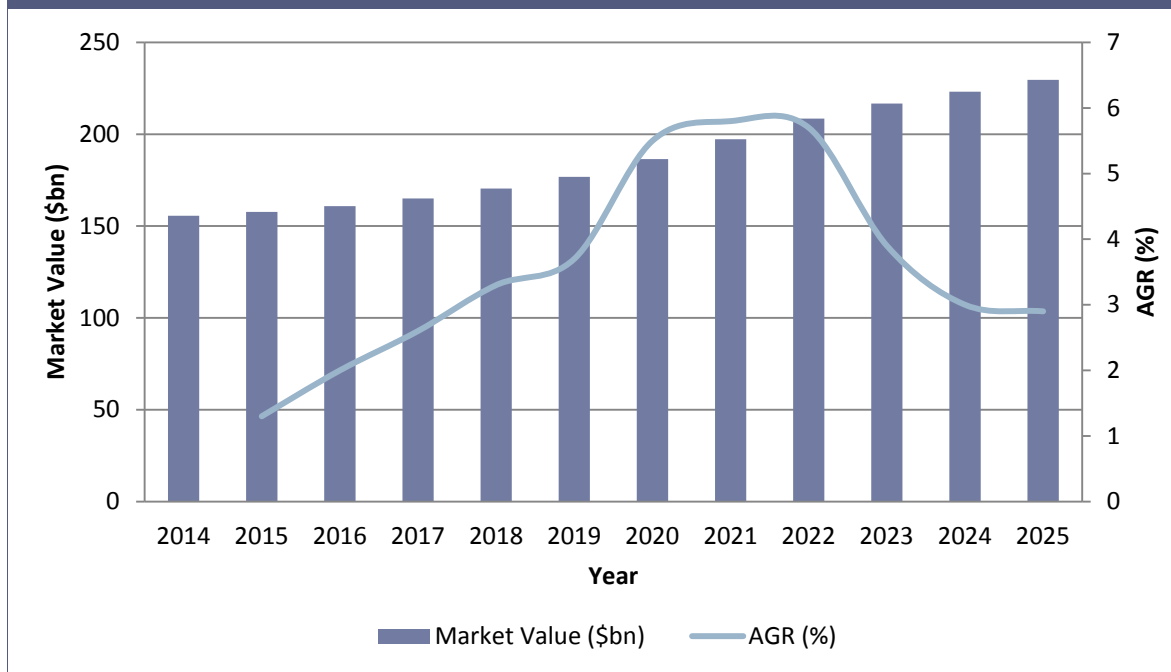


# Steel Market Forecast 2015-2025: Future Opportunities for Leading Companies

Figure 4.11 Steel Market Value Forecast in the Automotive 2015-2025 (\$bn, AGR%)



Source: *Visiongain 2015*

## 4.3.1 Automotive Steel Market Analysis 2015-2025

The consumption of steel by the automotive sector will be 184.46 million tonnes in 2015, and the market will be worth \$157.67 billion. Visiongain estimates that the automotive steel sector will be the second fastest growing submarket, with a CAGR of 3.7% during the forecast period. We calculate that market will be growing at a moderate rate between 2015 and 2020, with a CAGR of 3.3%. However, it will grow at a faster rate of 4.1% in the second half of the forecast period. Total cumulative consumption level in automotive steel market for the period of 2015-2025 will be 2,437.55 million tonnes that will be worth \$2,092.55 billion. The automotive sector will be the third largest consumer of steel throughout the forecast period. The sector will see a growing consumption share from 11.9% in 2015 to 12.3% in 2020 and then shrinking to 12% in 2025.

It is expected that auto production in the EU will start picking up. The expected revival in the auto industry in 2013 will increase auto production and subsequently increase steel consumption in the automotive sector. The market will flourish because the emerging economies of China and India will continue to witness strong growth in the automotive sector. The resurgence of the automotive

# Steel Market Forecast 2015-2025: Future Opportunities for Leading Companies

## 5.4 Japan Steel Market Forecast 2015-2025

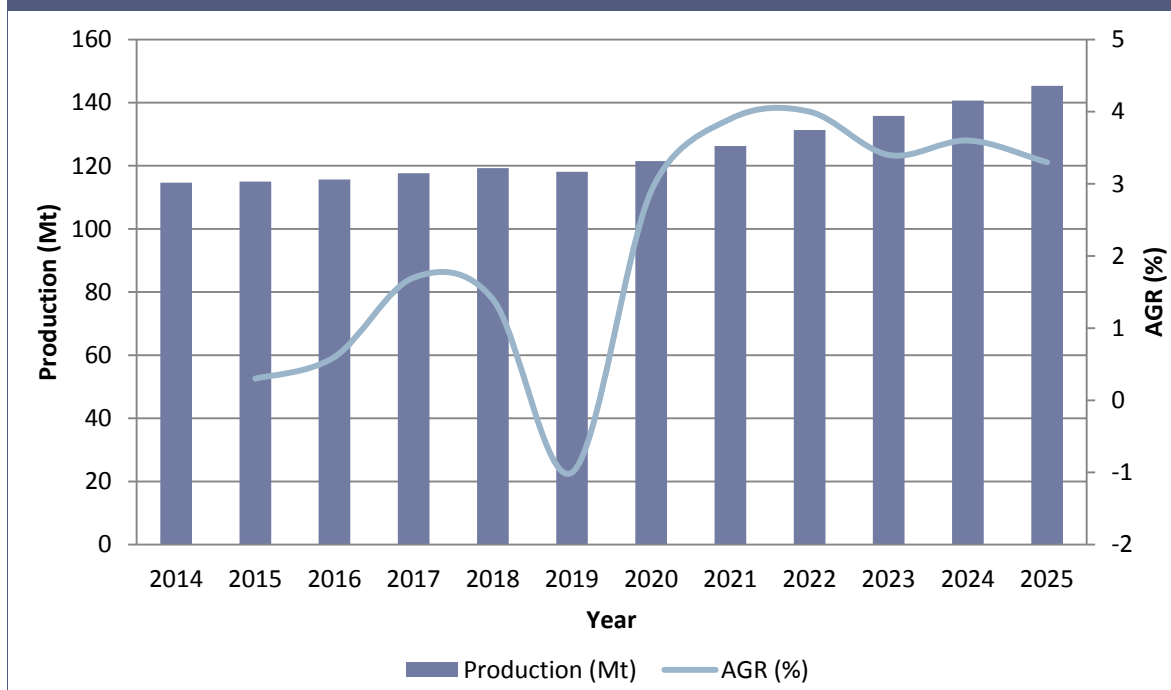
### 5.4.1 Japan Steel Market Production Forecast 2015-2025

**Table 5.16 Japan Steel Market Production Forecast 2015-2025 (Mt, AGR%, CAGR%, Cumulative)**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2015-2025
Production (Mt)	114.64	114.98	115.67	117.64	119.29	118.09	121.52	126.26	131.31	135.77	140.66	145.30	1386.50
AGR (%)		0.3	0.6	1.7	1.4	-1.0	2.9	3.9	4.0	3.4	3.6	3.3	
CAGR (%) 2015-20		1.1				2020-25			3.6				
CAGR (%) 2015-25		2.4											

Source: *Visiongain 2015*

**Figure 5.31 Japan Steel Market Production Forecast 2015-2025 (Mt, AGR%)**



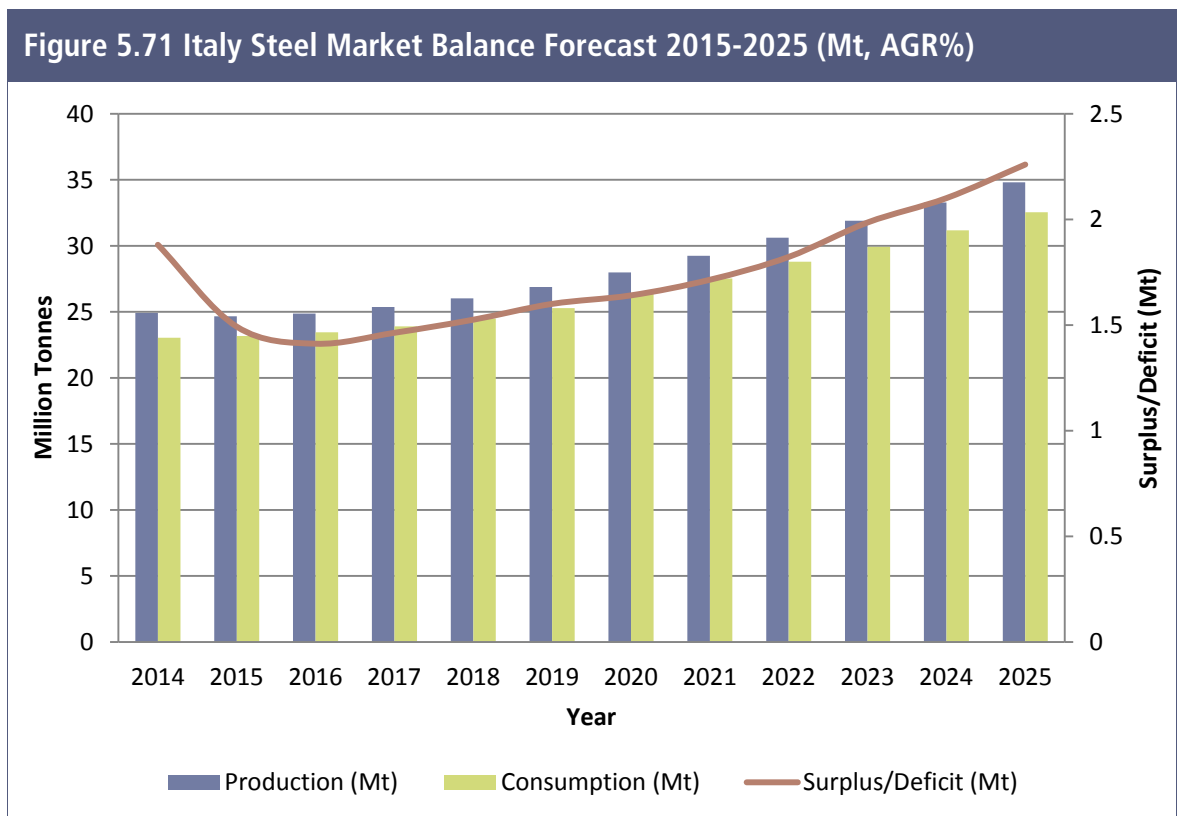
Source: *Visiongain 2015*

# Steel Market Forecast 2015-2025: Future Opportunities for Leading Companies

## 5.10.3 Italy Steel Market Balance Forecast 2015-2025

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
<b>Production (Mt)</b>	24.92	24.67	24.87	25.37	26.03	26.88	27.99	29.25	30.62	31.91	33.28	34.81
AGR (%)		-1.0	0.8	2.0	2.6	3.3	4.1	4.5	4.7	4.2	4.3	4.6
<b>Consumption (Mt)</b>	23.04	23.18	23.46	23.90	24.50	25.28	26.35	27.53	28.80	29.92	31.18	32.55
AGR (%)		0.6	1.2	1.9	2.5	3.2	4.2	4.5	4.6	3.9	4.2	4.4
<b>Surplus/Deficit (Mt)</b>	1.88	1.49	1.41	1.46	1.53	1.60	1.64	1.71	1.82	1.99	2.10	2.26
AGR (%)		-20.6	-5.4	3.7	4.2	4.9	2.5	4.5	6.3	8.9	5.8	7.6

Source: *Visiongain 2015*



Source: *Visiongain 2015*

# Steel Market Forecast 2015-2025: Future Opportunities for Leading Companies

- Merger of bar & wire processing companies in Thailand **January, 2013**.
- Merger of Nippon Steel Techno Research Corporation and Sumitomo Metal Technology, Inc. in **April 2013**.
- Merger of Nittetsu Shinko Shearing Corporation and Shearing Kozuyo, Ltd. in **April 2013**.
- In **October 2013**, Merger of Sumikin Bussan Corporation and Nippon Steel Trading Co., Ltd; Merger of Taihei Kogyo Co., Ltd. And Nittetsu Elex co., Ltd., a merger of Sumitomo Pipe & Tube Co., Ltd. and Nittetsu Steel Pipe Co., Ltd.

## 8.3 Hebei Iron and Steel

### 8.3.1 Hebei Iron and Steel Overview

**Table 8.11 Hebei Iron and Steel Overview: Total Company Revenue (\$bn), Sector Revenue (\$bn), Sector Output (Tonnes), Global Production Market Share (% of Total Market Value), Global Market Ranking, CEO, Headquarters, Founded, Number of Employees, Ticker, IR Contact, Website**

	<b>2013</b>
<b>Total Company Revenue</b>	\$17.92bn
<b>Sector Revenue</b>	\$16.75 bn
<b>Sector Output</b>	45.8 Mt
<b>Global Production Market Share</b>	2.8%
<b>Global Market Ranking</b>	3
<b>CEO</b>	Mr. Yu Yong
<b>Headquarters</b>	Hebei, China
<b>Founded</b>	2008
<b>Number of Employees</b>	124,031
<b>Ticker</b>	None
<b>IR Contact</b>	+86 (0)315-2793048
<b>Website</b>	<a href="http://www.hebgjt.com/">http://www.hebgjt.com/</a>

Source: *Hebei Iron and Steel 2015, World Steel Association 2015, Visiongain 2015*

Hebei Iron and Steel Group Company Limited was established on June 30, 2008 with the merger of Tangsteel and Hansteel in Hebei province, China. It is expected to produce an annual capacity of 30 million tonnes of steel. It is the largest steel producer in China and the third largest in the world.

Hebei Iron and Steel Co., Ltd is mainly engaged in smelting, processing and distribution of iron and steel products. The Company's major products are iron, steel, steel materials and vanadium slag, among others. The Company distributes its products in domestic market and to overseas