

The U.S. Steel Industry Outlook

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Abstracts

The steel industry is vital to the economic competitiveness of the United States. Steel serves as the backbone to automobiles, bridges, buildings, railroads, and machinery and is an important component of national defense weapons. Industry consolidation is shutting the doors of once thriving steel plants. Industry unemployment figures continue to rise in regions with the highest concentration of steel mills, including New York, Pennsylvania, Ohio, and Michigan. The U.S. government has taken some corrective steps to revive the overall economy and infuse steel demand in different facets of manufacturing. Out of the more than \$780 billion stimulus package, about 15% of the amount is expected to be spent on infrastructural projects requiring steel as an essential construction raw material. This will transform in the consumption of around 11 million short tons of steel in various federal governments supported projects. Along with the government support, the recovering industrial sector is expected to further create steel demand in the U.S.

This SBI report, "The U.S. Steel Industry Outlook," examines the competitive and economic challenges facing raw steel producers and end-users of steel. The analysis includes a historical perspective of the U.S. steel industry between 2006 and 2011 and forecasts the market value through 2022. The chapters discuss the key industries affected by U.S. steel production: construction, automotive, and machinery/equipment. It profiles the leading manufacturers of raw steel and values the import and export market of steel raw materials. We size the market based on historical data between 2002 to 2011 and forecast growth through 2022. Market sizing focuses on the stainless steel and ferroalloy steel segments. Our analysis takes a top-down approach to market projections in which we first estimate overall U.S. steel demand and production activity, including import and export values, and then extrapolate and project the value of select downstream steel products. The presentation of market data is as follows:

U.S. Steel Production and Value (in millions of tons and dollars), 2012 to 2022

U.S. Steel Industry Spending (in \$ millions) on Raw Materials, 2012 to 2022

Value of U.S. Steel Industry Imports (in metric tons) of Carbon and Alloy and Stainless Products, 2006 to 2012

Value of U.S. Steel Industry Exports (in metric tons) of Carbon and Alloy and Stainless Products, 2006 to 2012

Total Economic Impact of U.S. Steel Industry (in \$ thousands) and Other Steel Market Value Data, 2006 to 2009

Import/Export Value of Selected U.S. Steel Downstream Products, 2012 to 2022

Market Value (in \$ millions) of U.S. Steel Consumption by Manufacturing Sector, 2012 to 2017

We also forecast market growth by U.S. state, based on geographic steel mill production, new steel mill construction, and market potential based on location. Our forecasts take into account the direct steel market value, which is based solely on steel production, and indirect steel market value, which accounts for spending within the steel industry on supplies and spending by U.S. consumers on finished goods that use steel. We analyze the factors affecting the livelihood of major consumers of U.S. steel output, in the following sectors:

Construction: U.S. construction of commercial and residential properties has been stagnant since 2008 when the domestic recession began. Steelmakers are feeling the effects of poor demand from the construction industry and the trend toward recovery may lie in construction and renovation of U.S. infrastructure, including bridges and tunnels.

Automotive: U.S. steel makers are riding the slow wave of economic recovery affecting the U.S. automobile manufacturing industry. Car makers are more often turning to cheaper imports of raw steel and lighter materials, and that is affecting the ability of steel makers to stay profitable.

Machinery: Manufacturers of appliances, military equipment, and other machinery dependent on steel production are also looking to innovate by

incorporating less expensive polymers. Their lower dependence on steel is affecting how steelmakers market to machinery companies.

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