



SSAB:N TERÄSPAALUPÄIVÄ
23.1.2020

POHJARAKENTAMISEN YKKÖSTAPAHTUMA

SSAB

Safety first



WE CHOOSE SAFETY

SSAB in brief

75 BILLION
SEK
annual net sales in 2018



Annual steel
production capacity:
8.8 MILLION
TONNES

Steel making since
1878

14,300
professionals
in 50 countries

OUR BUSINESSES:

SSAB Special Steels,
SSAB Europe,
SSAB Americas, Tibnor,
Ruukki Construction

SSAB

A photograph of an industrial site showing two large, dark, weathered steel pipes. One pipe is horizontal in the upper left, and the other is vertical in the center-right. They are surrounded by a thick, dark, muddy slurry. The background shows a concrete wall and more debris. A white curved shape on the left side of the image contains the title text.

Steel industry context and outlook

Four fundamental forces shaping the steel industry dynamics

Shaping trends

- ▶ Economic development
- ▶ Steel intensity of economies
- ▶ Innovation



Steel demand

Shaping trends

- ▶ Global trade flows
- ▶ Trade barriers



Steel trade flows

Shaping trends

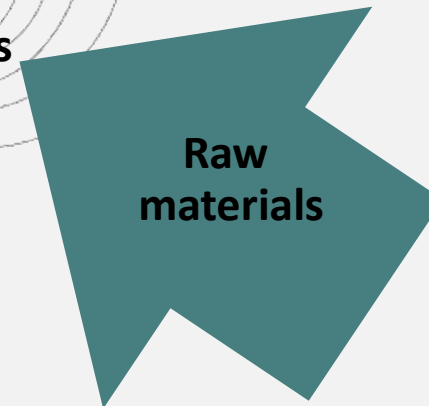
- ▶ Investments
- ▶ Consolidation
- ▶ Sustainability and environmental trends



Steel supply capacity

Shaping trends

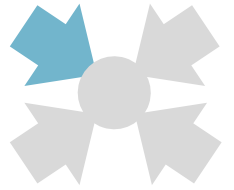
- ▶ Price volatility
- ▶ Material shortages



Raw materials

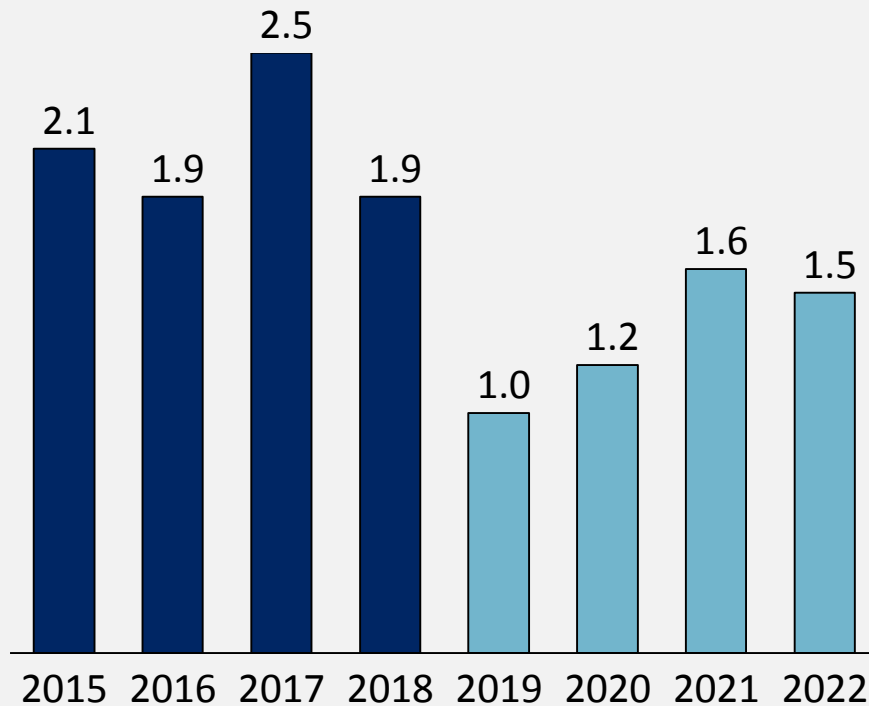
Steel industry dynamics

The EU economy is slowing down, midterm outlook still hopeful



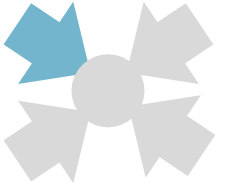
GDP growth, Euro Area (2015 – 2022)

■ Real GDP growth rate (%)



Source: Eurostat; forecast from Citibank (July 2019)

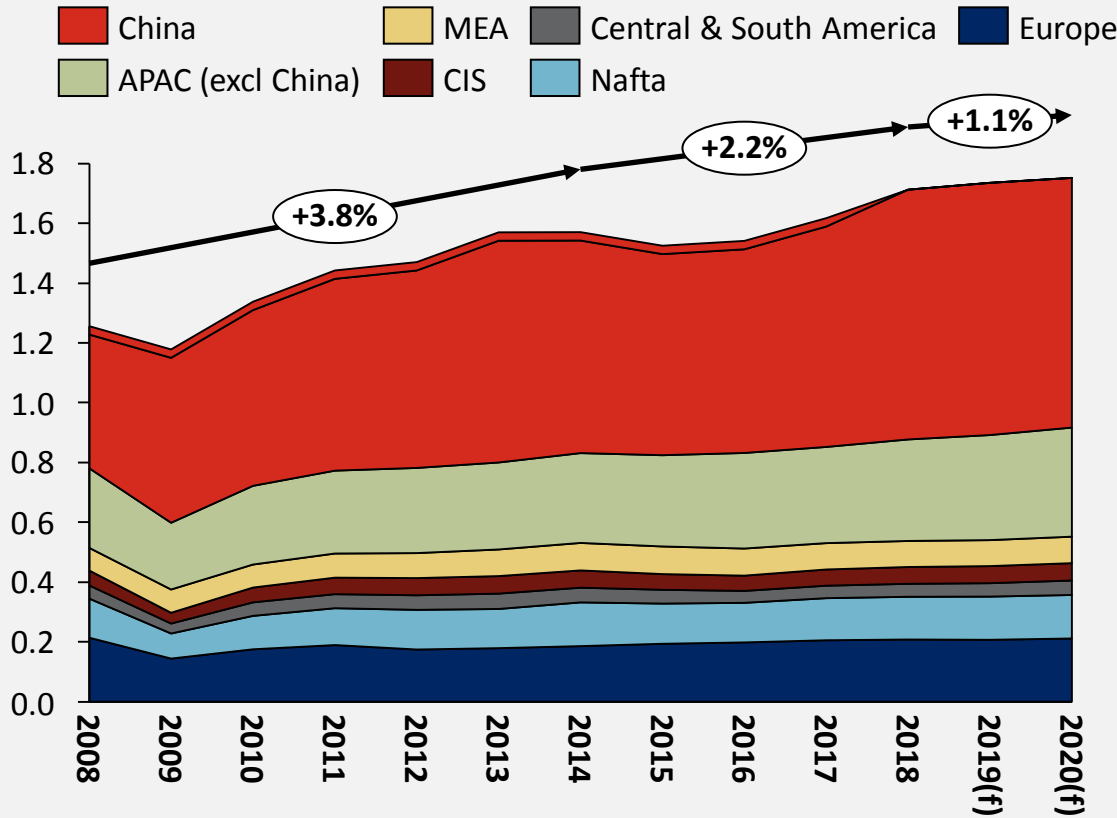
- ▶ Forecasts received **downwards revision during July 2019**
- ▶ Forecast **excluding potential disruptions**
 - Brexit
 - Global trade scenarios
 - Financial stability risks
- ▶ **Risk of technical recession** lingering



Steel demand outlook still positive

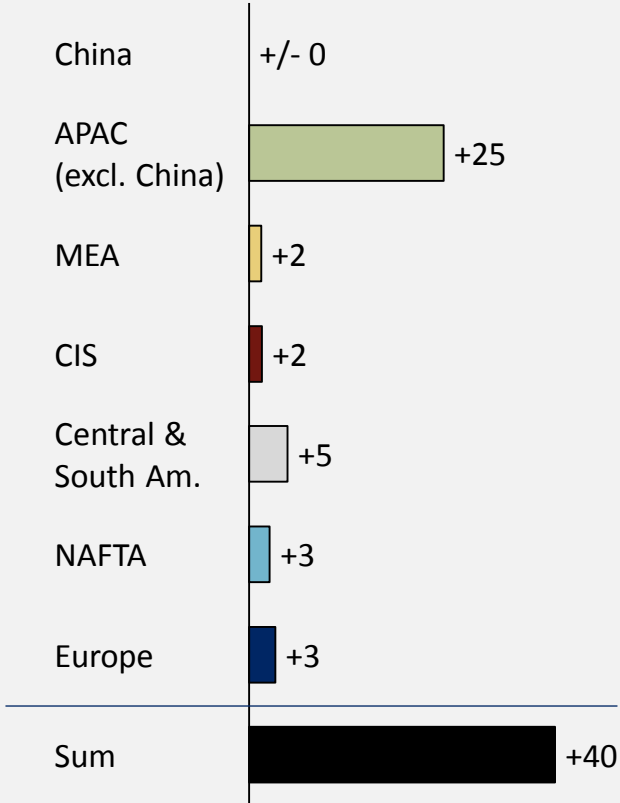
Apparent demand for finished steel products

Billion metric tons; CAGR %

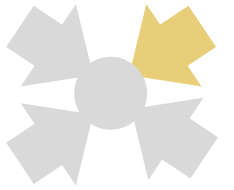


Demand development

2020F vs. 2018, mtons



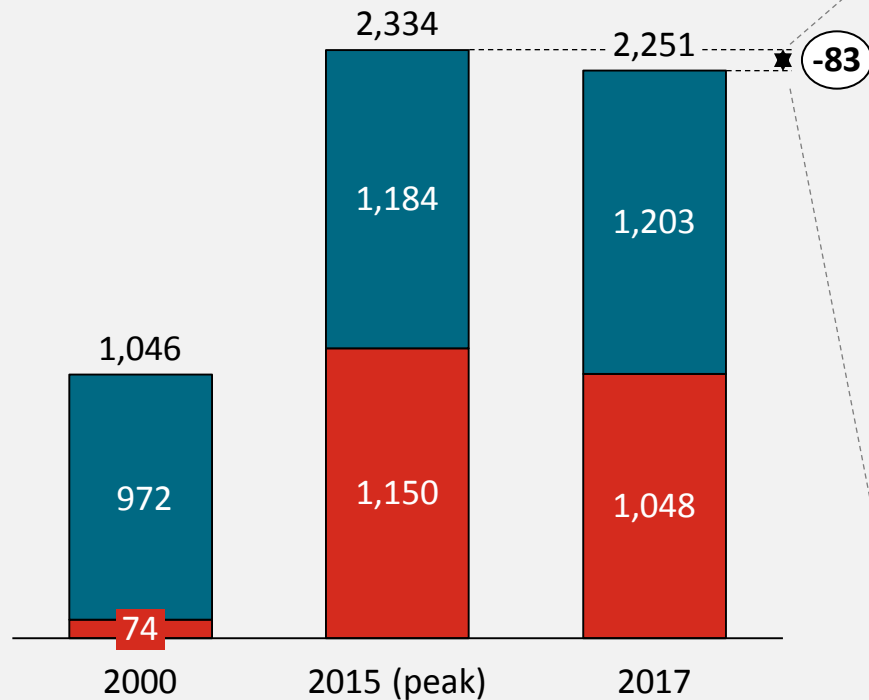
Source: Worldsteel Short Range Outlook April 2019



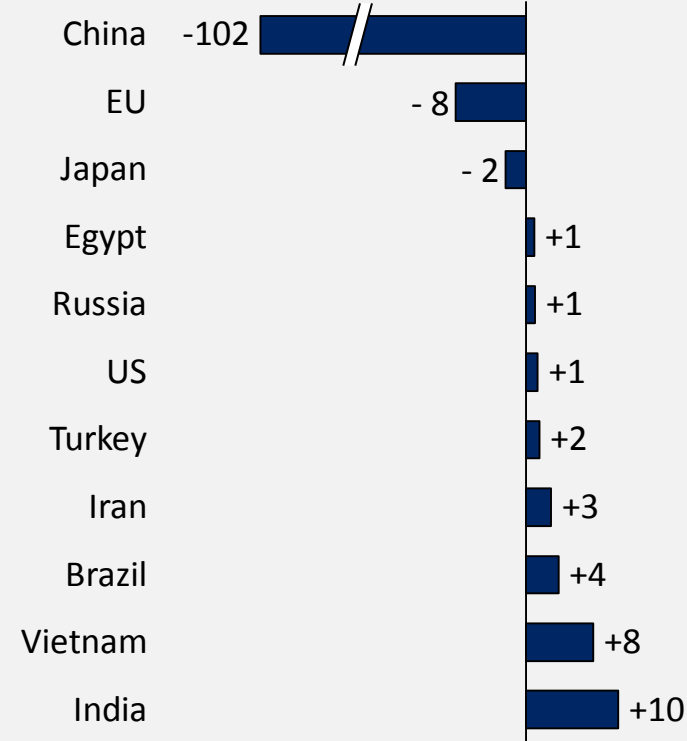
Capacity development driven by China

Steel making capacity, Mtons

China RoW

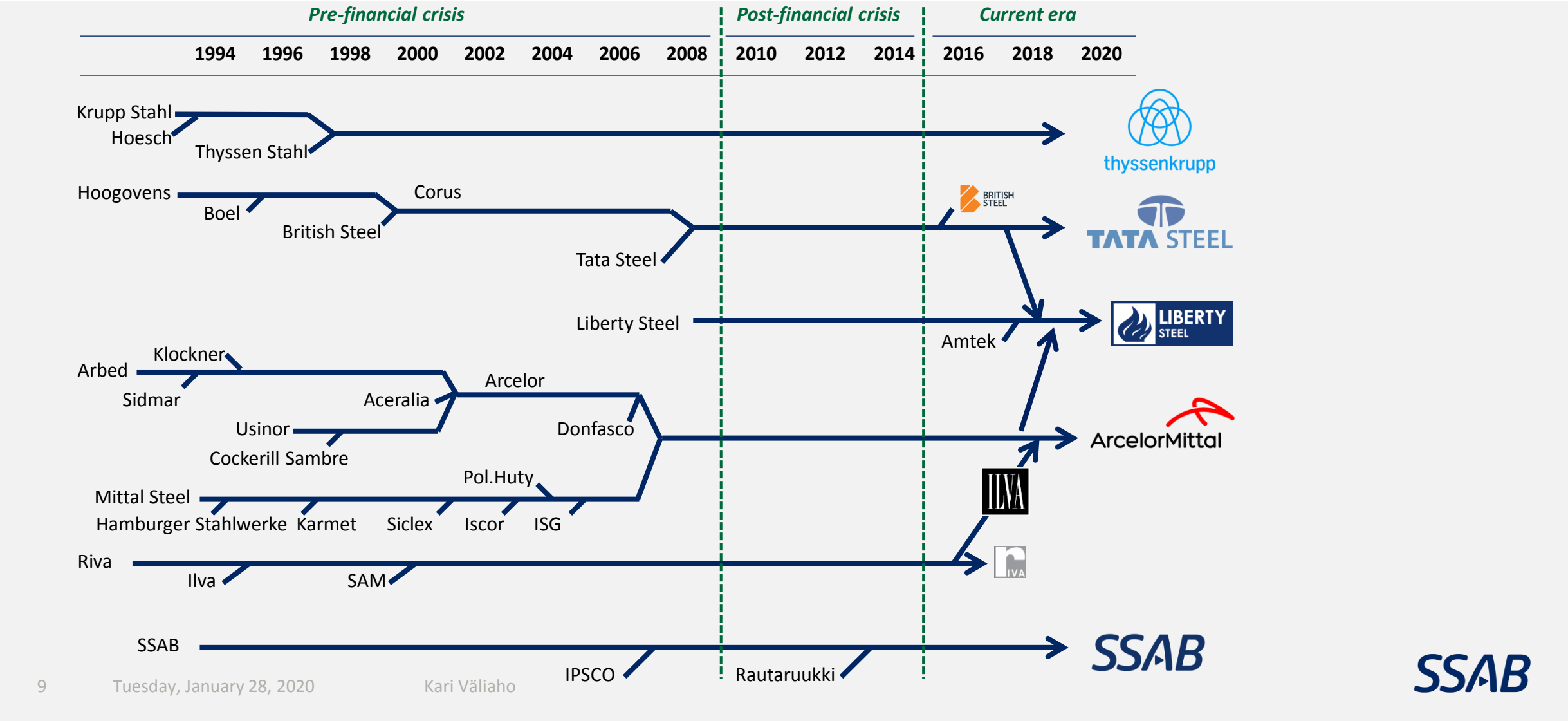
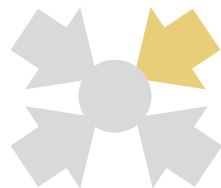


Notable net changes, Mtons (2015 – 2017)

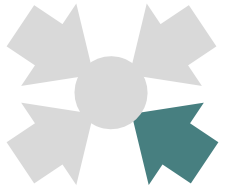


Source: OECD

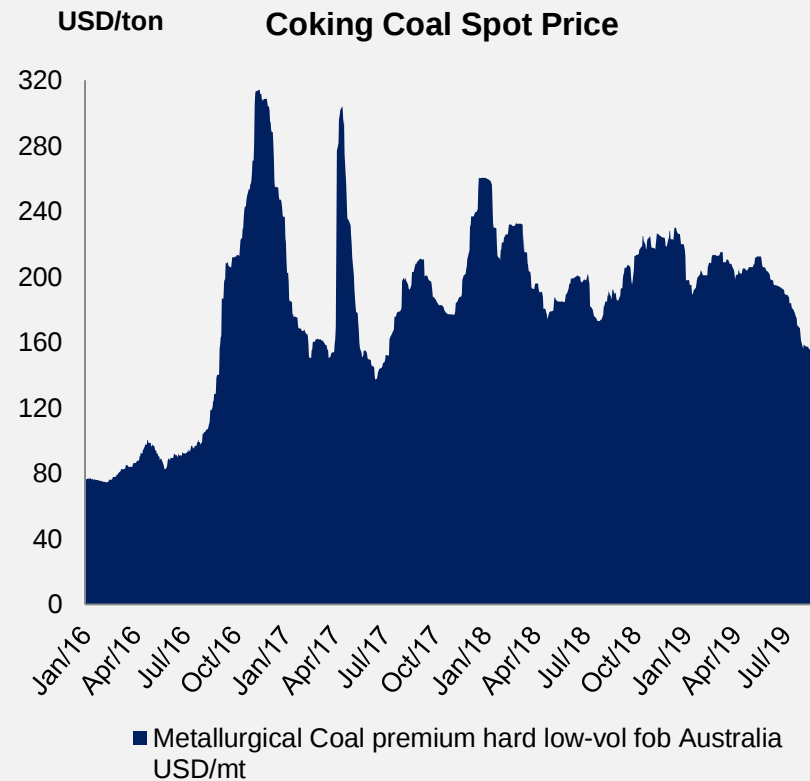
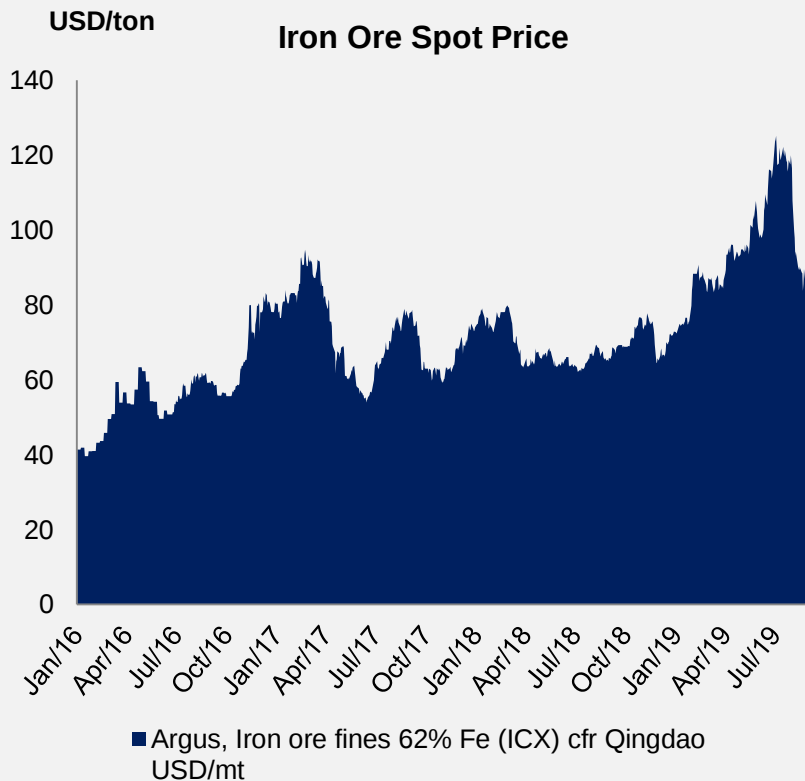
Second consolidation wave in European flat steel on the move



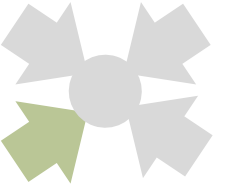
Iron ore and Coking coal prices have been volatile during recent years



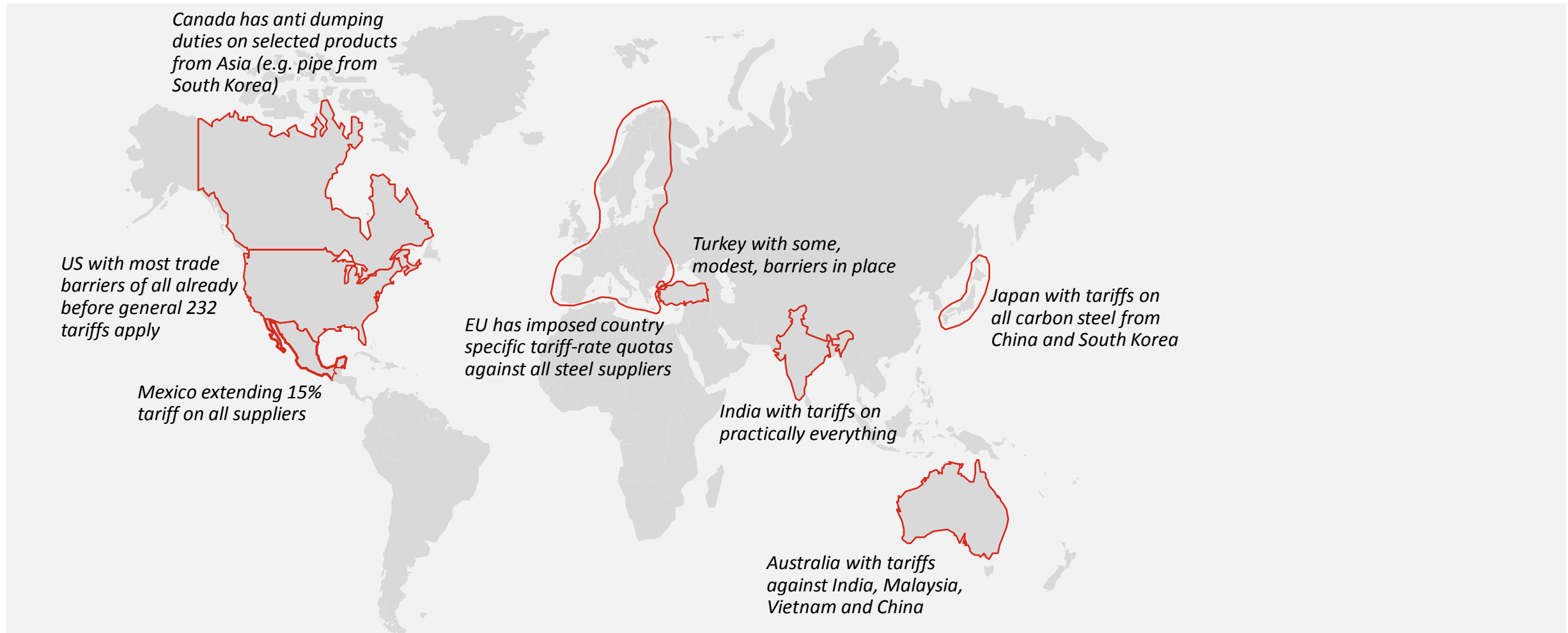
Price development of raw materials, 2016 - 2019



Source: Argus



Trade barriers are being put up

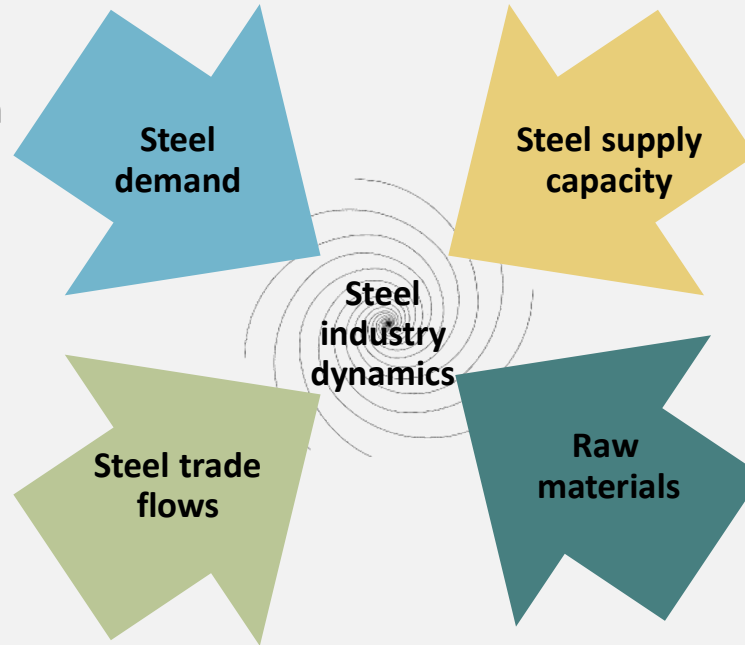


Source: Platts Global Market Outlook (Apr 2019)

Key takeaways

- ▶ Global economy **slowing down somewhat**
- ▶ **Modest steel demand growth expected** within the coming years

- ▶ Global **trade has fallen**
- ▶ **Trade barriers** continue to come up and might remain for the coming years



- ▶ **Overcapacity expected to remain stable**, even after Chinese capacity cuts
- ▶ **Gradual shift towards EAF steelmaking** expected in the long term

- ▶ Iron ore and coking coal **prices fluctuating** heavily
- ▶ Pellet **premium has skyrocketed**
- ▶ Global scrap availability should **be sufficient** if we **move towards circular system**



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SSAB Steel pile day 2020

8:30 - 9:30 ILMOITTAUTUMINEN JA AAMUKAHVI

Tervetuloa, Kari Väliaho, SSAB

Tuoteutiset, Anssi Hyvärinen, SSAB

RDT – RD®-paalu uudella kierrejatkoksella, Jari Mara, SSAB

VT4 Oulujoen sillat - Suuriläpimittaiset teräsputkipaalut & kalliokärkien projektikohtainen mitoitus, Sami Rantala, Kreate Oy & Anssi Hyvärinen, SSAB

Siirrettävät rautatiesillat ja teräsputkipaalut, Seppo Hakala, Sweco Arcus Oy

Rakennusalan visio vuodelle 2030, Olli Seppänen, Aalto Yliopisto

Tukiseinien automaattinen monitorointi, Sami Ylönen, Finmeas Oy

11:30 - 13:00 LOUNAS

Ankkuroidut vetopaalut – Suunnittelu ja toteutus, Seppo Rämö, Pohjatekniikka Oy & Patrik Thesleff, Skanska Oy

Siltapaalujen suolakorroosio –tutkimus, Veli-Matti Uotinen, Väylä

Teräspaalujen nurjahdusmitoitus, Antti Perälä, SSAB

Teräspaaluja kantaverkon pylväasperustuksissa, Matti Hakulinen

14:30 - 15:10 KAHVITAUKO

Construction of the new container terminal in Port of Gävle, Antonio Daban & Moises Louredo, Rover Grupo Sweden

Gdansk Dworzec Drzewny combi-seinä, Hannu Jokiniemi, SSAB

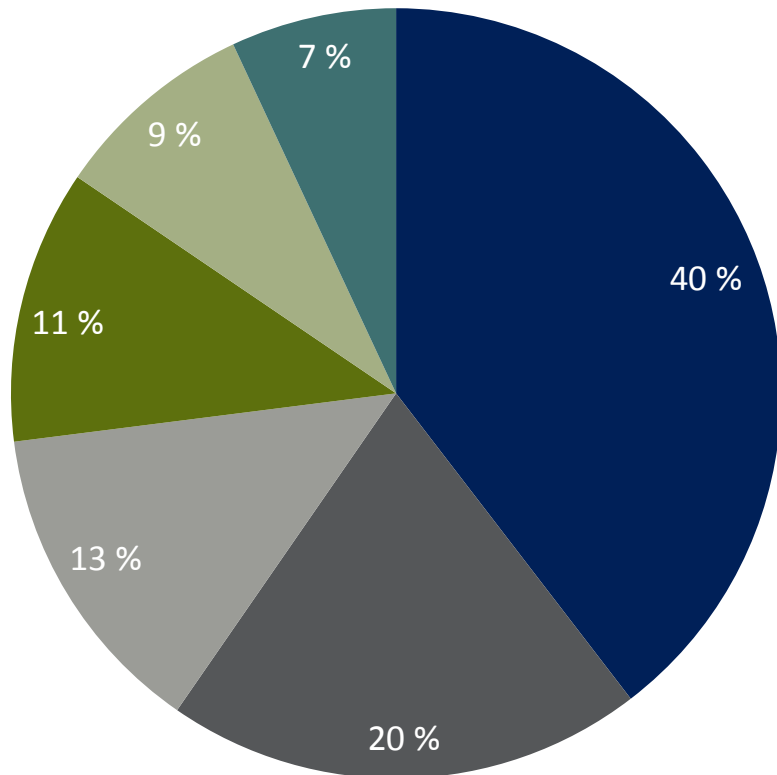
Hangon ratapihan porapaaluseinä ja ratasilta, Risto Lindroos, Ralf Ajalin Oy

Loppupuheenvuoro, Hannu Jokiniemi, SSAB

17:00 BUFFET

19:00 TILAISUUS PÄÄTTY

SSAB Steel pile day participants 23.1.2020



■ Contractors / Urakoitsijat

■ Geotechnical engineers / Geosuunnittelijat ja pohjatutkijat

■ Machine and material manufactures & importers / Laite- ja materiaalivalmistajat & maahantuojat

■ Authorities, research and education / Viranomaiset, tutkimus ja koulutus

■ Structure and bridge engineers / Rakenne- ja siltasuunnittelijat

■ Others / Muut



SSAB is a global steel company
with a leading position in
high-strength steels and
related services.



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