORLD MARKET OF IRON AND STEEL INDUSTRY  
RUSSIAN MARKET OF IRON AND STEEL INDUSTRY  
PRODUCTION OF IRON AND STEEL INDUSTRY  
EXPORT OF IRON AND STEEL PRODUCTS  
IMPORT OF IRON AND STEEL PRODUCTS  
PRICES FOR IRON AND STEEL PRODUCTS  
THE LARGEST PLAYERS ON RUSSIAN MARKET OF IRON AND STEEL INDUSTRY  
TRENDS OF RUSSIAN MARKET OF IRON AND STEEL INDUSTRY  
FORECAST OF DEVELOPMENT OF RUSSIAN MARKET OF IRON AND STEEL INDUSTRY FOR 2012-2014

**Market is segmented by:**

PRODUCTS TYPES  
REGIONS  
PRODUCERS  
IMPORT AND EXPORT SHARE

**The largest players on the market of iron and steel industry researched:**

“SEVERSTAL”, OJSC  
“MMK”, OJSC

"NLMK", OJSC

"EVRAZ ZSMK", OJSC

"CHMK", OJSC

**Information sources used:**

Federal State Statistics Service

Ministry of Economic Development of RF

Federal Custom Service

Federal Tax Service

Reports of the main players of the branch

Metal-Kurier information agency

Worldsteel Association

Rusmet

OECD Steel Committee

London Metal Exchange

Metals Consulting International Limited

Ernst&Young

World Bank

Evaluation of Experts of the Branch

Reports on retail sales

Materials of other main players of the branch

Data of other professional associations

Other printed and electronic publications of the branch

**The research contains 70 Schedules, 44 Diagrams, 54 Tables.**

## EXTRACTS FROM THE RESEARCH

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WORLD MARKET OF IRON AND  
STEEL INDUSTRY

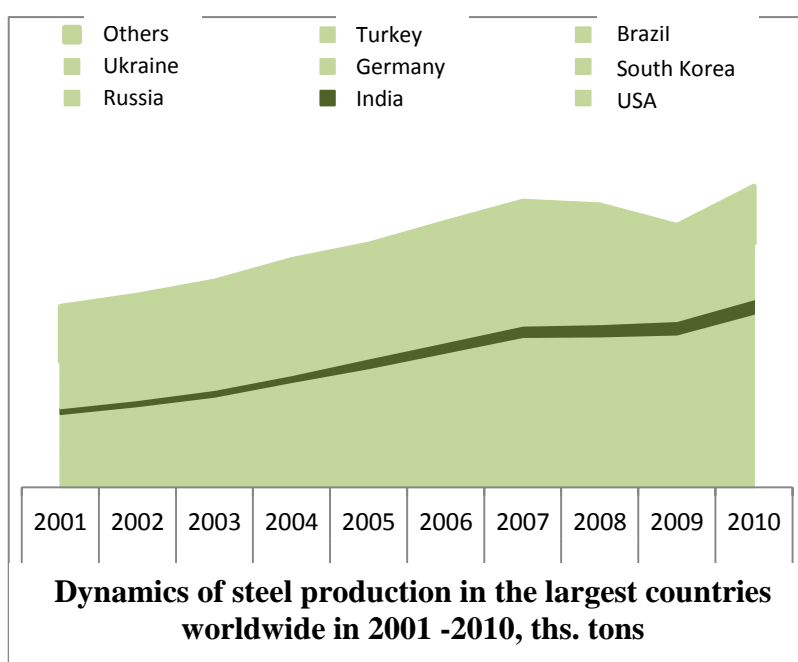
In 2010 the volume of world production of steel increased by \*\*\*% in comparison with the volume produced in 2001. Steady increase of production was interrupted by the world economic crisis in 2008-2009, after that in 2010 the market again achieved its 2007 level.

For the last ten years the production grew by \*\*\* mln. tons, 475 mln. tons (\*\*\*%) were constituted by China, \*\*\* mln. tons (\*\*\*%) – by India.

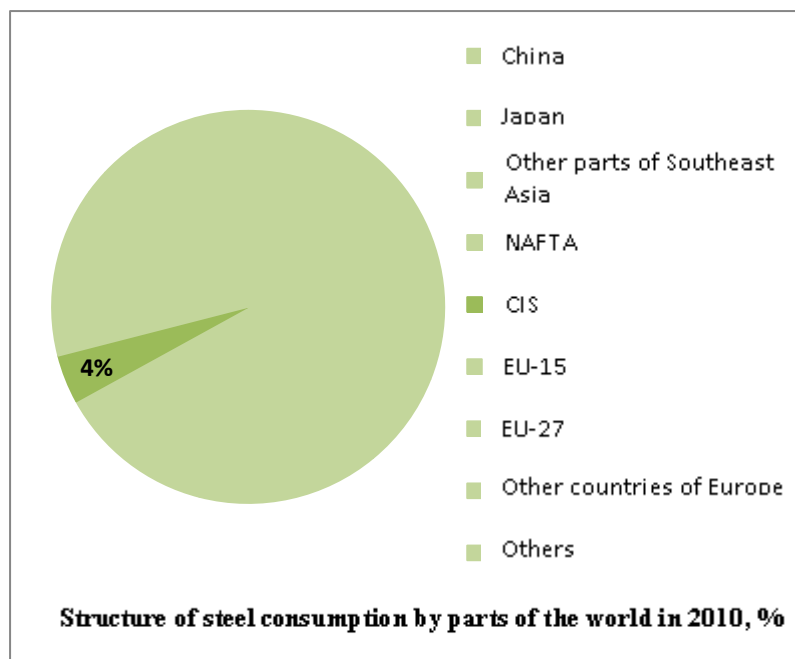
Besides Japan and Turkey constituted \*\*\*% each. These four countries made about \*\*\*% of the total world increase of steel production, although China, certainly, played the most significant role.

Therewith in the developed countries steel production was decreasing at different speeds, that was caused by growing prices for labour power, increase of cost for electric energy and tough competition among high-technical economic branches, on which foreign countries were specializing more and more.

On the whole consumption structure of steel by parts of the world corresponded the production structure. However the shares of steel consumption in Southeast Asia (beyond Japan and China, especially in India and Indonesia), NAFTA-countries and “other” countries



worldwide were greater, than their shares in production and on the whole these parts were net importers of steel. CIS countries, EU-15 and Japan were nett exporters.



## CHAPTER 5

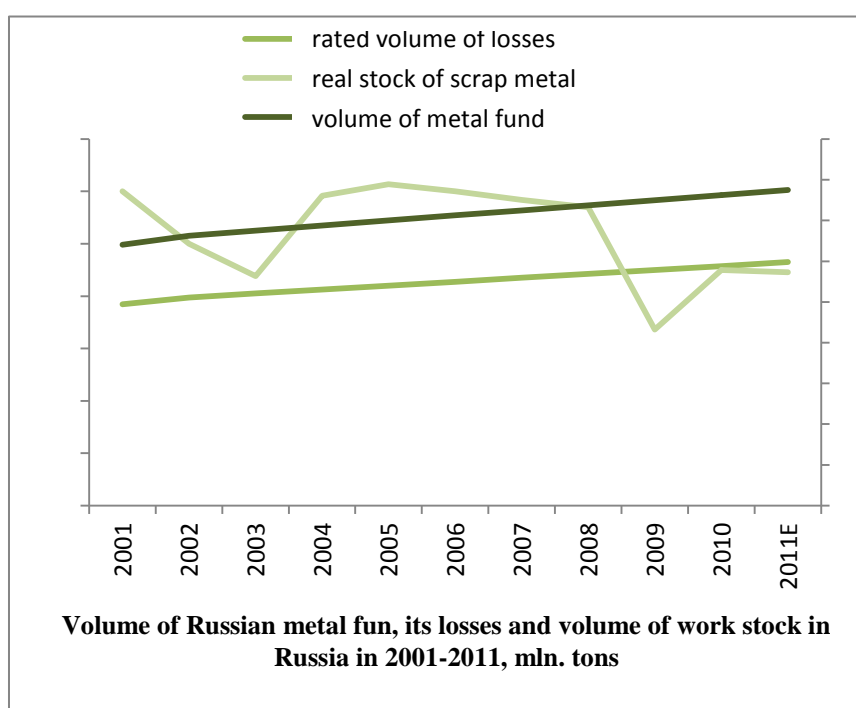
## RAW MATERIALS BASE

## Russian market of scrap metal

Volume of scrap metal stock depends, first of all, on the volume of existing metal fund (total volume of metal in economy, having a standard rate of amortization disposal) and on availability of already existing, but unprocessed volume of metal scrap.

In 2001-2010 the volume of scrap metal stock remained on a

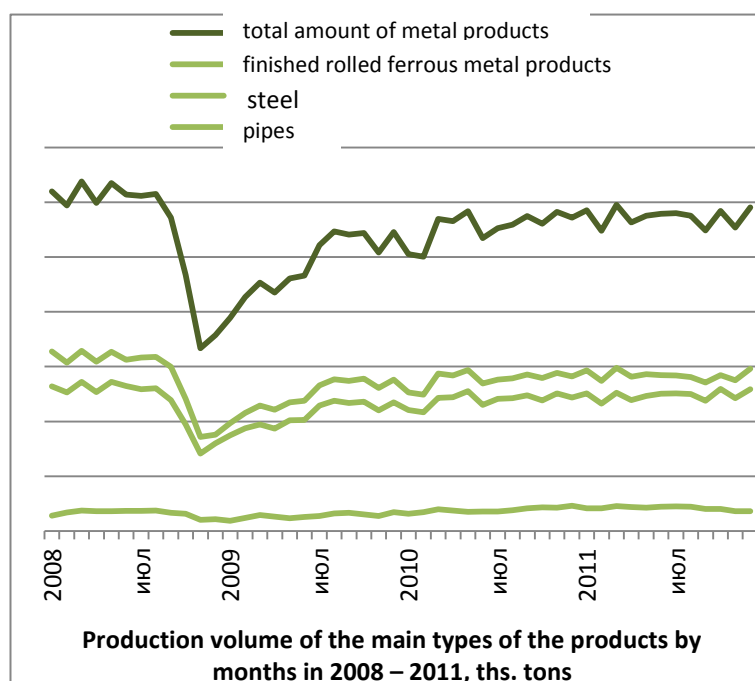
relatively high level and significantly exceeded the volume of disposal of Russian metal fund. This excess was observed as earlier as in the middle of 90-s and was caused by the realization of out-of-date manufacturing facilities and infrastructure, left since the USSR period. In the 90-s – 2000-s this reserve was mainly over, and further metal scrap volume is expected to be equal to the volume of metal fund disposal.



**CHAPTER 6*****PRODUCTION OF IRON AND  
STEEL INDUSTRY PRODUCTS IN  
RUSSIA***

In 2008 before the financial crisis started the production volume of the branch almost did not grow – the swings of the first quarter could not overcome general stagnation of demand. Drop in production in autumn 2008 almost equally influenced all segments of the products; volume recovery was relatively even too.

Due to obvious reasons volume of steel production during the whole period was roughly equal to the total sum of volume of rolled metal and pipes production.



## CHAPTER 13

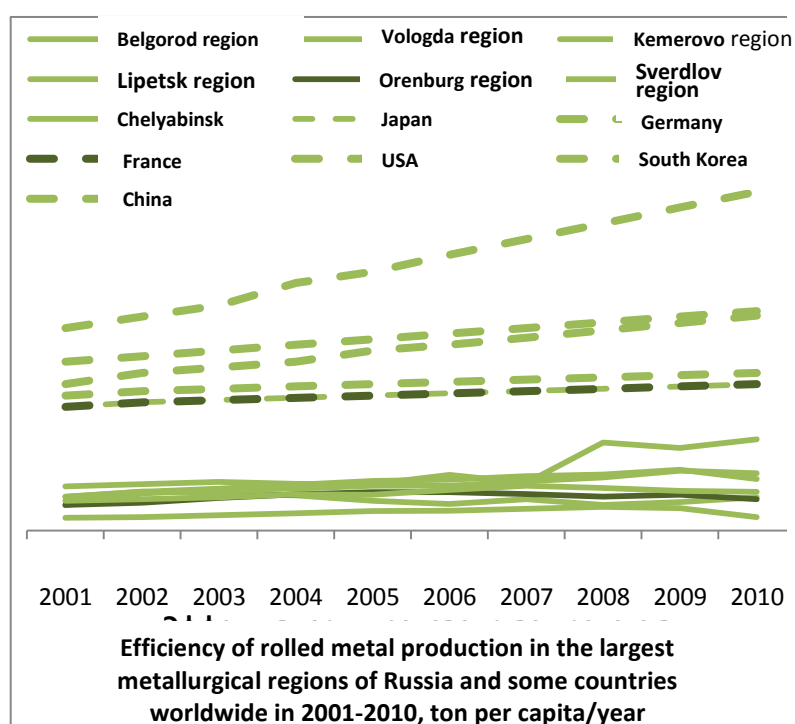
TRENDS ON RUSSIAN MARKET  
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## 13.1. Production efficiency

*Comparison with other countries worldwide*

On the world market of rolled metal products Russian producers are characterized by relatively low expenses (especially for raw materials and remuneration), and represented in the most segments of the market. In comparison with other countries producers, Russian ones are highly competitive thanks to good production quality and significantly lower price compared to West-European and North American manufacturers.

Therewith, according to the estimation of branch experts Russian companies bear more expenses of raw materials for production of one ton of a product, and underpayment is compensated by significant lower productivity per an employee. In 2001-2010 by productivity criterion only Kemerovo Region producers managed to come closer to the rates of Japan, France and Germany, although they still significantly fall behind the rates of the USA and South Korea. Most likely, productivity indicator of China is significantly overestimated and does not include shady employment.



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Schedule 70. Average cost of the main types of rolled metal in RF in 2001-2011 and forecast for 2012-2014, rub/ton

#### **ATTACHMENT 1. DYNAMICS OF COST OF THE MAIN TYPES OF IRON INDUSTRY PRODUCTS IN 2008-2011**

Schedule 54. Standard dynamics of cost of sheet products in the largest metallurgic regions of RF by months in 2008-2011, rub/ton

#### **ABOUT INTESCO RESEARCH GROUP**



## ABOUT INTESCO RESEARCH GROUP COMPANY

**INTESCO RESEARCH GROUP** is the analytical agency, specializing in development of high-quality business plans, feasibility studies and marketing researches on federal and regional levels. We provide our clients with up-to-date and accurate information, professional recommendations for conducting business.

All works of **INTESCO RESEARCH GROUP** are based on the proven investigation methods. When conducting marketing researches and developing the business plans the agency applies the worldwide accepted methods of investments efficiency evaluation and they are based on the Russian and international quality standards.

Analysts of **INTESCO RESEARCH GROUP** are the graduates of the leading Moscow institutions of higher education (Moscow State University, Moscow Institute of Physics and Technology, Russian academy of economics named after Plekhanov, Higher School of Economics, State University of Economics and Finance) and have deep knowledge in marketing, methods of marketing research arrangement, investment projects efficiency evaluation, preparing the analytical reports and business-forecasting.

Professional approach and service, high-quality specialists, deep knowledge of various markets, broad design experience and constant improvement allow the **INTESCO RESEARCH GROUP** to provide the high-quality service to all the clients.

Information from our reports is published in the largest Russian newspapers and magazines: “Vedomosti”, “Kommersant-Dengi”, “Rossiyskaya gazeta”, “Forbes”, “Russian Food Market”, “FoodService”, “RBK daily”, “Tsenovik”, “Moe delo. Magazin”, “MAXIM”, “Odnako”, “Khlebopekarnoe proizvodstvo”, “Producty i Pribyl”, “Konditerskaya sfera/khlebopechenie”, “Unipack.Ru”, etc.

## OUR CLIENTS



**PURPOSE OF OUR COMPANY IS TO ENSURE THE SUCCESSFUL  
IMPLEMENTATION OF BUSINESS PROJECTS OF OUR CLIENTS**