สถาบันเหล็กและเหล็กกล้าแห่งประเทศไทย
IRON AND STEEL INSTITUTE OF THAILAND

THAILAND STEEL INDUSTRY REPORT

June 2025 – MPI

BY IRON & STEEL INTELLIGENCE UNIT

IRON AND STEEL INSTITUTE OF THAILAND

ศูนย์ข้อมูลเชิงลึกอุตสาหกรรมเหล็กไทย
IRON & STEEL INTELLIGENCE UNIT

Content

World Steel Industry

- World Crude Steel production.
- China Steel Price.
- Asia's steel price
- China Situation.

Thailand Steel Industry.

- Consumption
- Production
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สถาบันเหล็กและเหล็กกล้าแห่งประเทศไทย
IRON AND STEEL INSTITUTE OF THAILAND

Crude Steel Production MAY 2025

Last updated on 24 June 2025

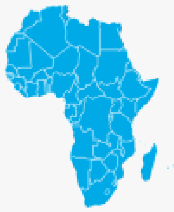
WORLD

May 2025	Jan-May 2025
-3.8%	-1.3%
158.8Mt	784.0Mt

- การผลิตเหล็กดิบของโลกเดือนพฤษภาคม 2025 อยู่ที่ 158.8 ล้านตัน หดตัว 3.8% y-o-y.
- โดยภูมิภาคมีการผลิตหดตัว ได้แก่ เอเชียโอเชียเนีย ยุโรป และ Russia & other CIS + Ukraine
- สะสม ม.ค.-พ.ค.. 2025 การผลิตเหล็กดิบของโลก ลดลง 1.3% y-o-y. มีปริมาณที่ 784 ล้านตัน

REGIONS

AFRICA



May 2025 +5.5% 1.9Mt | Jan-May 2025 +4.3% 9.7Mt

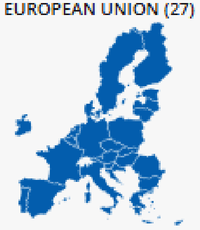
ASIA AND OCEANIA

May 2025 -4.7% 116.6Mt | Jan-May 2025 -1.0% 580.7Mt

RUSSIA & OTHER CIS (4) + UKRAINE

May 2025 -8.1% 7.0Mt | Jan-May 2025 -4.7% 34.8Mt

EUROPEAN UNION (27)



May 2025 -3.1% 11.4Mt | Jan-May 2025 -2.5% 54.9Mt

OTHER EUROPE

May 2025 -8.8% 3.6Mt | Jan-May 2025 -6.7% 17.5Mt

MIDDLE EAST

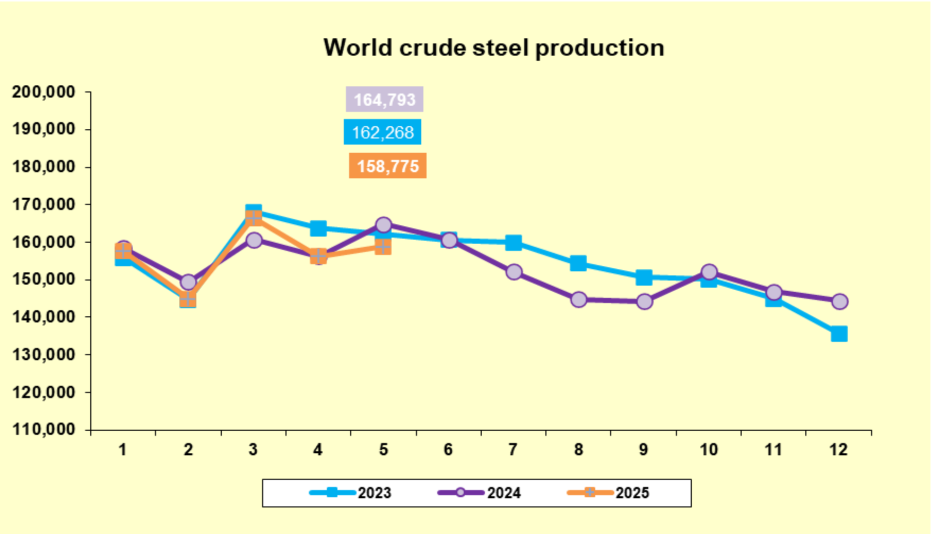
May 2025 +5.3% 5.4Mt | Jan-May 2025 -3.4% 23.8Mt

NORTH AMERICA

May 2025 +3.4% 9.5Mt | Jan-May 2025 +0.9% 45.4Mt

SOUTH AMERICA

May 2025 +4.2% 3.4Mt | Jan-May 2025 -0.7% 17.0Mt



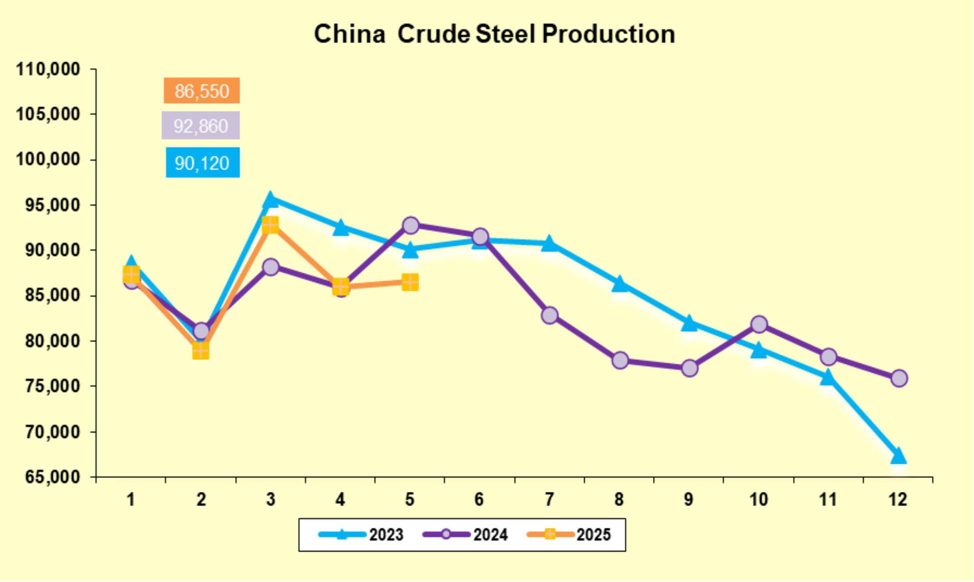
	May 2025 (Mt)	% change May 25/24	Jan-May 2025 (Mt)	% change Jan-May 25/24
Africa	1.9	5.5	9.7	4.3
Asia and Oceania	116.6	-4.7	580.7	-1.0
EU (27)	11.4	-3.1	54.9	-2.5
Europe, Other	3.6	-8.8	17.5	-6.7
Middle East	5.4	5.3	23.8	-3.4
North America	9.5	3.4	45.4	0.9
Russia & other CIS + Ukraine	7.0	-8.1	34.8	-4.7
South America	3.4	4.2	17.0	-0.7
Total 70 countries	158.8	-3.8	784.0	-1.3

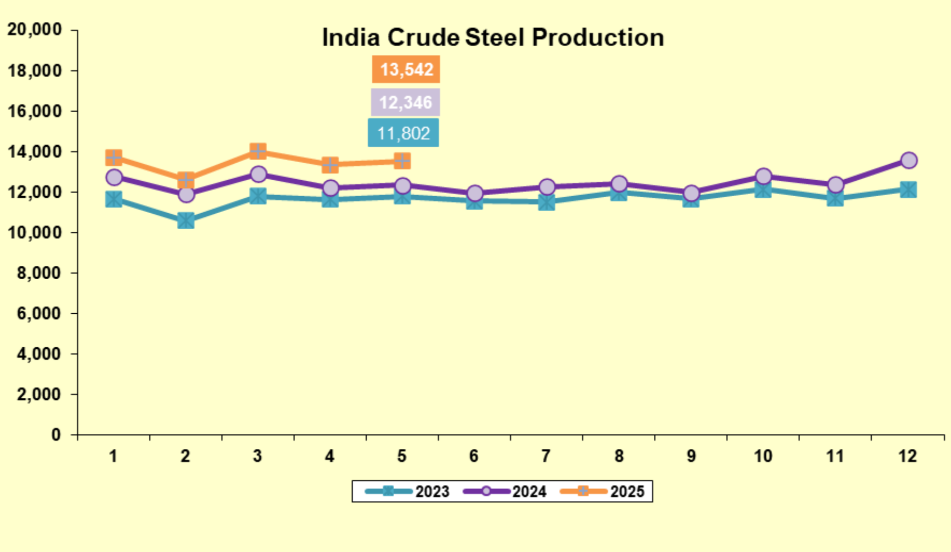
Source : WorldSteel Association

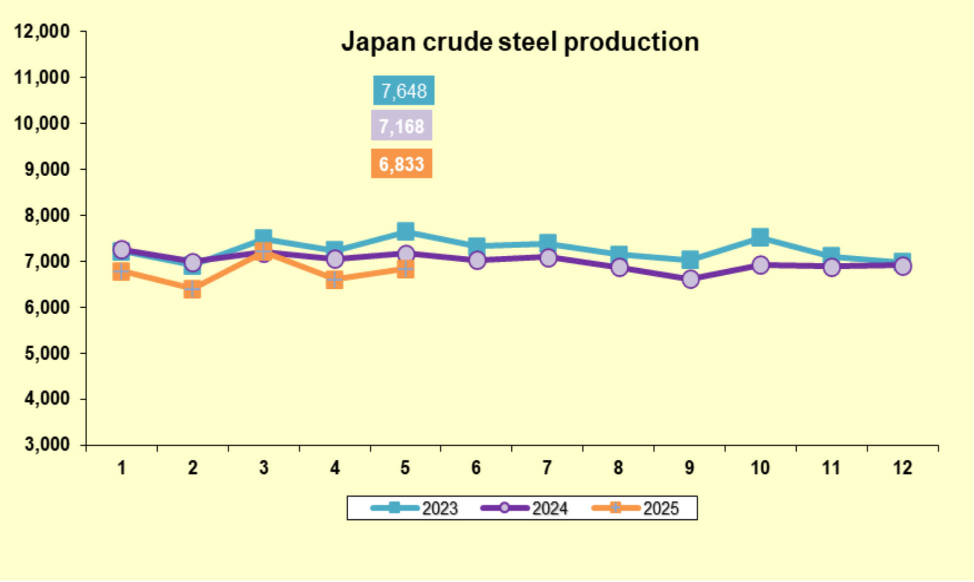
การผลิตเหล็กดิบของประเทศสำคัญ

	May 2025 (Mt)		% change May 25/24	Jan-May 2025 (Mt)	% change Jan-May 25/24
China	86.6		-6.9	431.6	-1.7
India	13.5		9.7	67.2	8.2
Japan	6.8		-4.7	33.8	-5.2
United States	7.0		1.7	33.4	0.3
Russia	5.8	e	-6.9	29.2	-5.2
South Korea	5.1		-1.7	25.6	-3.0
Türkiye	3.1		-2.8	15.4	-1.4
Germany	3.0		-6.4	14.4	-10.8
Iran	3.4	e	4.5	14.0	-5.3
Brazil	2.7		5.0	13.7	0.7

e – estimated. Ranking of top 10 producing countries is based on year-to-date aggregate



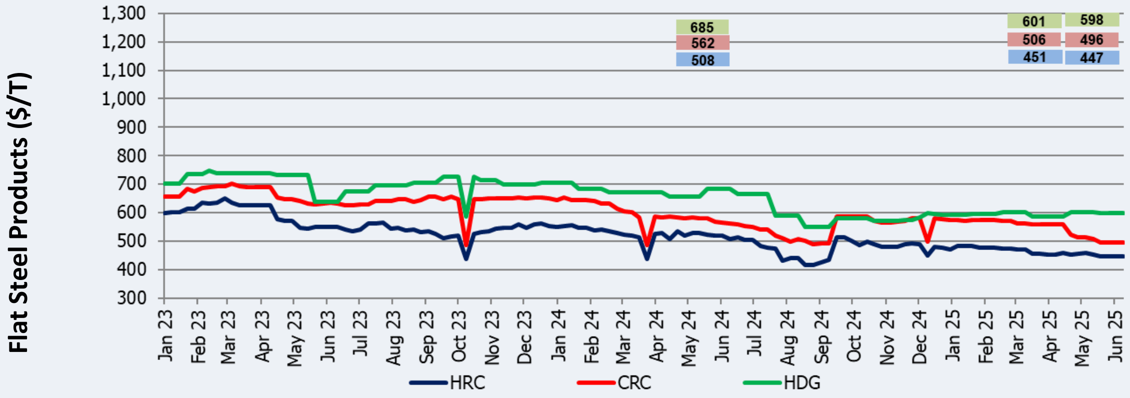


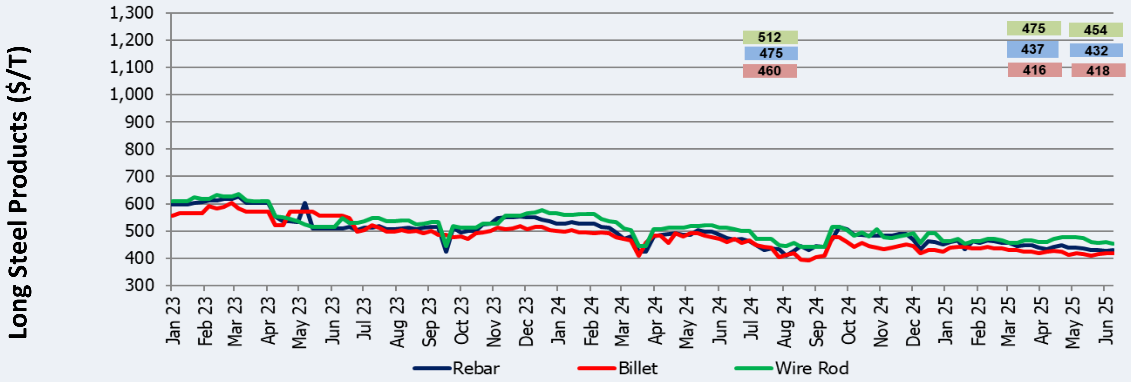


Source : WorldSteel Association

China Domestic Price

ปลายเดือนมิถุนายน 2025





	Latest ($/T)	M-o-M	Y-o-Y
HRC*	447	-0.9%	-12.0%
CRC*	496	-1.9%	-11.7%
HDG*	598	-0.5%	-12.7%

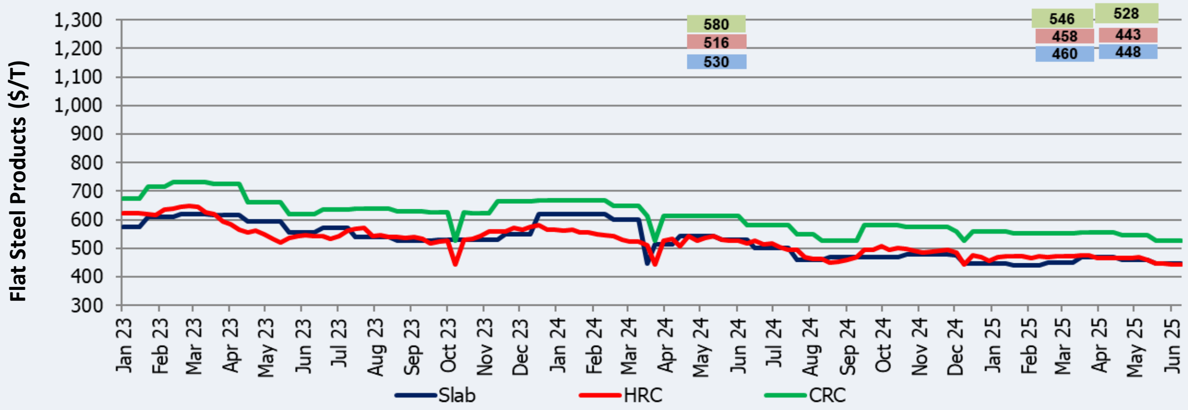
	Latest ($/T)	M-o-M	Y-o-Y
Rebar**	432	-1.3%	-9.2%
Billet***	418	0.3%	-9.2%
Wire rod*	454	-4.4%	-11.7%

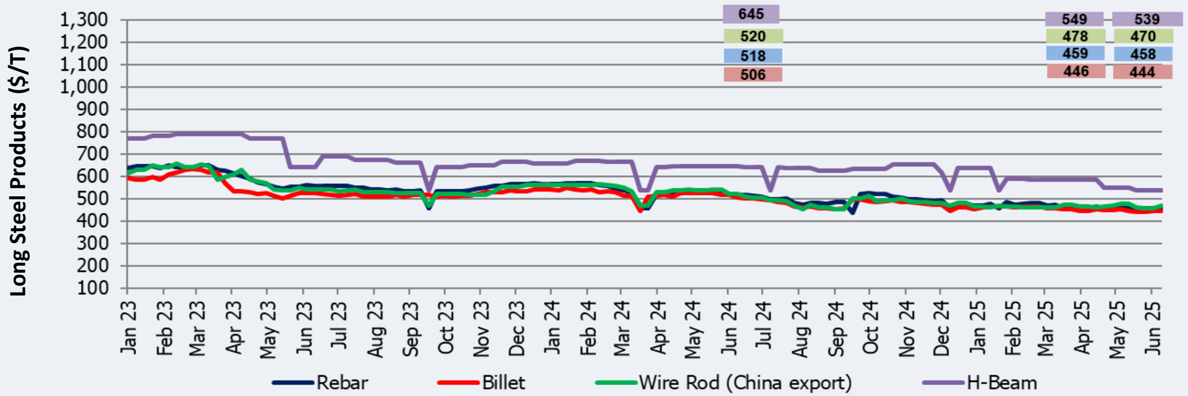
* Ex-stock Shanghai / China domestic VAT-inclusive
** EXW Jiangsu / China domestic VAT-inclusive
*** Ex-Stock Tangshan / China domestic VAT-inclusive

Source : S&P Global Commodity Insights

Asia Steel Price

ปลายเดือนมิถุนายน 2025





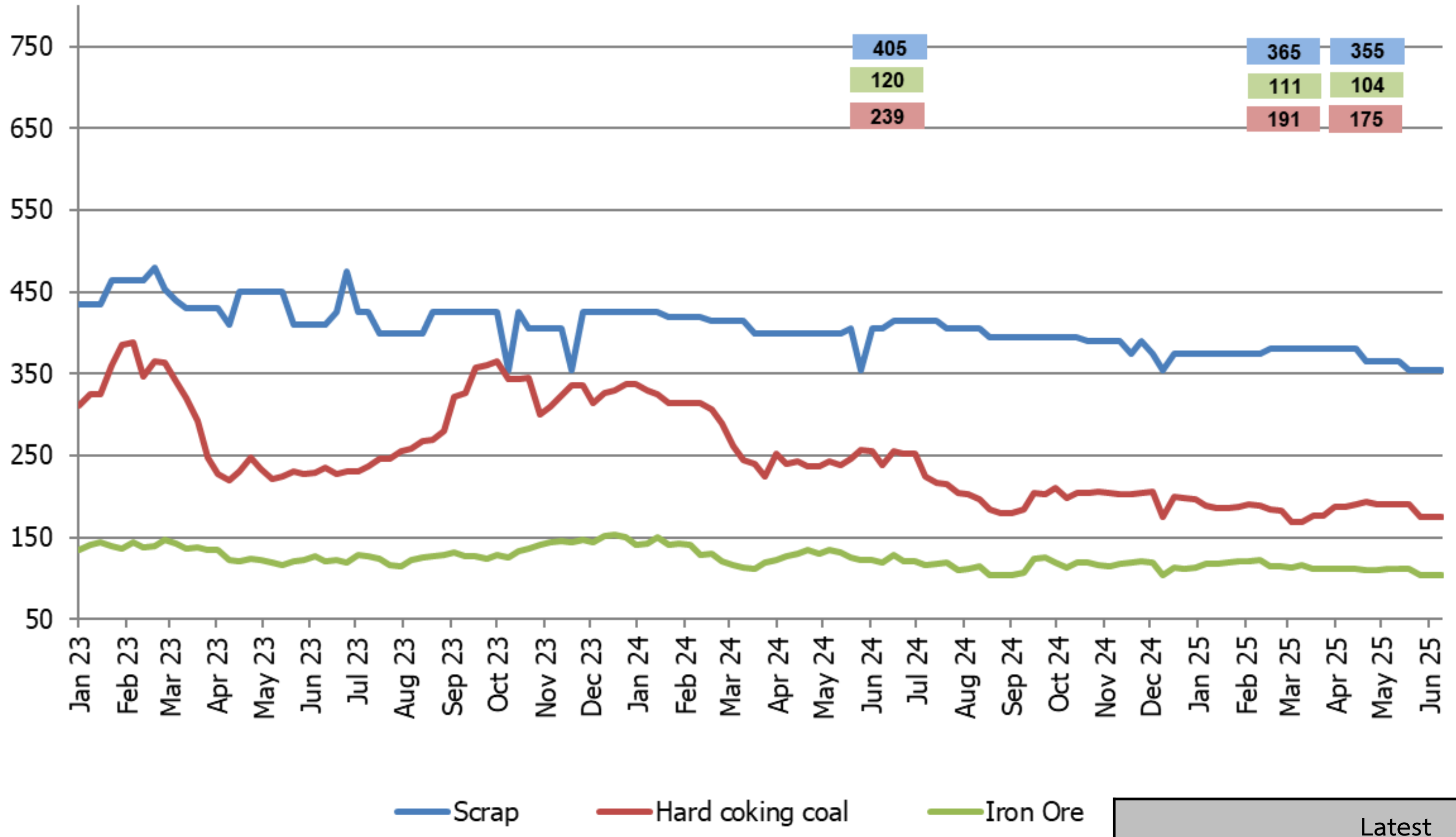
	Latest ($/T)	M-o-M	Y-o-Y
Slab*	448	-2.6%	-15.5%
HRC*	443	-3.3%	-14.1%
CRC**	528	-3.3%	-9.0%

	Latest ($/T)	M-o-M	Y-o-Y
Rebar*	458	-0.2%	-11.6%
Billet*	444	-0.4%	-12.3%
Wire Rod***	470	-1.7%	-9.6%
H-Beam*	539	-1.8%	-16.4%

* Southeast Asia import CFR $/t
** East Asia import CFR $/t
*** (mesh quality) / China export FOB Shanghai $/t

Source : S&P Global Commodity Insights

Raw material Price



ราคาวัตถุดิบในตลาดเอเชีย ปลายเดือนมิถุนายน 2025

- ราคาเศษเหล็ก ลดลง 2.7% m-o-m. มีราคาเฉลี่ยประมาณ 355 $/T.
- ราคาถ่านหินโค้ก ปรับลง 8.2% m-o-m. มีราคาเฉลี่ยประมาณ 175 $/T.
- ราคาสินแร่เหล็ก ปรับลง 6.4% m-o-m. มีราคาเฉลี่ยประมาณ 104 $/T.

	Latest ($/T)	M-o-M	Y-o-Y
Scrap*	355	-2.7%	-12.3%
Cocking Coal**	175	-8.2%	-26.6%
Iron Ore***	104	-6.4%	-13.1%

* East Asia import CFR East Asia Port $/t
** Australia export FOB $/t
*** Iron Ore Fines 65% Fe CFR Qingdao $/t

Source : S&P Global Commodity Insights

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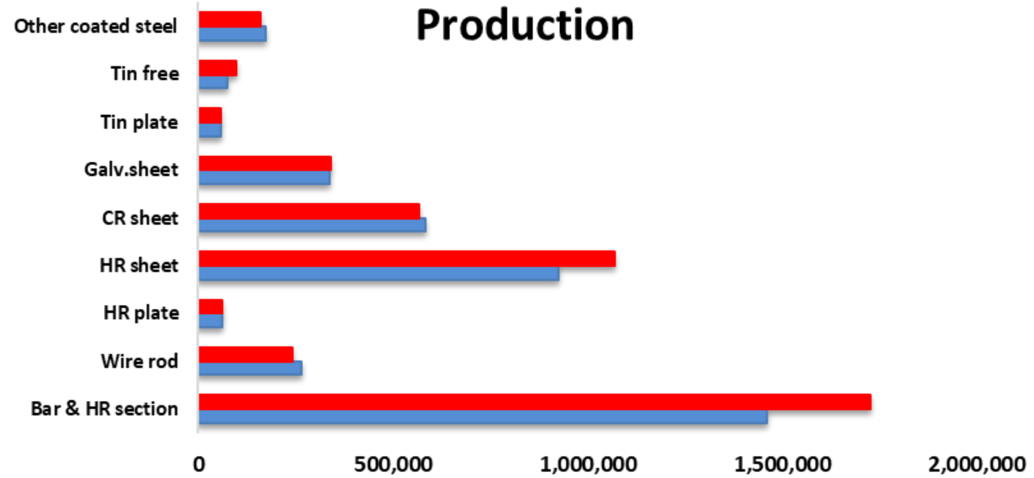
THAILAND FINISHED STEEL

"PRODUCTION"

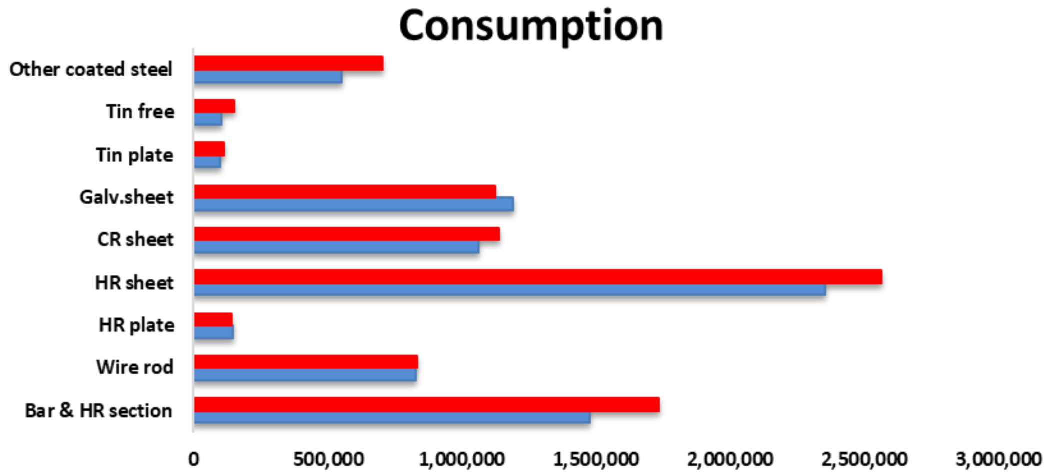
Production	May 2025 Quantity (tonne)	May 2025 M-o-M (%)	May 2025 Y-o-Y (%)	Jan –May 2025 (tonne)	Y-o-Y (%)
Finished Steel	587,612	-4.0%	4.9%	3,100,560	14.2%
Long products	321,321	-22.0%	-10.4%	1,968,743	14.1%
Flat products	266,292	33.3%	32.2%	1,131,817	14.4%



	Bar & HR section	Wire rod	HR plate	HR sheet	CR sheet	Galv.sheet	Tin plate	Tin free	Other coated steel
Jan-May 25	1,728,215	240,528	62,480	1,069,338	567,480	339,648	58,429	96,720	159,307
Jan-May 24	1,460,711	264,253	62,480	926,982	584,835	336,416	58,662	73,804	172,631

"CONSUMPTION"

Consumption	May 2025 Quantity (tonne)	May 2025 M-o-M (%)	May 2025 Y-o-Y (%)	Jan –May 2025 (tonne)	Y-o-Y (%)
Finished Steel	1,614,753	9.0%	16.5%	7,498,524	10.7%
Long products	468,535	-20.6%	-10.0%	2,755,042	11.3%
Flat products	1,146,219	28.7%	32.4%	4,743,482	10.4%



	Bar & HR section	Wire rod	HR plate	HR sheet	CR sheet	Galv.sheet	Tin plate	Tin free	Other coated steel
Jan-May 25	1,732,877	832,658	141,875	2,559,522	1,135,367	1,121,375	112,538	151,178	706,096
Jan-May 24	1,476,050	826,118	148,596	2,353,901	1,061,430	1,191,955	100,278	102,937	549,876

Source: ISIT Analysis

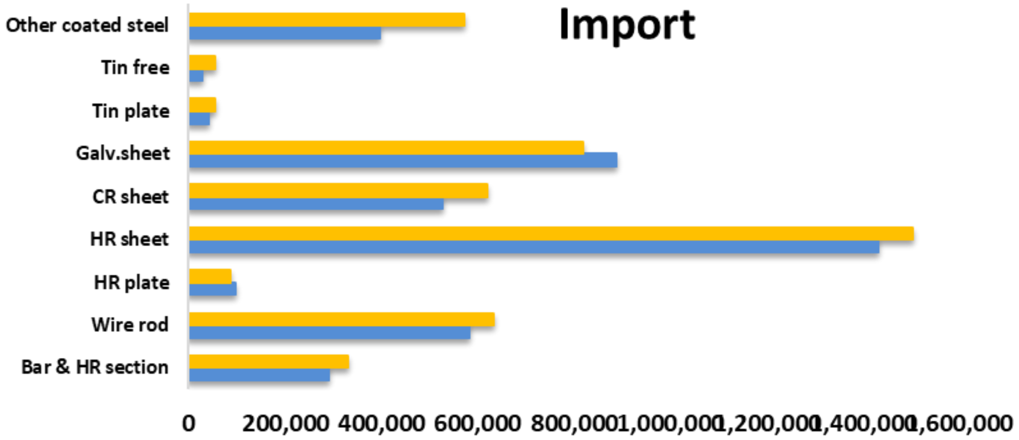
THAILAND FINISHED STEEL

"IMPORT"

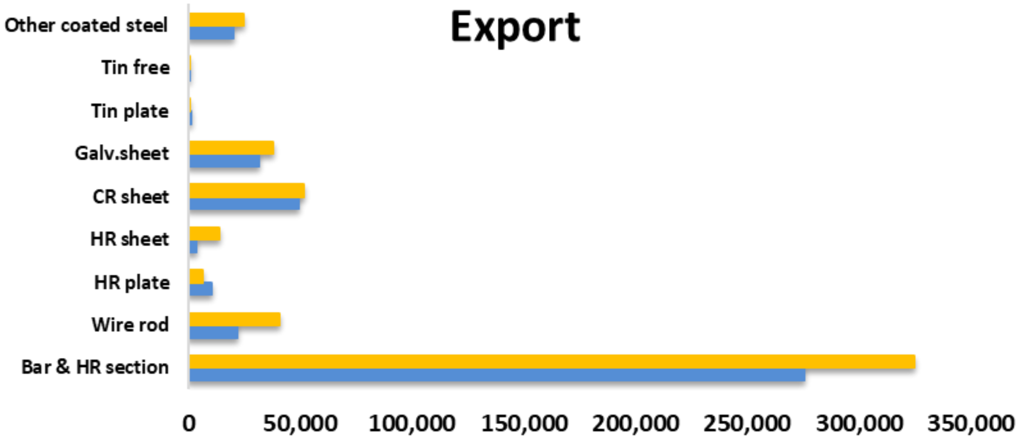
Import	May 2025 Quantity (tonne)	May 2025 M-o-M (%)	May 2025 Y-o-Y (%)	Jan –May 2025 (tonne)	Y-o-Y (%)
Finished Steel	**1,197,727**	19.8%	**26.7%**	**5,067,661**	**9.0%**
Long products	263,479	0.3%	6.6%	1,234,237	8.4%
Flat products	934,248	26.7%	33.8%	3,833,424	9.2%

"EXPORT"

Export	May 2025 Quantity (tonne)	May 2025 M-o-M (%)	May 2025 Y-o-Y (%)	Jan –May 2025 (tonne)	Y-o-Y (%)
Finished Steel	**170,586**	30.5%	**42.8%**	**669,697**	**12.8%**
Long products	116,265	37.5%	36.2%	447,938	15.4%
Flat products	54,321	17.7%	59.3%	221,759	8.0%



	Bar & HR section	Wire rod	HR plate	HR sheet	CR sheet	Galv.sheet	Tin plate	Tin free	Other coated steel
Jan-May 25	329,111	632,654	85,516	1,503,976	619,122	819,296	54,479	54,616	571,158
Jan-May 24	291,006	583,278	96,063	1,430,151	525,877	886,958	42,387	29,221	397,078



	Bar & HR section	Wire rod	HR plate	HR sheet	CR sheet	Galv.sheet	Tin plate	Tin free	Other coated steel
Jan-May 25	324,449	40,524	6,121	13,792	51,235	37,569	370	158	24,369
Jan-May 24	275,667	21,413	9,947	3,232	49,282	31,419	771	88	19,833

Source: ISIT Analysis

- **ประเทศที่มีความเสี่ยงที่จะส่งเหล็กมาไทย 8 ประเทศ คิดเป็นร้อยละ 32 ของยอดส่งออกเหล็กไปสหรัฐฯ 6.55 ล้านตัน**
- ประเทศที่มีความเสี่ยงที่จะส่งออกเหล็กมายังประเทศไทยเพิ่มเติม นอกเหนือจาก จีน แล้ว ยังมี ญี่ปุ่น และเกาหลีใต้ (ที่เคยได้รับการยกเว้นภาษีนำเข้าสินค้าเหล็กไปยังสหรัฐอเมริกาเมื่อปี 2561) และเป็นประเทศคู่ค้าสำคัญของไทย
- นอกจากนี้ยังประเทศในภูมิภาคใกล้เคียง เช่น เวียดนาม อินเดีย มาเลเซีย อินโดนีเซีย และไต้หวัน เป็นต้น ซึ่งมีความสามารถในการผลิตสินค้าเหล็กประเภทเดียวกันกับที่ไทยส่งออกไปขายยังสหรัฐอเมริกา และยังเป็นประเทศคู่ค้าหลักที่ส่งสินค้าเหล็กเข้ามาประเทศไทยด้วย

การส่งออกสินค้าเหล็กสำเร็จรูปจากประเทศ จีน ญี่ปุ่น เกาหลีใต้ เวียดนาม อินเดีย มาเลเซีย อินโดนีเซีย และไต้หวัน (ตัน)

Country	2020	2021	2022	2023	2024	Share%
Korea, South	1,824,616	2,574,252	2,593,569	2,419,680	2,572,060	12.5%
Vietnam	285,519	853,975	858,165	515,072	1,231,530	6.0%
Japan	701,183	972,831	1,122,004	1,018,808	989,431	4.8%
Taiwan	526,107	793,613	951,299	529,666	918,366	4.5%
China	368,765	439,432	637,140	524,538	494,287	2.4%
India	96,687	244,806	527,874	257,523	241,017	1.2%
Indonesia	22,979	50,508	78,729	55,076	69,023	0.3%
Malaysia	5,821	7,002	131,034	61,652	30,954	0.2%
Total 8 Countries	3,831,677	5,936,419	6,899,814	5,382,014	6,546,667	32%
Other	10,981,757	15,151,394	16,347,541	14,580,400	14,068,235	68%
World	14,813,434	21,087,813	23,247,355	19,962,415	20,614,902	100%

Source : Global Trade Atlas

- **สินค้าที่มีความเสี่ยงที่จะส่งมาไทยจาก 8 ประเทศ** (จีน ญี่ปุ่น เกาหลีใต้ เวียดนาม อินเดีย มาเลเซีย อินโดนีเซีย และไต้หวัน)
- **8 ประเทศ คิดเป็นร้อยละ 32 ของยอดส่งออกเหล็กไปสหรัฐฯ 6.55 ล้านตัน**

No.	Products	tonne				
		2021	2022	2023	2024	
1	Welded Pipes	1,180,411	1,607,263	1,489,020	1,520,631	AD เวียดนาม จีน เกาหลี
2	HR Coils/Sheets(< 3 mm.)	961,538	725,363	610,846	761,858	AD > 21 ประเทศ, AC > จีน * มีข้อยกเว้นท้ายประกาศ
3	Galvanized Sheets	474,894	542,890	233,960	630,703	AD จีน มีข้อยกเว้นท้ายประกาศ
4	Cold-Rolled Sheets&Strips	522,528	618,540	297,752	565,380	AD จีน, เวียดนาม, ไต้หวัน
5	Color Coated	394,088	352,501	302,801	494,331	AD เวียดนาม จีน เกาหลี
6	Zn-Al	474,885	395,094	252,391	458,703	AD จีน,เกาหลี, ไต้หวัน มีข้อยกเว้นท้ายประกาศ
7	Wire Rods	402,797	619,739	329,011	383,448	AD จีน (high carbon)
8	TP/TF	358,917	455,102	259,877	312,475	AD จีน, เกาหลี, EU
9	Seamless Pipes	166,939	428,928	417,212	263,510	
10	Plates (>=3 mm.)	222,508	228,982	270,126	248,832	AD > 21 ประเทศ, AC > จีน * มีข้อยกเว้นท้ายประกาศ
	Other	776,918	925,414	919,021	906,798	
	Total	5,936,422	6,899,816	5,382,017	6,546,669	

Source : Global Trade Atlas

IF in ASEAN country

Box 3. IFs in ASEAN

The number of IFs have been growing in the Association of South East Asian Nations (ASEAN) region. There are many small enterprises producing steel based on the IF technology in this region, and official statistics on IF capacity are not available in many cases. However, it is estimated that more than 8 mmt of IF steelmaking capacity is currently in place in the ASEAN region (Table 8). The difference from the previous paper can be attributed to the operation of a new IF in Vietnam in the second half of 2019.

Table 8. Unofficial estimates of steelmaking IF capacities in ASEAN

Economy	IF capacity (mmt)
Indonesia	Over 3
Malaysia	0.53
Philippines	0.4-0.5
Thailand	2.8
Viet Nam	1.63
Total	8.4-8.5

Note: Capacity figures for Indonesia, Malaysia, the Philippines and Thailand are sourced from comments by steel industry experts in these economies. The World Steel Capacities Database released by Metal Expert does not report any IF capacities for these economies. Therefore, these unofficial IF capacities based on anecdotal evidence are not included in the OECD Steelmaking Capacity database (Annex C) because detailed information, such as company names, plant location and commissioning year, is not available. The capacity figure for Viet Nam is based on the World Steel Capacities Database.
Sources: Metal Expert (Metal Expert, 2018[73]), Reuters (Reuters, 2019[75]) and the World Steel Capacities Database (Metal Expert, 2020[59]).

Source : https://one.oecd.org/document/DSTI/SC(2020)3/FINAL/En/pdf

- **In 2017, China began a major effort to eliminate induction furnace-based steel production due to concerns about environmental impact and substandard steel quality. The government set a deadline of the end of June 2017 to completely eradicate this type of steel production. This action is part of China's broader supply-side structural reforms in the steel industry.**
- Some countries, like **China and Japan, have already banned** the use of induction furnaces, with some obsolete furnaces being sent to Southeast Asian countries.
- In the **Philippines, there is a push to ban** steel produced by facilities using induction furnaces due to concerns about substandard reinforcing steel bars and angle bars.
- The San Simon municipal government in Pampanga province has banned the use of induction furnaces (IF) in the smelting of metal scraps in the town following reports of respiratory illnesses among residents and easily rusting roofs in at least five villages near these steel plants.
-
- The induction furnace market is **experiencing growth in several regions,** including the GCC countries, Egypt, South Africa, Turkey, Nigeria, and the rest of the Middle East and Africa, driven by factors like raw material availability and economic growth.

Investment data of IF

No.	REGION	ECONOMIES	COMPANY	STATUS	START	EQUIPMENT	CAPACITY tonne
1	Africa	Algeria	SARL SFM	operating	2023	IF	200
2	Africa	Egypt	Delta Steel Mill	operating	2023	IF	-
3	Africa	Nigeria	Kam Industries	underway	-	IF	260
4	Asia	Bangladesh	Bangladesh Steel ReRolling Mills (BSRM)	operating	2024	IF	-
5	Asia	Bangladesh	SHAHRIAR STEEL MILLS LTD. (SSRM)	underway	2024	IF	108
6	Asia	Bhutan	Druk Metallurgy Limited (DML)	underway	-	IF	200
7	Asia	India	Mono Steel (India) Ltd.	underway	-	IF	-
8	Asia	India	Crest Steel (Una) Pvt. Ltd	plan	-	IF	-
9	Asia	India	MSP Metallics Ltd	plan	-	IF	240
10	Asia	India	Lloyds Metals and Energy	plan		IF	250
11	Asia	India	Gallantt Group	plan	2024	IF	
12	Asia	Malaysia	Kinsteel Bhd	plan	-	IF	500
13	Asia	Pakistan	Ittehad Steel	underway	-	IF	600
14	Asia	Pakistan	Naveena Steel Mills	plan		IF	80
15	Asia	Pakistan	FF Steel	underway		IF	250
16	Asia	Pakistan	Mughal Steel	operating	2023	IF	108
17	Asia	Pakistan	Kamran Steel ReRolling Mills (Pvt) Ltd.	underway	-	IF	130
18	Asia	Pakistan	Hunza Steel	underway	2024	IF	90
19	Asia	Pakistan	Hunza Steel	underway	2025	IF	300
20	Europe	Türkiye	Tufan Metalurji	plan	2024	IF	244
21	Middle East	Iran	Kavir Damghan Steel Complex (KADASCO)	plan	-	IF	200
22	Middle East	Iran	Malayer Steel Company	plan	-	IF	300
23	Middle East	Iran	Orumieh Steel Company	plan	-	IF	400
24	Middle East	Iran	Kavir Damghan Steel Complex (KADASCO)	plan	-	IF	200
25	Middle East	Iran	Kavir Steel Cooperative	underway	-	IF	150
26	Middle East	UAE	Arabian Gulf Steel Industries (AGSI)	underway	-	IF	151
27	Middle East	Iraq	Qaiwan Steel	underway	2024	IF	400
28	Middle East	Saudi Arabia	Madina Metal	underway	-	IF	300

Source : https://one.oecd.org/document/DSTI/SC(2024)3/FINAL/en/pdf

Steel policy

China

1. **Output Control and Restructuring**: China continued its efforts to control steel output and restructure the industry to align with environmental goals. The most affected steel mills will be those running blast furnace-basic oxygen furnaces (BF-BOFs) because of their high carbon intensity. Electric arc furnaces (EAFs) will be prioritized to ensure good production rates.
2. **The supporting policies to expand domestic scrap** steel supply more rapidly in the coming years, including taxation and financial aid.
3. **Stricter Export Regulations:** New regulations were implemented to strengthen export management, tax compliance, and supervision over company closures, aiming to curb low-priced steel exports and prevent dumping. Increased Scrutiny of Steel Exports

South Korea

1. **South Korea will revise its customs regulations** and permit the Korea Trade Commission (KTC) to investigate the circumvention of antidumping duties by rerouting products through a third country.
2. **MTC (mill test certificate)** will become a mandatory submission for all steel imports. The MTC, which is "issued by a company in the production of steel materials, contains more detailed information on the product's requirements and origin than the existing certificate of origin, so that the current status of steel materials flowing and distributed in Korea can be more accurately tracked.

India

1. **Make in India" and PM Gati-Shakti:** These initiatives are being leveraged to increase engagement with potential steel users in various sectors, including railways, defense, and infrastructure, to boost domestic steel consumption.
2. **Steel Scrap Recycling Policy**: The policy aims to increase the availability of domestically generated scrap for recycling and reuse in steel production, promoting sustainability and resource efficiency.
3. **India tightens steel procurement policy**: Favors local production, adds reciprocity clause. The policy priorities domestically produced steel in government contracts and implements stricter procurement rules to limit foreign competition
4. **India has imposed a 12% safeguard duty** on alloy and non-alloy steel flat products for 200 day.
5. **Promoting the development of specialty steel** The Government has launched the Production Linked Incentive (PLI) Scheme for specialty steel to promote the manufacturing of 'Specialty Steel' within the country and reduce import by attracting capital investments. The anticipated additional investment under PLI Scheme for specialty steel is Rs. 29,500 crores and an additional capacity creation of around 25 million tonnes (MT) for specialty steel

Japan

1. **Government Support for Decarbonization :** The Japanese government is providing subsidies and support for the transition to less carbon-intensive steelmaking methods, including those using electric arc furnaces (EAFs).
2. **Increased Scrap Utilization**: There's a push for more progressive policies that incentivize greater scrap utilization and encourage demand for low-carbon steel.
3. **The transition away from excessive dependence on fossil fuels** has been explicitly emphasized, with RE identified as the primary resource, but further RE installation is encouraged to ensure the stable and cost-competitive RE supply for the steel industry.

Steel policy

Malaysia

1. **Moratorium on Steel Industry Expansion**: A two-year moratorium was imposed in August 2023 on the steel industry (72 and 73).This allows for stabilization and realignment with the NIMP 2030. In 8 Nov 2024, this moratorium has been re-examined (72: Status quo and non-ferrous segment: Status quo)
2. **Anti-dumping duties:** Malaysia maintains anti-dumping duties on certain steel imports from countries like China and Japan.
3. **Mandatory standards** are in place for imported and locally produced steel products to ensure quality and safety.
4. **Implement Carbon Tax by 2026**, and Climate Change Bill (RUUPIN) in 2025 – supporting the nation's goal achieving carbon neutrality latest by 2050.

Indonesia

1. **Antidumping Regulations Review:** The government is reviewing its antidumping regulations to anticipate and mitigate potential surges in steel imports, particularly from countries experiencing overcapacity.
2. **Indonesia aims to increase its domestic steel consumption**, The government recognizes the importance of infrastructure development as a key driver for steel demand and is focusing on related projects.
3. **Increased Local Content (TKDN):** TKDN (Tingkat Komponen Dalam Negeri) policy, which focuses on raising the local content in products, including steel. This initiative aims to strengthen domestic industries by encouraging the use of local resources, labor, and technology.

Vietnam

1. **Trade Protection Measures:** Anti-Dumping Measures on imported steel, particularly from China and South Korea, and the development of a national steel industry strategy.
2. **Quality Standards:** TCVN (Vietnam Steel Standard) outlines quality criteria for various steel grades. These standards ensure quality and consistency in domestically produced and imported steel.
3. **Steel industry strategy (2030, vision 2050) :**A formal strategy, developed by the Ministry of Industry and Trade (MoIT), aims to guide production capacity, tech modernization, investment in large-scale "mega-complexes," green transition, etc
   - proposed that the Ministry of Finance review, update and adjust import tax policies for certain steel products with significant price fluctuations.
   - proposed that the State Bank of Việt Nam direct and encourage commercial banks to implement preferential credit packages to support steel investment, production and business.
   - By 2030, the sector aims to meet the majority of domestic steel demand, reduce dependence on imports of high-grade steel, and improve value chains.

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