Trends Shaping the Steel Industry
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Major shifts in the past...

Megatrends shaping the future...
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Megatrends shaping the future...
60% of steel making capacity owned by governments in 1980s, currently 30 – 40%

Fewer distortions, faster supply correction in down cycles
Steel demand in China rose from 138 Mnt in 2000 to 737 Mnt in 2017.
Consolidation and the emergence of Global majors

1970 - 1980

- Formation of Usinor, Aceralia and Arbed through consolidation

1990

- Mittal Steel

2000

- Usinor
- Aceralia
- Arbed

- Sibalsa
- Sidbec
- Inland
- ISG

- + Several others

2010

- Arcelor
- ArcelorMittal

Nippon Steel [Yawata + Fuji]

Baoshan I&S Corp.

Shanghai Metallurgical

Guangdon Shouguan I&S

Wuhan Corp.

Next set of 50+ mtpa steel companies emerging in China
Major shifts in the past...

Megatrends shaping the future...
Indian steel demand to grow the fastest at 5% - 6% p.a. (2018 - 2025)

Urbanization to drive steel demand in Construction & Infrastructure and the automotive sector

Growing rural demand for steel – currently an under-addressed opportunity
Increasing influence of communities – amid rising disparities

Climate change influencing policy, choice of technology and material

Digitalization: IOT, Robotics etc. rapidly becoming accessible

Implications for the Global steel industry

• Licence to operate to become increasingly difficult
• Reduce carbon footprint, increase waste use and recycling.
• Leverage digital technologies across steel value chain.
Thank You