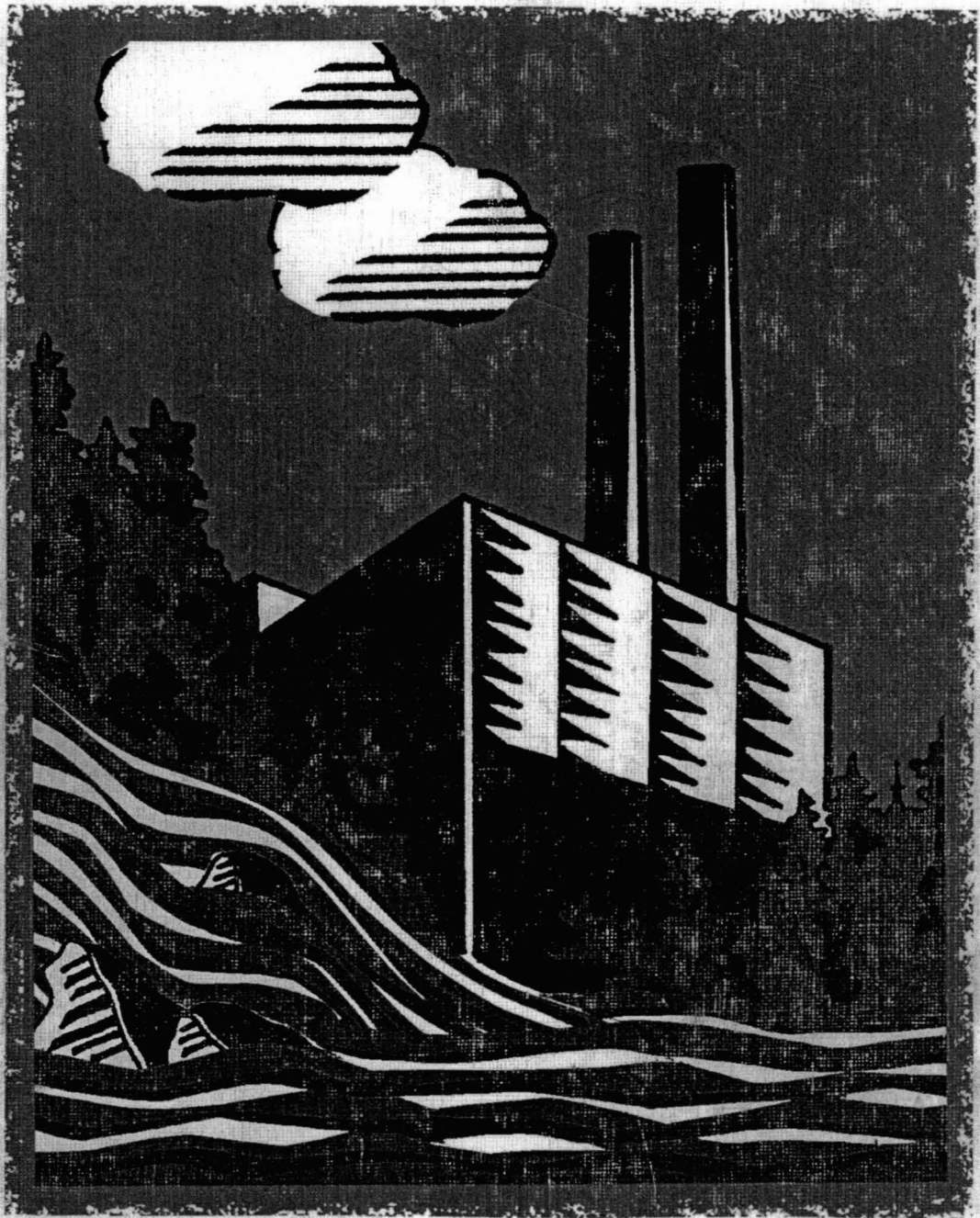


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The Norwegian Ferroalloy Research
Organization (FFF)



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 SINTEF - The Foundation for Scientific and Industrial Research at the Norwegian Institute of Technology

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FUTURE LOCALIZATION AND STRUCTURE OF THE FERROALLOY INDUSTRY

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ABSTRACT

The structural changes that occurred in world ferroalloy production, consumption and trade patterns between 1980 and 1992 are examined. An outlook is provided for the year 2000, taking developments in three key areas -- 1) world steel production, 2) energy and the environment and 3) trade -- into account. The analysis concludes that increased demand for ferroalloys is likely to be met largely through higher production from Latin America, Africa (including the Middle East) and Asia (including Oceania). Production in Europe and North America, on the other hand, is seen as likely to decline further.

INTRODUCTION

We at the OECD are delighted to have been invited to participate in this conference on ferroalloys. It has presented an interesting challenge to us, as we are very much industry outsiders. We have no activity that deals specifically with ferroalloys at the OECD, nor do we have significant expertise in the area. Before proceeding, I would also like to point that the presentation that follows is one that was prepared by the Secretariat and does not represent the views of the Organisation.

The topic that we were asked to examine -- future localization and structure of the ferroalloy industry -- was an ambitious one for us. After all, you in the industry will be the ones that determine where investments are made in new facilities and where plants will be closed. You are the ones that will develop marketing strategies that determine production and trade flows. If we had access to each company's intentions and a great deal of time, we could probably piece together an interesting analysis. But we don't have this information, nor do we have the considerable time and resources that would be required to analyse it.

What I will therefore do today is first take a look at the current structure of the industry in terms of production, consumption and trade and comment on how it has changed over time. I will then examine how changes in three key areas: consuming markets, energy and the environment, and trade are likely to affect the future structure of the industry, again in terms of production, consumption and trade. The analysis will stop there since we do not have the depth of industry knowledge that would be required to explore issues such as how