



Structural change on commodity and steel markets – consequences for the automotive industry

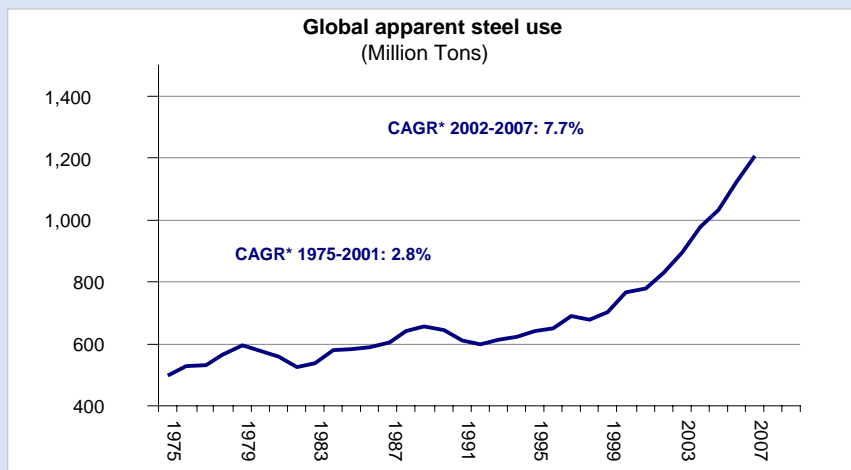
The Automotive Industry

16th Handelsblatt Annual Conference
15 and 16 December 2008, Frankfurt am Main

Hans Jürgen Kerkhoff
President German Steel Federation
Chairman Steel Institute VDEh

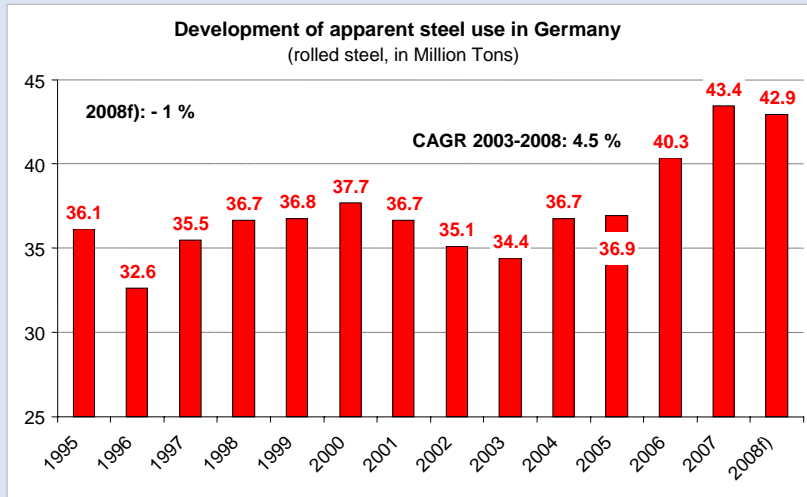


Rapid growth of the global steel industry in the last years





Also strong growth on the German steel market

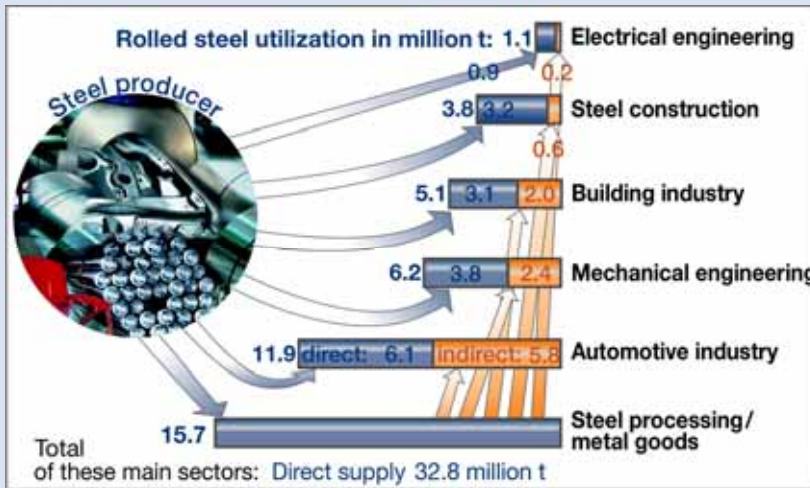


Steel production in Germany

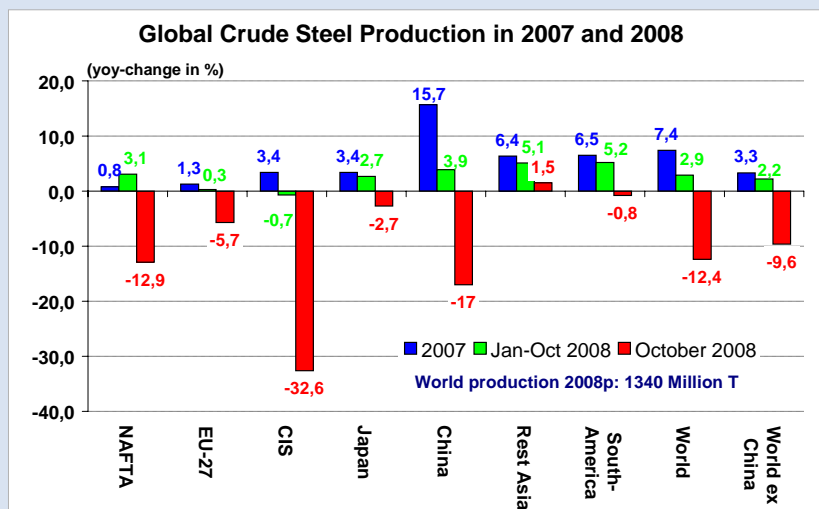




Steel use in Germany 2007 (~ 41 Mill. T)

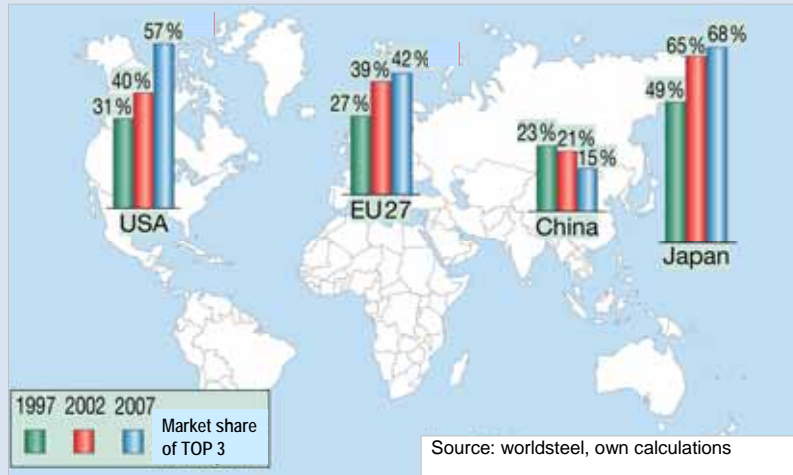


World Steel Market 2008: Boom stopped abruptly

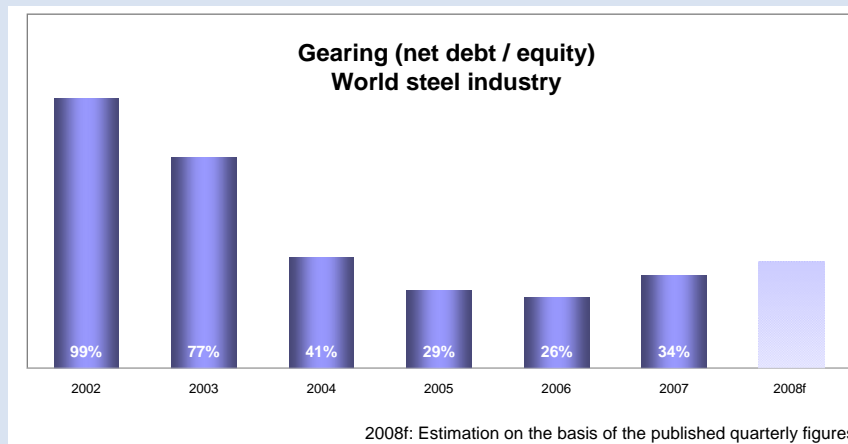




Restructuring and consolidation in the steel industry 1997 / 2002 / 2007

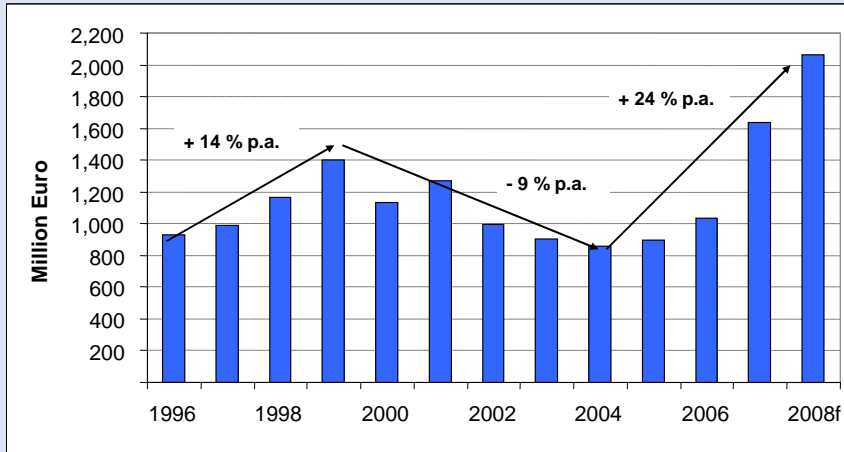


Improved capital structure as a solid basis

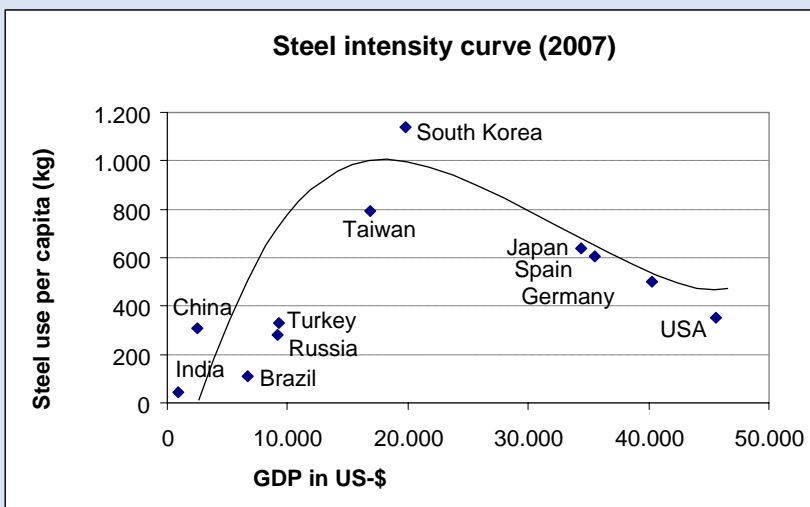




Investments of the German steel industry at a record level in 2008

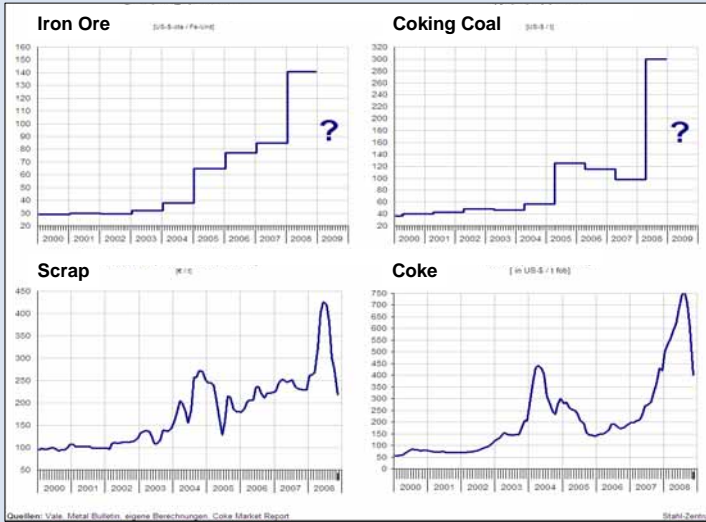


Mid-term demand outlook is still robust





Raw material prices – a burden also in 2009?



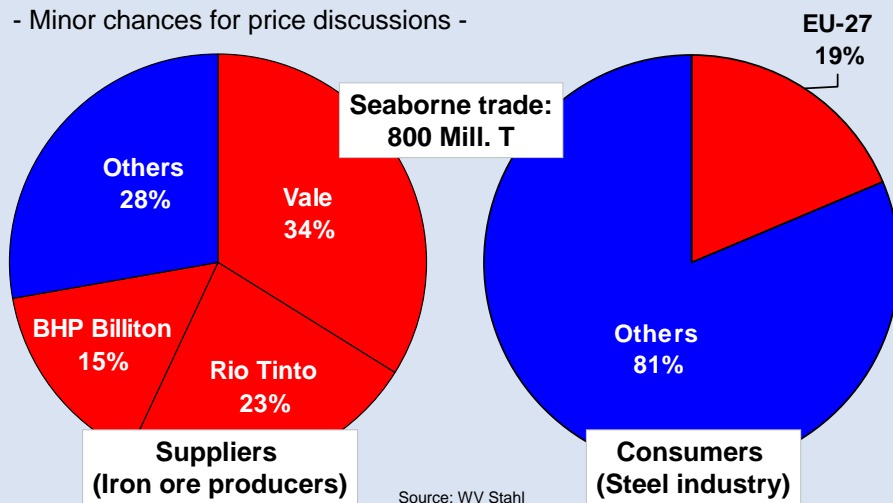
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Market share seaborne iron ore trade 2007

- Minor chances for price discussions -



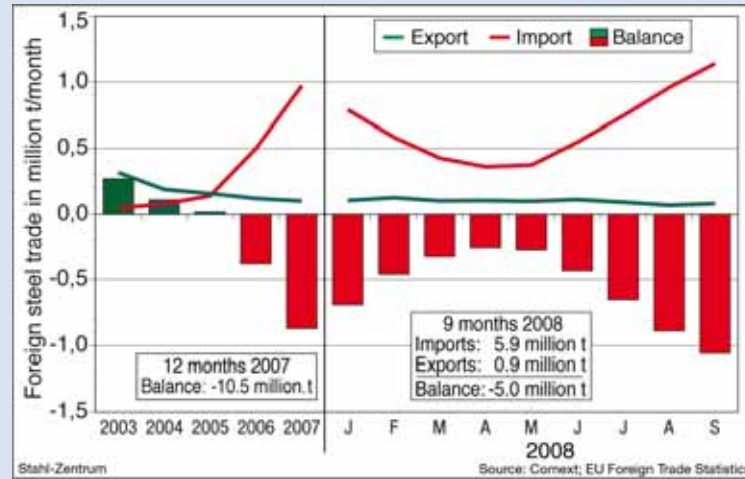
Source: WV Stahl

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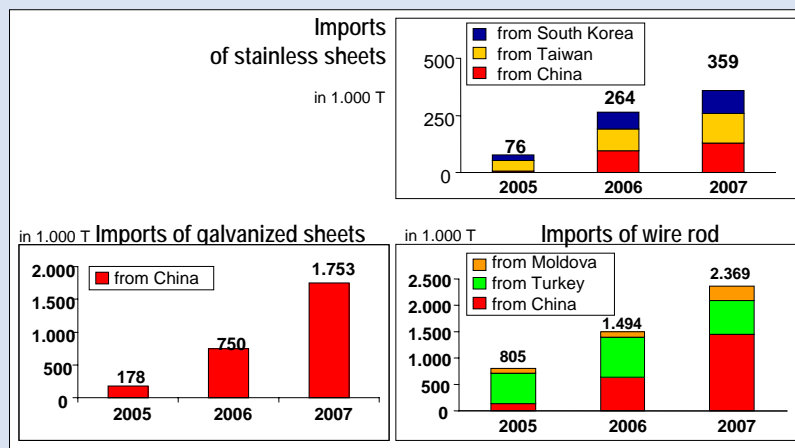
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Steel external trade of the EU 27 with China 2003 - 2008 (Steel mill products)

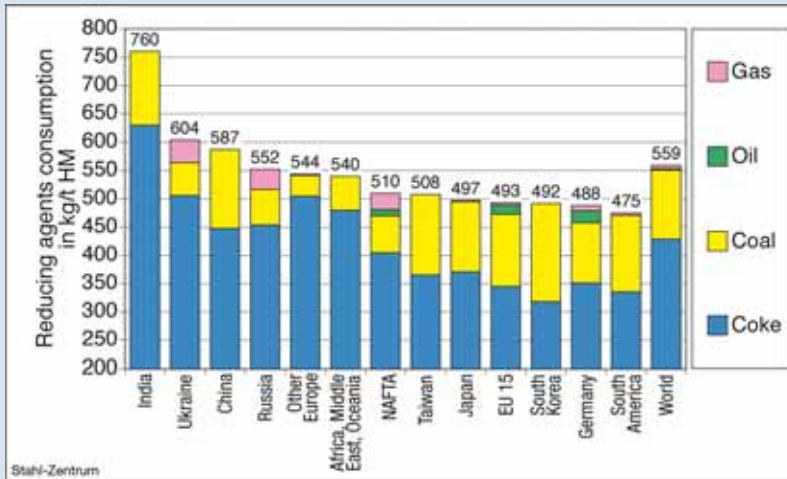


Three antidumping proceedings in the European Union



Quelle: Europäische Außenhandelsstatistik und eigene Berechnungen

Reductants consumption of blast furnaces in the world, 2007



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