

# STEEL & **THE ECONOMY** 2021



LIFE  
**IS MADE  
OF STEEL**

## Brazil Steel Institute

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Formed in 1963, the objectives of the Brazil Steel Institute are to increase the competitiveness of the Brazilian steel market and carry out a variety of activities, such as studies, research, and representation in both the public and private sphere. The Institute has since maintained a commitment to sustainable development and the demands of society, which is reflected in sustainable actions based on economic, social, and environmental pillars.

## Associated Companies

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AÇO VERDE DO BRASIL - AVB  
APERAM SOUTH AMERICA  
ARCELORMITTAL AÇOS LONGOS  
ARCELORMITTAL TUBARÃO  
COMPANHIA SIDERÚRGICA DO PECÉM - CSP  
GERDAU AÇOMINAS S.A.  
GERDAU S.A.  
GERDAU AÇOS LONGOS S.A.  
SIDERÚRGICA NORTE BRASIL S.A. - SINOBRA  
TERNIUM BRASIL  
USIMINAS  
VALLOUREC SOLUÇÕES TUBULARES DO BRASIL S.A.  
VILLARES METALS S.A.

● ● ● The Brazilian Steel Industry | 2020



**31** STEEL  
MILLS

**Steel Producer Sites:**

15 integrated parks  
and 16 semi-integrated  
parks administered by  
12 groups.



**104.4**  
billions

**Net Revenue:**

R\$ 104.4 billions



**19.7**  
billions

**Taxes Paid:**

R\$ 19.7 billions



**51.0**  
millions

**Installed Capacity:**

51.0 millions t/year of crude  
steel at the end of 2020



**9<sup>th</sup>** RANKED  
PRODUCER

**9<sup>th</sup> Ranked producer  
in Global Ranking**

*Production (t of crude steel):*

*Brazil = 31.4 million tonnes*

*World = 1,877.3 million tonnes*

*1.7% (Brazil/World)*

*Latin America = 56.0 million tonnes*

*56.1% (Brazil/Latin America)*



**103** thousand

**Collaborators:**

Current company  
workforce: 64,569

Collaborators

Subcontractors: 38,739



**64.6**  
billions

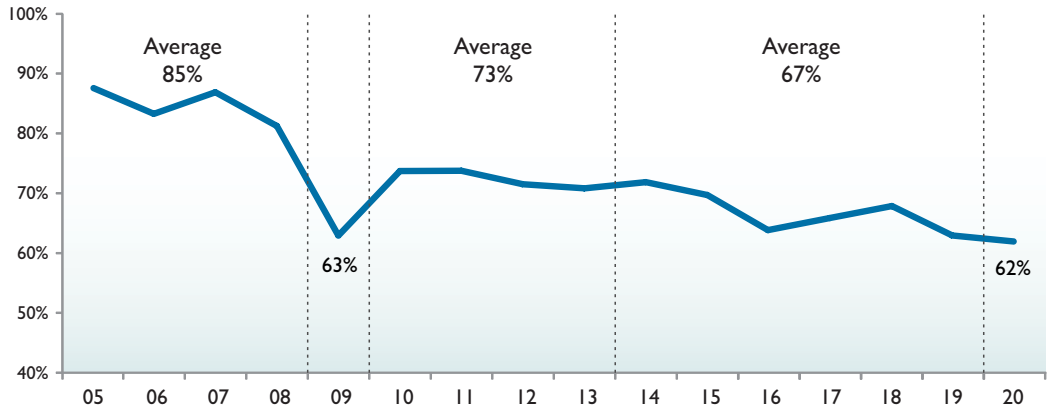
**Investment:**

R\$ 64.6 billions in  
investments between  
2008 and 2020

## BRAZILIAN STEEL INDUSTRY



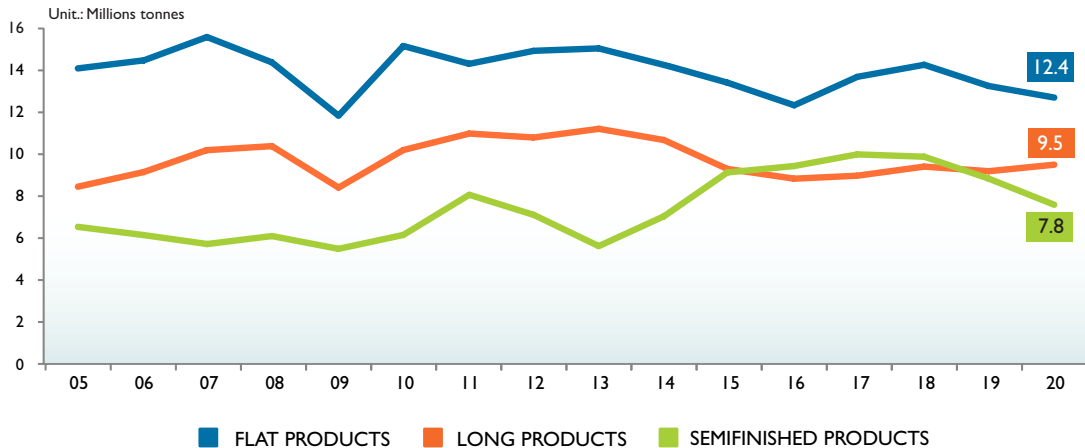
## CAPACITY UTILIZATION



Source: Brazil Steel

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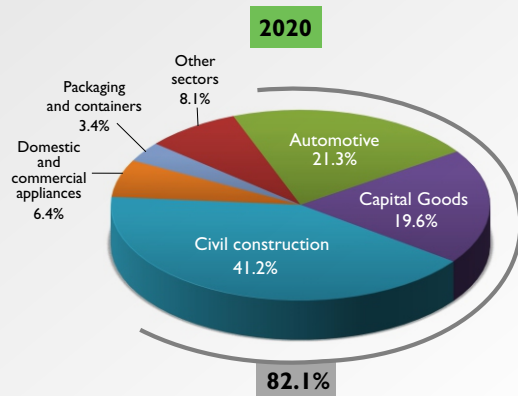
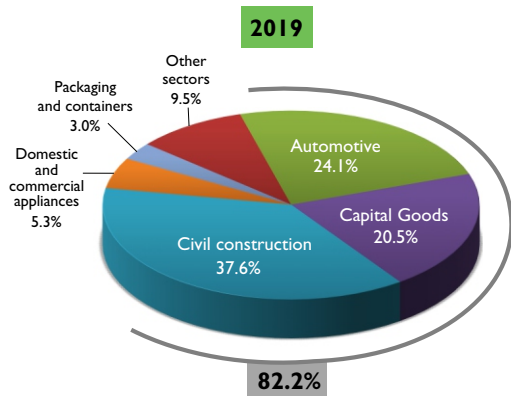
## PRODUCTION EVOLUTION BY PRODUCT



Source: Brazil Steel Institute

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## CONSUMPTION PARTICIPATION OF FINISHED STEEL PRODUCTS BY SECTORS



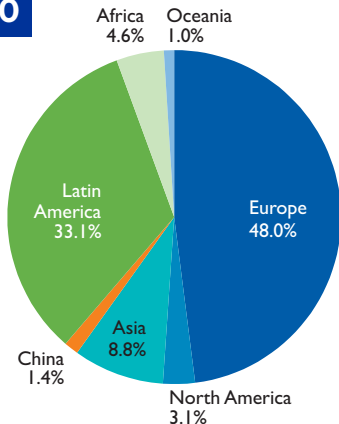
## CONSUMPTION OF FINISHED STEEL PRODUCTS BY SECTORS (Thousand tonnes)

SECTOR	2018	2019	2020	20/19 (%)
Civil Construction	7,074	7,894	8,844	12.0
Automotive	5,235	5,058	4,559	-9.9
Capital Goods	4,643	4,285	4,169	-2.7
Domestic and Commercial Appliances	1,171	1,108	1,374	24.0



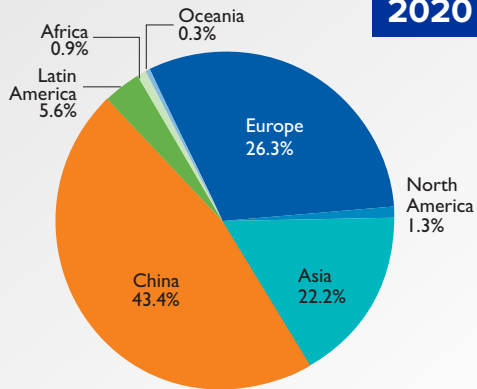
## IMPORTS OF STEEL PRODUCTS BY ORIGIN

2000



Imports from China: 12 thousand tonnes












2020



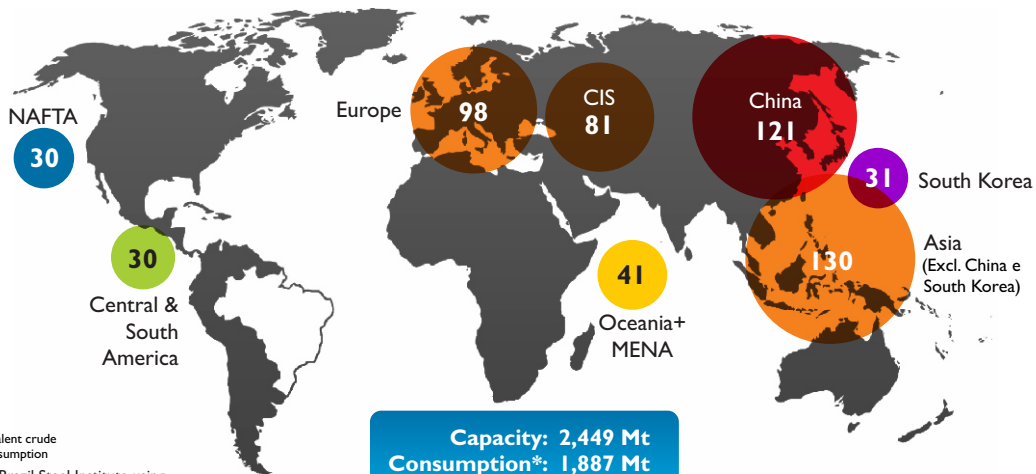
Imports from China: 844 thousand tonnes

## APPARENT STEEL USE PER CAPITA

Unit.: kg per inhabitant

SECTOR	1980	2000	2020
 China	32.0	96.9	691.3
 South Korea	134.4	808.3	954.9
 Japan	605.2	596.7	415.7
 USA	377.4	425.6	241.8
 Germany	369.3	473.6	370.9
 Spain	200.5	425.4	250.1
 Brazil	100.6	92.6	100.9
 India	12.7	26.3	64.2
 Chile	52.5	96.0	123.9
 Mexico	115.0	136.4	168.4
 World	128.3	122.0	227.3

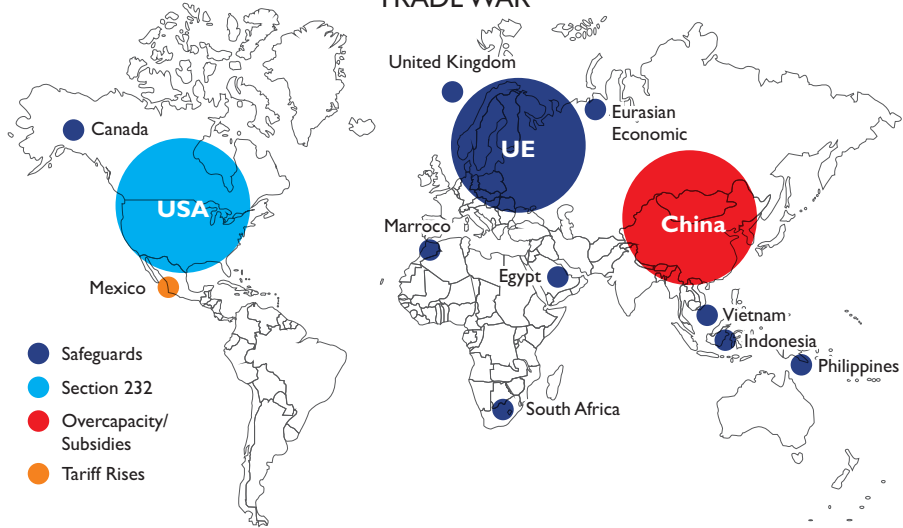
## GLOBAL STEEL PRODUCTION OVERCAPACITY - 2020 (Millions tonnes)



(\*) Equivalent crude steel consumption

Source: Brazil Steel Institute using data from OECD and worldsteel

## TRADE WAR



Source: OMC

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