

STEEL DISTRIBUTION IS A SYSTEMIC PARTNER FOR CONSTRUCTIONAL STEEL FABRICATORS

Journée Construction Acier 2014



Des informations et rencontres autour de l'acier
le jeudi 27 novembre - Bruxelles

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www.infosteel.be



GEORGES KIRPS, DIRECTOR GENERAL EUROMETAL

EUROMETAL: THE VOICE OF EUROPEAN STEEL INTERMEDIATION

WITH FOUR MEMBER ORGANISATIONS COVERING ALL TYPES OF DISTRIBUTION & TRADE

NAT.FED
ASSOCIATION OF NATIONAL
STEEL DISTRIBUTION
FEDERATIONS

EASSC
EUROPEAN ASSOCIATION
OF FLAT STEEL SERVICE CENTERS



STSG
STUDY GROUP
OF STEEL TRADING
COMPANIES

dismet
STUDY GROUP OF
DISTRIBUTORS
OF STEEL, TUBES AND METALS

IN 2013, EUROMETAL REPRESENTS:
70 MIO TONS OF SALES
1 600 ASSOCIATED COMPANIES
100 000 EMPLOYEES
MORE THAN 1 MILLION CUSTOMERS

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EUROMETAL

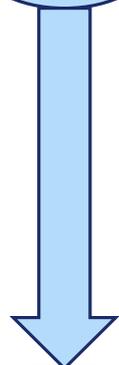


**EU STEEL DISTRIBUTION IS AN INTELLIGENT MATCHMAKER
BETWEEN 200 STEEL AND TUBES PRODUCERS
AND MORE THAN ONE MILLION STEEL END USERS**

**THE KEY PLAYERS IN EU STEEL SUPPLY CHAIN:
200 STEEL AND TUBES PRODUCERS,
3 000 STEEL DISTRIBUTORS & SSC
1 000 000 STEEL AND TUBES ENDUSERS**

EU STEEL & TUBE PRODUCERS

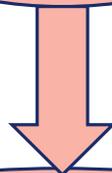
200



MAX 25-30 000
END USERS
SERVED DIRECTLY BY
PRODUCERS

EU STEEL & TUBE DISTRIBUTORS

3 000



CLOSE TO 1 000 000
END USERS SERVED BY
DISTRIBUTORS

EU STEEL END USERS

ABOUT 1 000 000
STEEL END USERS



EU STEEL DISTRIBUTION & STEEL SSC ARE SYSTEMIC FOR SUPPLY CHAINS TO STEEL END USERS



**SERVICE OFFER OF STEEL DISTRIBUTION
IS MANYFOLD AND
CENTERED ON CUSTOMER NEEDS**



STEEL DISTRIBUTION IS THE INTELLIGENT MATCHMAKER BETWEEN STEEL PRODUCERS AND CONSTRUCTIONAL STEEL FABRICATORS

PARAMETERS OF STEEL PRODUCTION BUSINESS MODEL

BIG
VOLUMES

LONG
RUNS

ECONOMIES
OF SCALE

PARAMETERS OF STEEL DISTRIBUTION – CUSTOMER SIDE

PRODUCT
AVAILABILITY

PROCESSING
SERVICES

ONE STOP
SHOPPING

PRODUCT
SOURCING

DELIVERY IN
24-48 HOURS

LOCAL & REGIONAL
FOOT PRINTS

MULTI-
PRODUCT

CLUSTERING
ORDERS

NON COMPLEX
ORDERS

MILL ORDER
LEAD TIMES

DELIVERY BY
RAIL OR BOAT

PARAMETERS OF DISTRIBUTION – MILL SIDE

SMALL
ORDERS

ADDITIONAL
PROCESSING

INCREASING
COMPLEXITY

SHORT
LEAD TIMES

SERVICE
AND VALUE

RAPID
RESPONSE

DELIVERY
REQUIREMENTS

FLEXIBILITY

PARAMETERS OF CONSTRUCTIONAL STEEL FABRICATORS BUSINESS MODEL

**BASED ON PRODUCT AND SERVICE OFFER,
EU STEEL DISTRIBUTION IS RUNNING SEVEN MAIN TYPICAL OPERATIONAL MODELS
HAVING FOCUS ON SPECIFIC END USE SEGMENTS**

TYPICAL STEEL STOCKHOLDING

BEAM & PROFILE CENTERS & GENERAL STOCKIST

REINFORCING STEEL CENTERS

DISTRIBUTION OF TUBULAR PRODUCTS

STAINLESS STEEL SERVICE CENTER

HIGH CARBON & ALLOY STEELS STOCKIST

FLAT STEEL SERVICE CENTERS

STRIP MILL PRODUCTS SERVICE CENTER

PLATE PROCESSOR & STOCKIST

MAIN CHARACTERISTICS OF BEAM AND PROFILE CENTERS

OPERATIONAL MODELS

**BEAM &
PROFILE
CENTER :
STOCKING AND
PROCESSING**

**GENERAL
STEEL
STOCKHOLDING**

PRODUCT & SERVICE OFFER

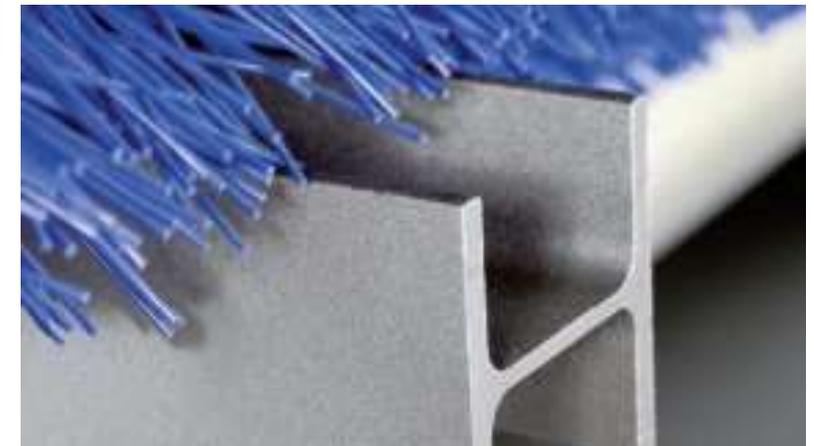
**PRODUCTS
BEAMS & PROFILES
HOLLOW SECTIONS, ANGLES,
WIDE FLATS, COMMERCIAL
SHEETS**

**PROCESSING SERVICES
CUT-TO-LENGTH, SHOT BLASTING,
PRIMERING, EDGING, BENDING,
DRILLING, MARKING, PROFILING**



END USE CUSTOMER SEGMENTS

**STRUCTURAL STEELWORKS
CIVIL ENGINEERING
OTHER BUILDING INDUSTRY
MECHANICAL ENGINEERING**



MAIN CHARACTERISTICS OF PLATE PROCESSING CENTERS

OPERATIONAL MODELS

**PLATE
PROCESSING
& STOCKING**

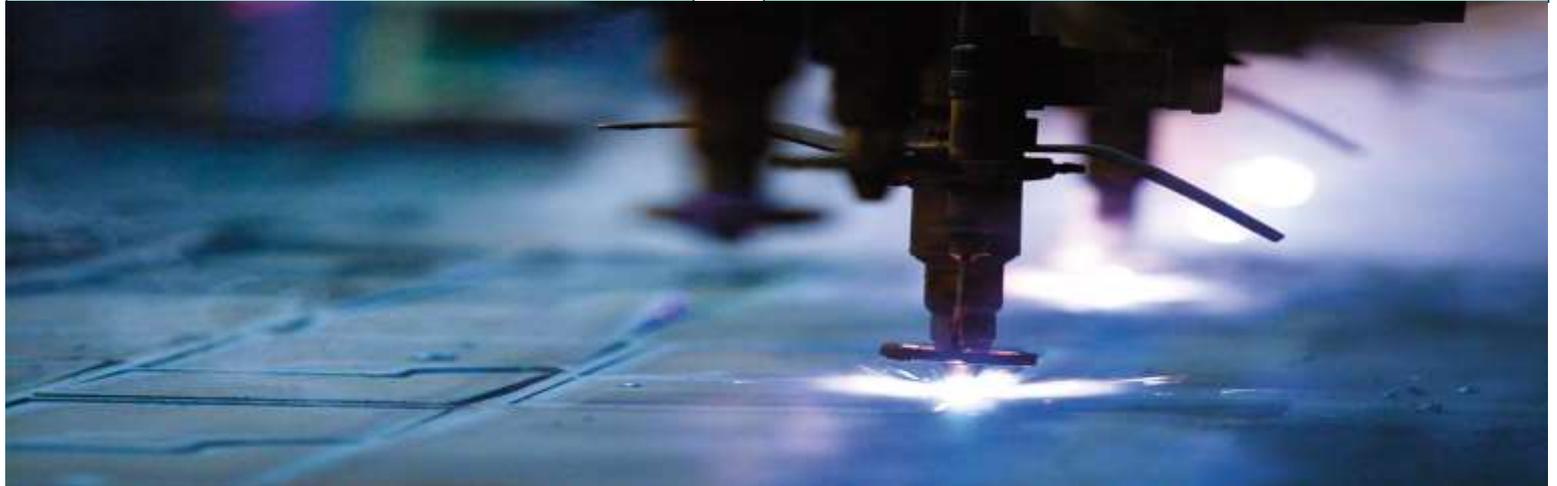
PRODUCT & SERVICE OFFER

PRODUCTS
QUARTO PLATES, HR FLATS,
PROFILING AND PROCESSING

PROCESSING SERVICES
SHOT BLASTING, PRIMERING
PLASMA- & FLAME CUTTING,
DRILLING,
PUNCHING, MARKING,
STAMPING, BENDING,

END USE CUSTOMER SEGMENTS

**CONSTRUCTIONAL WORKS
SHIPBUILDING,
WIND TOWERS,
YELLOW GOODS,
OIL & GAS
MECHANICAL ENGINEERING
CEMENT INDUSTRY
WASTE RECYCLING
TRUCK BINS**





EU STEEL DISTRIBUTION & STEEL SSC ARE SYSTEMIC FOR SUPPLY CHAINS TO STEEL END USERS

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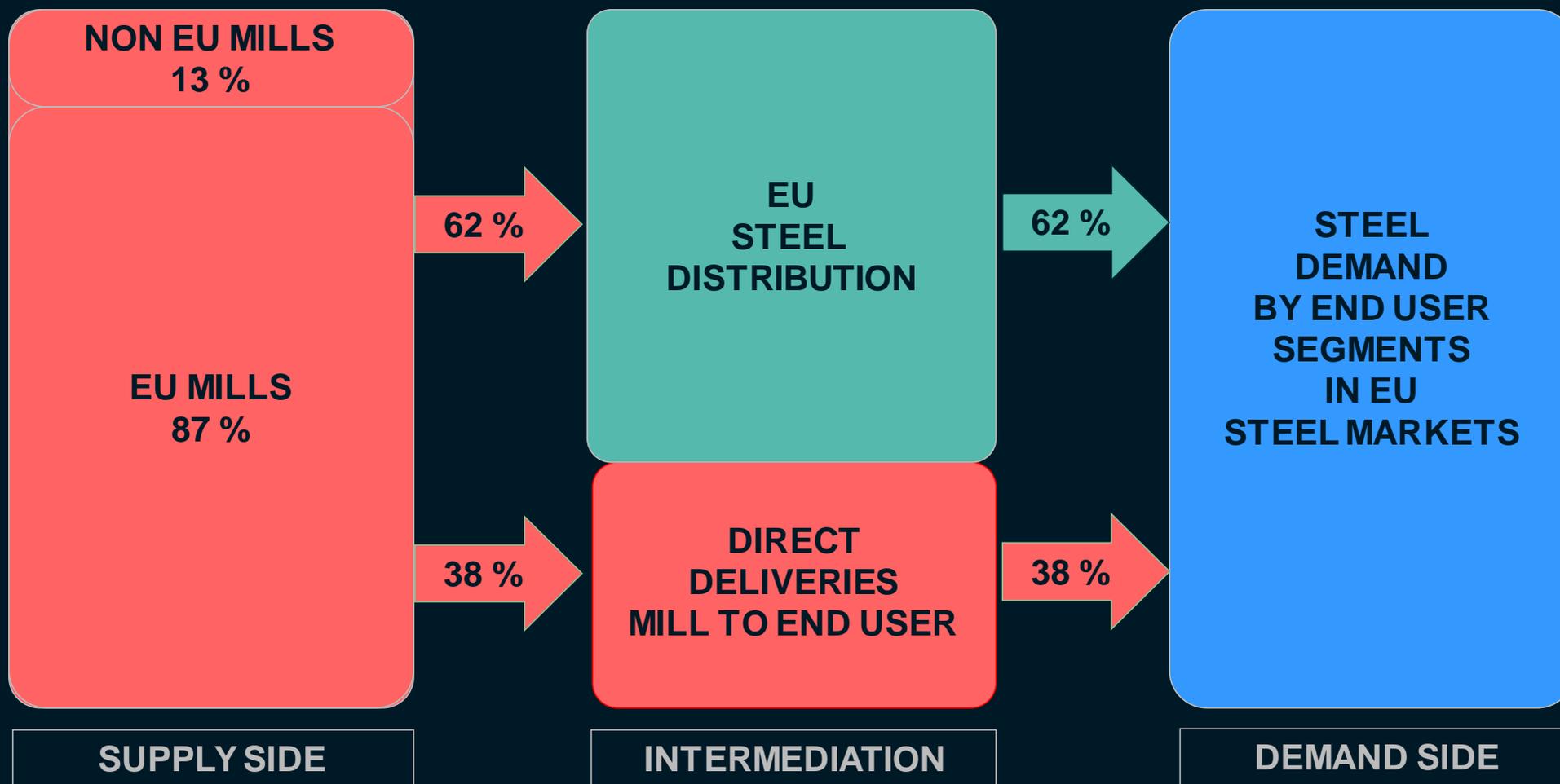
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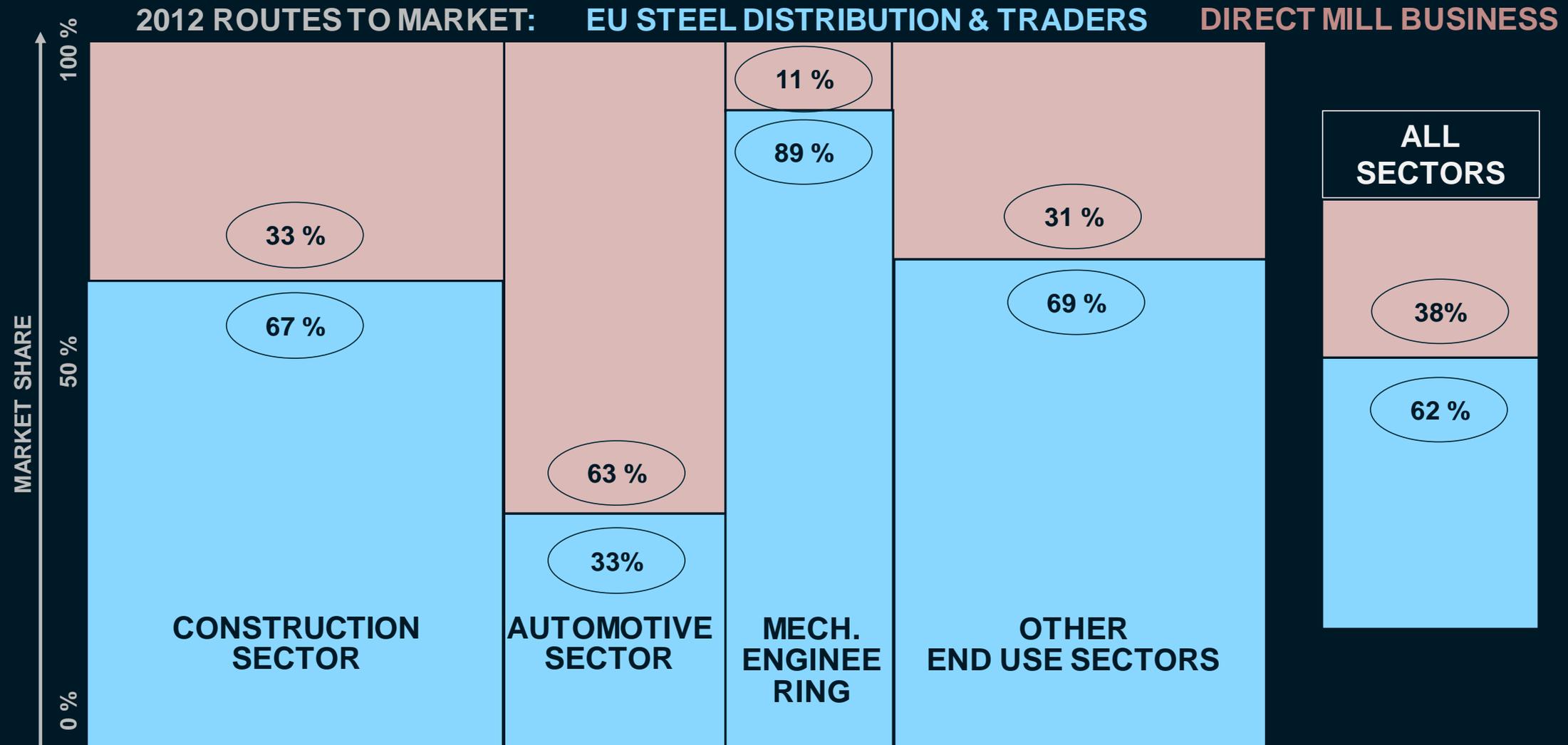


ALL STEEL PRODUCTS CONSIDERED, STEEL DISTRIBUTION INTERMEDIATES TODAY 62 % OF EU-27 STEEL MARKET SUPPLY,





BY END USE SECTORS, STEEL DISTRIBUTION IS A SYSTEMIC PLAYER FOR CONSTRUCTION END USE SECTORS

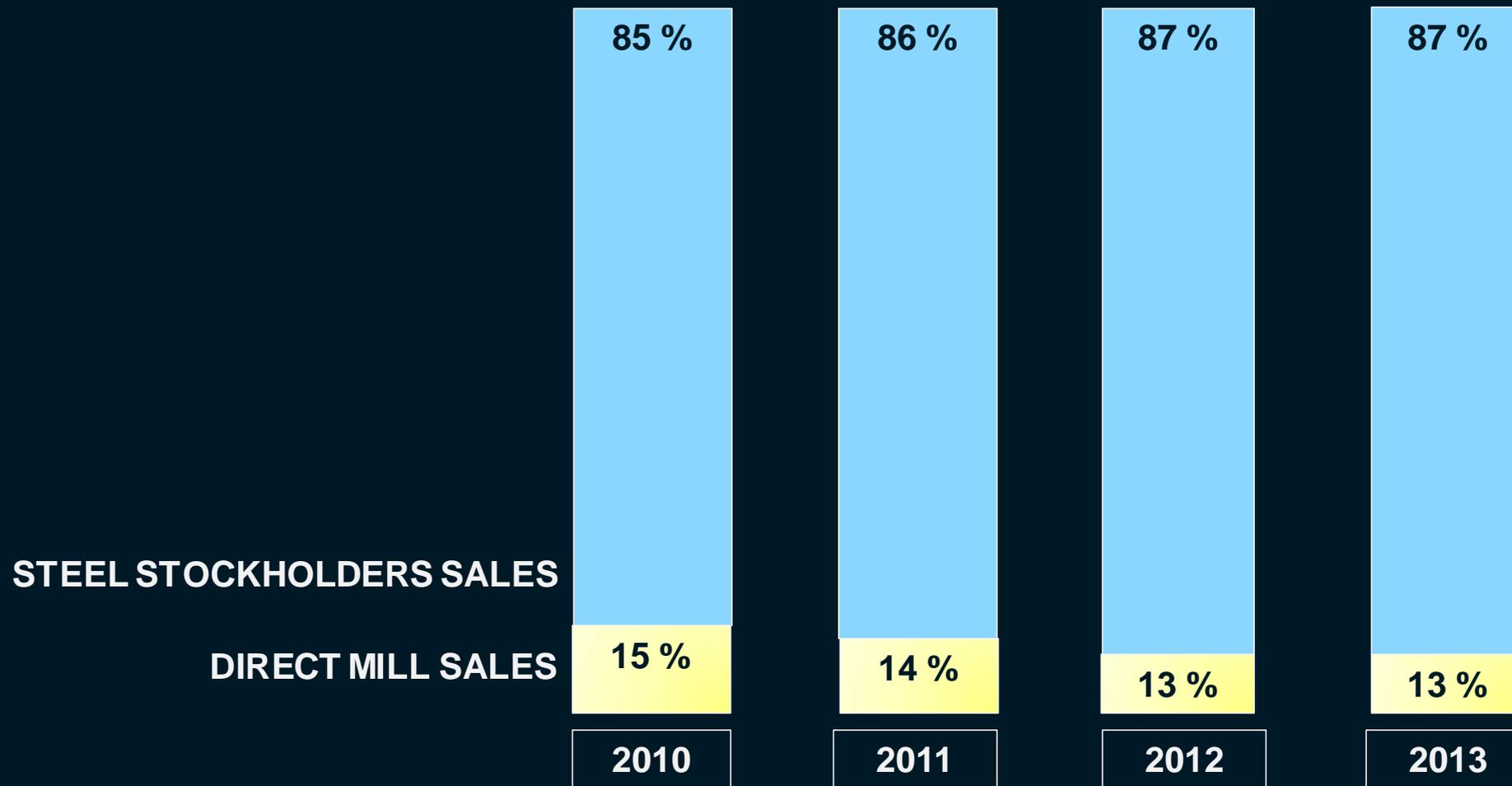


* INCL PRE-MATERIAL FOR COLD REROLLING & TUBES,



LONG STEEL PRODUCTS ARE THE PRIVILEGED TERRITORY OF STEEL STOCKHOLDING DISTRIBUTION TO SUPPLY STEEL FABRICATORS

SHARE IN EU MARKET SUPPLY IN LONG STEEL PRODUCTS





EUrometal

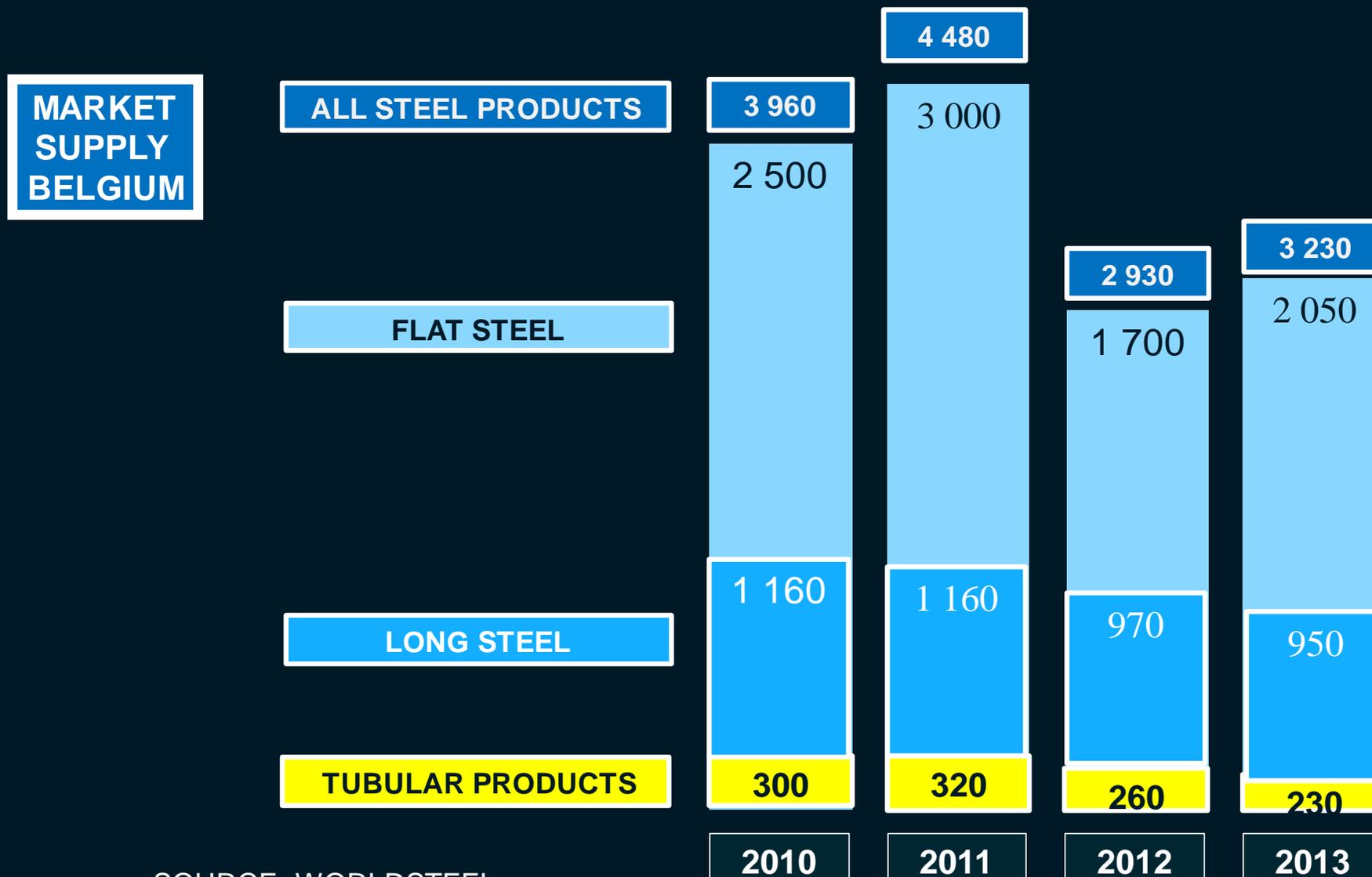


**BELGIAN STEEL DISTRIBUTION IS A SYSTEMIC
PLAYER IN THE SUPPLY OF
BELGIAN STEEL END USERS**





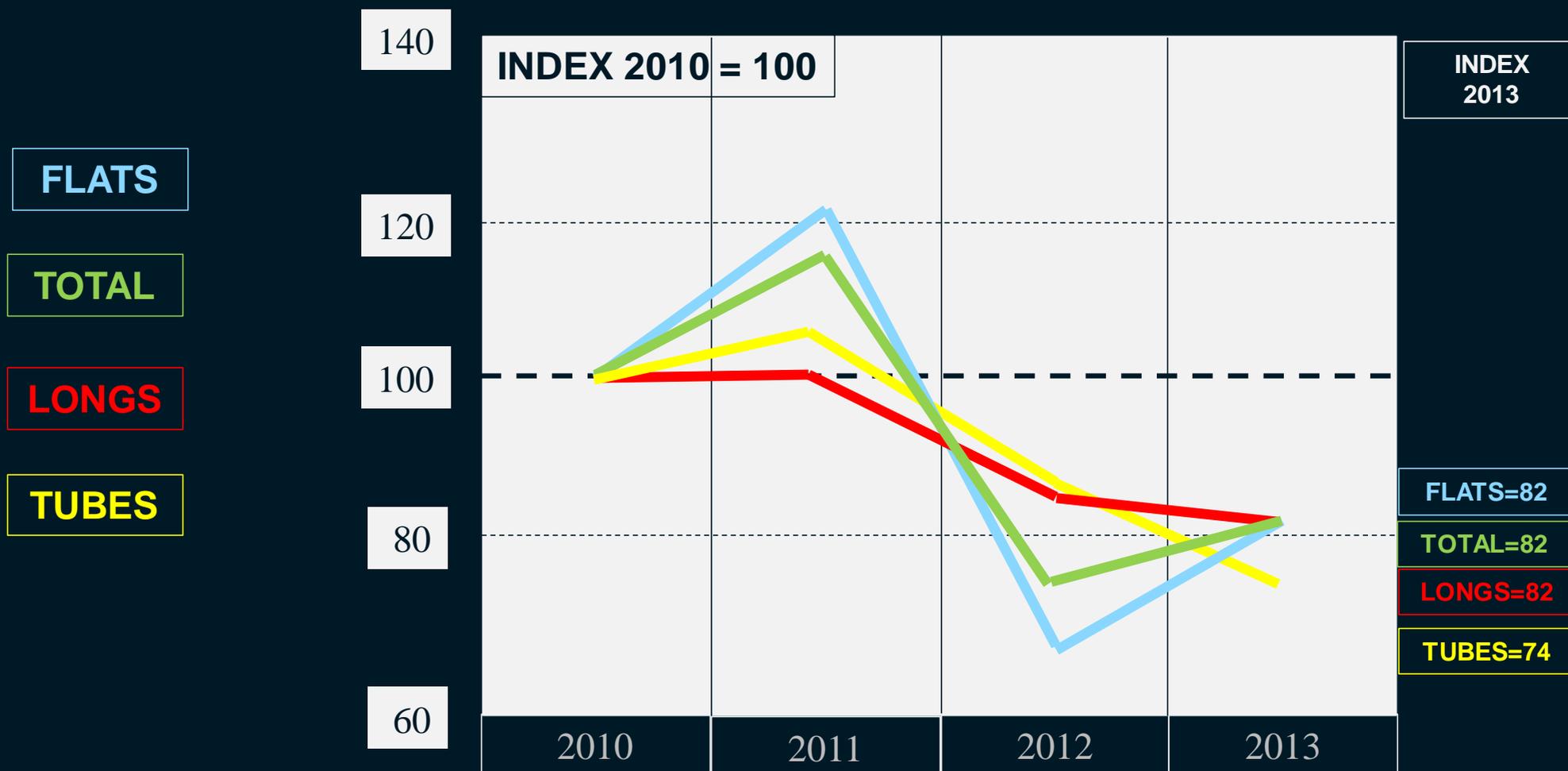
BELGIAN STEEL MARKET SUPPLY DIVED STRONGLY BETWEEN 2010 AND 2013



SOURCE: WORLDSTEEL



BETWEEN 2010-2013 BELGIAN APPARENT STEEL CONSUMPTION LOST -18 %. BOTH PRODUCT GROUPS LONGS AND FLATS SHARED THE SAME LOSS





IN BELGIUM, STEEL DISTRIBUTION IS FEDERATED IN GRYPMAFER

BELGIAN STEEL DISTRIBUTION HAS SOPHISTICATED SERVICE OFFER:

100 STEEL DISTRIBUTION COMPANIES

2 500 EMPLOYEES

2 000 000 TONS OF STEEL SALES

300-350 000 TONS OF STEEL STOCKS

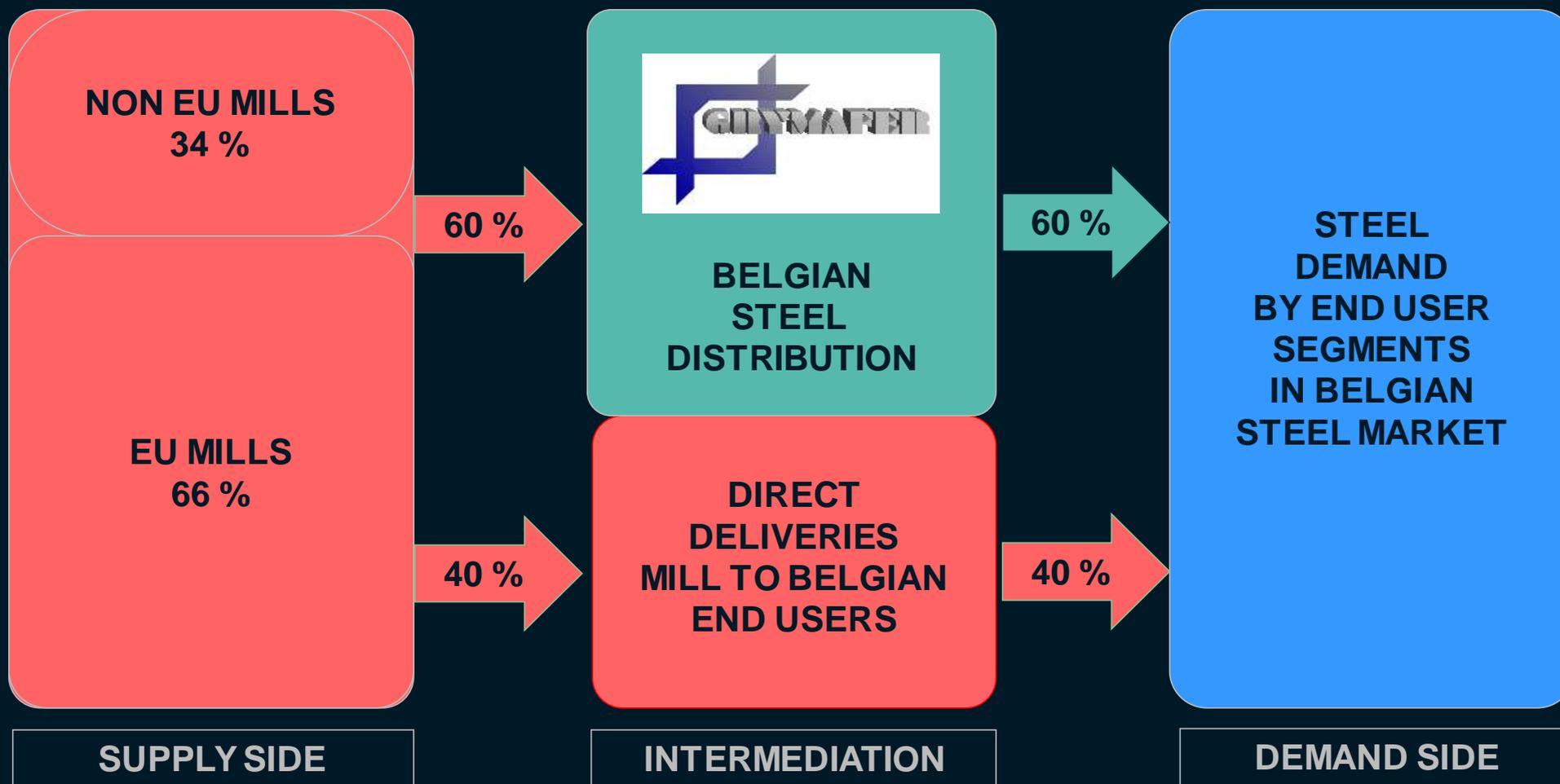
STATE OF THE ART PROCESSING FACILITIES



**EFFICIENT SERVICE PROVIDERS TO THE
BELGIAN CONSTRUCTIONAL STEEL COMMUNITY**



ALL STEEL DISTRIBUTION PRODUCTS CONSIDERED, BELGIAN STEEL DISTRIBUTION INTERMEDIATES TODAY 60 % OF BELGIAN STEEL MARKET SUPPLY





BELGIAN STEEL DISTRIBUTION HAS STRONGLY INVESTED TO SERVE BELGIAN CONSTRUCTIONAL STEEL WORKS





BELGIAN STEEL DISTRIBUTORS: EFFICIENCY IN STEEL PROCESSING



SOURCE: ROB LAUWERS, MCL



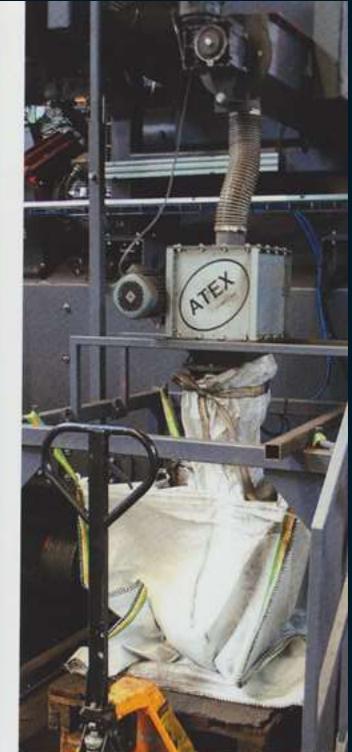
IN BELGIUM, STEEL DISTRIBUTION IS FEDERATED IN GRYMAFER



De conserveringslijn helpt het nieuwe businessmodel te realiseren



Profielen net voor ze zullen worden gelakt



Afvoer van stof en grit

EFFICIENT SERVICE PROVIDERS TO THE BELGIAN CONSTRUCTIONAL STEEL COMMUNITY

PHOTOS: HENSFERSTAUX – DE SAEDELEIR



PHOTOS:SAEY SSC

BELGIAN STEEL DISTRIBUTION: EFFICIENCY IN STEEL PROCESSING