

**DIRECTORATE FOR SCIENCE, TECHNOLOGY AND INDUSTRY
STEEL COMMITTEE**

INDIA

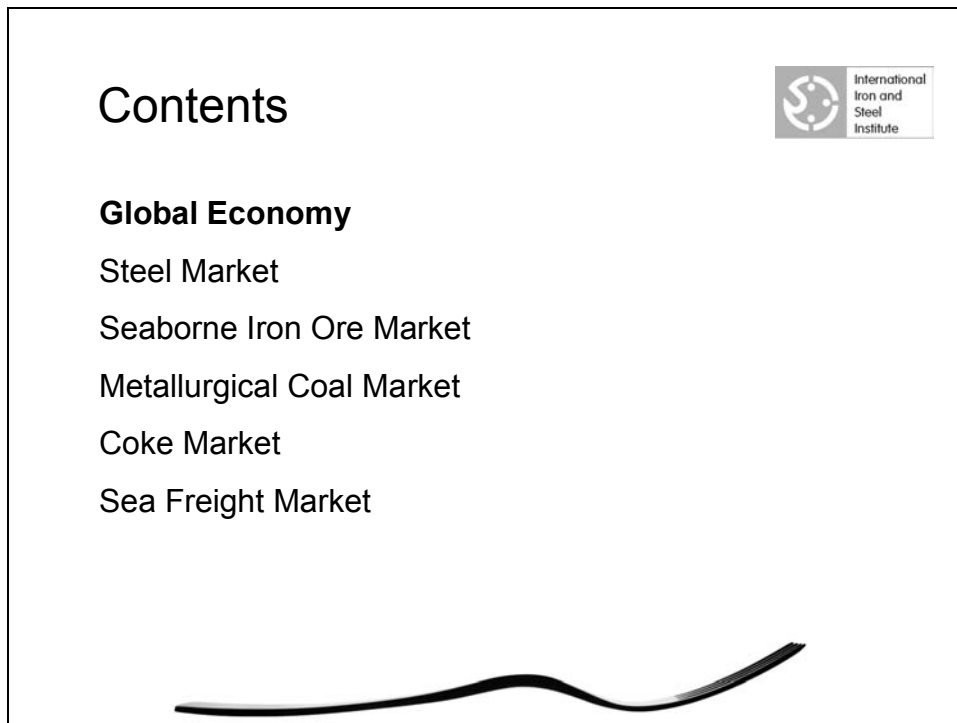
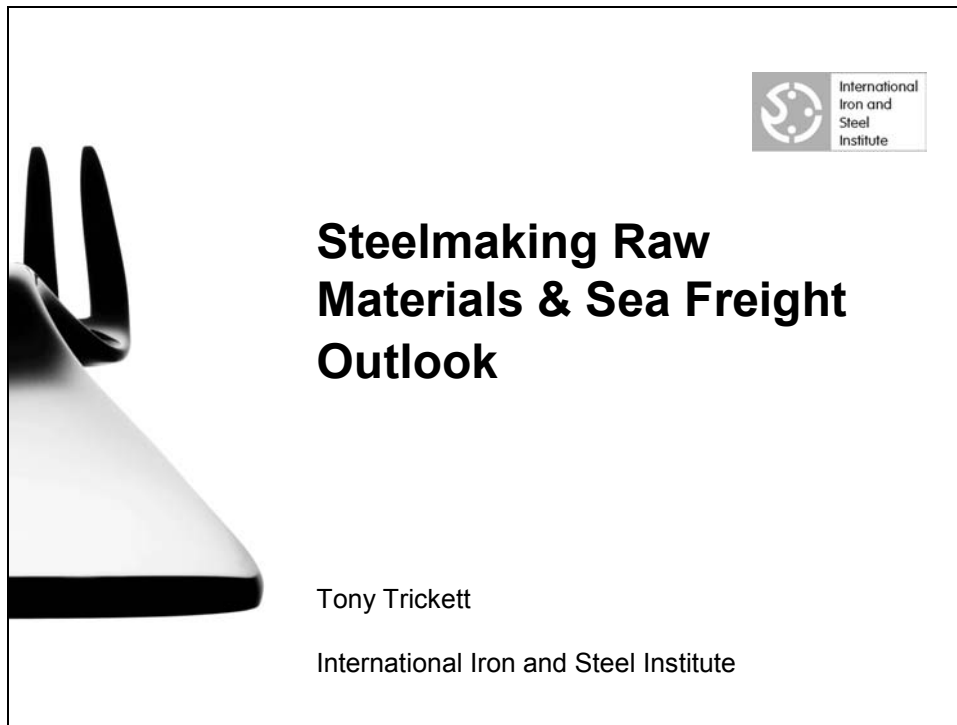
STEELMAKING RAW MATERIALS AND SEA FREIGHT OUTLOOK

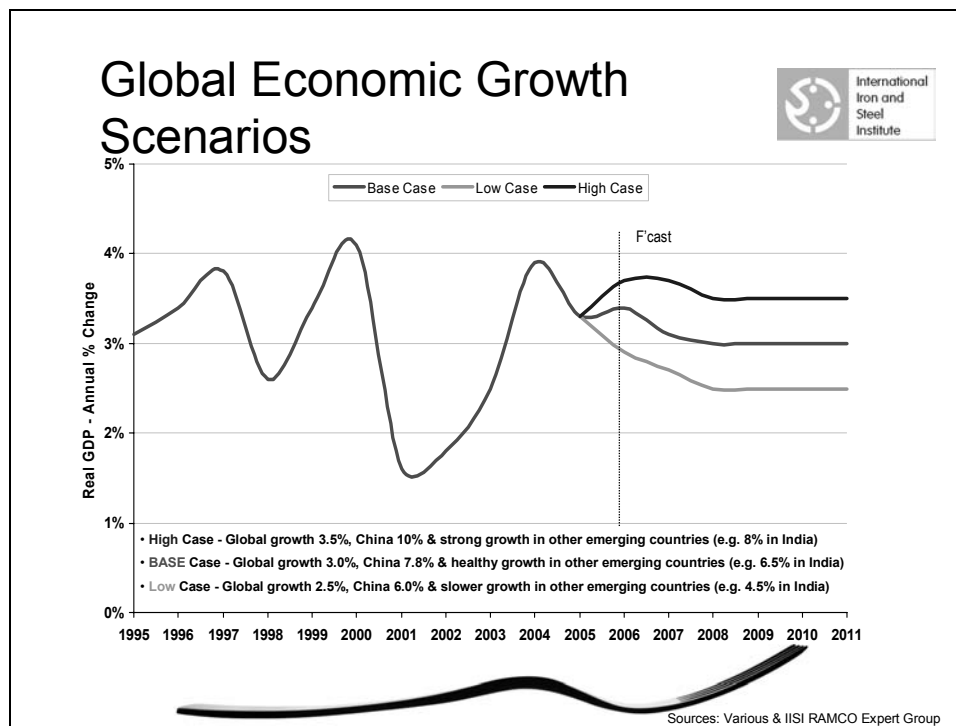
Joint India/OECD/IISI Workshop, New Delhi (India), 16-17 May 2006.

Presentation by Mr. Tony Tricken, General Manager, International Iron and Steel Institute.

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Global Economy

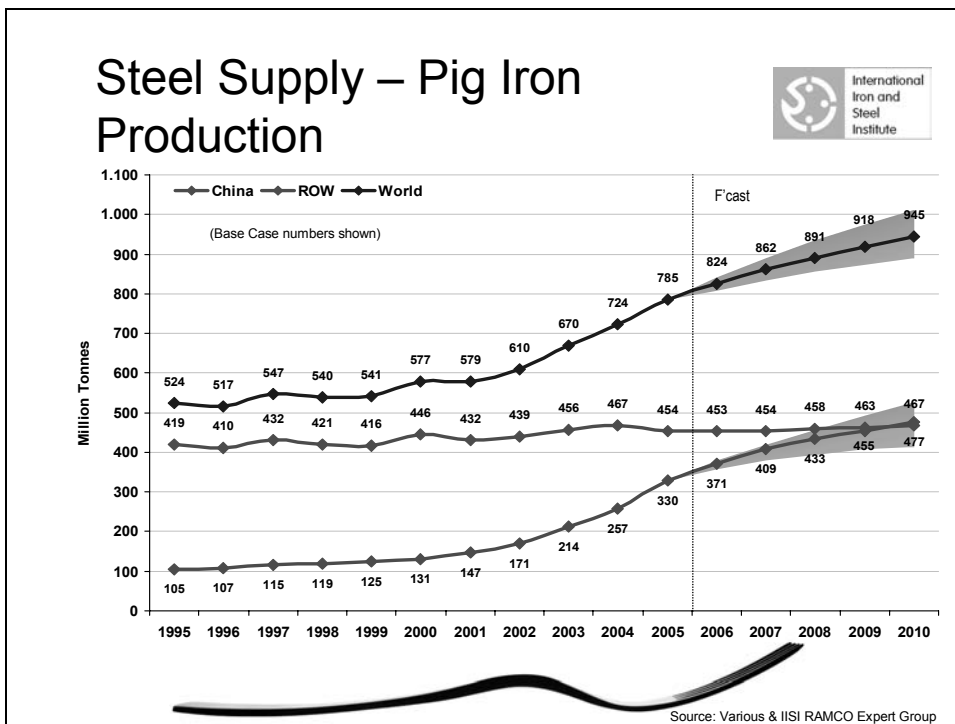
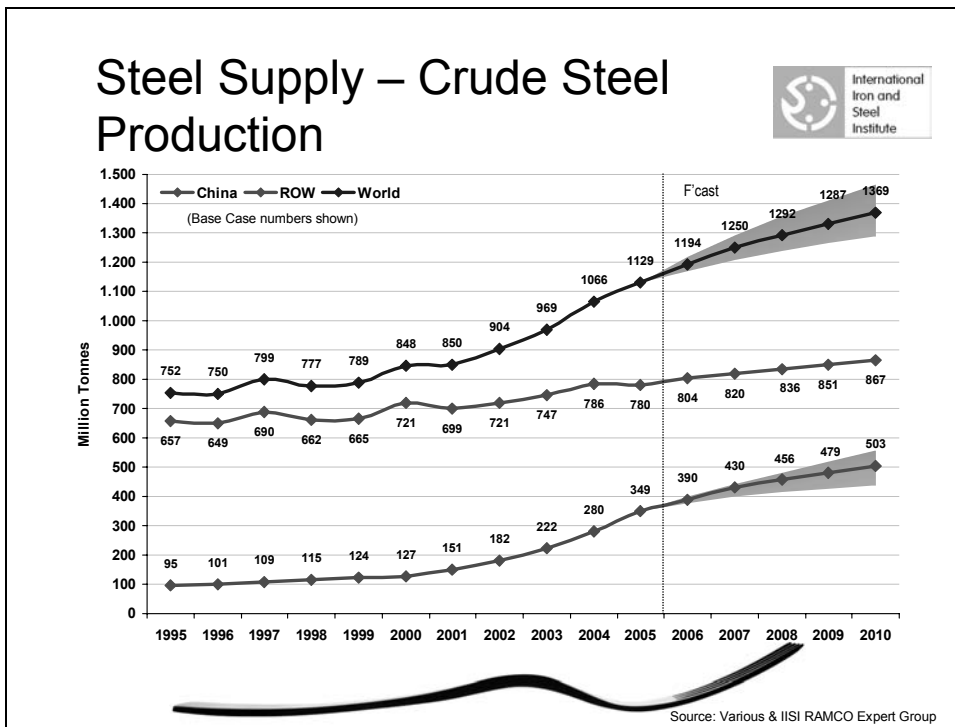
Steel Market

Seaborne Iron Ore Market

Metallurgical Coal Market

Coke Market

Sea Freight Market

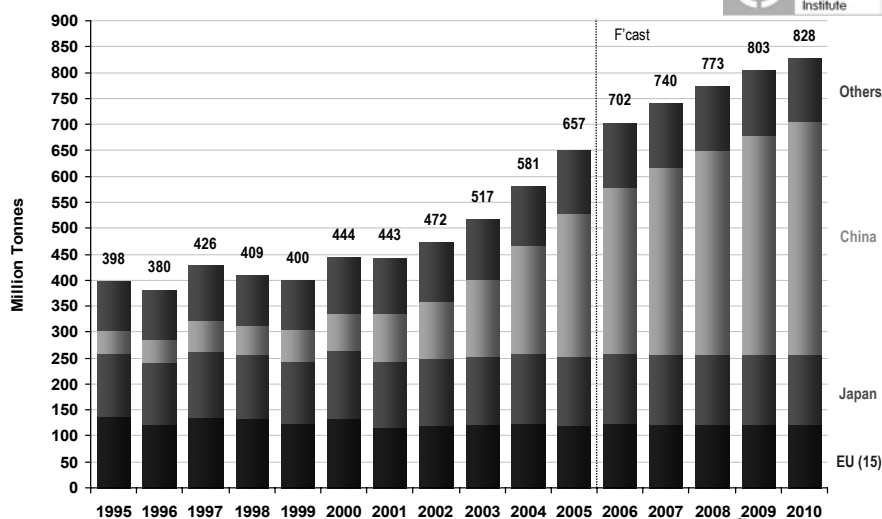


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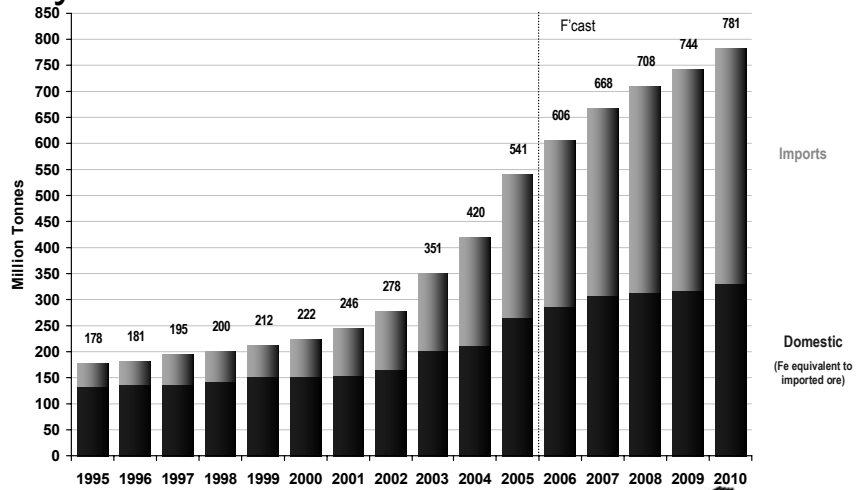
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Seaborne Iron Ore Demand



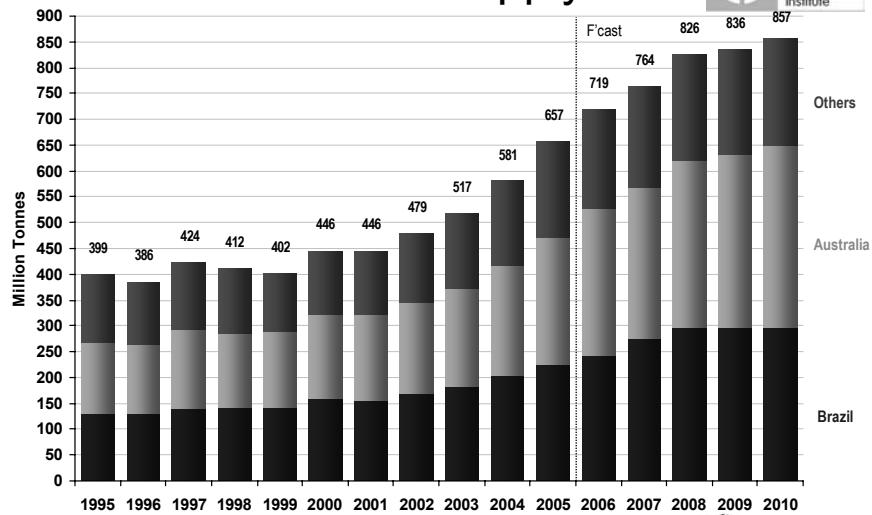
Source: Various & IISI RAMCO Expert Group

China's Iron Ore Consumption by Source

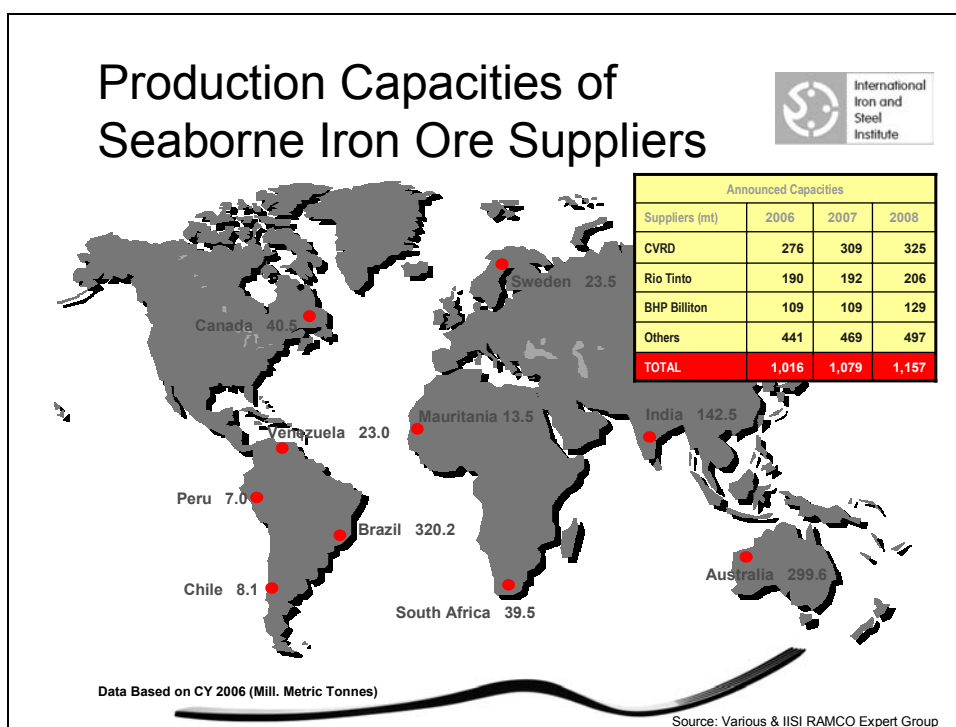
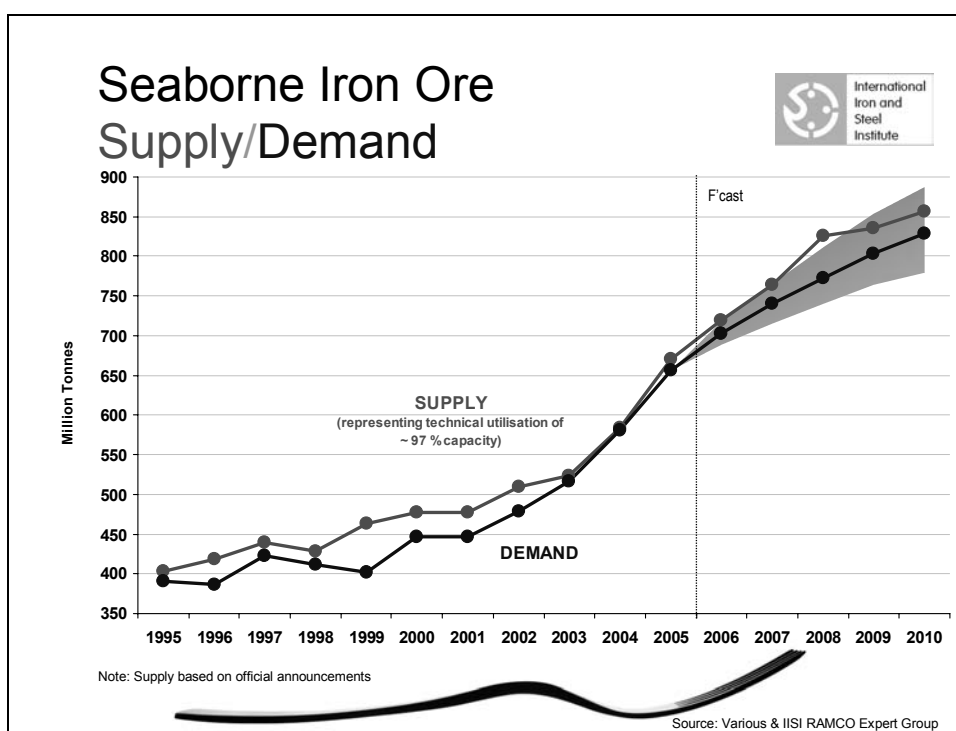


Source: RAMCO Expert Group

Seaborne Iron Ore Supply



Source: Various & IISI RAMCO Expert Group



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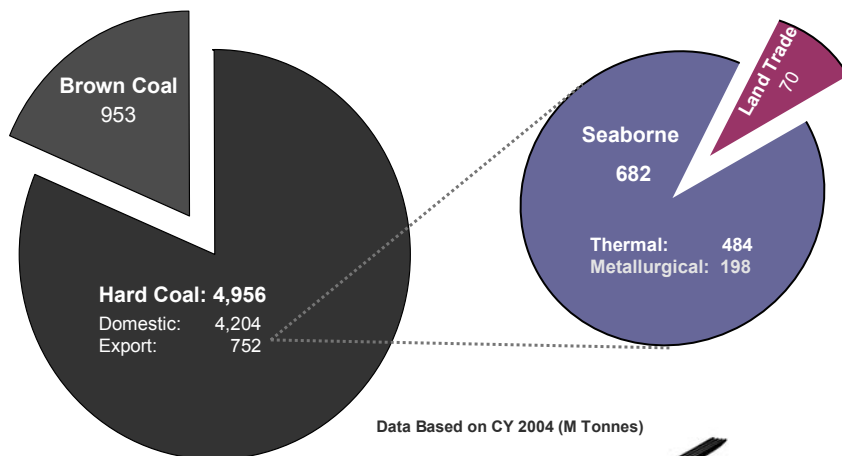
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Coal Market Overview



Total Production 5,909 mt

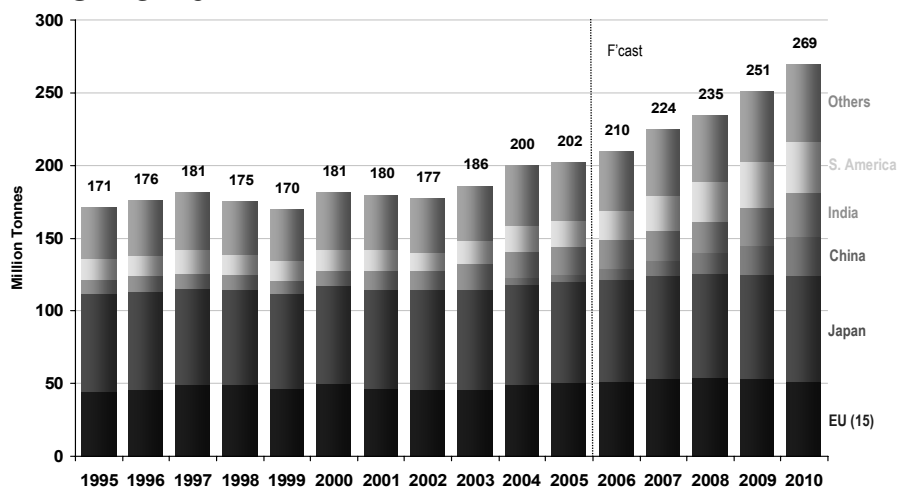
Export 752 mt



Data Based on CY 2004 (M Tonnes)

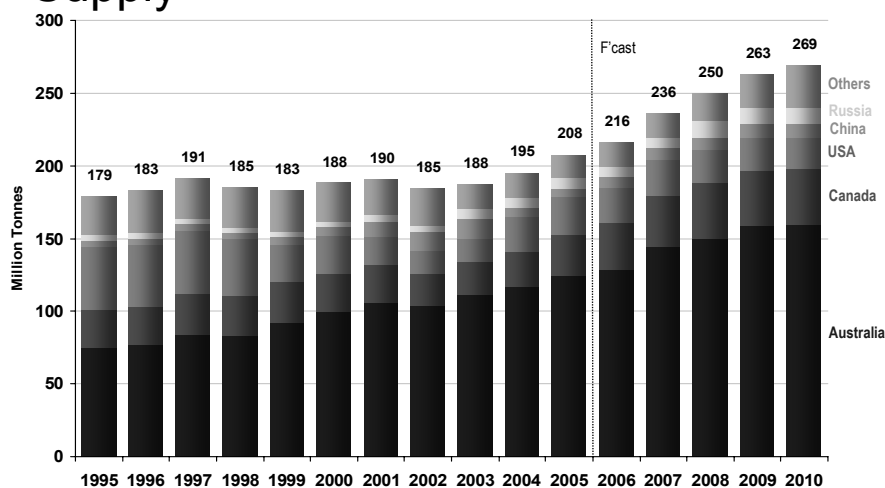
Source: Barlow Jonkers, World Coal Institute

Seaborne Metallurgical Coal Demand

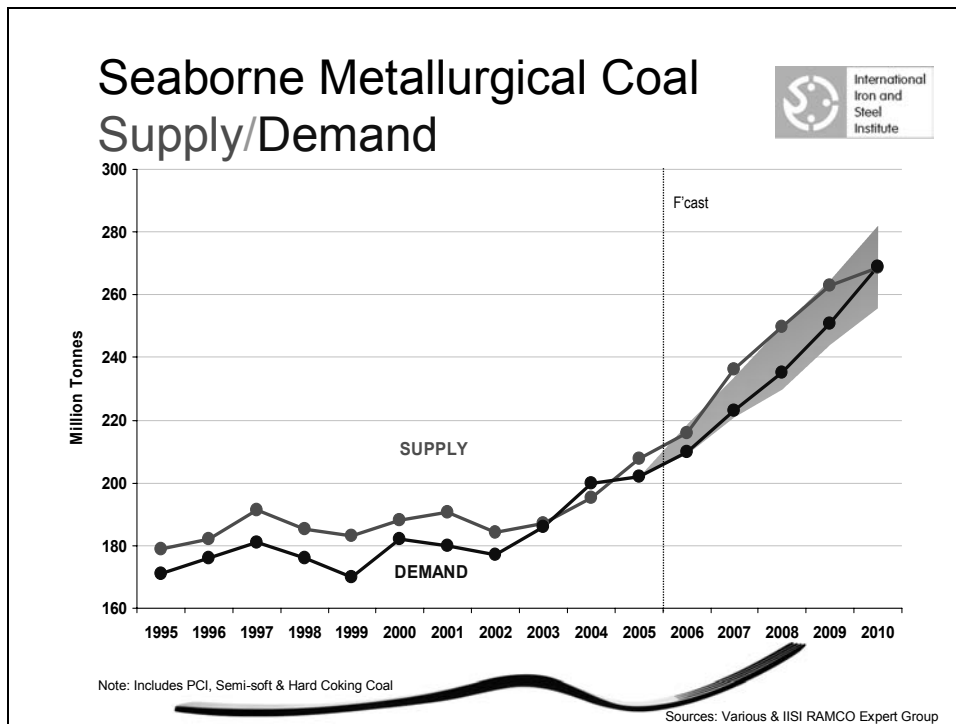


Sources: Various & IISI RAMCO Expert Group

Seaborne Metallurgical Coal Supply

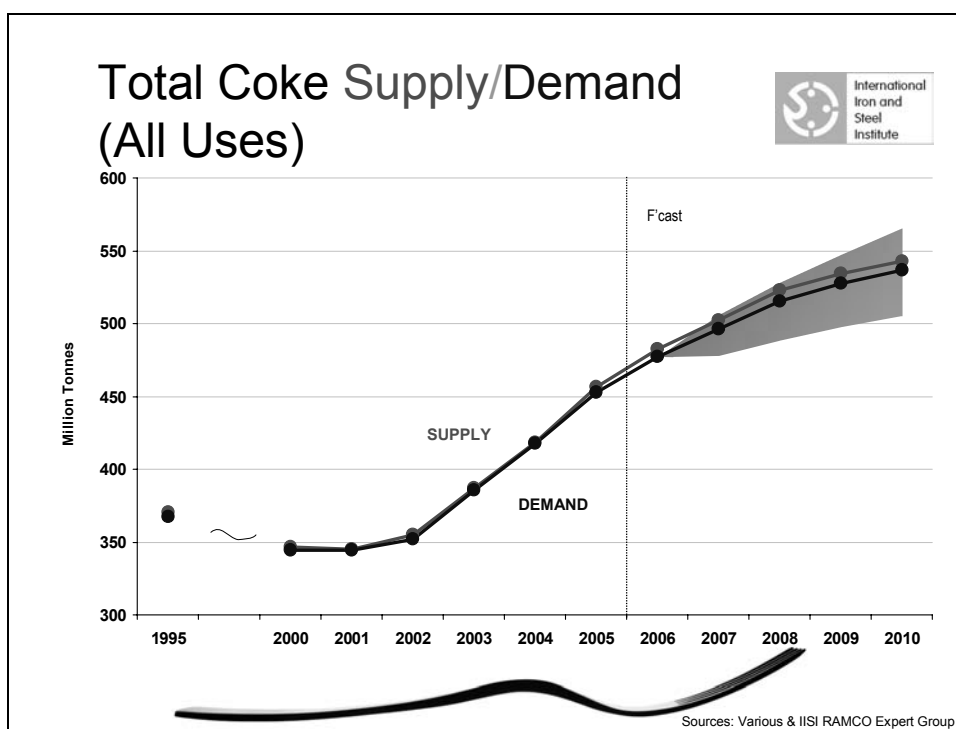
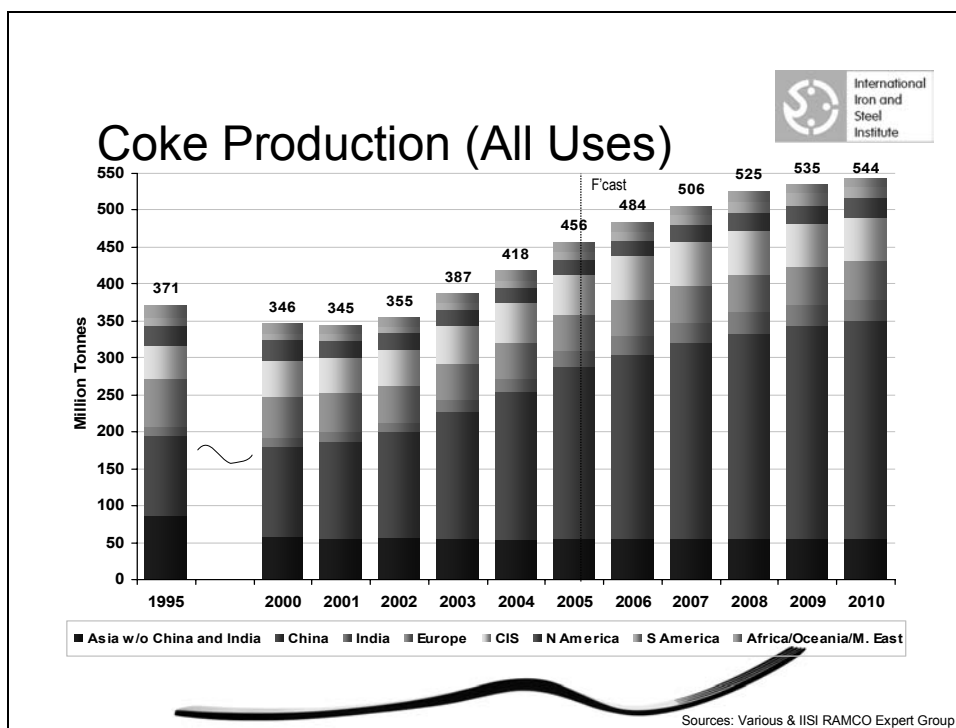


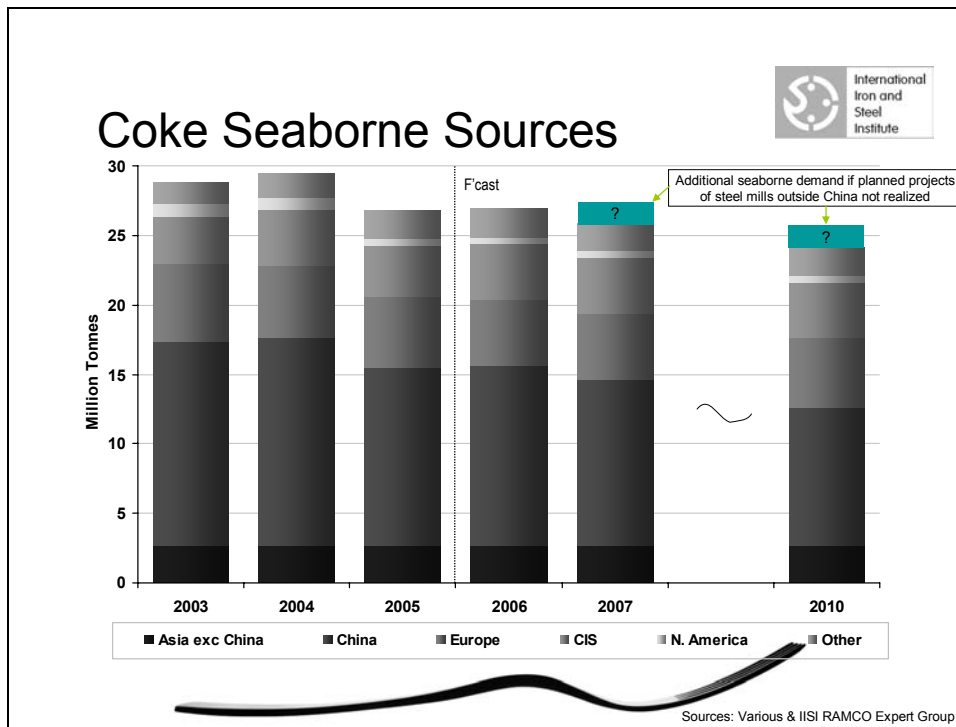
Sources: Various & IISI RAMCO Expert Group



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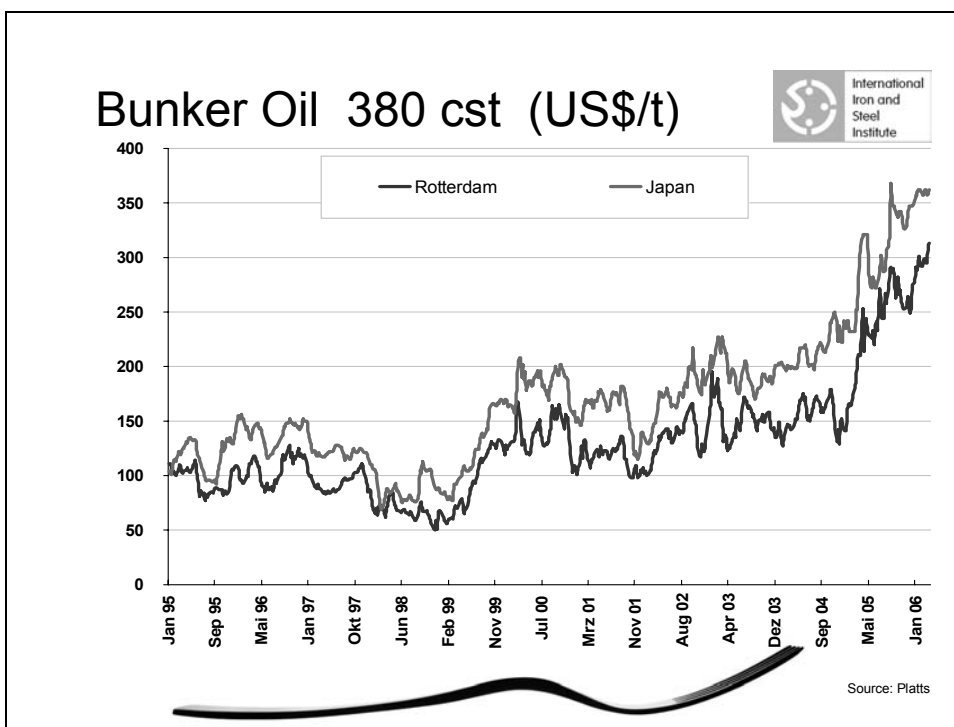
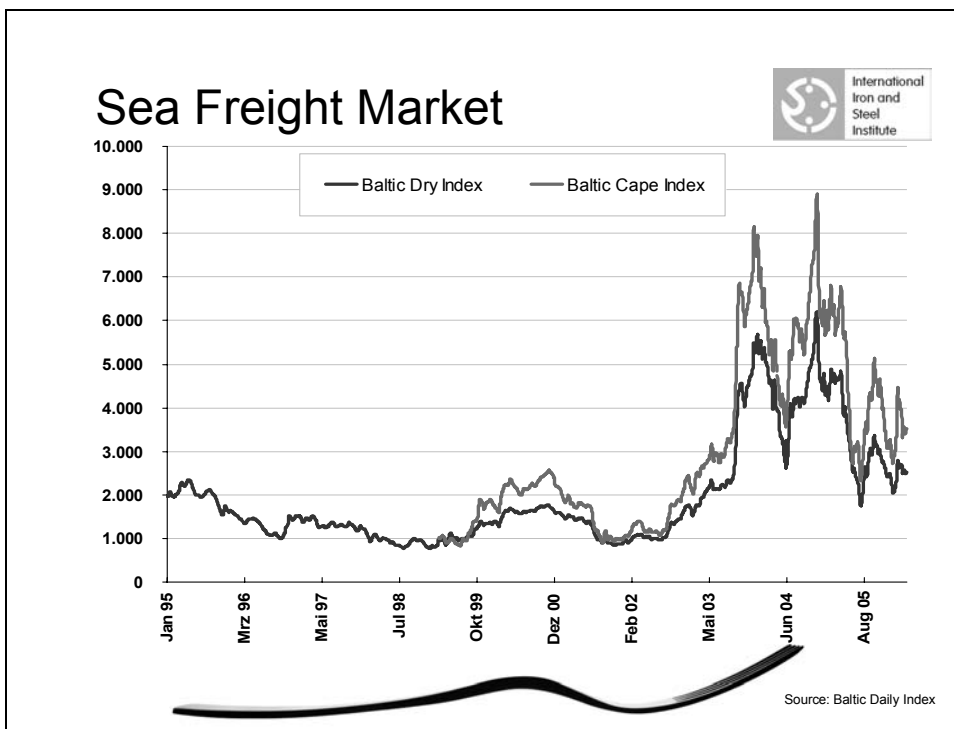
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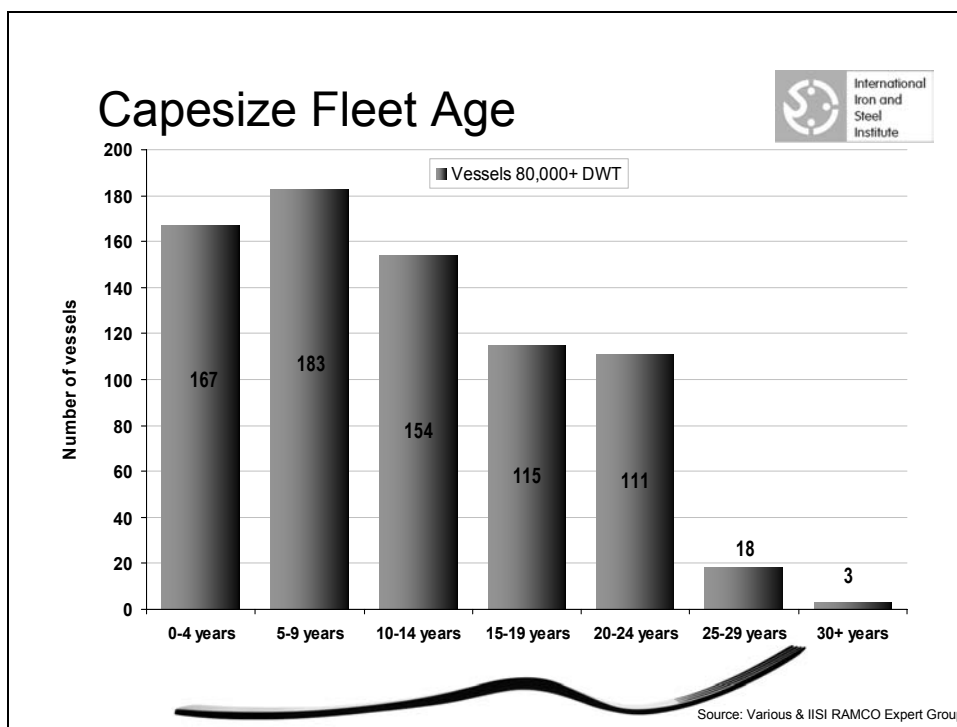
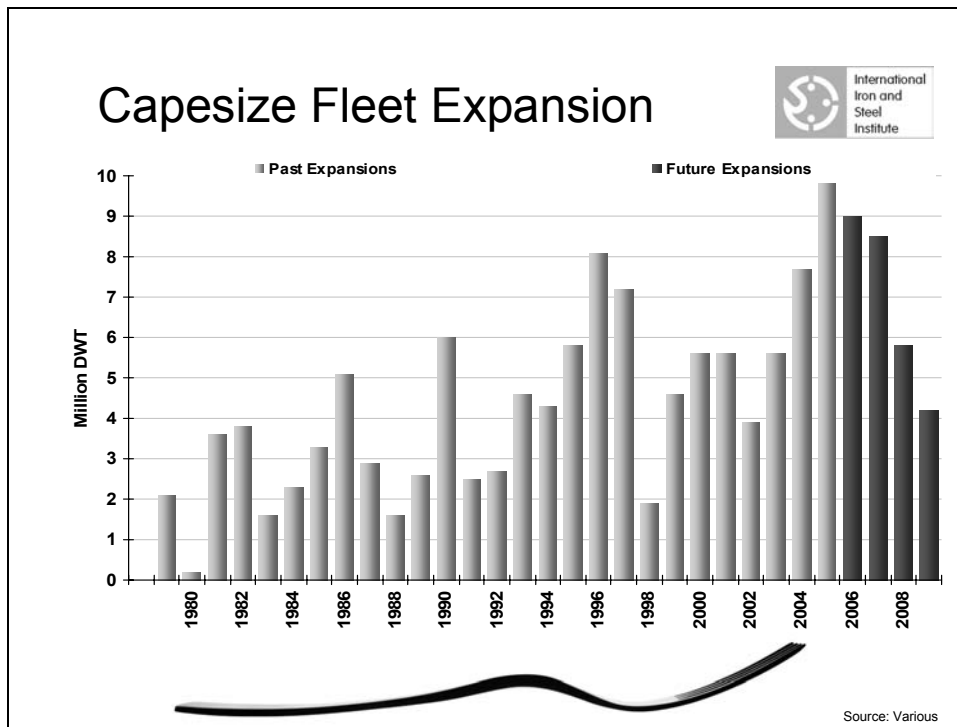


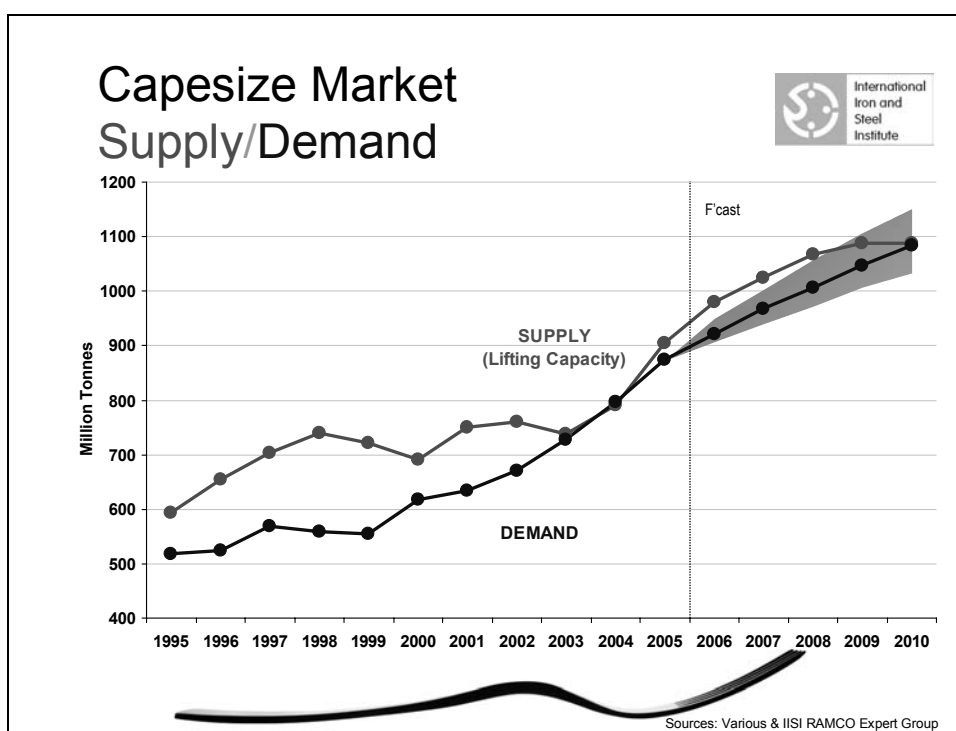


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International Iron and Steel Institute

Steelmaking Raw Materials & Sea Freight Outlook

IISI RAMCO Expert Group

- Shiromi Brell
- Aurelio Garcia Fernandez
- Akira Satoh
- Peter Sixt
- Mark Swan
- Tony Trickett
- Marko Uhlig

- BlueScope Steel
- Arcelor
- Nippon Steel
- Voestalpine
- Corus
- IISI
- ThyssenKrupp Steel AG

April 2006

Information Sources



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