



RAW MATERIAL REPORT

STEEL 2021



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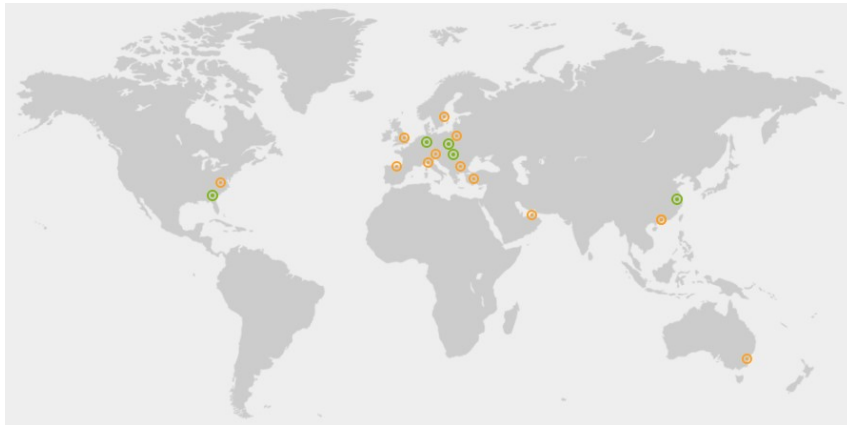
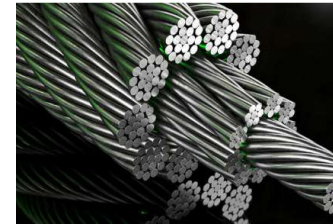
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Some facts about GUSTAV WOLF

Speaker:

Holger Kruse

Wire Division of GUSTAV WOLF GmbH



- 7 plants in 5 countries
- Approx. 600 employees worldwide
- Approx. 100 mio. € annually turnover
- Approx. 80.000 tons annually use of steel

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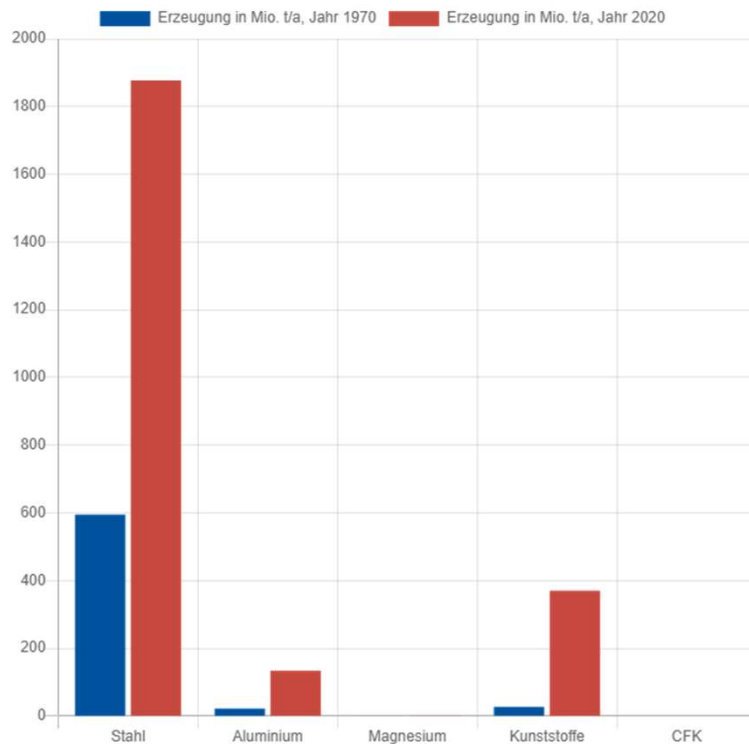
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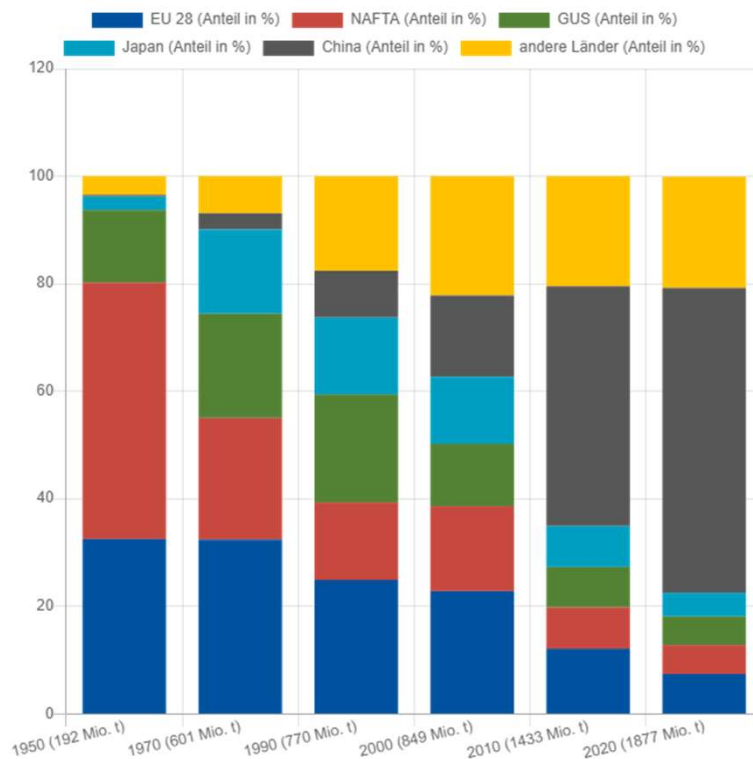
World creation 1970/ 2020

Among the listed substitutes, steel is by far the most important material in terms of quantity and has even gained in importance over the past 30 years.



World crude steel production by region

The EU is the second largest steel producer worldwide after China.



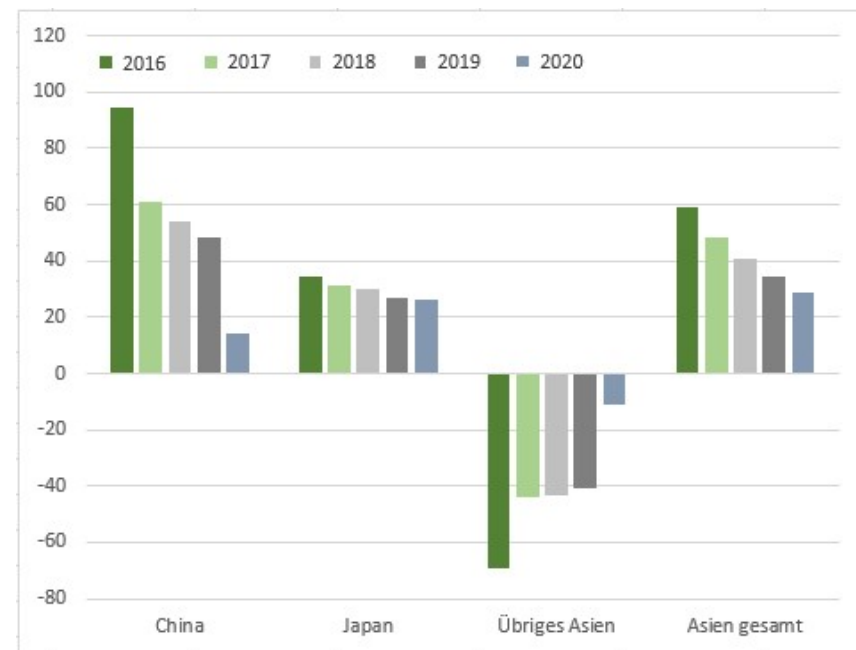
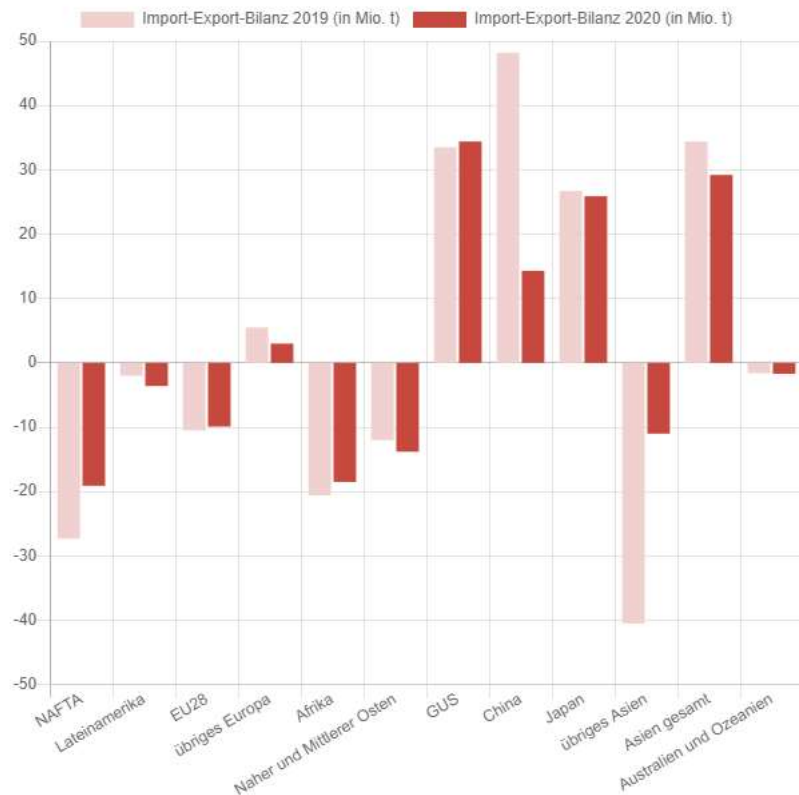
Steel production China **2019**:
996 mio tons

Steel production China **2020**:
1.065 mio tons

+ 7%

World steel trade: Import- Export balance

The classic import regions are NAFTA, the Middle East and Africa. The CIS countries and China are export regions.



Top 10 crude steel producing countries worldwide

Million tonnes

Countries	Aug 2021	Jan-Aug 2021
China	83.2	733.0
India	9.9	77.7
Japan	7.9	64.0
United States	7.5	57.1
Russia	6.3	50.8
South Korea	6.1	47.5
Germany	3.0	26.7
Turkey	3.5	26.6
Brazil	3.1	24.1
Iran	2.5	20.4

Growth rates %

Countries	Aug 2021	Jan-Aug 2021
China	-13.2	5.3
India	8.2	25.6
Japan	22.9	17.0
United States	26.8	19.5
Russia	4.4	7.7
South Korea	6.2	8.4
Germany	6.7	17.4
Turkey	7.1	16.7
Brazil	14.1	20.9
Iran	8.7	9.7

Top 20 steel producers worldwide

2019

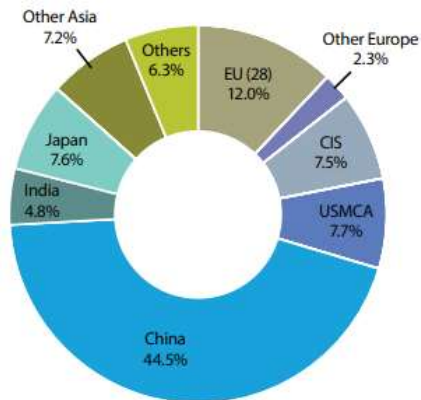
Rank	Company	Tonnage
1	ArcelorMittal ⁽¹⁾	97.31
2	China Baowu Group ⁽²⁾	95.47
3	Nippon Steel Corporation ⁽³⁾	51.68
4	HBIS Group ⁽⁴⁾	46.56
5	POSCO	43.12
6	Shagang Group	41.10
7	Ansteel Group	39.20
8	Jianlong Group	31.19
9	Tata Steel Group	30.15
10	Shougang Group	29.34
11	Shandong Steel Group	27.58
12	JFE Steel	27.35
13	Valin Group	24.31
14	Nucor Corporation	23.09
15	Hyundai Steel	21.56
16	IMIDRO ⁽⁵⁾	16.79
17	JSW Steel	16.26
18	SAIL	16.18
19	Benxi Steel	16.18
20	Fangda Steel	15.66

2020

Rank	Company	Tonnage
1	China Baowu Group ⁽¹⁾	115.29
2	ArcelorMittal ⁽²⁾	78.46
3	HBIS Group ⁽³⁾	43.76
4	Shagang Group	41.59
5	Nippon Steel Corporation ⁽⁴⁾	41.58
6	POSCO	40.58
7	Ansteel Group	38.19
8	Jianlong Group	36.47
9	Shougang Group	34.00
10	Shandong Steel Group	31.11
11	Delong Steel Group	28.26
12	Tata Steel Group	28.07
13	Valin Group	26.78
14	JFE Steel	24.36
15	Nucor Corporation	22.69
16	Hyundai Steel	19.81
17	Fangda Steel	19.60
18	IMIDRO ⁽⁵⁾ (e)	18.90
19	Benxi Steel	17.36
20	Liuzhou Steel	16.91

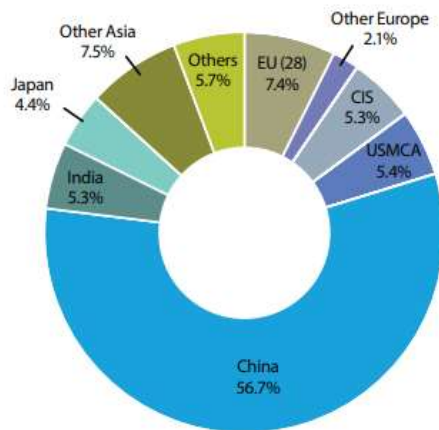
Global Trade War Steel

China



Steel production 2010:
639 mio tons

Steel use 2010:
588 mio tons

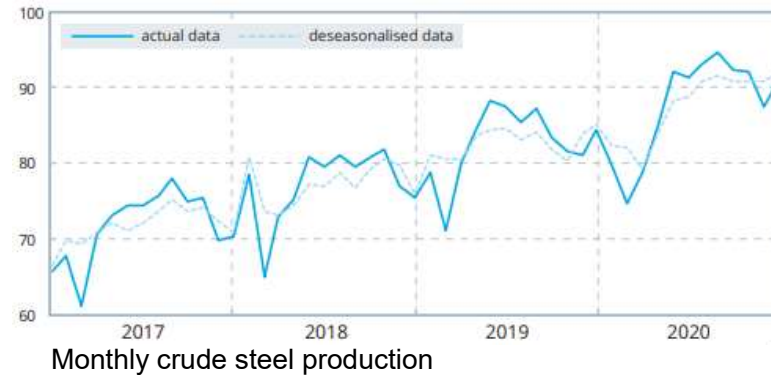


Steel production 2020:
1.065 mio tons

+ 67%

Steel use 2020:
996 mio tons

+ 69%



Climate policy challenges for the steel industry

In order to achieve the desired CO₂ reduction, increasingly higher specific GHG emission costs are to be expected.



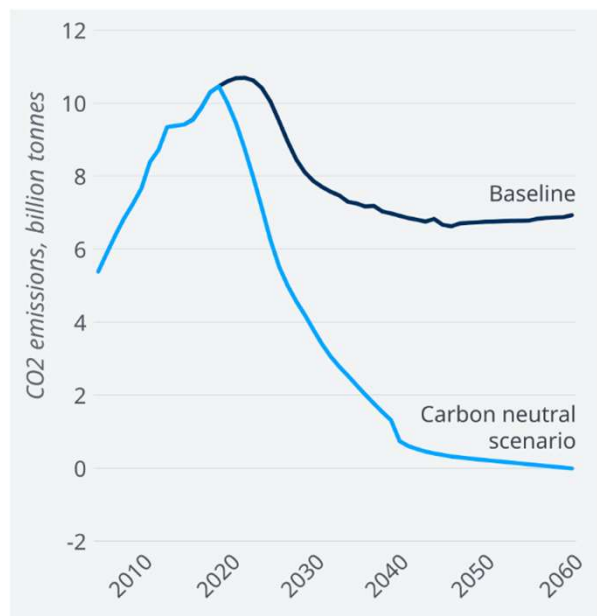
Costs GHG-Emissions

2020: 25€/ t CO₂

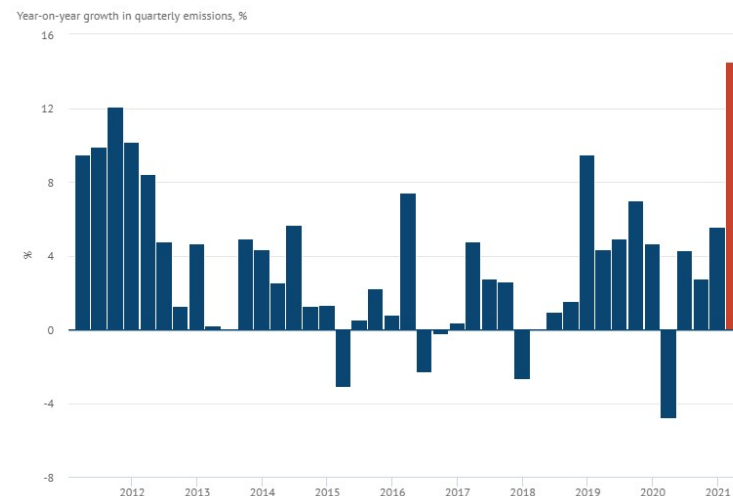
2032: 105€/t CO₂

Climate policy challenges for China

China may increase steel imports to meet home demand and cut carbon emissions.



China's 2060 carbon neutral pledge



CO2 emission growth

Steel index

Steel price from Q4 / 15 indexed

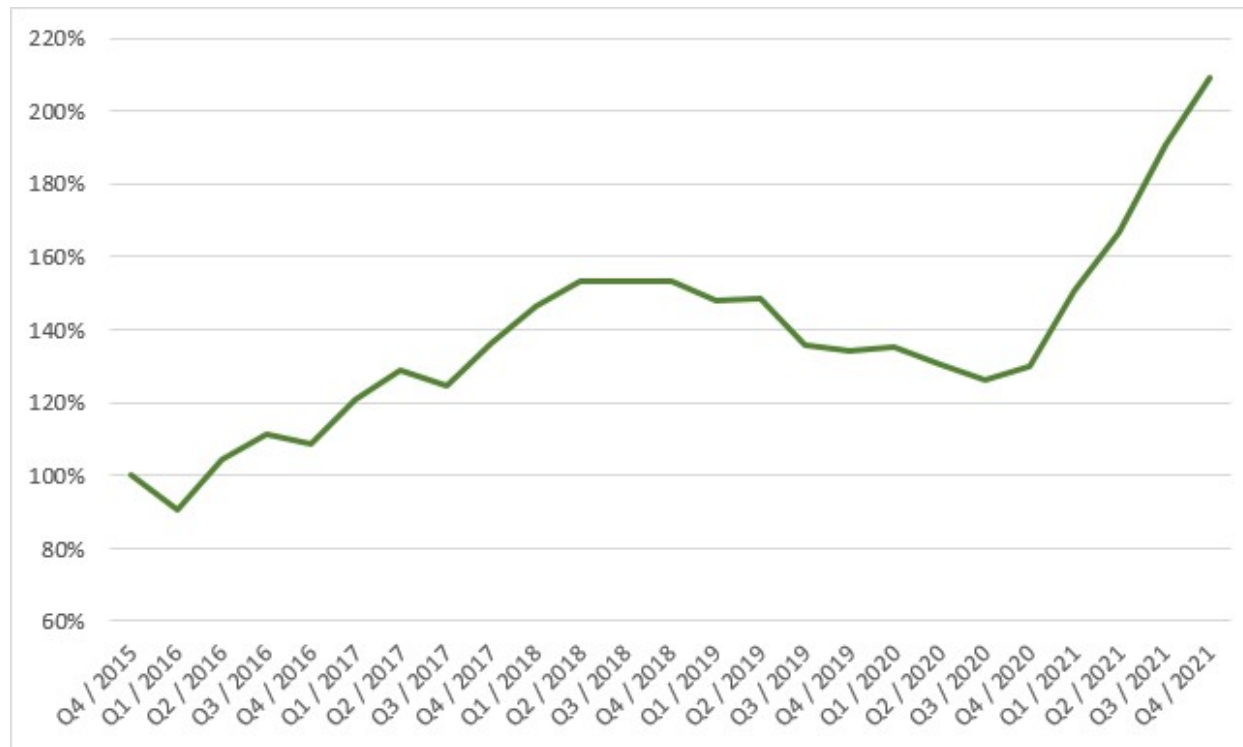


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GUSTAV WOLF



Thank you for your attention!

