



## **The EU Integrated Steel Industry - Profiles of leading EU steel mills (2017)**

**A Service by SteelConsult International**

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## Introduction

The EU houses the world's largest integrated steel industry after China, **producing some 95 mln tonnes of hot metal**, around **100 mln tonnes of BOF crude steel**, and close to **90 mln tonnes of finished steel products** per year. Whilst steel imports remain high and there is still overcapacity in the EU steel industry, the longer term outlook for the EU economy in general, and for high quality flat steel produced by EU integrated mills in particular, has improved considerably.

This report provides a clear and easy to digest helicopter view of each of 18 key integrated steel mills in the EU steel industry, shedding insight in each mill's activities, operations, markets, production, strengths and weaknesses as well as an outlook for the future.

## Key questions addressed in this study

- What are the fundamentals of leading EU integrated steel mills?
- What are the bottlenecks in EU steel mill operations, and which investments are made?
- Which plants are expected to close in the next decade and who will take over their business volumes?
- What is the outlook for sales of finished and semi-finished products and production of crude steel by these mills?

## What will you receive?

### MS Excel file for each relevant EU integrated plant with database incl.:

- Summary of sales and production volumes of finished and semi-finished steel products;
- Material flow of downstream processes;
- Capacities and utilization per process.

### Profile Report for each company (in MS PowerPoint slide format, 50 pages per report on average) incl.:

- Introduction;
- SWOT Analysis;
- Company Fundamentals (structure, strategy, markets, operations, investments, ownership);
- Production by product and outlook for each plant.

*In total, clients will receive 17 Excel plant databases and 7 Profile Reports (incl. for multi-site companies). Excel files are provided with values only. Data is provided for 2006-2016 (actuals) and forecasts for 2017-2030.*



### Plants included

- ArcelorMittal Dunkerque
- ArcelorMittal Fos-sur-Mer
- ArcelorMittal Asturias
- ArcelorMittal Gent
- ArcelorMittal Bremen
- ArcelorMittal Eisenhüttenstadt
- ThyssenKrupp Steel (Duisburg)
- Salzgitter (incl. Salzgitter Flachstahl, Ilsenburger Grobblech and Peiner Träger)
- HKM (Huckingen)
- ROGESA (incl. Dillinger HW and Saarstahl)
- voestalpine Linz
- voestalpine Donawitz
- Tata Steel IJmuiden
- Tata Steel Port Talbot
- British Steel (Scunthorpe)
- SSAB Sweden (Oxelösund & Lulea)
- SSAB Raahe

### Table of Contents of Database

Full material flow analysis and forecasts for each plant, incl.:

#### Products:

- HR coil
- CR coil
- Galvanized sheet
- Organic Coated sheet
- Tinplate
- Rebar
- Sections
- Merchant bars
- Wire rod

#### Processes:

- Hot metal output
- Liquid steel output
- Crude steel output
- Sales and purchases of slab, bloom and billet
- Production of rolled steel products by type

### Why this report?

- Easy to digest summary view of leading EU steel plants and companies;
  - Systematic, standardized and complete **availability of key production data** per plant;
  - Analysis includes long term view on the **development of the EU steel industry**, incl. which plants will be the **winners** and **losers** in EU steel;
  - Data provides an **excellent platform for business planning** for steel mills;
  - The study will also be highly instrumental in **estimating future business levels and identifying new supply opportunities** for suppliers of raw materials, utilities and services to the steel industry;
  - The Profile Reports are not only valuable for mills and suppliers to the steel industry, but also for **buyers of steel**, who wish to better understand their suppliers.
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### Who should buy this service?

- Producers of steel
- Raw materials and utilities suppliers
- Subcontractors and service providers to the steel industry
- Logistical companies
- Users of steel
- Traders & distributors
- Banks



### About SteelConsult International

SteelConsult International is an independent consulting firm, entirely dedicated to the carbon steel sector, serving clients in the iron ore, metallurgical coal and steel industries and markets. SteelConsult provides services in strategic consulting, market research, economics analysis and training. We have extensive experience in the markets for all main steel products, covering steelmaking raw materials, semis, sheet, longs and plate. From our offices in Amsterdam (The Netherlands) we work for clients around the globe. Our customers include companies with a variety of interests in steel: mills, consumers, traders, distributors and processors of steel as well as banks, government institutions and suppliers to the steel industry.

### The editor of the service



For the past 13 years, Gilles Calis has been Managing Director of SteelConsult International based in The Netherlands. He has been associated with the steel sector for 20 years, having worked as a consultant with Hoogovens Technical Services/Corus Consulting (currently known as Tata Steel Consulting), CRU International and Hatch Beddows prior to founding his own firm. He is an experienced consultant and trainer, with expertise in the conduction of strategy projects, market studies, business planning and economics analysis for the iron & steel industry and its markets.

In the course of his career, Gilles worked for many of the world's main steel mills, processors, consumers and suppliers to the steel industry, covering markets for steelmaking raw materials, semis, sheet, plate and longs in countries around the world.

Gilles is a regular speaker at leading industry events and holds a MSc. in Business Economics at the Erasmus University Rotterdam.

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