



Spanish Steel industry

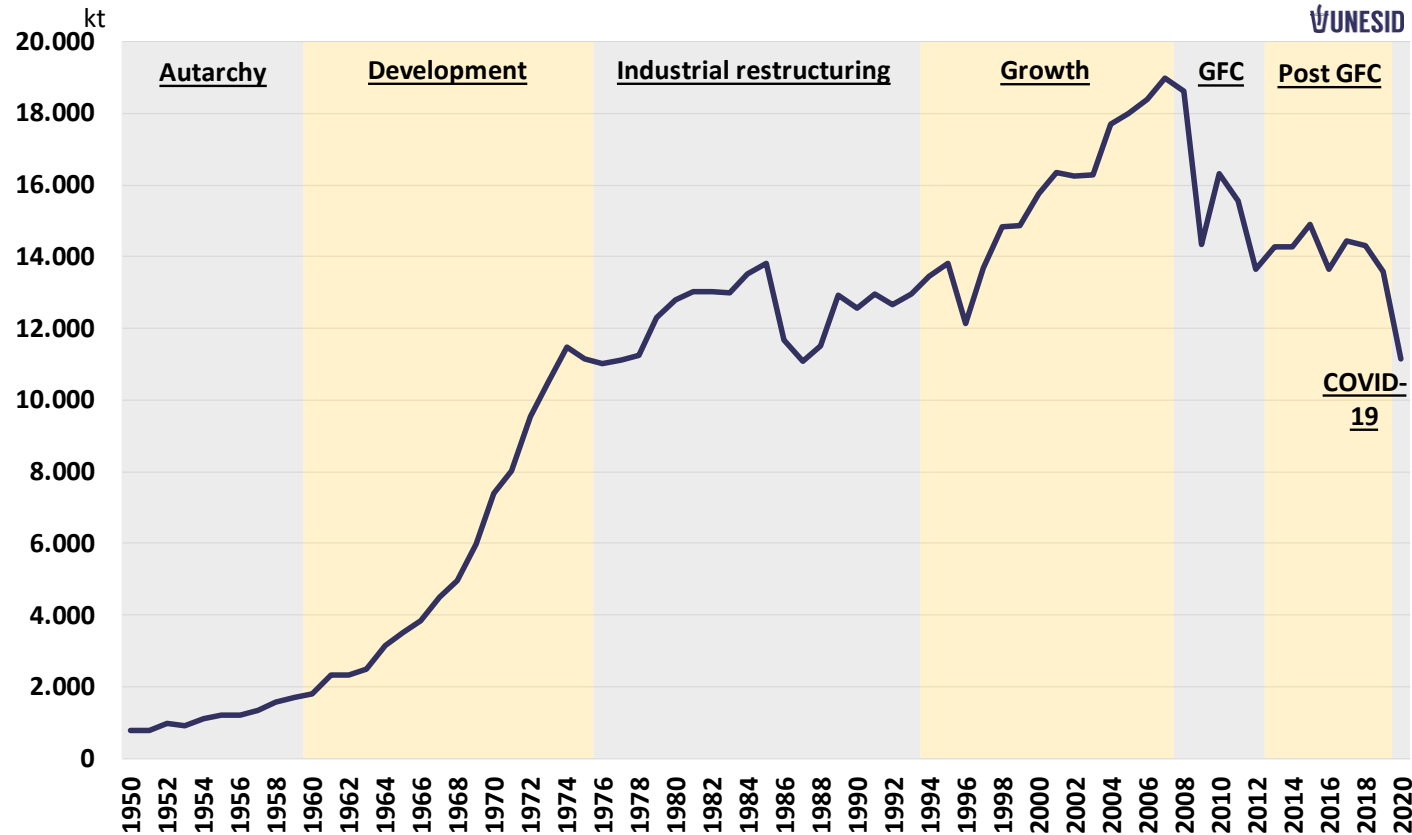
Siderweb webinar – March 2021



Spanish steel industry. History

Autarchy	Development	Industrial Restructuring	Growth	Global financial crisis	Post GFC
•Postwar, centralized policies oriented towards inner industrial development. Sluggish steel growth	•Economic liberalization begins but the state develops industrial hubs and "national champions" (Ensidesa)	•Oil shocks, Spanish access to the EEC (1986), public steel companies are privatized all over Europe (Aceralia)	•Industrial and construction boom, Spanish corporations go global.	•Spanish construction sector collapses, downsizing of steel industry	•Industry struggles against very slow growth. Dynamic automotive industry

Crude steel production



Spanish steel mills

FLATS

ACERINOX

ARANIA

ARCELORMITTAL

GONVARRI

LAYDE

NETWORK STEEL

GALMED

LONGS

GALLARDO BALBOA

OLARRA

ARCELORMITTAL

CELSA

ROLDÁN

MEGASA

SIDENOR

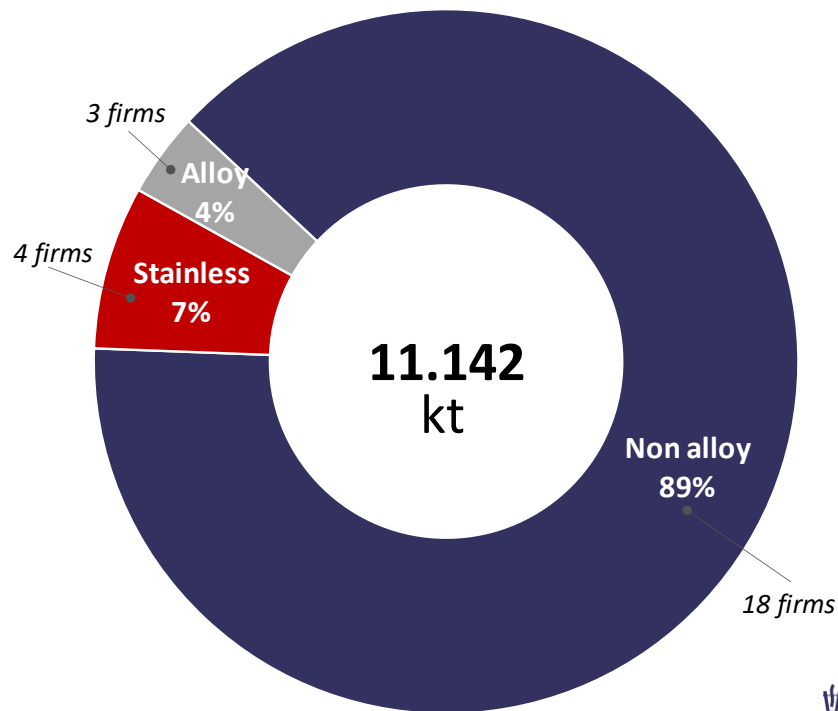
SIDERÚRGICA SEVILLANA

TUBACEX

TUBOS REUNIDOS

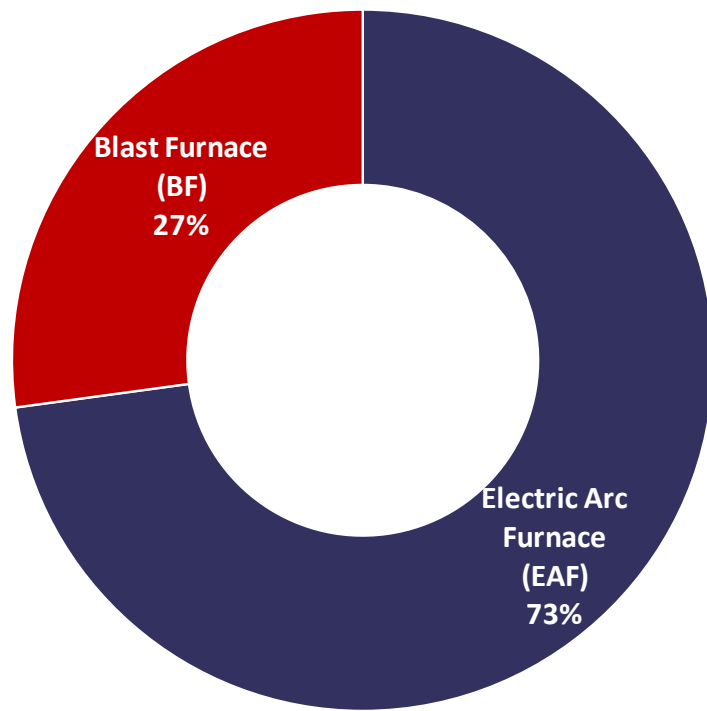
2020 heavily affected by COVID

Spain: crude steel production, qualities



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Spain: crude steel production, process



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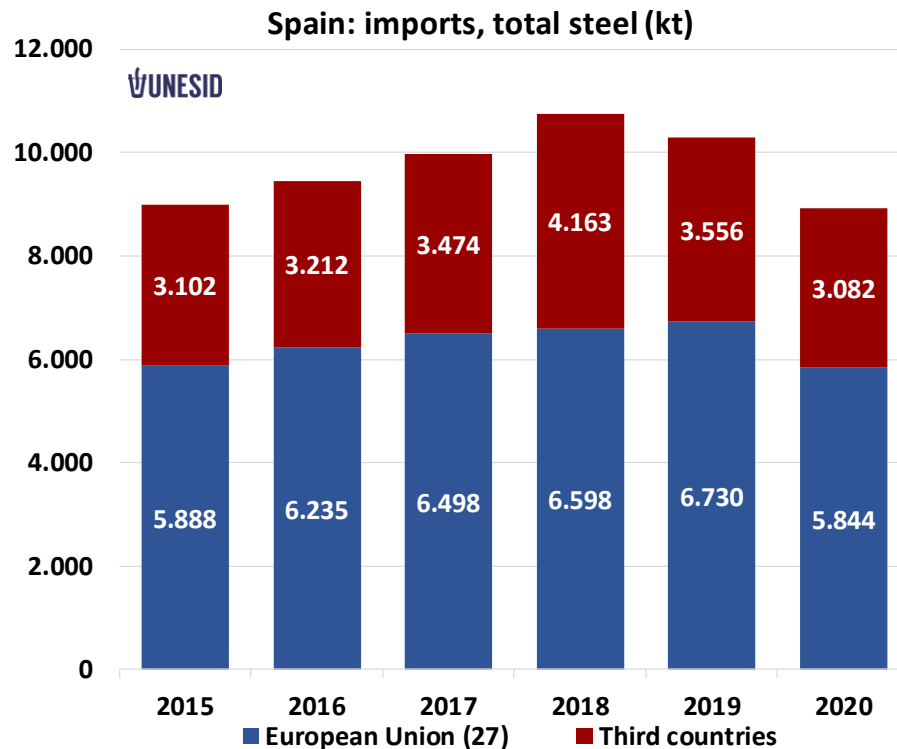
Steel exports

✚ Growing share of EU markets



Steel imports

ψ Maximum pressure from third countries in 2018



Trade balance: all products, 2020 (kt)

Countries	Exports	Imports	BALANCE
TOTAL	7.957	8.926	-969
European Union (27)	5.129	5.844	-715
France	1.875	1.707	168
Germany	1.200	532	668
Italy	805	777	28
Portugal	858	957	-99
Third Countries	2.827	3.082	-254
Turkey	410	885	-475
United Kingdom	412	276	136
Algeria	344	0	344
RoW	2.051	3.791	-1.740

Includes tubes and other basic transformations

Trade balance: main products, 2020 (kt)

Product	Exports	Imports	BALANCE
LONGS	4.363	963	3.401
Wire rod (all qualities)	990	335	655
Rebars (NA)	725	293	433
Merchant bars (all qualities)	599	284	315
Sections	1.871	31	1.840
FLATS	1.979	6.176	-3.873
Hot rolled coil (other than stainless)	225	2.302	-2.077
Cold rolled coil (all qualities)	379	782	-403
Metallic coated coil (all qualities)	587	1.795	-1.208
SEMIS	110	947	-837



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