



ITEM 5

CAPACITY DEVELOPMENTS IN THE WORLD STEEL INDUSTRY

Presentation by Hokuto OTSUKA
28 September, 83rd Session of the Steel Committee
Paris, France

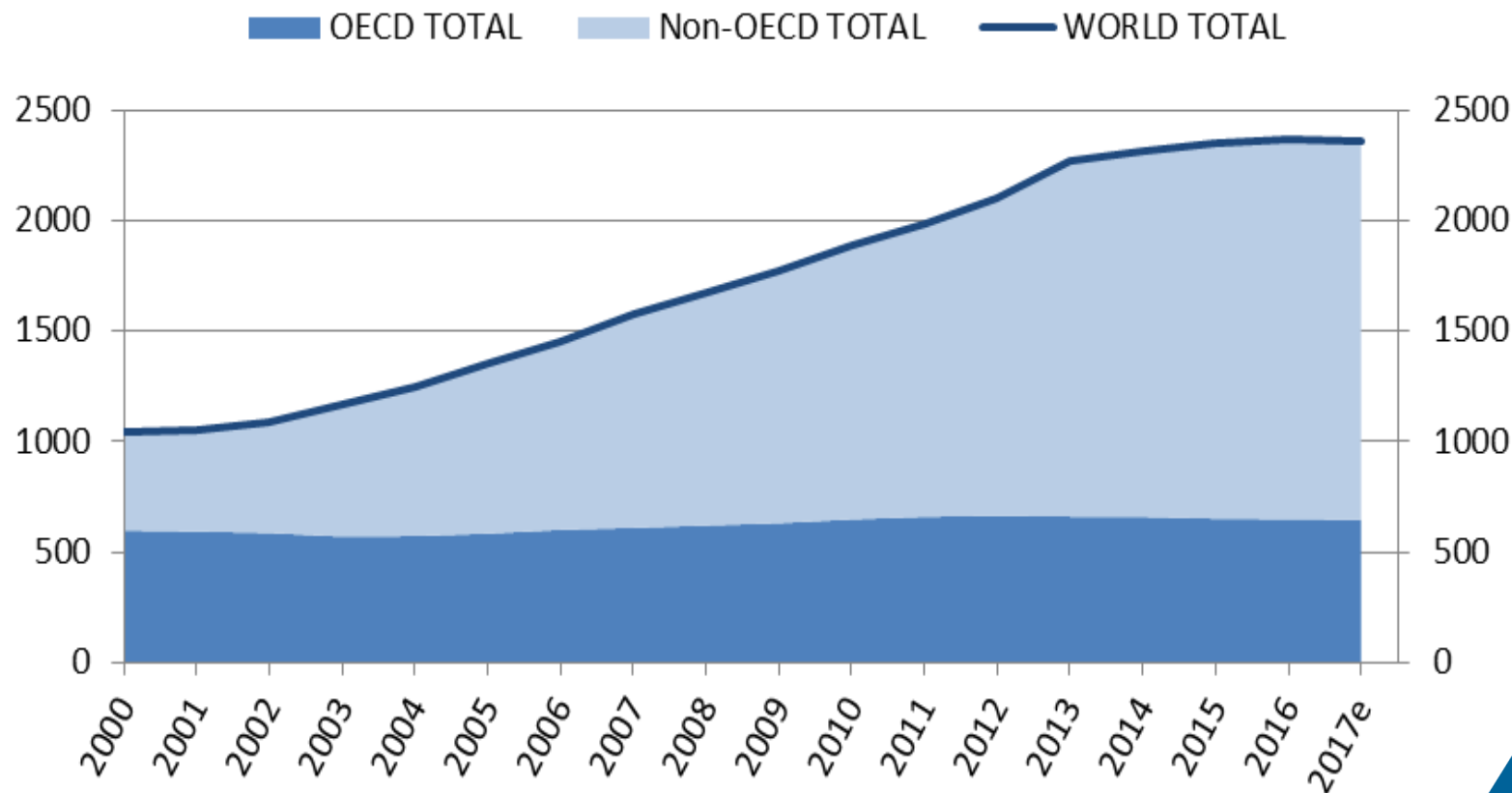


Outline

- 1. Global summary of steelmaking capacity developments**
 - in levels
 - in changes
- 2. Capacity developments by region**
- 3. Global crude steelmaking capacity and crude steel production**
 - Capacity-Production gap
 - Capacity utilisation rate



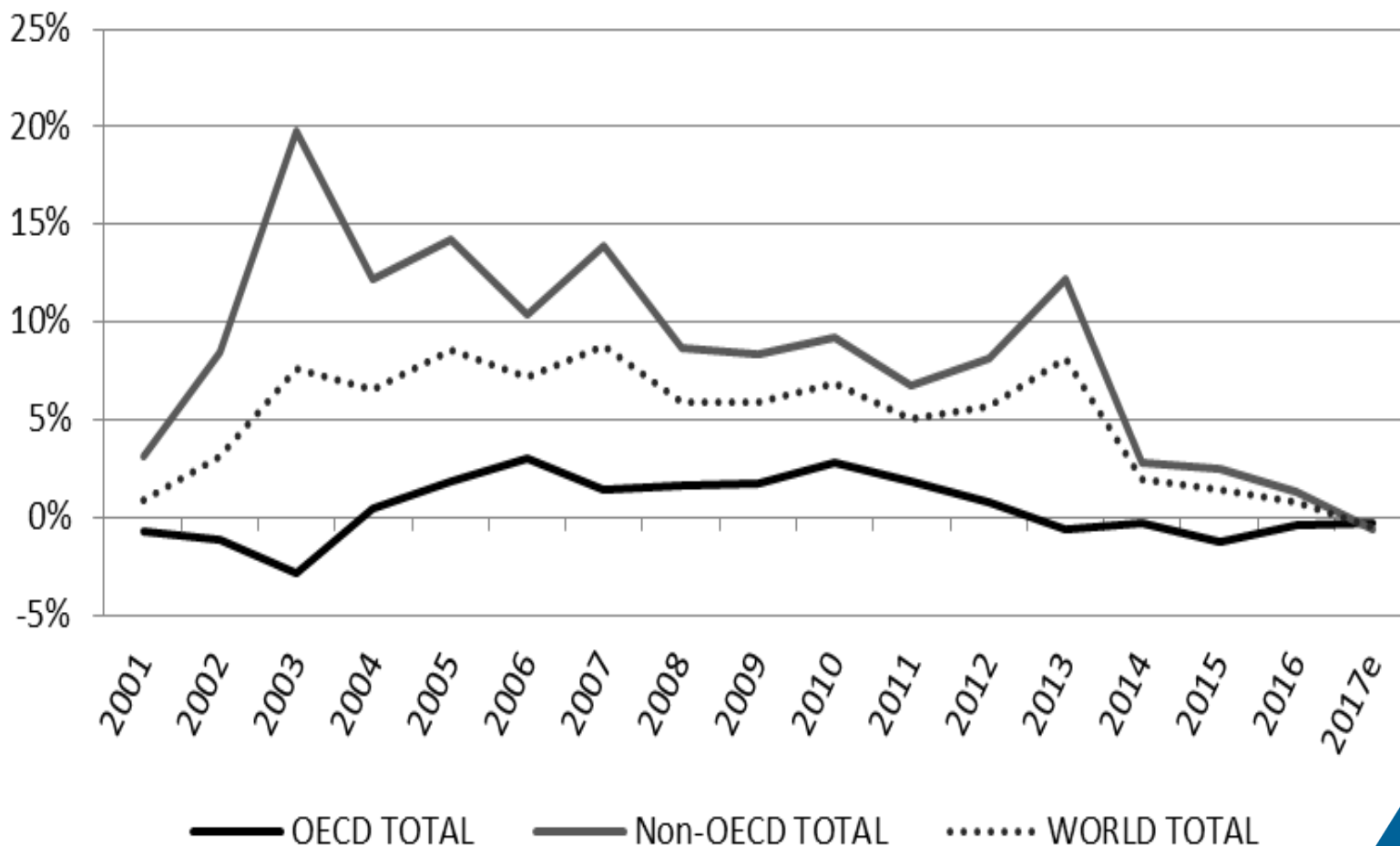
1. Global summary of steelmaking capacity developments – in levels



Source: OECD Secretariat calculations



1. Global summary of steelmaking capacity developments – in changes





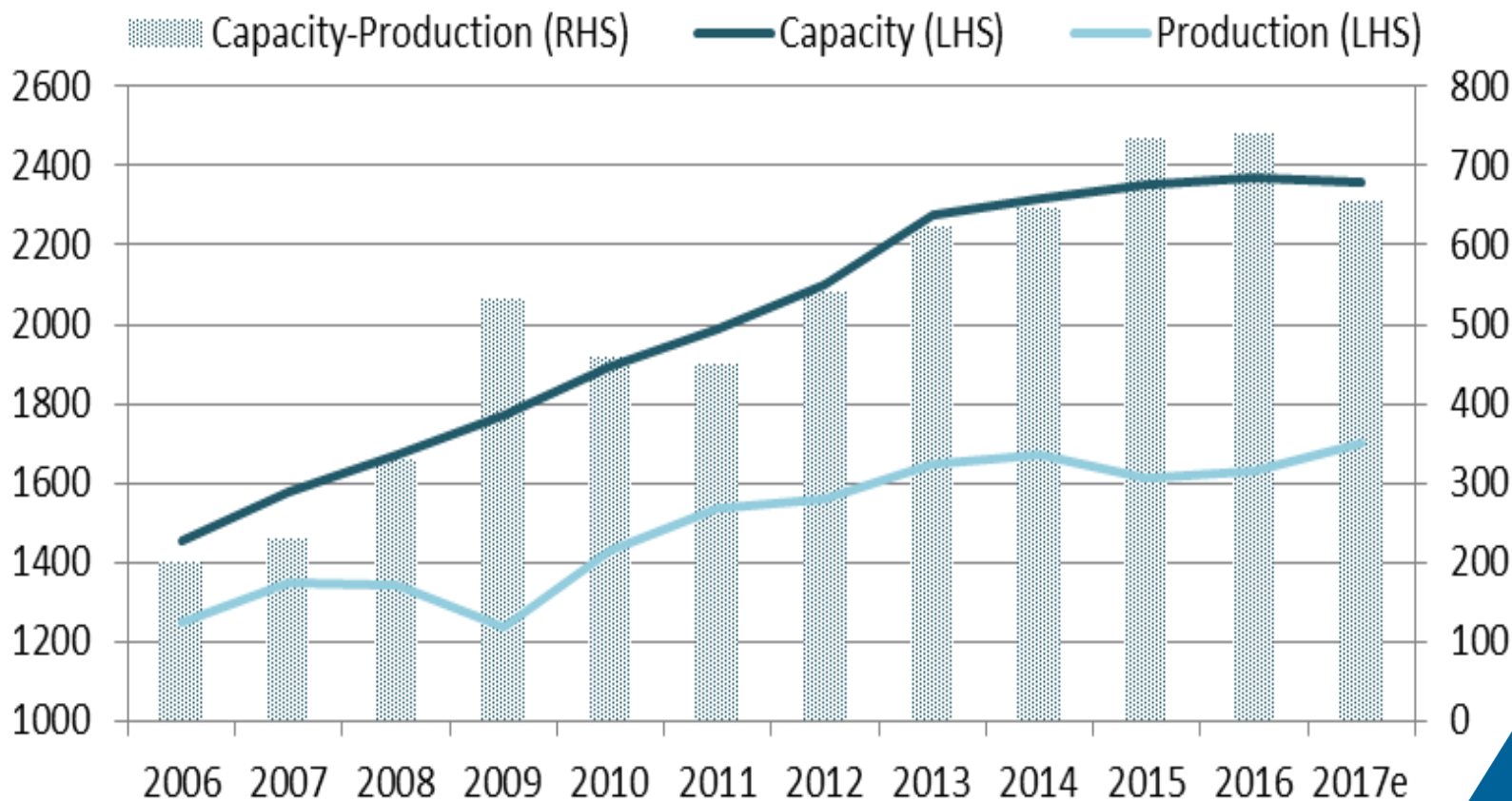
2. Capacity developments by region

	Expected nominal capacity	Existing nominal capacity	% change expected	Potential gross capacity additions in 2018-20		Capacity in 2020		% change expected
	2017 (A)	2016	2017-2016	Underway (B)	Planned* (C)	Low (A)+(B)	High (A)+(B)+(C)	2020-2017
Asia	1561.95	1597.34	-2.2%	0.82	63.94	1562.77	1626.70	0.1%
CIS	153.50	150.65	1.9%	5.37	9.14	158.87	168.01	3.5%
Latin America	76.69	76.69	0.0%	0.00	2.40	76.69	79.09	0.0%
Middle East	78.64	63.08	24.7%	14.80	8.91	93.44	102.35	18.8%
Africa	40.52	35.29	14.8%	0.85	13.45	41.37	54.82	2.1%
Europe	275.44	278.34	-1.0%	0.00	3.67	275.44	279.11	0.0%
NAFTA	160.65	159.17	0.9%	0.00	0.40	160.65	161.05	0.0%
Oceania	9.10	9.10	0.0%	0.00	0.00	9.10	9.10	0.0%
OECD Total	647.15	648.57	-0.2%	0.00	4.07	647.15	651.22	0.0%
Non-OECD Total	1709.34	1721.09	-0.7%	21.84	97.84	1731.18	1829.02	1.3%
World Total	2356.49	2369.66	-0.6%	21.84	101.91	2378.32	2480.23	0.9%

Notes: Data for 2017 are estimated. Capacity data reflects all information on changes up to June 2017. *Planned additions for 2018-20 in column (C) of this table include capacity investments that are "planned" to become operational in 2017. The Secretariat welcomes any clarifications from delegates regarding the status of capacity investments plans. If, by the end of 2017, the status of a "planned" capacity investment project is not clear, the Secretariat will incorporate it as existing capacity in 2017 in its March 2018 update of steelmaking capacity developments.

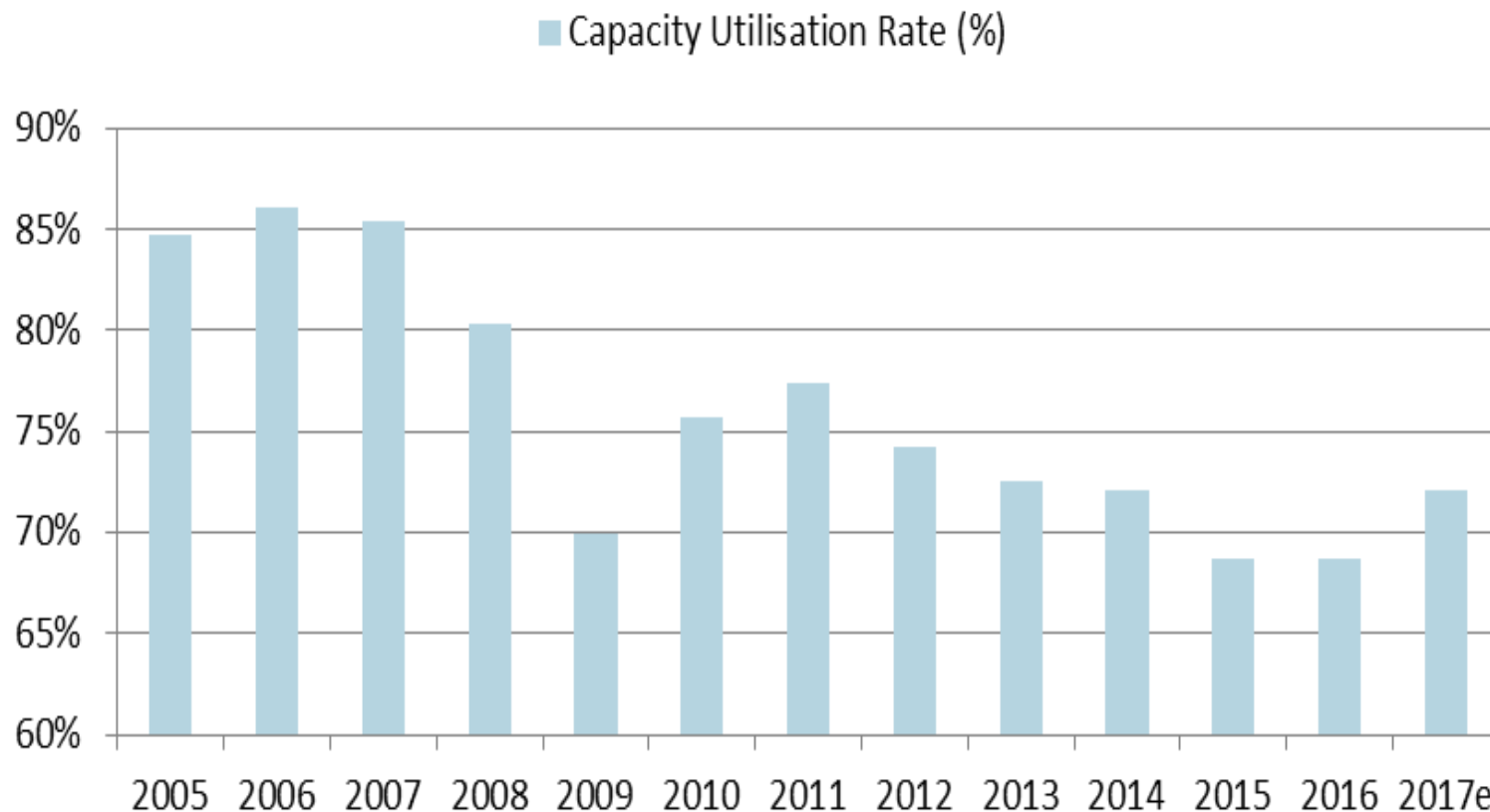


3. Global crude steelmaking capacity and crude steel production - Capacity-Production gap





3. Global crude steelmaking capacity and crude steel production – capacity utilisation rate





Thank you for your attention