

# World Steel, Coke & Coal Tar

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CTC International

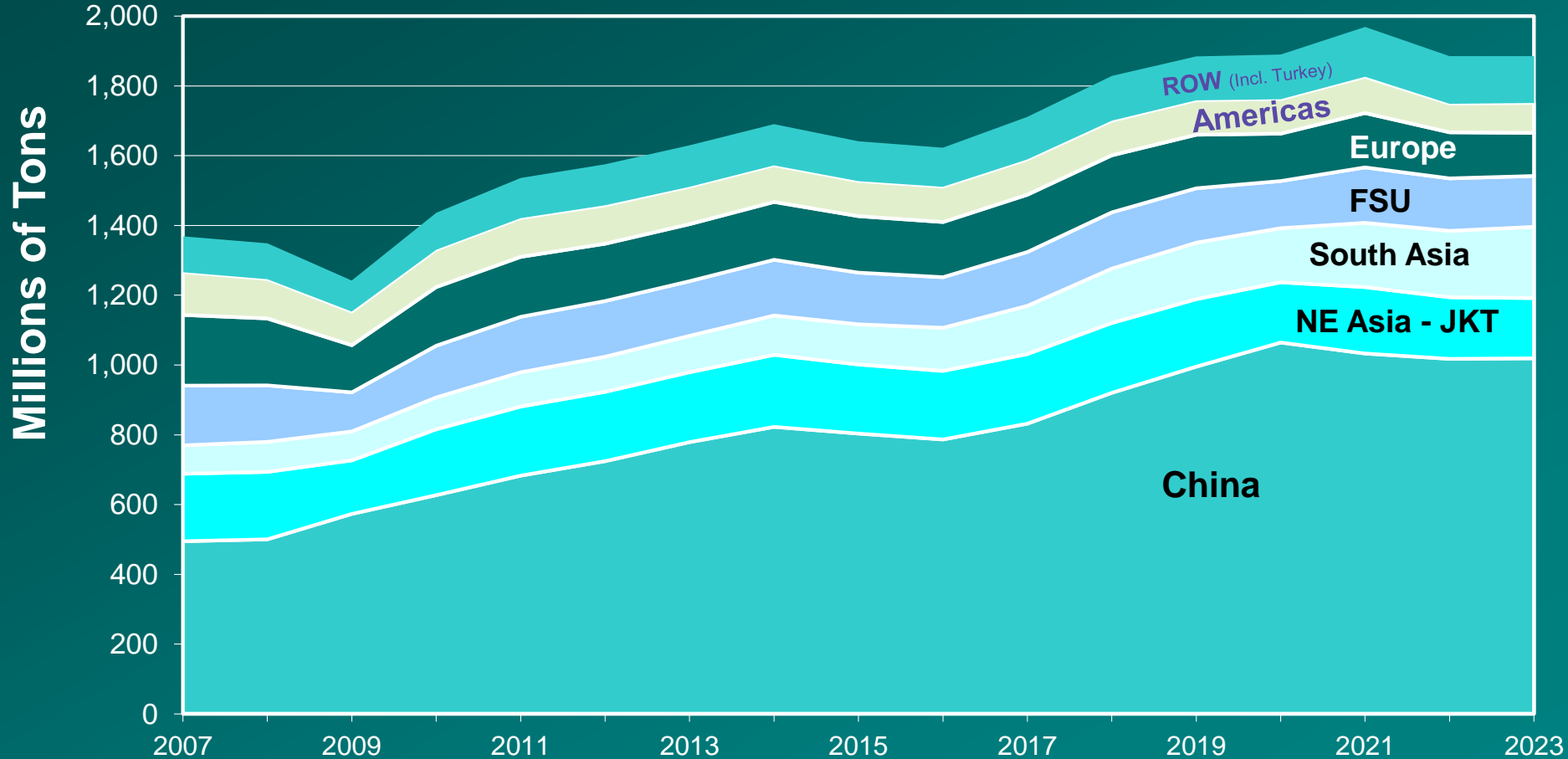
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Carbon Management Intl. LLC (CMI)

***International Tar Association Spring Conference***

March 2024 - Orlando, Florida

# Steel Production History



# Steel Production In Asia, 2019 - 2023

## North Asia:

Includes Japan, South Korea & Taiwan.

Total Steel production down 10% since 2019, following a rebound in 2021 post-pandemic.

- ❖ Japan -12%
- ❖ South Korea -6.6%
- ❖ Taiwan -13.7%

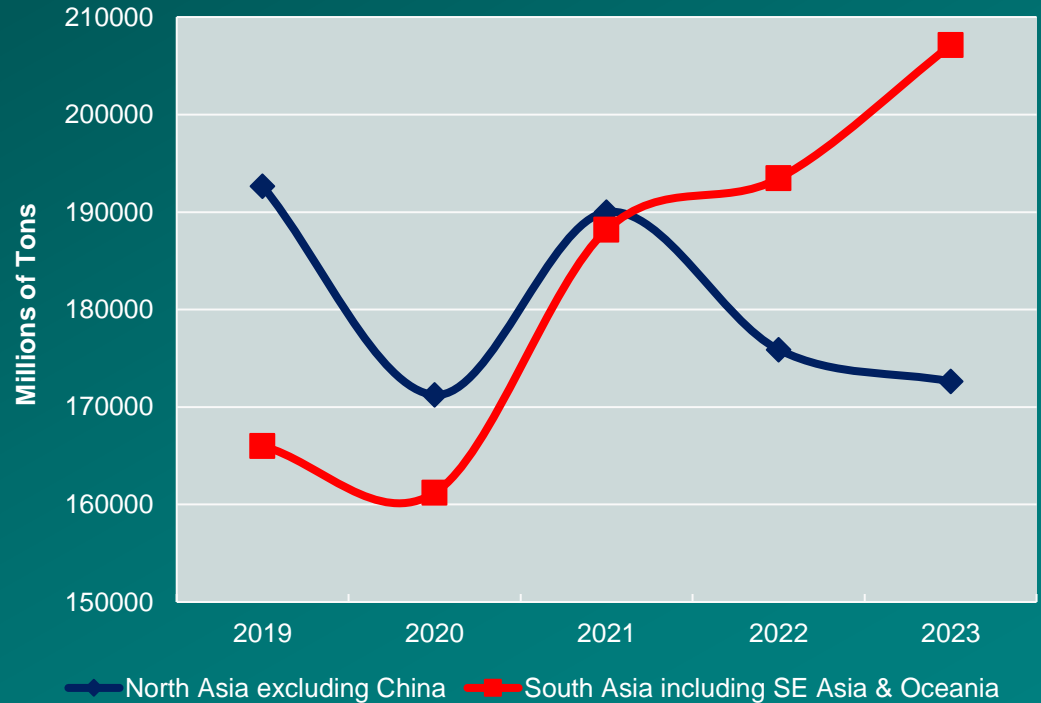
## South Asia:

Includes South Asian, SE Asian & Oceania countries.

Total Steel production up 25% since 2019.

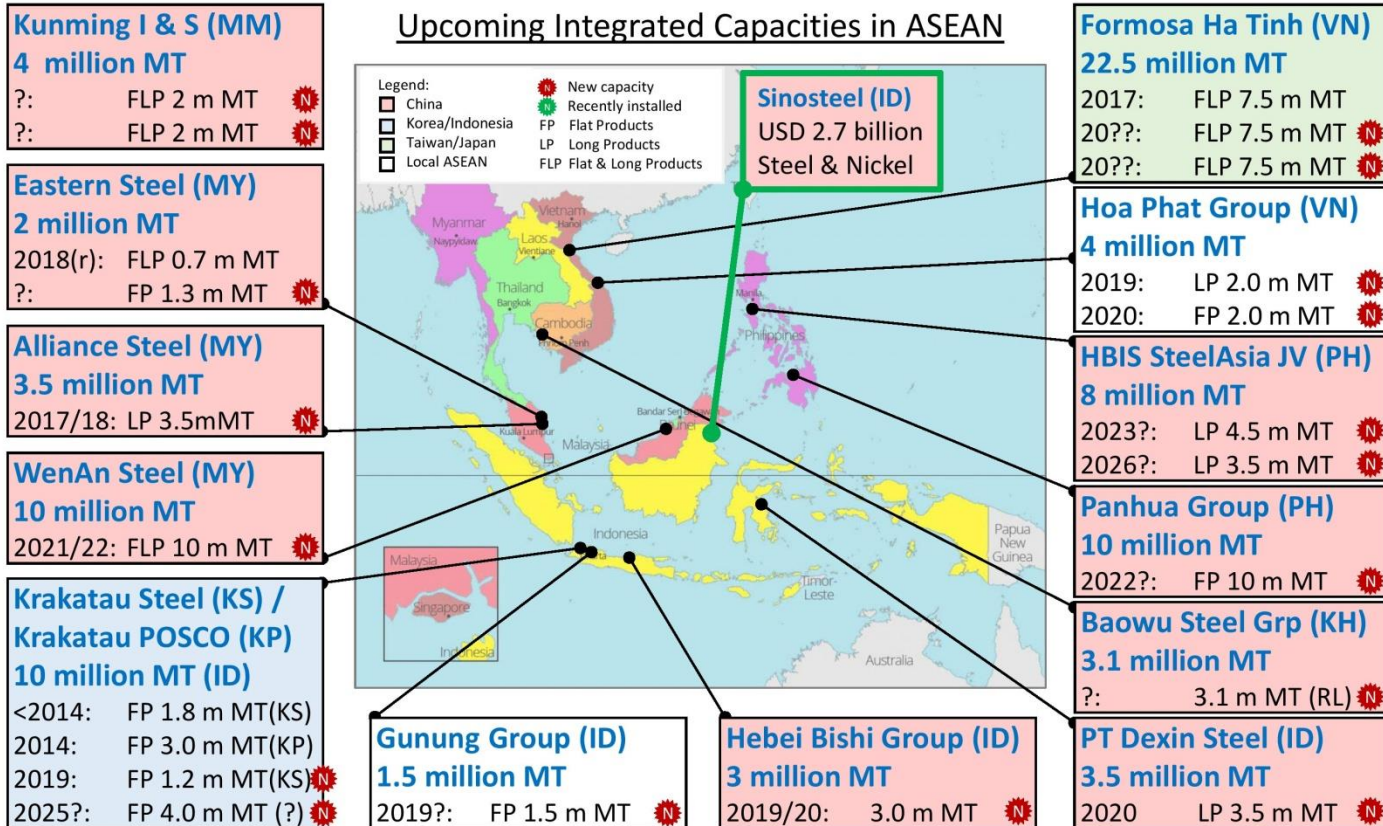
- ❖ Philippines +85%
- ❖ India +40%
- ❖ Pakistan: +40%
- ❖ Singapore +31%
- ❖ Indonesia +24%
- ❖ Malaysia: +14%
- ❖ Myanmar +14%
- ❖ Thailand +11%

South Asia production exceeded North Asia in 2021 – 2022 period.

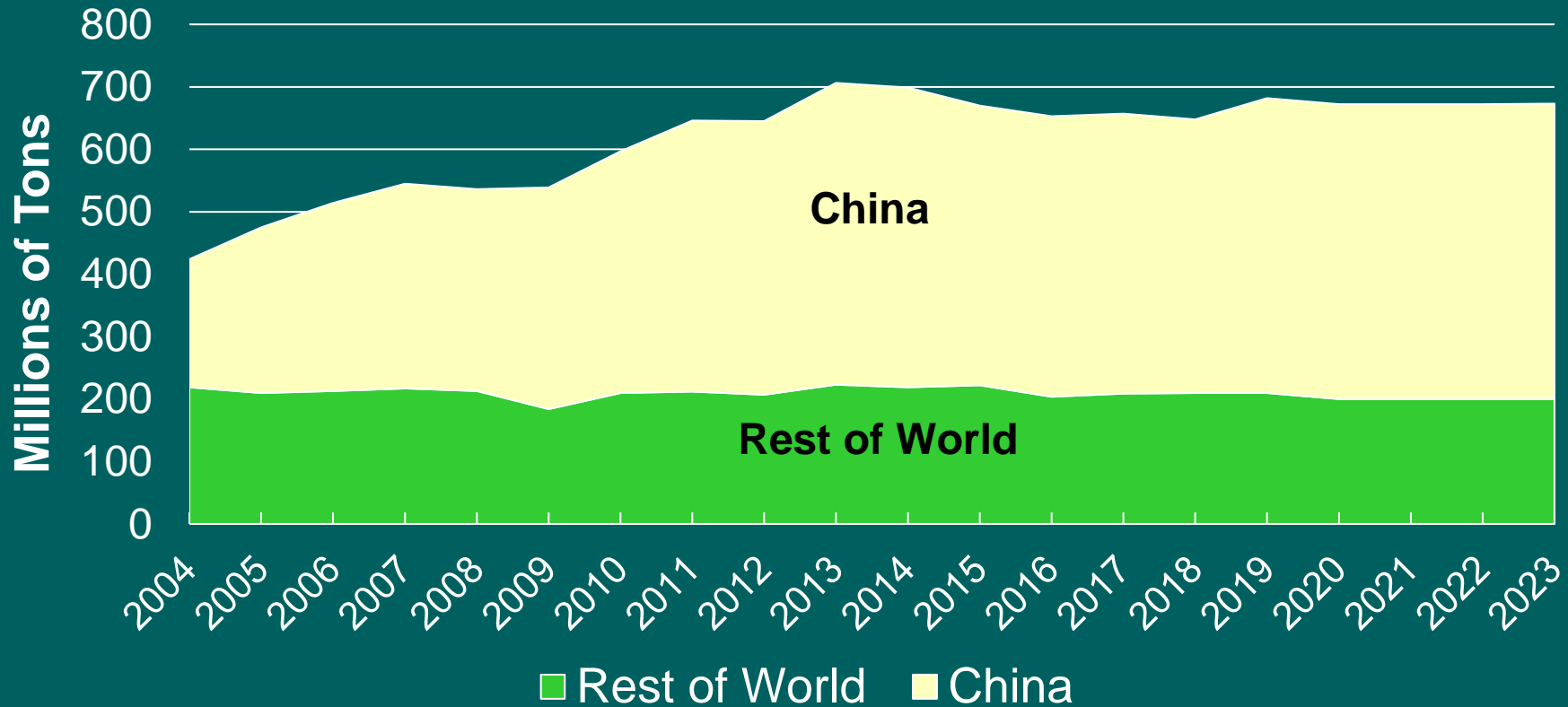


# RISE OF THE INTEGRATED MEGAMILLS (CARBON STEEL)

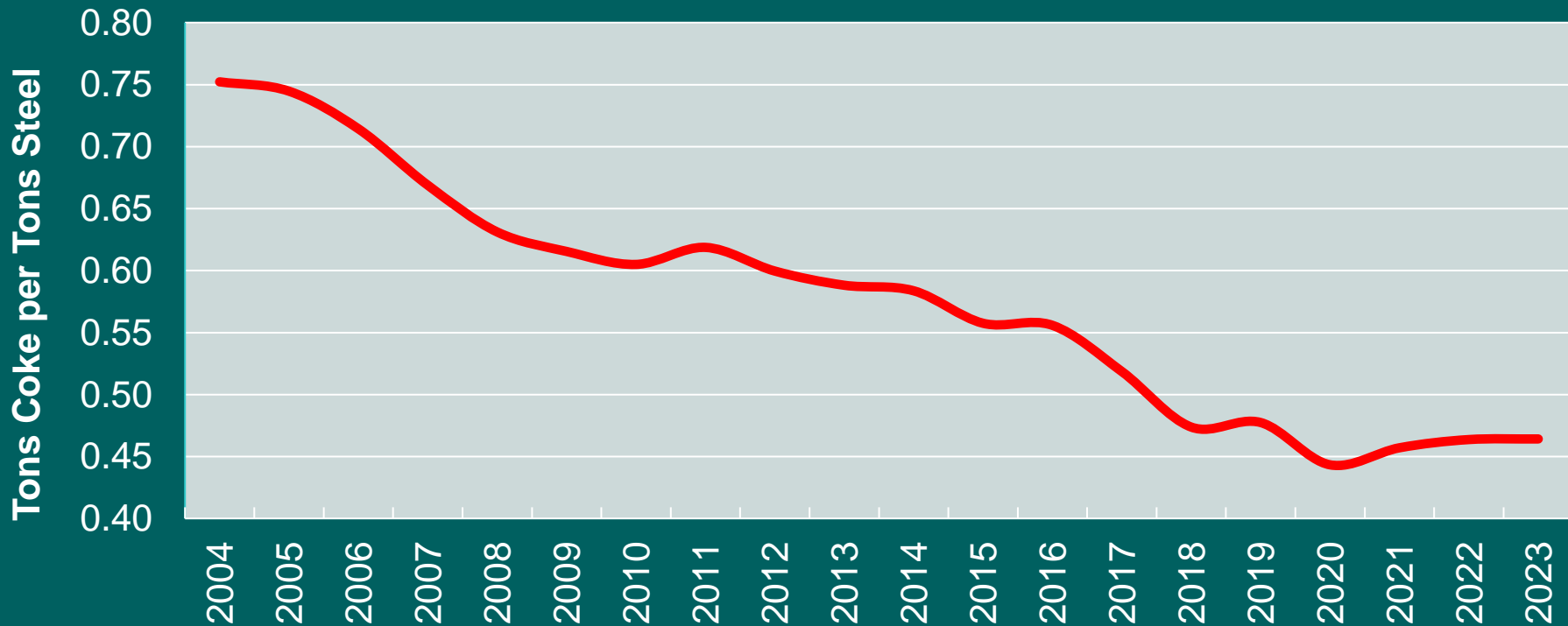
Many huge integrated mills (carbon steel) are starting up in Malaysia, Indonesia, Philippines and Vietnam, with most of the investors being China Steel Mills



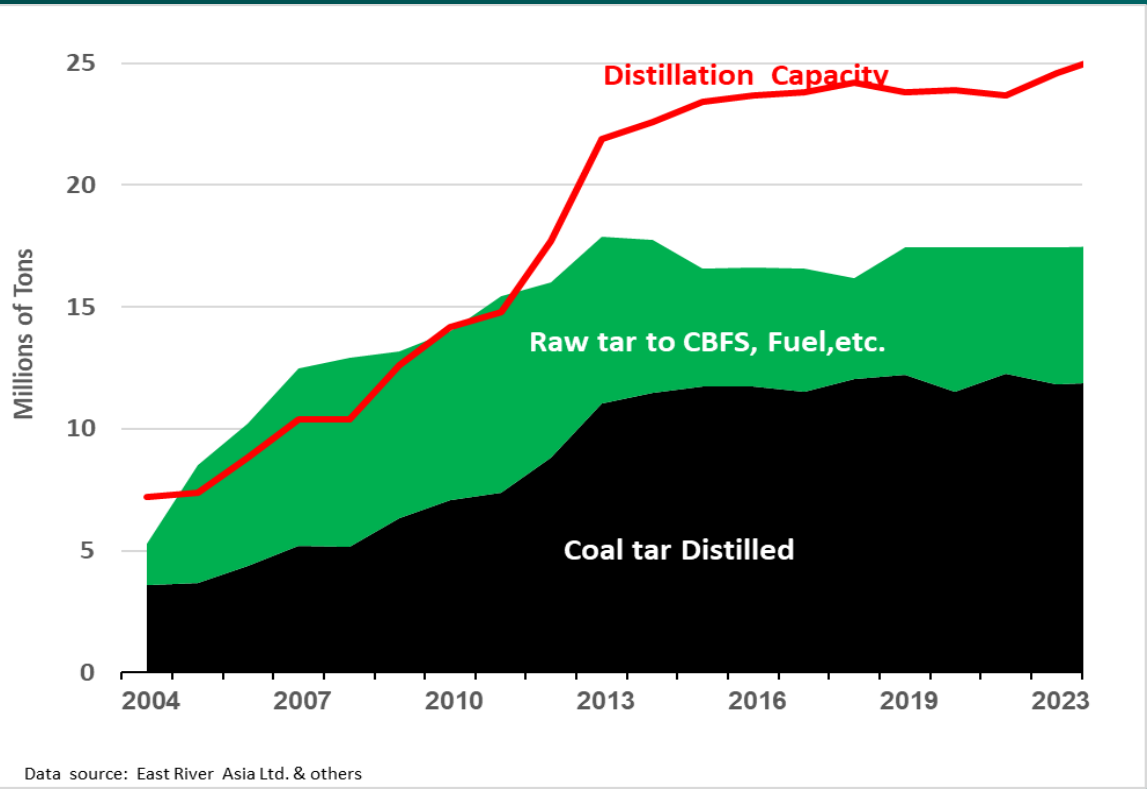
# Coke Output - China & Global



# China Coke / Steel Ratio



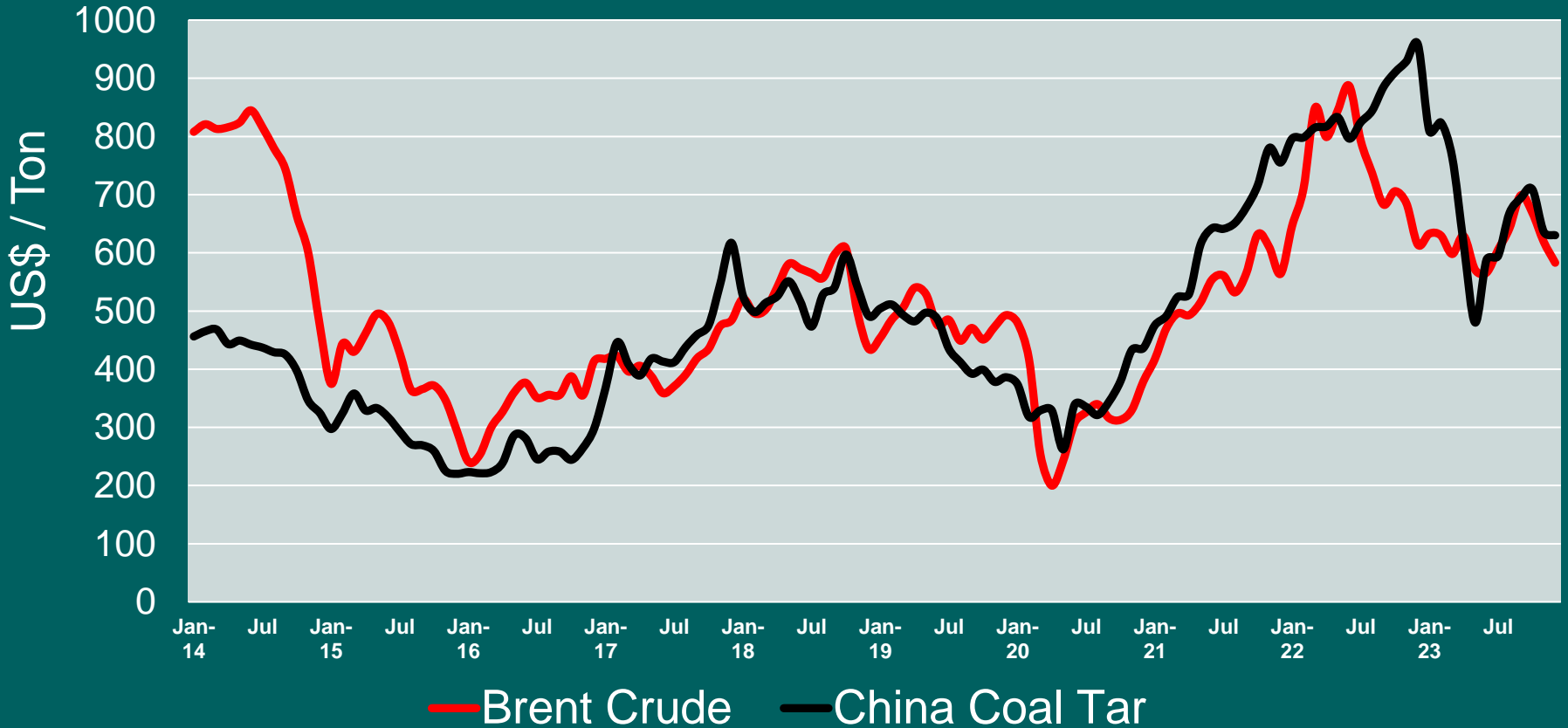
# China Coal Tar Distillation Capacity, Distilled vs. Recovered Tar Volumes & Coal Tar Imports 2021 - 2023



	2021	2022	2023	% Chg. 2023/2022
<b>Total</b>	<b>104.8</b>	<b>110.9</b>	<b>133.2</b>	<b>20%</b>
<i>Vietnam</i>	-	14.4	66.4	<b>361%</b>
<i>Malaysia</i>	40.7	41.1	47.5	<b>16%</b>
<i>Indonesia</i>	39.5	54.0	19.3	<b>-64%</b>
<i>Japan</i>	8.4	1.4	-	-
<i>South Korea</i>	16.2	-	-	-

# Crude Oil versus China Coal Tar

## 2014 - 2023





**Thank you!**