

Ukraine Metals Report Q4 2014

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Abstracts

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BMI View: After a sharp downturn in production and consumption in the local steel industry in 2014, Ukraine's metals sector will see modest growth over the forecast period, with a handful of new projects to increase production growth. Production will not return to pre-crisis highs, however, due to global overcapacity and steel prices not making substantive gains over 2013. There are no major expansions on the cards, and no major players in either the aluminium or steel industries have announced substantial investment plans.

Figures recorded at the start of 2014 have been disappointing. Ukrainian companies manufactured 477,000mt of steel pipes during January-April 2014, according to figures released by Ukraine's cabinet of ministers. The steel pipe production was down 16.1% year-on-year (y-o-y), the figures revealed. The country's steel pipe production was recorded as 140,600mt in April 2014, up 3.6% month-on-month (m-om), according to the official figures. More broadly speaking, steel output in Ukraine decreased by more than 7% in H114 and exports to Russia have been impacted amid conflicts between the two countries, according to data released by the International Steel Statistics Bureau. Shipments to Russia declined by 38% in January-April 2014. Steelmaking in the country is focused on the conflict-torn regions of Luhansk and Donetsk, where several mills, factories and mine have been forced to stop operations. Meanwhile, steel consumption in the country declined by 700,000 tonnes to 2.3mn tonnes in January-May 2014, compared to sales of 3mn tonnes in January-May 2013. Sales to the CIS fell 36% y-o-y to 1.34mn tonnes, with sales to Russia declining 30% y-o-y to 1mn tonnes. The country's total steel exports fell 4% y-o-y to 9.55mn tonnes during the reported period.

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