

Sustainable Steel Market - A Global and Regional Analysis: Focus on Product Type, End-Use Application, Technology, and Region - Analysis and Forecast, 2022-2031

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Abstracts

Global Sustainable Steel Market Overview

The global sustainable steel market is projected to reach \$795.8 billion by 2031 from \$327.3 billion in 2021, growing at a CAGR of 8.97% during the forecast period 2022-2031. The growth in the global sustainable steel market is expected to be driven by stringent government regulations, carbon neutrality targets, energy and cost efficiency owing to the use of recycled steel, and a significant increase in steel demand with the scarcity of raw materials and energy. However, impurities in recycled steel due to incomplete separation and complex product design and the high cost of production for green steel amid high infrastructure costs and green hydrogen prices are some key restraining factors for the market.

Market Lifecycle Stage

The global sustainable steel market is in a growing phase. New trends, such as rising investments in green technologies, change in business models of companies due to climate action, increasing demand for green steel across the value chain, and development of economic and environmental technologies, are further expected to provide opportunities for the market to grow in the coming years.

Industrial Impact

With an increased worldwide focus on environmentally friendly, high-quality, recyclable,

and sustainable materials, there is an increasing shift toward green and recycled steel in end-use industries, thereby creating demand for sustainable steel. The shift is more prominent in the building and construction and transportation industries in regions such as China, Europe, and North America.

Impact of COVID-19

The COVID-19 pandemic had a minor impact on the global sustainable steel market. It altered the market in both positive as well as negative ways. During the COVID-19 pandemic, sectors such as packaging and furniture and appliances showed positive growth, while demand from end-use industries, including building and construction and transportation, was impacted negatively due to the economic slowdown.

Market Segmentation

Segmentation 1: by End-Use Application

Transportation

Building and Construction

Furniture and Appliances

Packaging

Others

Based on end-use application, the building and construction segment was dominant, accounting for a 38.6% share of the global sustainable steel market in 2021.

Segmentation 2: by Product Type

Recycled Steel

Green Steel

Based on product type, the recycled steel segment was dominant, accounting for a

99.97% share of the global sustainable steel market in 2021. It is one of the most significant product types used to reduce carbon footprint, energy consumption, and raw material requirements.

Segmentation 3: by Technology

Electric Arc Furnace (EAF)

Blast Furnace-Basic Oxygen Furnace (BF-BOF)

Others

Based on technology, the electric arc furnace (EAF) segment was dominant, accounting for a 71.9% share of the global sustainable steel market in 2021.

Segmentation 4: by Region

North America - U.S., Canada, and Mexico

Europe - Germany, France, Italy, Spain, and Rest-of-Europe

U.K.

Asia-Pacific and Japan - Japan, India, South Korea, and Rest-of-Asia Pacific and Japan

China

Rest-of-the-World - Middle East and Africa and South America

China occupied the largest market share in 2021, and the region is expected to lead the market by 2031 as well. China is major producer and consumer of the crude steel and also lead the sustainable steel market.

Recent Developments in the Sustainable Steel Market

In October 2022, Tata Steel signed a memorandum of understanding (MoU) with an

American multinational automobile manufacturer, Ford, in Europe. Under this agreement, Tata Steel Nederland will supply the carmaker with Zeremis green steel once the IJmuiden steelworks start operating with green hydrogen-based steelmaking. Tata Steel has recently launched a new steel product, Zeremis Carbon Lite, with reduced carbon emissions of up to 100%. Ford has aimed to reach its carbon neutrality target by 2035, and this partnership will secure the future supply of environmentally friendly produced steel.

In September 2022, NIPPON STEEL CORPORATION announced that it would launch a steel product that is certified and reduces carbon emissions under the brand name NSCarbolex Neutral. The company has a new initiative against climate change, i.e., the Carbon Neutral Vision 2050, and its new product will be featured in the market by the first half of the fiscal year 2023.

In August 2022, HBIS GROUP signed an agreement with a German multinational manufacturer of performance luxury vehicles and motorcycles, BMW Group, to jointly manufacture green low carbon steel. The company will supply CO₂-reduced steel to BMW Group's plants located in Shenyang from 2023.

In July 2022, LIBERTY Steel Group announced its plans to invest more than \$350 million in two hybrid electric arc furnaces at Ostrava steelworks. These new furnaces will have a capacity of 3.5 million tons per year and will reduce the overall carbon emissions of the Ostrava steelworks by more than 80% by 2027. LIBERTY Ostrava, a subsidiary of LIBERTY Steel Group, signed an agreement with a leading global manufacturer of plant and machinery, Danieli, for the delivery of two state-of-the-art hybrid electric arc furnaces.

Demand – Drivers and Limitations

Following are the demand drivers for the global sustainable steel market:

Stringent Regulations and Carbon Neutrality Targets

Energy and Cost Efficiency owing to the Use of Recycled Steel

Significant Increase in Steel Demand with Scarcity of Raw Materials and Energy

Following are the challenges for the global sustainable steel market:

Impurities due to Incomplete Separation and Complex Product Design

High Infrastructure Cost and Green Hydrogen Prices Curbing the Green Steel Developments

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different types of sustainable steel available and their potential globally. Moreover, the study provides the reader with a detailed understanding of the different sustainable steel end-use applications in industries such as transportation, building and construction, furniture and appliances, packaging, and others.

Growth/Marketing Strategy: Business expansions, partnerships, acquisitions, collaborations, and joint ventures are some key strategies adopted by key players operating in the space. For instance, in October 2022, Steel Dynamics acquired a ferrous and nonferrous scrap metals recycling company, ROCA ACERO SA de CV (ROCA). ROCA has five scrap processing facilities located near high-volume industrial scrap sources, mainly in Central and Northern Mexico. This acquisition was part of the company's North American raw material procurement strategy.

Competitive Strategy: Key players in the global sustainable steel market analyzed and profiled in the study involve sustainable steel providers. Moreover, a detailed competitive benchmarking of the players operating in the global sustainable steel market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Key Market Players and Competition Synopsis

The companies profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, and market penetration.

Key Companies Profiled

ArcelorMittal

CMC

Gerdau S/A

HBIS GROUP

LIBERTY Steel Group

NIPPON STEEL CORPORATION

NUCOR

Steel Dynamics

Pascap Co. Inc.

POSCO

Schnitzer Steel Industries, Inc.

Lech Stahlwerke GmbH

Tata Steel

Celsa Group

Kiliclara Inc.

Boston Metal

ScrapBuk

f3nice Srl

ElectraSteel Incorporated

H2 Green Steel

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