5th SCT2017

5th International Conference on Steels in Cars and Trucks

June 18 – 22, 2017 | Noordwijkerhoud, Amsterdam, NL

Global challenges – Regional perspectives

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Executive Member of the Managing Board

Steel Institute VDEh

SCT2017 Stahl

12 years SCT – a success story

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Noorwijkerhoud - Amsterdam

- Bringing the automotive, supplier und steel industries together
- Future trends in steel development, processing technologies and applications

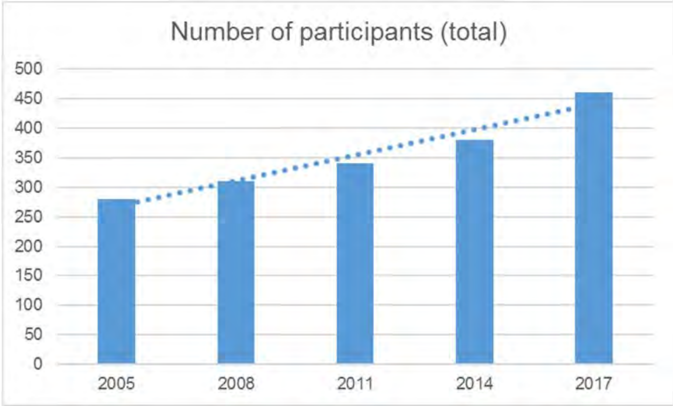
SCT2005, 05 to 10 June, Wiesbaden, Germany

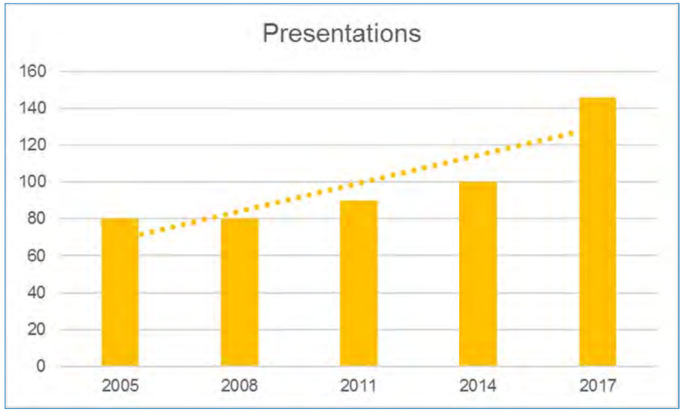
SCT 2008, 01 to 05 June, Wiesbaden, Germany

SCT 2011, 05 to 09 June, Salzburg, Austria

SCT 2014, 15 to 19 June, Braunschweig, Germany

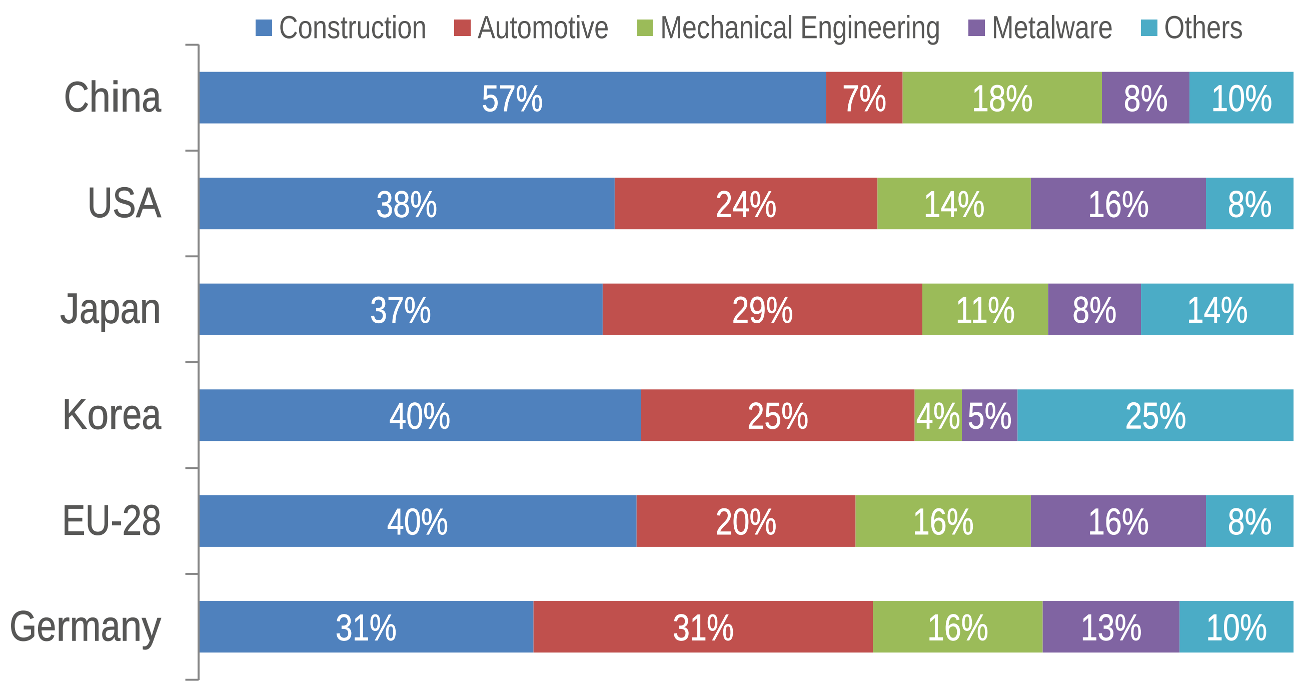
SCT 2017, 18 to 22 June, Amsterdam – Noordwijkerhoud, The Netherlands





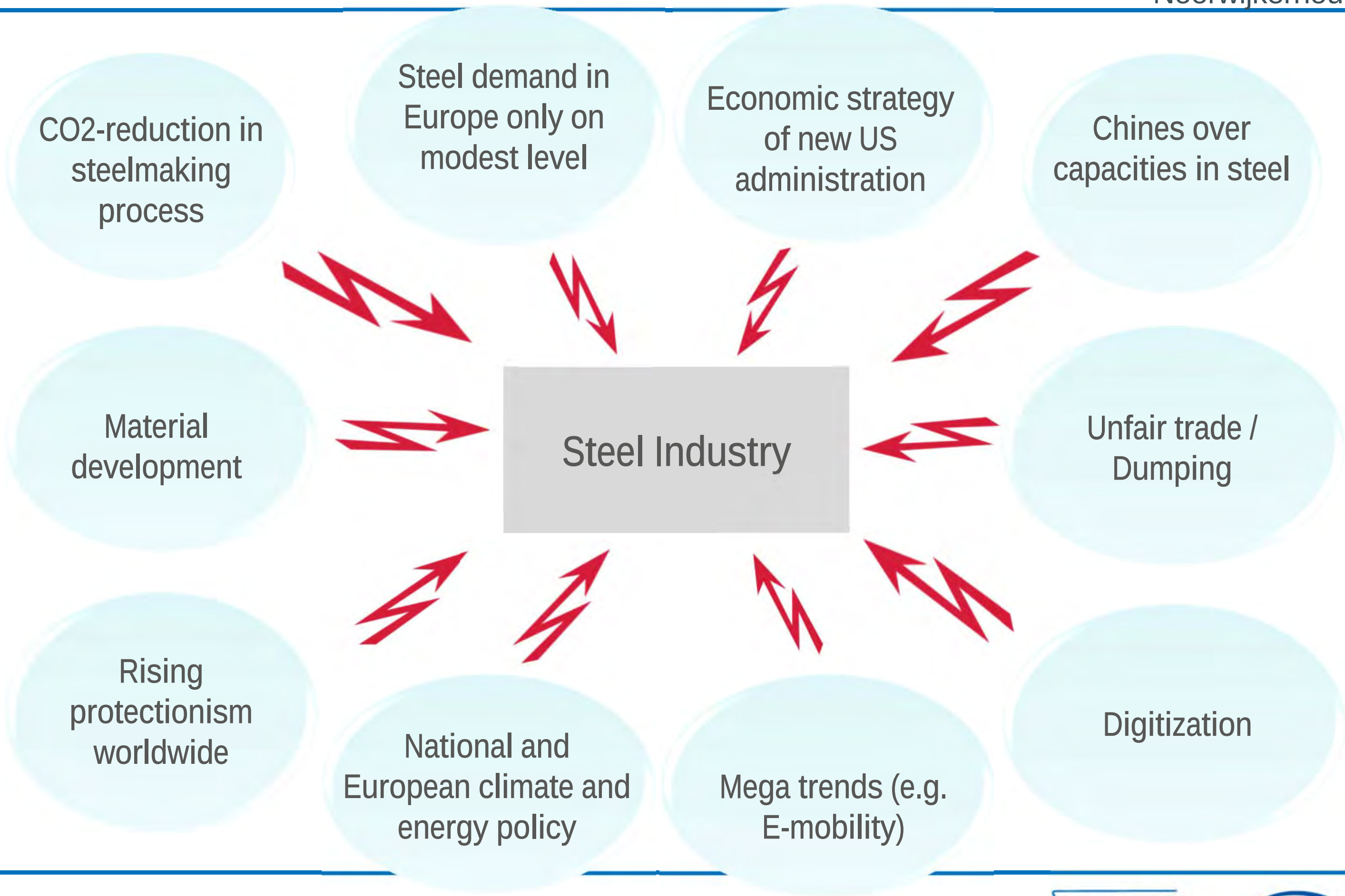
Structure of steel demand: focus on automotive and machinery

Sector shares in steel consumption in major countries (2016)



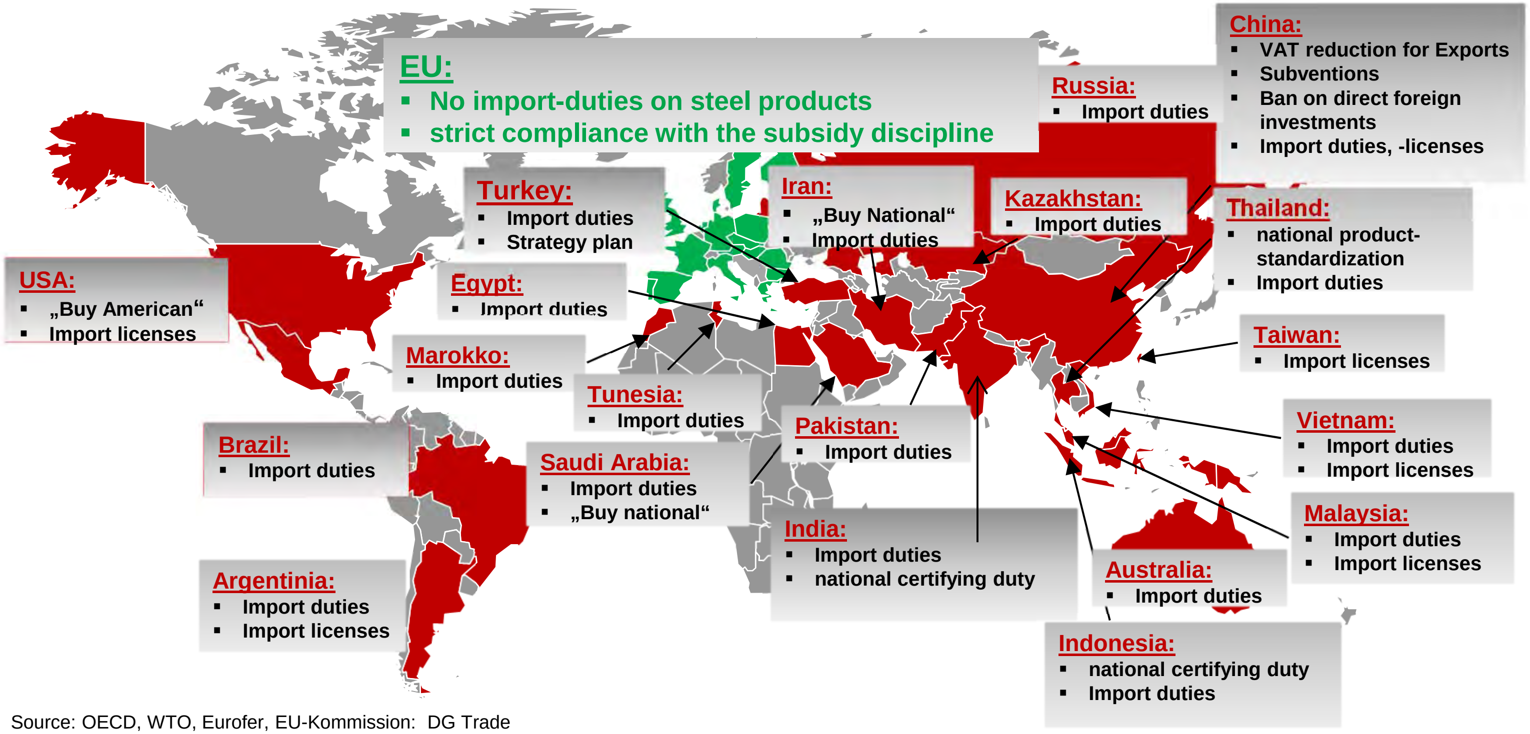
Source: Worldsteel

Central challenges for German and European steel industry



Protectionism in the steel sector growing worldwide

Examples for tariff and non-tariff trade restrictions



Source: OECD, WTO, Eurofer, EU-Kommission: DG Trade

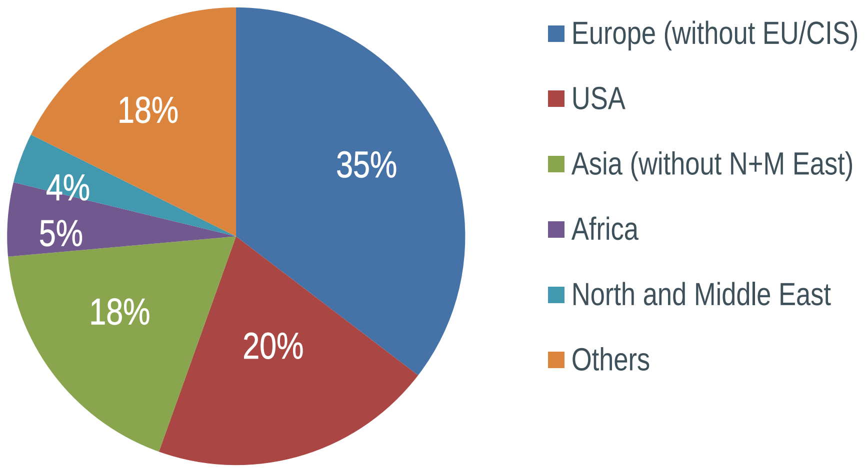
New US trade policy targeting steel industry

January 24, 2017: „Construction of American Pipes“	„Buy American“ – preferential treatment of the US-steel industry for tubes and pipes; measures also affecting private investment projects
March 01, 2017: National Trade Policy Agenda 2017	Definition of key objectives of the national trade policy for 2017
March 31, 2017: Omnibus Report on Significant Trade Deficits	Assessment of major causes of the US trade deficit with several of its major trading partners in 2016
April 18, 2017: „Buy American, Hire American“	Reinforcement of legislation for preferential treatment of US companies on allocation of government procurement; restriction of working visas for foreigners
April 20, 2017: „Standig up to Unfair Steel Trade Practices“	Section 232 investigation to determin the effects of steel imports on the US national security
April 29, 2017: „Addressing Trade Agreements Violations and Abuses“	Review of all existing trade agreements on „violations and abuse“

Importance of German and EU28 steel exports to the US

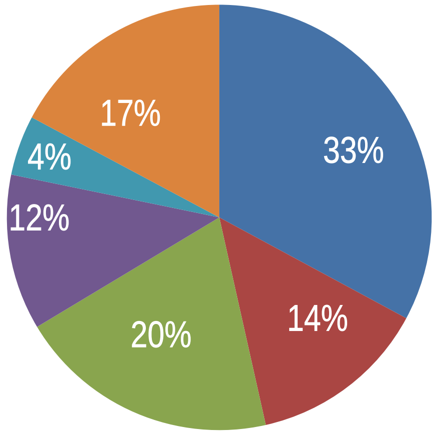
Germany: Export Rolled Steel
(2016, Share in Percent)

2016*): 4,1 Mill. t in countries outside of the EU (Third Countries)



EU-28: Export Rolled Steel
(2016, Share in Percent)

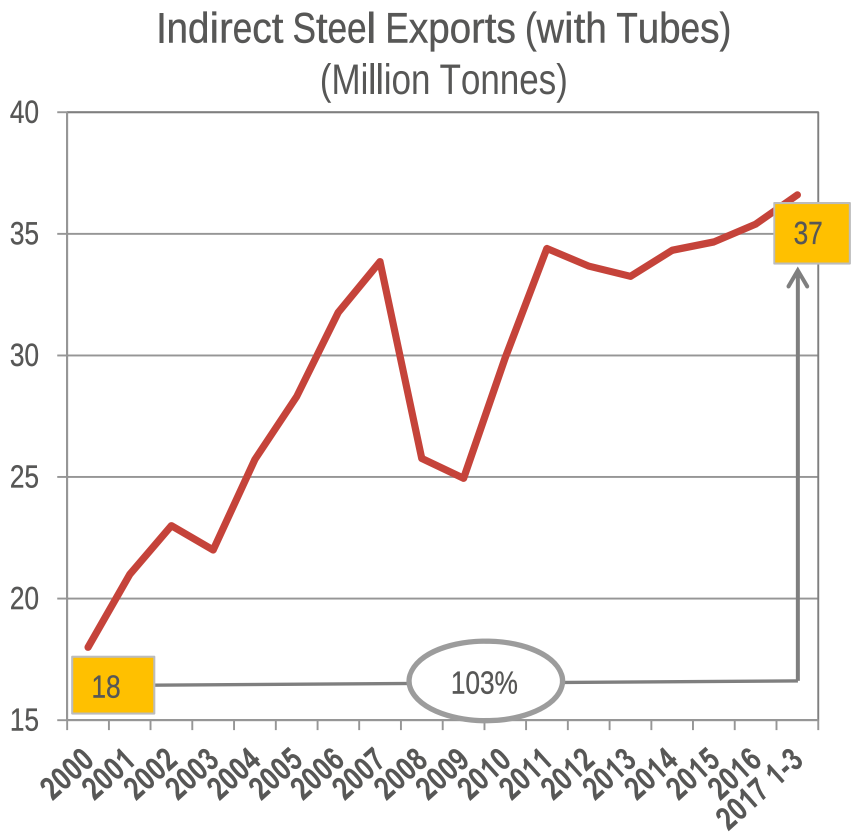
2016: 24 Mill. t



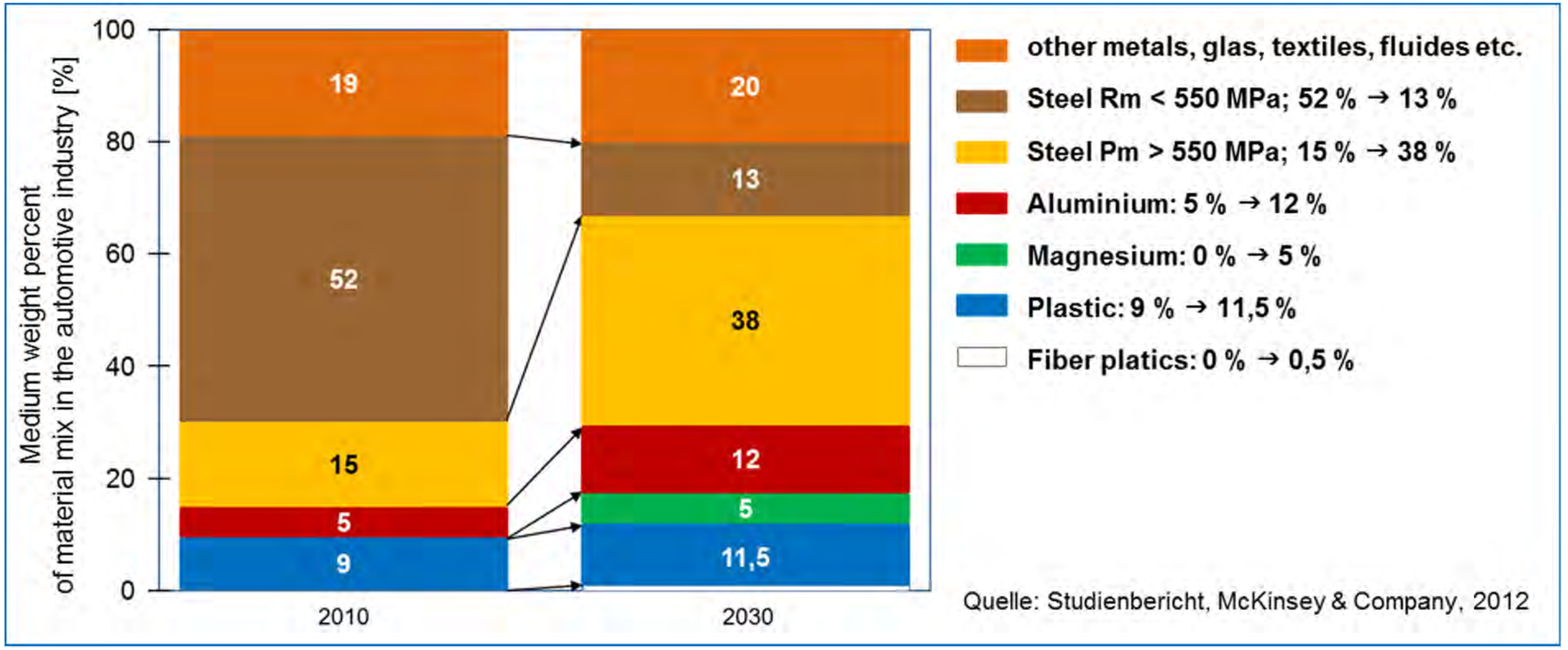
*Jan-Nov annualized

The USA are for the steel industry in Germany the most important market.

Indirect export key for German steel demand



Use of materials in automobile construction today and in the future

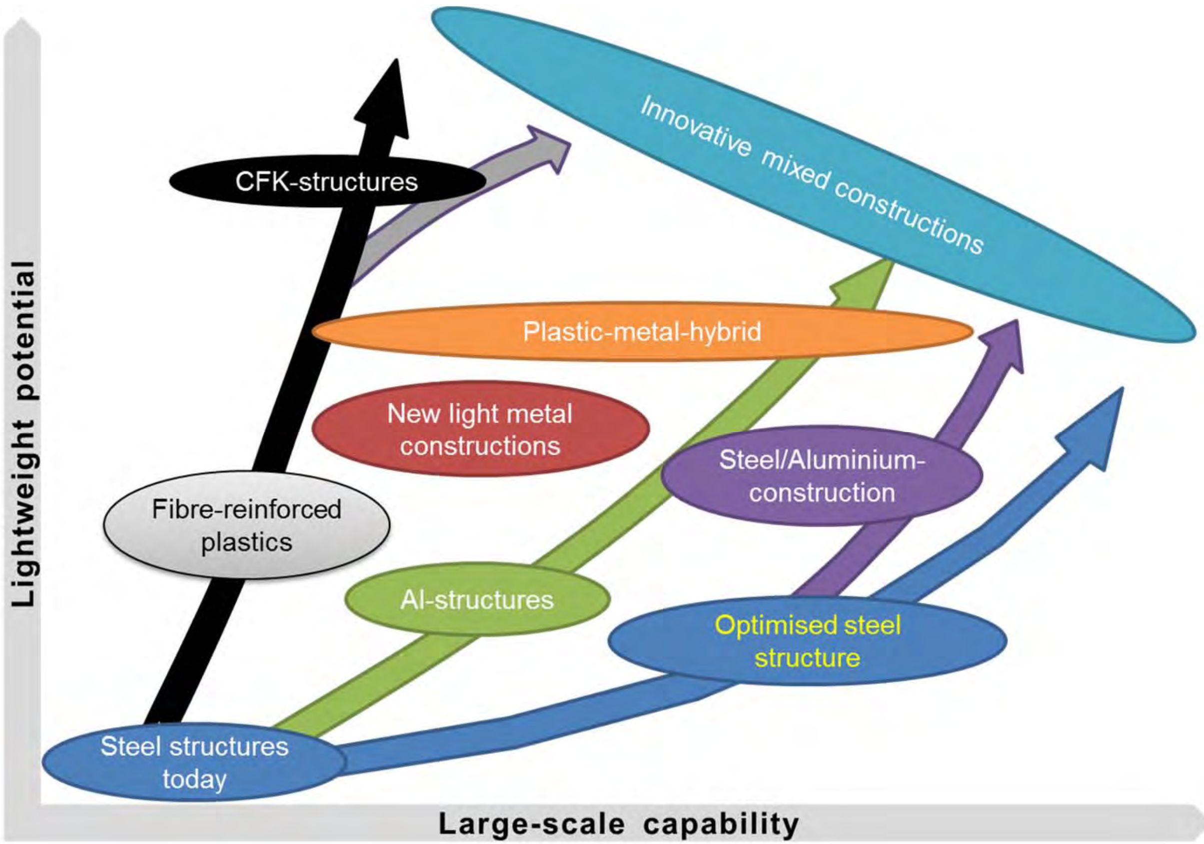


„Audi drastically increasing steel usage in 2018 A8 model“

The 2018 Audi A8 will be made up of 40.5 % steel, a drastic change from the all-aluminum body originally developed in 1994 …

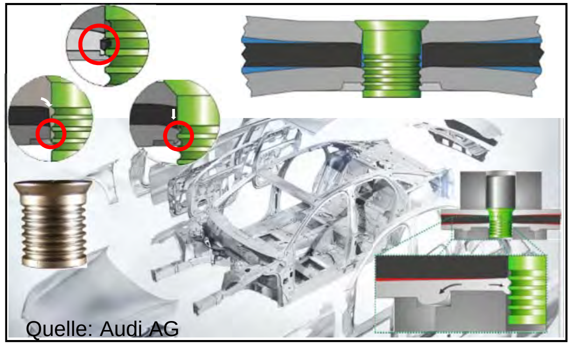
Steel Business Briefing, Friday, 12 Mai 2017

Lightweight construction concepts



Source VW: >>Automobil Industrie<< Leichtbau-Gipfel 2012, Würzburg 2012

New or customized joining technologies are needed



- Successful co-operation of various materials
- Solution to meet the requirements of the construction
- Hybrid design: „The right material in the right place.“
- Reduced material consumption ➡ Resource conservation
- Weight savings ➡ CO_2-avoidance

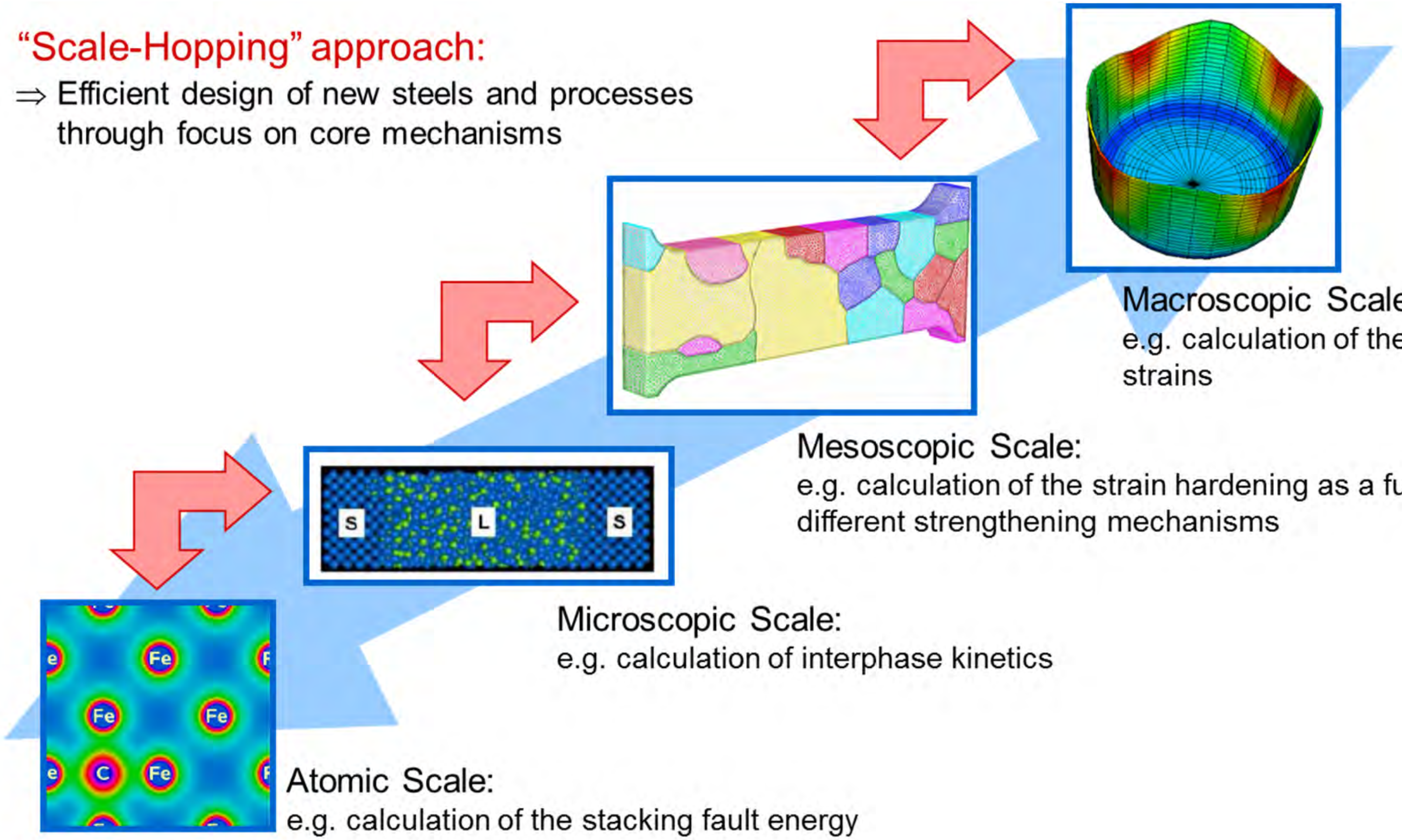
Steel in powerful drives for e-mobiles

- Electrical sheets of steel belong to the key components of electric motors and determine essentially their efficiency.
- New steel alloys reduce the losses in the motor during the re-magnetization by up to 30% and thus increase the efficiency especially at high speeds.
- These non-grain-oriented electrical steels play a key role for full-electric vehicle drives.

Modelling on different scales are used selectively

"Scale-Hopping" approach:

⇒ Efficient design of new steels and processes through focus on core mechanisms



Source: MPI for Iron Research

Steel – multi recycling champion

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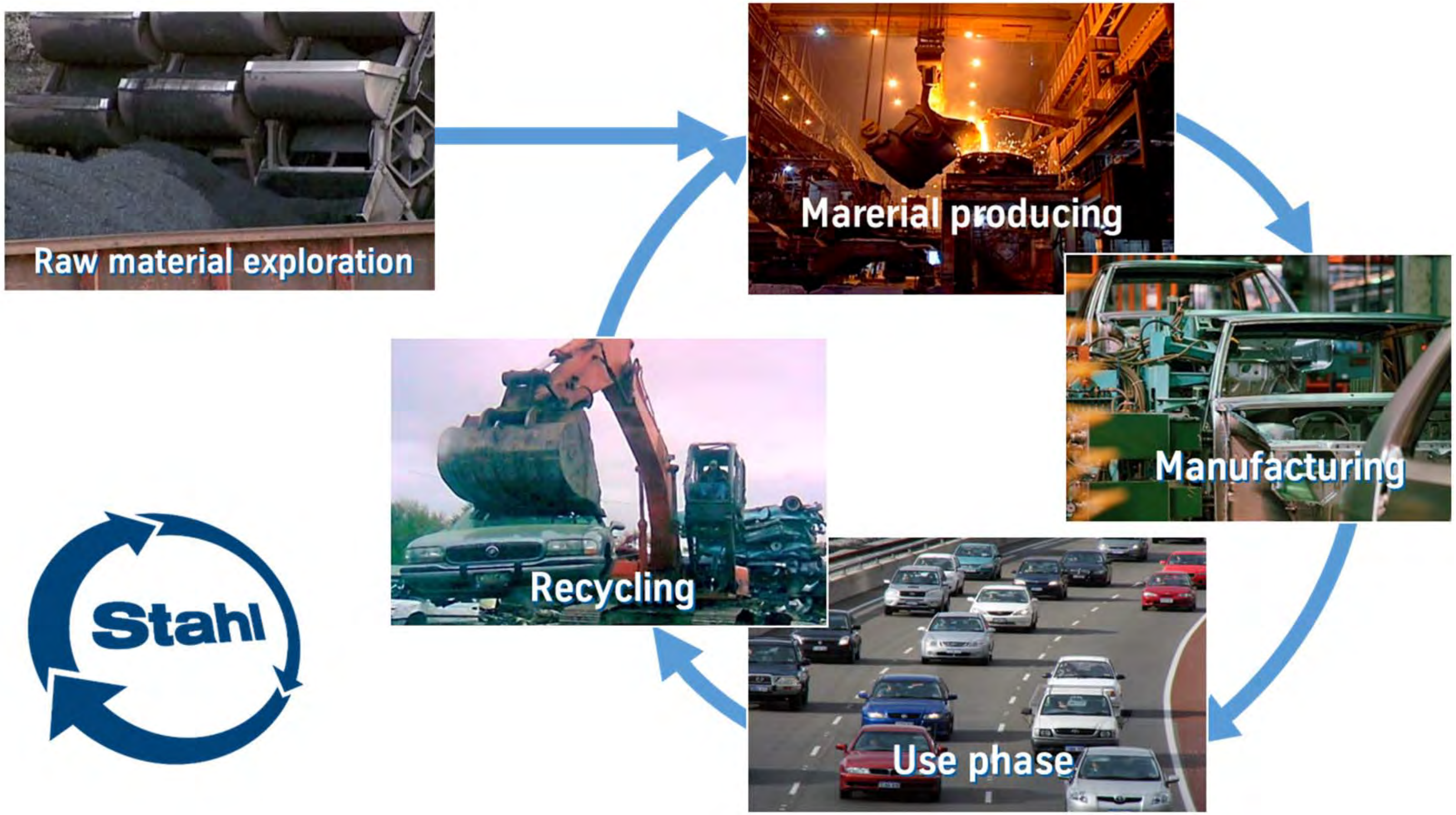

High economic leverage due to networking with suppliers and service providers

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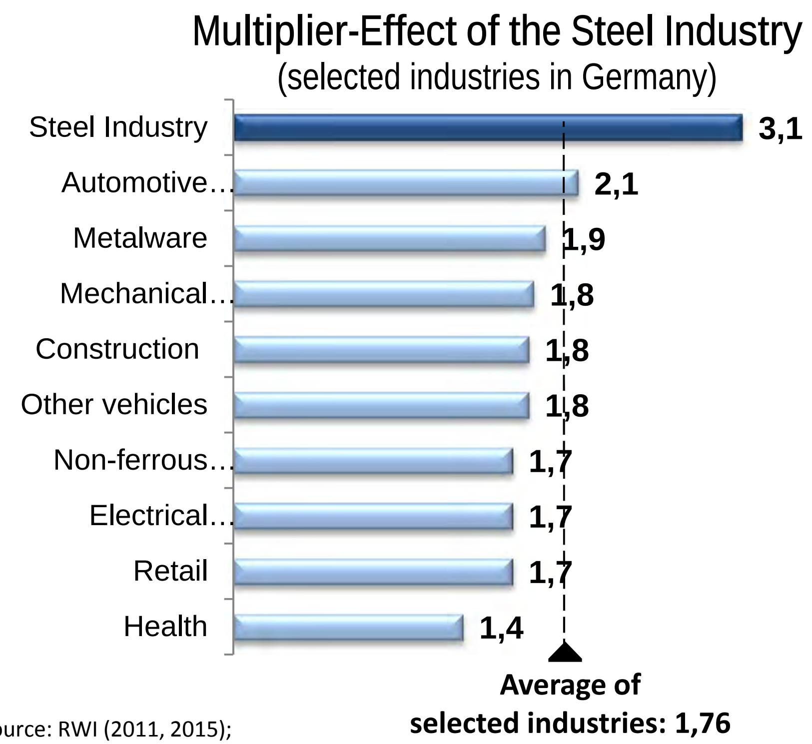

Source: RWI (2011, 2015);

- The multiplier is a measure for the leverage of an industry.
- An additional 1 euro demand for steel products is accompanied by another demand of € 3.1, of which 1 euro is allocates to the steel industry itself and € 2.1 to other suppliers.
- The powerful leverage arises from long value chains in the German economic area (transport, industry-related services, etc.).

Thanks to all supporters

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