

CENTRAL AND EASTERN EUROPE

Unit: thousand tonnes per year

| Country | Nominal capacity | | | | | | | Crude steel production 2005 | Apparent consumption 2004 |
|--------------|------------------|------------------|--------------|----------|------------------|---------------|---------------|-----------------------------------|---------------------------------|
| | Exist 2005 | Increase to 2008 | | | Capacity in 2008 | | | | |
| | | Firm | Possible | Unlikely | Mean | Low | High | | |
| ALBANIA | 300 | 0 | 0 | 0 | 300 | 300 | 300 | n.a. | 263 |
| BULGARIA | 3 240 | 0 | 0 | 0 | 3 240 | 3 240 | 3 240 | 2 587 | 1 690 |
| ROMANIA | 9 100 | 0 | 0 | 0 | 9 100 | 9 100 | 9 100 | 6 235 | 3 960 |
| OTHERS | 4 871 | 0 | 1 300 | 0 | 5 521 | 4 871 | 6 171 | 2 405 | 4 314 |
| TOTAL | 17 511 | 0 | 1 300 | 0 | 18 161 | 17 511 | 18 811 | 11 227 | 10 227 |

Note: Apparent consumption is in terms of crude steel.

Source: Capacity – OECD secretariat. Production and apparent consumption – IISI.

Country: **BULGARIA**

Unit: thousand tonnes per year

| <u>Company</u> | <u>Existing capacity</u> | <u>Existing equipment</u> | <u>Increase capacity</u> | <u>Additional equipment</u> | <u>Ownership</u> | <u>Comments</u> | <u>Source</u> |
|----------------------------|--------------------------|---------------------------|--------------------------|-----------------------------|------------------|---|------------------------------|
| Plant or project | | | | | Start-up date | | |
| <u>Kremikovtzi Corp</u> | | | | | S/P | | |
| Sofia-Botunetz | 2150 | | | | | Global Steel Holdings, the international arm of Pramod and Vinod Mittal's Ispat group in India, has acquired control of Bulgarian largest integrated steelmaker Kremikovtzi in August 2005. The Mittals have bought 100 percent of Finmetals which owns 71.1 percent stake in Kremikovtzi while 25.9 percent is owned by the Bulgarian government. The purchase price was reportedly \$110 million. In addition, the Mittals have agreed with the Bulgarian government an investment programme that will total \$300 million over three years. Much of this work is likely to be directed towards environmental upgrades at the plant under a viability programme agreed between the Bulgarian government and the European Union. | MB 16-Aug-05 MB 20-Apr-05 |
| | (1650) | BF x 3 | | | | | |
| | (1750) | LD x 3 | | | | | |
| | (400) | EF x 2 | | | | | |
| | (500) | WR | | | | | |
| | (2100) | Hot | | | | | |
| | (120) | Cold x 6 | | | | | |
| | | LF | | | | | |
| | | HGL | | | | | |
| | | Ptg | | | | | |
| | | Tin plate | | | | | |
| | (1600) | CC (slab) x 2 | | | | | |
| <u>Promet Steel JSC</u> | | | | | S/P | | |
| Burgas | | | | | | The government announced the sale of Promet in June 1998. | |
| | (800) | STR | | | | | |
| <u>Stomana Industry SA</u> | | | | | P | | |
| Pernik | 1090 | | | (Possible) | 2006 | Sidenor, the Greek mini-mill group, is adding a 400,000 tpy bar mill at its Stomana Industry works in Bulgaria in an investment worth \$46 million. The mill at Pernik, near Sofia, will initially produce 400,000 tpy of 16-120mm diameter plain rounds and 8-40mm deformed bars. Start-up is targeted before the end of 2006. A 120 tph Danieli Centro Combustion walking beam furnace will also be installed at the plant. Sidenor owns 85 percent of the equity of Stomana Industry, while fellow Greek investor Evrometal owns the remaining 15 percent. | MB 07-Dec-05 |
| | (1090) | EF x 3 | (400) | STR | | | |
| | | CC (bloom) | | | | | |
| | | CC (slab) | | | | | |
| | | STR x 2 | | | | | |
| | (800) | Plate | | | | | |
| | | CC (billet) | | | | | |

Country: **ROMANIA**

Unit: thousand tonnes per year

| <u>Company</u> | <u>Plant or project</u> | <u>Existing capacity</u> | <u>Existing equipment</u> | <u>Increase capacity</u> | <u>Additional equipment</u> | <u>Ownership</u> | <u>Comments</u> | <u>Source</u> |
|---|-------------------------|--------------------------|--|--------------------------|-----------------------------|----------------------|--|---------------|
| | | | | | | <u>Start-up date</u> | | |
| <u>Artrom SA</u> | Slatina, Olt | (110) | SMLS | (90) | (Unlikely) SMLS | P 2007 | Russian pipemaker TMK will nearly double capacity at Artrom to 200,000 tpy in 2007 from the current 110,000 tpy, a TMK source said after completing the purchase of Sinara Handel, Artrom's holding company. The 100 percent acquisition of Germany trading group Sinara Handel was launched in 2004 but has just been given the legal stamp of approval by Romanian authorities. Sinara in turn owns 99.3 percent of Resita, which is 80.6 percent owned by Sinara. Artrom's tubular billet requirements are fully supplied from Resita, which has an annual capacity of 450,000 tonnes of crude steel. | MB 06-Mar-06 |
| <u>CSR SA Resita</u> | Resita | 450 | BF (130) Plate (450) Steelmkg (415) STR x 4 | | | P | Germany trading group Sinara handel owns 99.3 percent stake of Resita. | MB 06-Mar-06 |
| <u>Donasid (formerly Siderca SA Calarasi)</u> | Danube | 470 | | | (Possible) CC (round) | | Argentinian company Tenaris has acquired Donasid, formerly Siderca Calarasi, in May 2005 to integrate it with its Silcotub seamless pipe mill in north central Romania. Tenaris plans to invest 25 million euros in converting the mill's production equipment to produce round billet. The round billets will feed Silcotub seamless pipe mill and its Dalmine plant, near the Italian city of Milan, for rolling into seamless pipes. | MB 05-May-05 |
| | | (470) | EF | (470) | | | | |
| | | (470) | CC (bloom) x 2 | | | | | |

Country: **ROMANIA (2)**

Unit: thousand tonnes per year

| <u>Company</u> | <u>Plant or project</u> | <u>Existing capacity</u> | <u>Existing equipment</u> | <u>Increase capacity</u> | <u>Additional equipment</u> | <u>Ownership</u> <u>Start-up date</u> | <u>Comments</u> | <u>Source</u> |
|---|-------------------------|--------------------------|---|--------------------------|-----------------------------|--|--|---------------|
| <u>Ductil SA</u> | Buzau | (500) | STR | | | S/P | Singaporean trader Windmill International acquired a 51% stake in Ductil in 1997 which had been held by the Romanian State Ownership Fund. | |
| <u>Gavazzi Steel SA</u> | Judet Caras Severin | | EF CC (billet) CC (bloom) Hot (60) STR (240) STR (45) Hot | | | | The company was formerly known as Otelul Rosu Works, and then as Societ Com Socomet SA. | |
| <u>Intfor Galati</u> | Galati | | Hot Cold HGL | | | | | |
| <u>Landro SA (formerly Intreprinderea Metallurgica)</u> | | (400) | STR | | | | German steel group Max Aicher acquired Landro SA in 2000. | |

Country: **ROMANIA (3)**

Unit: thousand tonnes per year

| <u>Company</u> | <u>Plant or project</u> | <u>Existing capacity</u> | <u>Existing equipment</u> | <u>Increase capacity</u> | <u>Additional equipment</u> | <u>Ownership</u> | <u>Comments</u> | <u>Source</u> |
|--|-------------------------|--------------------------|---------------------------|--------------------------|-----------------------------|----------------------|--|------------------------------|
| | | | | | | <u>Start-up date</u> | | |
| <u>Laminorul Braila</u> | | | | | | | | |
| | Danube | | | | | | Laminorul Braila, which has capacity of 550,000 tpy and produces sections and bars, was sold to Tubman International in 1999. But as the company did not meet its investment commitment, the majority of shares were returned to the state, apart from a 16.21-percent stake for which the company fulfilled its investment obligations. In 2006, Romania's Authority for State Assets Recovery (AVAS) tried to sell a 68.31-percent stake in Laminorul Braila and received only one bid from Donau Commodities. | MB 14-Mar-06 MB 25-Jul-05 |
| | | (550) | STR x 3 | | | | | |
| <u>Laminorul SA Focsani</u> | | | | | | | | |
| | | | | | | | Metanef SA, a Romanian trading house, purchased Laminorul SA Focsani in 1998. | |
| | | (240) | STR | | | | | |
| <u>Mechel Targoviste SA (formerly Cost SA)</u> | | | | | | | | |
| | Targoviste | 458 | | | (Possible) | P | 2006 Mechel Targoviste SA, a subsidiary of Russian Mechel Group, plans to revamp its 75-tonne electric arc furnace to double the productivity. | AMM 29-Jun-05 |
| | | | (stainless steel) | | | | | |
| | | (458) | EF x 4 | | | | | |
| | | | LF | | | | | |
| | | (120) | Cold x 2 | | | | | |
| | | (458) | CC (billet) x 2 | | | | | |
| | | | BLM | | | | | |
| | | (458) | STR x 2 | | | | | |

Country: **ROMANIA (4)**

Unit: thousand tonnes per year

| <u>Company</u> | <u>Existing capacity</u> | <u>Existing equipment</u> | <u>Increase capacity</u> | <u>Additional equipment</u> | <u>Ownership</u> | <u>Comments</u> | <u>Source</u> |
|---|--------------------------|---------------------------|--------------------------|-----------------------------|----------------------|---|--------------------|
| <u>Plant or project</u> | | | | | <u>Start-up date</u> | | |
| <u>Mittal Steel Galati (formerly Sidex SA Galati)</u> | | | | | P | | |
| Galati | 5500 | (stainless steel) | | | | Mittal Steel Galati is the largest integrated iron and steel works in Romania, accounting for over 50 per cent of the country's steel production. The company was privatised in 2001 when it was acquired by Mittal Steel. According to the news source, the company had spent \$100 million throughout 2004 on its works' modernisation programme. | MB 26-Aug-04 HP |
| | (5100) | BF x 6 | | | | | |
| | (5500) | LD | | | | | |
| | (4300) | CC (bloom) | | | | | |
| | (4400) | CC (slab) | | | | | |
| | (2300) | Plate | | | | | |
| | (3200) | Hot | | | | | |
| | (1100) | Cold | | | | | |
| | (44) | ERW | | | | | |
| | (220) | HGL | | | | | |
| <u>Mittal Steel Hunedoara (formerly Siderurgica SA Hunedoara)</u> | | | | | P | | |
| Hunedoara | 750 | (stainless steel) | | | | Mittal Steel Hunedoara, which was acquired by Mittal Steel in March 2004, has a \$12 million investment programme to improve the quality and technology of it's production facilities over the next ten years. The main focus of that investment will be the modernisation of the electric arc furnace and the upgrading of the finishing mills. A further \$4.1 million has been set aside for environmental projects. | MB 29-Sep-04 HP |
| | (750) | EF x 3 | | | | | |
| | (300) | CC (bloom) | | | | | |
| | (200) | CC (round) | | | | | |
| | (500) | BTM | | | | | |
| | | STR | | | | | |
| | | WR | | | | | |
| <u>Mittal Steel Iasi (formerly Tepro SA)</u> | | | | | P | | |
| Lasi | | | | | | Mittal Steel Iasi, located in the industrial zone of Iasi, was established 1963 and acquired by Mittal Steel on its privatisation in 2003. The company is reportedly increasing its capacity by de-bottlenecking works. | MB 30-Sep-04 HP |
| | (380) | ERW | | | | | |

Country: **ROMANIA (5)**

Unit: thousand tonnes per year

| <u>Company</u> | <u>Existing capacity</u> | <u>Existing equipment</u> | <u>Increase capacity</u> | <u>Additional equipment</u> | <u>Ownership</u> | <u>Comments</u> | <u>Source</u> |
|--|--------------------------|---------------------------|--------------------------|-----------------------------|------------------|--|--------------------|
| Plant or project | | | | | Start-up date | | |
| <u>Mittal Steel Roman (formerly Petrotub SA)</u> | | | | | P | | |
| Roman | (500) | SMLS | | | | Mittal Steel Roman, which was privatised in 2003 when it was acquired by Mittal Steel, plans to invest \$18 million over the next ten years to modernise it's facilities to boost production and increase product quality to meet international standards. A further \$13 million will be spent on environmental projects. | MB 26-Aug-04 HP |
| <u>Otelinox SA Târgoviste</u> | | | | | S/P | | |
| Târgoviste | (100) | STR | | | | The company is owned by Samsung Deutschland and the Romanian State. | |
| | (50) | Cold (stn) | | | | | |
| <u>SC Industria Sârmei SA</u> | | | | | | | |
| Cluj | 400 | | | | | | |
| | (400) | EF | | | | | |
| | (450) | BTM | | | | | |
| | (350) | WR | | | | | |
| | (70) | STR x 2 | | | | | |
| | | CC (billet) | | | | | |
| <u>SC Promet SA Beclean</u> | | | | | S | | |
| Beclean | | | | | | | |
| | | WR | | | | | |
| | | HGL | | | | | |

Country: **ROMANIA (6)**

Unit: thousand tonnes per year

| <u>Company</u> | <u>Plant or project</u> | <u>Existing capacity</u> | <u>Existing equipment</u> | <u>Increase capacity</u> | <u>Additional equipment</u> | <u>Ownership</u> | <u>Comments</u> | <u>Source</u> |
|----------------------------|-------------------------|--------------------------|-------------------------------------|--------------------------|-----------------------------|----------------------|-----------------|---------------|
| | | | | | | <u>Start-up date</u> | | |
| <u>Siderca SA Calarasi</u> | | | | | | S/P | | |
| | Calarasi | 100 | | | | | | |
| | | (100) | EF BF LD CC (bloom) STR | | | | | |
| <u>Silcotub SA</u> | | | | | | | | |
| | Salaj | | | | | | | |
| | | (250) | SMLS | | | | | |

Country: **SLOVENIA**

Unit: thousand tonnes per year

| <u>Company</u> | <u>Existing capacity</u> | <u>Existing equipment</u> | <u>Increase capacity</u> | <u>Additional equipment</u> | <u>Ownership</u> | <u>Comments</u> | <u>Source</u> |
|---|--------------------------|---------------------------|--------------------------|-----------------------------|------------------|--|---------------|
| Plant or project | | | | | Start-up date | | |
| <u>Slovenske Zelezarne Acroni d.o.o. Jesenice</u> | | | | | S | | |
| Acroni Jesenice | 400 | (stainless steel) | | (Possible) | | Acroni Jesenice is in talks with equipment suppliers about a 15 million euros expansion of its stainless plate activities to around 70,000 tpy. Meanwhile, Slovenian Steel Group, the holding company of steelmakers Acroni and Metal Ravne, will be privatised in 2006. The sell-off programme had been approved by the country's parliament in December 2005. The privatisation process is expected to begin in December 2005 and the sale to be conducted in May or June of 2006. The state will sell a 55.3 percent stake in the holding company, leaving it with a 25 percent-plus-one-share stake. | MB 22-Dec-05 |
| | (160) | Cold (stn) x 2 | (30) | Plate | | | MB 06-Oct-04 |
| | (40) | Plate | | | | | |
| | (400) | EF | | | | | |
| | (450) | CC (slab) | | | | | |
| | | LF | | | | | |
| | | SLM | | | | | |
| | | Hot | | | | | |
| <u>Slovenske Zelezarne Metal Ravne d.o.o.</u> | | | | | S | | |
| Ravne | 125 | | | | | Slovenian Steel Group, the holding company of steelmakers Acroni and Metal Ravne, will be privatised in 2006. The sell-off programme had been approved by the country's parliament in December 2005. The privatisation process is expected to begin in December 2005 and the sale to be conducted in May or June of 2006. The state will sell a 55.3 percent stake in the holding company, leaving it with a 25 percent-plus-one-share stake. | MB 22-Dec-05 |
| | (125) | EF | | | | | |
| | (150) | BTM | | | | | |
| | (124) | STR x 2 | | | | | |
| <u>Store Steel (formerly Inexa Store)</u> | | | | | P | | |
| Celje | 145 | | | | | | |
| | (145) | EF | | | | | |
| | | LF | | | | | |
| | | CC (billet) | | | | | |
| | | STR x 2 | | | | | |

Country: **OTHERS**

Unit: thousand tonnes per year

| <u>Company</u> | <u>Plant or project</u> | <u>Existing capacity</u> | <u>Existing equipment</u> | <u>Increase capacity</u> | <u>Additional equipment</u> | <u>Ownership</u> | <u>Comments</u> | <u>Source</u> |
|----------------------------------|-------------------------|--------------------------|---------------------------|--------------------------|-----------------------------|----------------------|---|---------------|
| | | | | | | <u>Start-up date</u> | | |
| ALBANIA | | | | | | | | |
| <u>Enver Hoxha Tractor Plant</u> | | | | | | | | |
| | Tirana | 50 | | | | | | |
| | | (50) | EF | | | | | |
| <u>Kurum Steel Co</u> | | | | | | | | |
| | Elbasan | 250 | | | | P | | |
| | | (250) | EF | | | | | |
| | | (250) | LF x 2 | | | | | |
| | | (250) | CC (billet) x 2 | | | | | |
| | | (210) | STR x 4 | | | | | |
| | | (30) | WR | | | | | |
| | | | | | | | Kurum Steel Co, a Turkish-owned steel plant in Albania, halted operations in February 2006, blaming the move on higher electricity costs and transport charges, and lower import tariffs. Kurum Steel Co said it would not reopen unless custom tariffs were raised to at least 15 percent to avoid Albanian companies ordering steel from outside the country and also called for the exclusive use of lines on the Albanian railway network. Kurum has a 1,000-strong work force, making it a major employer in the country. It has invested some US\$78 million since 1999 in its Elbasan facility, 55 kilometers from Tirana. | NET 01-Feb-06 |

Country: **OTHERS (2)**

Unit: thousand tonnes per year

| <u>Company</u> | <u>Existing capacity</u> | <u>Existing equipment</u> | <u>Increase capacity</u> | <u>Additional equipment</u> | <u>Ownership</u> | <u>Comments</u> | <u>Source</u> |
|---|--------------------------|---------------------------|--------------------------|-----------------------------|------------------|---|------------------------------|
| Plant or project | | | | | Start-up date | | |
| BOSNIA HERZEGOVINA | | | | | | | |
| <u>Mittal Steel Zenica (formerly BH Steel)</u> | | | | | | | |
| Zenica | 754 | | 1300 (Possible) | | P | | |
| | (754) | EF CC (bloom) BTM | (1300) (1300) | CC (slab) Steelmkg | 2007 | Mittal Steel Zenica, formerly BH Steel in Bosnia's Muslim-Croat Federation, plans to restart integrated steelmaking by 2007. The first step of restarting integrated production will be commissioning the plant's coke oven plant, which should take eight or nine months. The company will also restart the existing 2,000 cu metres blast furnace and BOF converters and install a new slab caster to replace the old bloom casters. Once production reaches capacity, the plant will be casting around 1.3 million tpy of slab to feed Mittal Steel's rolling mills in Skopje, Macedonia. In October 2004, Mittal Group completed acquisition of a majority stake in BH Steel. | MB 28-Jun-05 MB 14-Oct-04 |
| | (840) (430) | STR x 2 WR BF LD | | | | | |
| <u>Unis (Associated Metal Industry in Sarajevo)</u> | | | | | | | |
| Banja Luka | | | | | | | |
| | (115) | Cold | | | | | |
| Derventa | | | | | | | |
| | | ERW | | | | | |

Country: **OTHERS (3)**

Unit: thousand tonnes per year

| <u>Company</u> | <u>Plant or project</u> | <u>Existing capacity</u> | <u>Existing equipment</u> | <u>Increase capacity</u> | <u>Additional equipment</u> | <u>Ownership</u> | <u>Comments</u> | <u>Source</u> |
|-----------------------------|-------------------------|--------------------------|-------------------------------|--------------------------|-----------------------------|----------------------|---|---------------|
| | | | | | | <u>Start-up date</u> | | |
| CROATIA | | | | | | | | |
| <u>Zeljezara Sisak</u> | | | | | | S | | |
| | Sisak | 75 | | | | | Russian steel group Mechel has finalised its withdrawal from Croatian pipe mill Zeljezara Sisak. The group has signed a protocol with the Croatian government, outlining the conditions of returning the pipemaking assets to the Croatian government, which it acquired in February 2003 at a symbolic price of 16 cents. Mechel is returning the Sisak assets, including the equipment purchased for the mill's upgrade, and obligations to the workers to the Croatian government, after which the parties will have no mutual obligations, according to the protocol. | MB 16-Sep-04 |
| | | (75) | EF CC (bloom) CC (slab) | | | | | |
| | | (100) | SMLS x 2 | | | | | |
| | | (210) | ERW x 4 | | | | | |
| <u>Zeljezara Split d.d.</u> | | | | | | S | | |
| | Split | 252 | | | | | According to the news source, Croatian government has a plan to merge long products maker Zeljezara Split and seamless pipemaker Zeljezara Sisak into one company for privatisation. | MB 04-Mar-05 |
| | | (252) | EF x 3 | | | | | |
| | | (80) | CC (billet) x 3 WR STR | | | | | |
| | | (77) | Rolling | | | | | |

Country: **OTHERS (4)**

Unit: thousand tonnes per year

| <u>Company</u> | <u>Plant or project</u> | <u>Existing capacity</u> | <u>Existing equipment</u> | <u>Increase capacity</u> | <u>Additional equipment</u> | <u>Ownership</u> Start-up date | <u>Comments</u> | <u>Source</u> |
|-----------------------------------|-------------------------|--------------------------|---------------------------|--------------------------|-----------------------------|-----------------------------------|--|---------------|
| ESTONIA | | | | | | | | |
| <u>Galvex</u> | Tallinn | (500) | HGL | | | P | A motion has been filed in the US Bankruptcy Court of Southern New York for the sale by current management of all the assets of Galvex Estonia OU, a hot-dip galvanizing operation in Estonia. The sale will be free and clear of all liens, claims and encumbrances. New York-based Galvex Capital and several affiliates filed for Chapter 11 bankruptcy protection in January 2006. Bids for the Estonia facility, which is capable of producing about 500,000 tpy of hot-dip galvanized steel, are due by April 30. If more than one qualified bidder shows interest in the operation, an auction of the assets will take place May 2. | AMM 23-Mar-06 |
| MACEDONIA | | | | | | | | |
| <u>Makstil A.D. Duferco Group</u> | Skopje | 420 | | | | | | |
| | | (420) | EF | | | | | |
| | | (850) | CC (slab) | | | | | |
| | | (620) | Plate | | | | | |
| | | (700) | LF | | | | | |
| <u>Mittal Steel Skopje</u> | Skopje | | | | | P | Mittal Steel has acquired Mittal Steel Skopje in May 2004. | HP |
| | | (800) | Hot | | | | | |
| | | (150) | HGL | | | | | |
| | | (15) | Ptg | | | | | |
| | | (750) | Cold | | | | | |

Country: **OTHERS (5)**

Unit: thousand tonnes per year

| <u>Company</u> | <u>Plant or project</u> | <u>Existing capacity</u> | <u>Existing equipment</u> | <u>Increase capacity</u> | <u>Additional equipment</u> | <u>Ownership</u> Start-up date | <u>Comments</u> | <u>Source</u> |
|---|-------------------------|--------------------------|--------------------------------------|--------------------------|-----------------------------|-----------------------------------|---|---------------|
| <u>Welded Steel Pipe & Section Works 11 Oktomvri Kumanovo</u> | | | | | | | | |
| | Kumanovo | | ERW HGL | | | | | |
| SERBIA AND MONTENEGRO | | | | | | | | |
| <u>Boris Kidrik Niksik</u> | | | | | | | | |
| | Niksic, Montenegro | 300 | (stainless steel) | | | | | |
| | | (300) | EF x 2 LF x 2 | | | | | |
| | | (150) | CC (billet) STR x 2 WR Cold | | | | | |
| <u>US Steel Serbia d.o.o (formerly Sartid AS)</u> | | | | | | | | |
| | Goranska, Smederevo | 2400 | | | | P | | |
| | | (1600) | Cold x 4 | | | | US Steel Corp took over the assets of the former Sartid AS, which operated two steel mills in Smederevo and Sabac, in September 2003. Smederevo mill's second blast furnace, idle since 1987, resumed production in June 2005 and it would bring the mill up to its designed capacity of 2.4 million tpy. | NET 29-Jun-05 |
| | | (2400) | BF x 2 | | | | | |
| | | (2400) | LD x 3 CC (slab) | | | | | |
| | | (2400) | Hot | | | | | |
| | Sabac, west of Belgrade | | | | | | | |
| | | (138) | Tin Plate | | | | | |

APPENDIX
TWO-YEARLY REPORT ON DEVELOPMENTS IN STEELMAKING CAPACITY
OF NON-OECD ECONOMIES

TABLE OF CONTENTS

| | |
|----------------------------------|-----|
| Notes to the Appendix | 21 |
| Explanatory Notes | 22 |
| Tables: | |
| Africa | 47 |
| Central and Eastern Europe | 67 |
| Latin America | 81 |
| Middle East..... | 123 |
| New Independent States | 161 |
| Asia..... | 197 |

NOTES TO THE APPENDIX

Methodology

In order to estimate the steelmaking capacity of non-OECD economies in the year 2008, the expansion projects of those economies were classified as “firm”, “possible”, or “unlikely” on the basis of whether they would proceed and be completed by 2008. The criteria used to classify the projects included:

- Current stage of each project: feasibility study, planning, government approval, tendering, construction or suspension of construction.
- Availability of financial resources for each project.
- Domestic steel market: apparent steel consumption in terms of current size.
- Intention of government to establish and expand the industry; and
- Availability of raw materials and energy.

Each project was evaluated for the likelihood of its completion by 2008 according to the above criteria. Although information on a number of aspects was often lacking, the figures included in the tables are considered appropriate in the light of the original sources of information and the evidence available. The classification of projects and comments on their progress do not in any way represent a judgement or imply a view on the advisability or feasibility of the projects.

A project classified as “firm” is one which is under construction or for which contracts have been awarded and to which a major financial or state commitment has been made and which is due and on schedule for completion before 2008. “Possible” projects are those under construction or whose for which contracts have been awarded, but which have been delayed due to financial or technical problems and whose completion may not be realised by 2008. “Unlikely” projects are those at the feasibility or early planning stage, those yet to receive financial or state backing and those not scheduled for completion by 2008. In the Appendix, those projects are noted in the column “Comments” and, in some cases, presented in brackets in the column “Increase in capacity”, but are not included in the estimation of steelmaking capacity in the year 2008.

The estimate of each country’s capacity in 2008 has been obtained by adding to their existing capacity the capacity of “firm” projects and half the proposed capacity of all “possible” projects in the country. The principle of including only half the total capacity of possible projects is used as a surrogate for complete project-by-project assessments.

EXPLANATORY NOTES

Abbreviations used for equipment are:

| | |
|----------|--|
| BF | Blast furnace, of which: - charcoal - coke-based - mini |
| Corex | Corex ironmaking unit |
| DR | Direct reduction unit, of which - Codir - Finmet - Fior - HYL - Krupp - Midrex - Plasma - Romelt - SLRN |
| EPIF | Electric pig iron furnace |
| ERP | Electric reduction pig iron furnace |
| IC | Iron Carbide |
| AOD | Argon Oxygen Decarburisation Unit |
| BS | Basic Bessemer converter |
| EF | Electric arc furnace, of which - DC - shaft furnace |
| EOF | Energy optimising furnace |
| IF | Induction furnace |
| LD | LD Basic oxygen furnace |
| LF | Ladle furnace |
| OH | Open hearth furnace |
| Steelmkg | Unspecific steelmaking unit |
| CC | Continuous casting machine, of which - slab - thin slab - bloom - billet - round billet |
| SLM | Slabbing mill |
| BLM | Blooming mill |
| BTM | Billet mill |
| STR | Bar, section, shape, beam or angle mill |
| WR | Wire rod mill |
| Plate | Plate mill |
| Hot | Hot strip mill |
| Rolling | Unspecific rolling mill |
| ERW | Electric-resistance welded pipe mill |
| SMLS | Seamless tube mill |
| CAPL | Continuous annealing and pickling line |
| Cold | Cold strip mill |
| HGL | Hot-dip galvanising line |

| | |
|-----------|--------------------------------|
| EGL | Electro galvanising line |
| ZnAl | Zincaluminum coating line |
| Tin plate | Tin plate |
| Ptg | Painting line (colour coating) |
| Silicon | Electrical sheet/coil line |

Capacity figures are nominal or rated capacity. The unit of capacity figures is a thousand tonnes per year, unless otherwise stated.

“Existing capacity” and “Existing equipment” are those estimated as of the end of December 2005.

The capacity figures given in this report have been estimated on the basis of the most reliable information available. Nevertheless, as the information sources are limited, many of the capacity figures quoted relate to the nominal or rated capacity. In some cases, however, nominal capacity figures have been modified in line with data on actual production or aims of modernisation projects.

The “Ownership” column shows a distinction between state-owned plants or projects (S) and those which are privately owned (P).

Sources of information are indicated in the column “Source”. Listed capacity figures are not necessarily identical to these sources’ estimates. The abbreviations used in the “Source” column are:

| | |
|-------|---|
| AME | AME info FZ LLC |
| AMM | American Metal Market |
| ANGP | Angola Press |
| APL | Asia Pulse |
| BL | Business Line (published in India) |
| BNA | Business News Americas |
| BPOST | Bangkok Post (published in Thailand) |
| BS | Business Standard (published in India) |
| BT | Business Times (published in Malaysia) |
| CMN | China Metallurgical Newsletter |
| DH | Deccan Herald (published in India) |
| DJ | Dow Jones Newswires |
| ET | The Economic Times (published in India) |
| FE | The Financial Express (published in India) |
| FT | Financial Times |
| HP | Company home page on the Net |
| HT | Hindustan Times (published in India) |
| IHT | International Herald Tribune |
| IINFO | India Infoline (published in India) |
| ISWW | Iron and Steel Works of the World (published by Metal Bulletin Books) |
| KT | Khaleej Times (published in the UAE) |
| MB | Metal Bulletin |
| ME | ME Steel (on the Internet) |
| MP | Metal Producing & Processing |
| MYSTL | My Steel.com (published in China) |
| NET | Internet |
| NFB | News From Bangladesh |
| REU | Reuters Ltd |
| SA | Steels Alert |
| SWEEK | Steel WEEK (published in UK) |
| TG | The Telegraph (published in India) |
| VIR | Vietnam Investment Review |
| VNS | Vietnam News |

APPENDICE

LES CAPACITÉS DE PRODUCTION D'ACIER DANS LES ECONOMIES NON-OCDE : RAPPORT BIENNAL

TABLE DES MATIERES

| | |
|---------------------------------------|-----|
| Notes sur l' Appendice | 42 |
| Notes explicatives..... | 43 |
| Tableaux : | |
| Afrique..... | 47 |
| Europe centrale et orientale | 67 |
| Amérique latine | 81 |
| Moyen-Orient | 123 |
| Les Nouveaux États indépendants | 161 |
| Asie..... | 197 |

NOTES SUR L'APPENDICE

Méthodologie

Aux fins d'estimation des capacités d'acier dans les économies non membres de l'OCDE en l'an 2008, les différents projets d'expansion de ces pays ont été classés en trois catégories : « ferme », « possible » ou « peu probable », selon qu'ils devraient être mis en route ou achevés d'ici l'an 2008. Les projets ont été classés en fonction des critères suivants :

- Stade actuel d'avancement de chaque projet - étude de faisabilité, planification, autorisation officielle, appel d'offres, exécution ou arrêt des travaux de construction.
- Disponibilité des ressources financières nécessaires pour chaque projet.
- Taille du marché intérieur de l'acier, telle qu'elle ressort de la consommation apparente d'acier.
- Intention de créer une industrie sidérurgique et/ou de la développer.
- Offre de matières premières et d'énergie.

Les possibilités d'achèvement d'ici l'an 2008 des différents projets étudiés ont été évaluées au regard des critères mentionnés ci-dessus. Si les informations sur un certain nombre d'aspects faisaient assez souvent défaut, les chiffres indiqués dans les tableaux sont considérés comme exacts, en fonction des sources d'informations consultées et des données disponibles. Le classement des projets et les commentaires formulés sur leur état d'avancement n'expriment, en aucun cas, un jugement de valeur sur l'opportunité ou la faisabilité des projets.

Ont été classés dans la catégorie « ferme » les projets qui sont en cours de réalisation ou pour lesquels des contrats ont été attribués et ont fait l'objet d'engagement majeurs sur le plan financier ou au niveau officiel et qui devraient, selon le calendrier d'exécution des travaux, être terminés d'ici 2008. Ont été classés dans la catégorie « possible », les projets qui sont en cours de réalisation ou pour lesquels les contrats ont été attribués, mais qui ont été retardés par des problèmes d'ordre financier ou technique et qui ne devraient pas être achevés d'ici 2008. Ont été classés dans la catégorie « peu probables », les projets qui en sont au stade des études de faisabilité ou au premier stade de la planification et n'ont pas encore mobilisé de ressources financières ou de soutien de l'État, de même que les projets qui devraient être terminés après 2008. Dans l'Appendice, ces projets sont signalés dans la colonne des «commentaires» et dans certains cas, présentés entre crochets dans la colonne « accroissement des capacités », mais ne sont pas pris en compte dans les estimations des capacités de production d'acier en 2008.

L'estimation des capacités en 2008 a été obtenue, pour chaque pays, en ajoutant à ses capacités actuelles, les capacités des projets « fermes » et la moitié des capacités de tous les projets classés dans la catégories « possible » pour ce pays. Il a été décidé de tenir compte de la moitié seulement de la capacité totale des projets classés « possible » plutôt que de procéder à une évaluation plus précise de chaque projet.

NOTES EXPLICATIVES

Les signes et abréviations utilisés sont les suivants :

| | |
|------------|--|
| BF | Haut fourneau : - au charbon de bois - au coke - mini |
| Corex | Unité de réduction directe utilisant le procédé Corex |
| DR | Unité de réduction directe, procédés: - Codir - Finmet - Fior - HYL - Krupp - Midrex - Plasma - Romelt - SLRN |
| EPIF | Four électrique fonte |
| ERP | Four électrique réduction fonte |
| IC | Carbure de fer |
| AOD | Unité de décarburation argon oxygène |
| BS | Convertisseur Bessemer basique |
| EF | Four à arc électrique, dont: -DC - four à cuve |
| EOF | Four à optimisation énergétique |
| IF | Four à induction |
| LD | Convertisseur LD à l'oxygène pur |
| LF | Four à poche |
| OH | Four Martin |
| Steel m kg | Unité de fabrication d'acier non spécifiée |

| | |
|-----------|---|
| CC | Machines de coulée continue utilisées pour fabriquer des: - brames - brames minces - blooms - billettes - billettes rondes |
| SLM | Train à brames |
| BLM | Train à blooms |
| BTM | Train à billettes |
| STR | Train à barres, à profilés, à poutrelles ou à cornières |
| WR | Train à fil-machine |
| Plate | Train à tôles fortes |
| Hot | Train à bandes à chaud |
| Rolling | Laminoir non précisé |
| ERW | Unité de fabrication de tubes soudés à résistance électrique |
| SMLS | Train à tubes sans soudure |
| CAPL | Ligne de recuit et de décapage, en continu |
| Cold | Train à bandes à froid |
| HGL | Ligne de galvanisation par immersion à chaud |
| EGL | Ligne d'électro galvanisation |
| ZnAl | Ligne de revêtement zinc/aluminium |
| Tin plate | Tôles étamées |
| Ptg | Ligne de revêtement couleur |
| Silicon | Tôles électriques/ligne de production de bandes |

Les chiffres des capacités correspondent à des capacités nominales ou théoriques. Sauf indication contraire, ces chiffres sont exprimés en milliers de tonnes par an.

Les chiffres indiqués pour la « capacité existante » et les « équipements actuels » correspondent aux estimations établies fin décembre 2005.

Les chiffres sur les capacités indiqués dans le présent rapport ont été estimés sur la base les informations disponibles les plus fiables. Toutefois, les sources d'informations étant limitées, bon nombre des chiffres cités correspondent aux capacités nominales ou théoriques. Dans certains cas cependant, les chiffres sur les capacités nominales ont été modifiés au vu des chiffres de la production effective ou des objectifs des projets de modernisation.

Dans la colonne « origine des capitaux », on distingue les entreprises ou projets d'État (S) et les entreprises ou projets du secteur privé (P).

L'origine des informations est précisée dans la colonne « sources ». Les chiffres indiqués sur les capacités ne sont pas nécessairement identiques aux estimations tirées de ces sources. Les abréviations utilisées dans la colonne « sources » sont les suivantes :

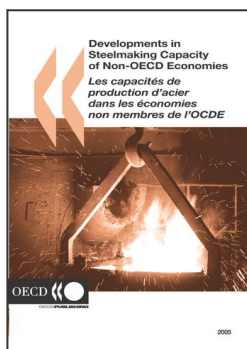
| | |
|-------|---|
| AME | AME info FZ LLC |
| AMM | American Metal Market |
| ANGP | Angola Press |
| APL | Asia Pulse |
| BL | Business Line (publié en Inde) |
| BNA | Business News Americas |
| BPOST | Bangkok Post (publié en Thaïlande) |
| BS | Business Standard (publié en Inde) |
| BT | Business Times (publié en Malaisie) |
| CMN | China Metallurgical Newsletter |
| DH | Deccan Herald (publié en Inde) |
| DJ | Dow Jones Newswires |
| ET | The Economic Times (publié en Inde) |
| FE | The Financial Express (publié en Inde) |
| FT | Financial Times |
| HP | Page d'accueil Internet de la société |
| HT | Hindustan Times (publié en Inde) |
| IHT | International Herald Tribune |
| IINFO | India Infoline (publié en Inde) |
| ISWW | Iron and Steel Works of the World (publié par Metal Bulletin Books) |
| KT | Khaleej Times (publié aux EAU) |
| MB | Metal Bulletin |
| ME | ME Steel (sur Internet) |
| MP | Metal Producing & Processing |
| MYSTL | My Steel.com (publié en Chine) |
| NET | Informations obtenues sur Internet |
| NFB | News from Bangladesh |
| REU | Reuters Ltd |
| SA | Steel Alert |
| SWEEK | Steel WEEK (publié au Royaume-Uni) |
| TG | The Telegraph (publié en Inde) |
| VIR | Vietnam Investment Review |
| VNS | Vietnam News |

TABLE OF CONTENTS

| | |
|--|----|
| I. Introduction | 5 |
| II. Summary | 5 |
| III. Recent developments | 6 |
| Trends in capacity, production and consumption | 6 |
| Capacity utilisation and self-sufficiency..... | 7 |
| IV. Outlook for the year 2008..... | 8 |
| <i>Appendix</i> | 20 |

TABLE DES MATIERES

| | |
|---|----|
| I. Introduction | 25 |
| II. Résumé..... | 25 |
| III. Évolutions récentes..... | 26 |
| Tendances d'évolution des capacités, de la production et de la consommation | 26 |
| Taux d'utilisation des capacités et de couverture des besoins | 27 |
| IV. Perspectives à l'horizon 2008 | 28 |
| <i>Appendice</i> | 41 |



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