

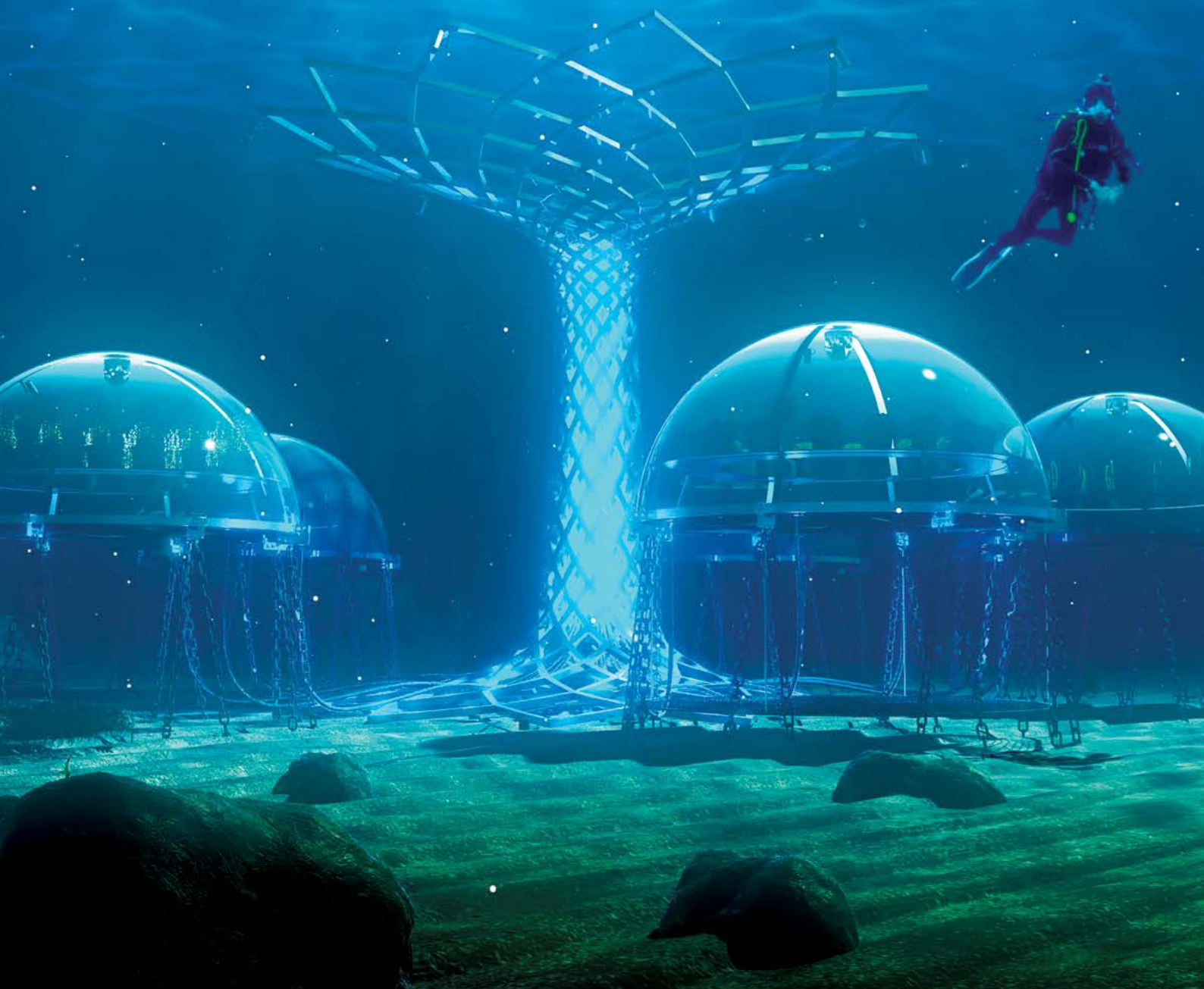
Mainstreaming the Steel Master Plan Conference Programme

Emperors Palace
19 & 20 May 2022



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Foreword

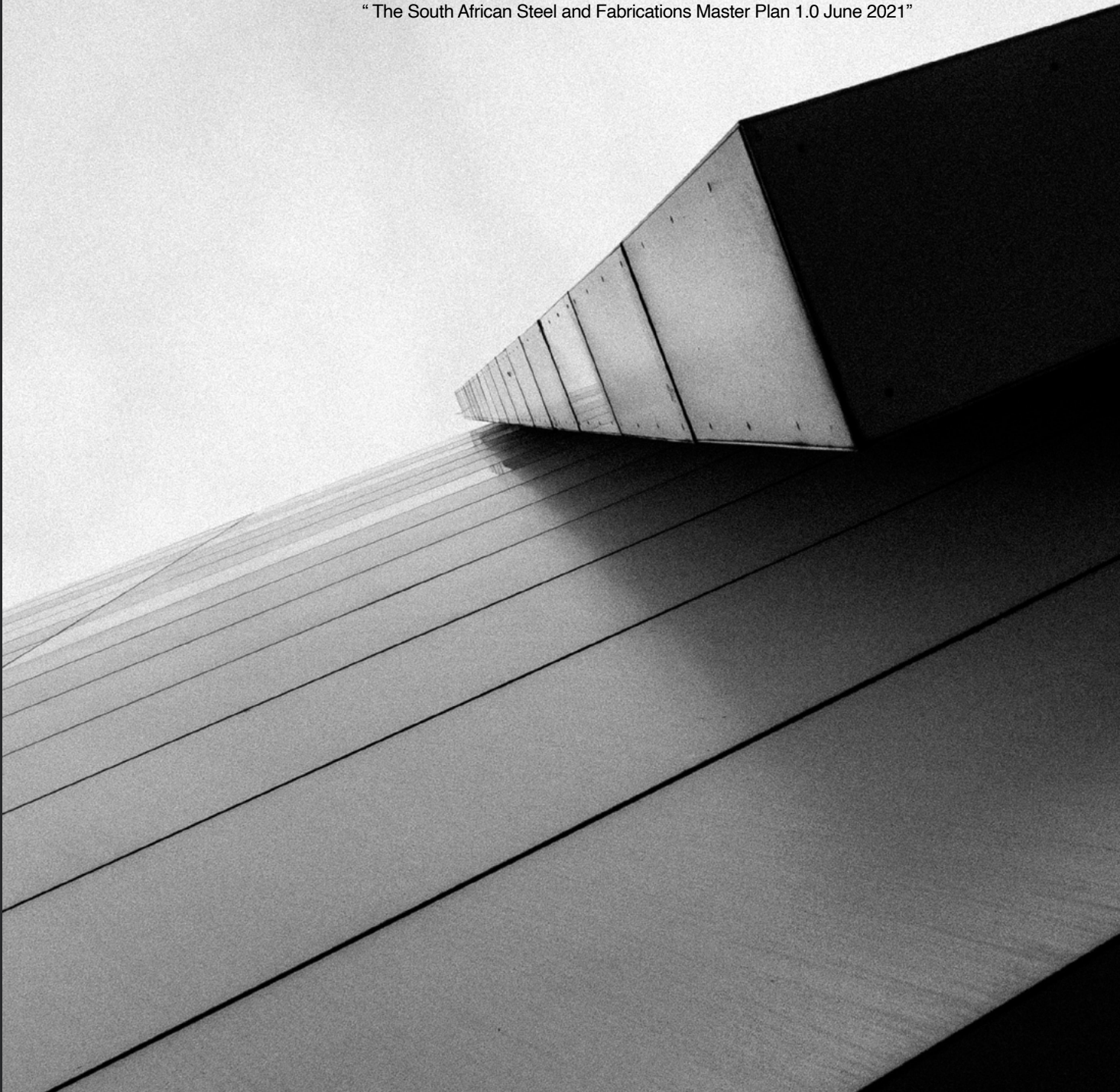
This Steel and Metal Fabrications Master Plan consolidates the comments received from the steel and steel products industry and stakeholders in Government on the first draft of the Steel Master Plan. The first draft, which was circulated for comment on 6 October 2020, was the outcome of discussions held between Industry Stakeholders and Government Facilitators.

This document incorporates feedback received from industry and specific Public Entities. The Minister convened the first Steel Oversight Council to table this revised document and consider an implementation road-map.

The Implementation Plan covers the immediate priorities from the base document, setting out the areas of focus within the first six months, the first year, and the first three years.

This Master Plan will guide the stabilization and progress of the industry. It is a dynamic document, hence it is called version 1.0, and it is expected that changes will be made when necessary following discussion at the Steel Oversight Council. Such changes will aim to take account of the developments in the industry, including internal and the external factors which affect the industry.

“ The South African Steel and Fabrications Master Plan 1.0 June 2021”



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PROGRAMME DIRECTOR

Nuraan Alli is the Marketing, Sales and Communication Executive at SEIFSA. She is responsible for the promotion and sales for all SEIFSA's products and services, including increasing SEIFSA digital footprint across all digital platforms.



Nuraan
SEIFSA Marketing, Sales and
Communication Executive

PROGRAMME FACILITATOR

Michael Avery researches, produces and anchors BDTV's Business Watch daily, hosts a daily on hour drive time radio show on HOT 102.7 FM, and writes a weekly Business Day column, called Badger and edits Gleason Publications' quarterly private equity magazine, Catalyst.



Michael Avery
Business Analyst



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SPEAKERS

Ebrahim Patel was appointed Minister responsible for Trade, Industry and Competition on 29 May 2019 by President Cyril Ramaphosa, combining the portfolios of Economic Development with Trade & Industry. Prior to this, he was South Africa's Minister of Economic Development, since May 2009. As Minister of Trade, Industry and Competition, Minister Patel is responsible for the development and implementation of industrial policy including investment, competition, industrialisation, trade, consumer protection and technical standards.



Ebrahim Patel
Minister of Trade, Industry
and Competition

Marius Croukamp is Deputy General Secretary at Solidarity and is responsible for strategic engagement with industry and government on industry matters. Marius has 28 years' experience in the labour movement across the Chemical Industry, Communications Industry, Mining Industry and the Steel and Engineering Industry.



Marius Croukamp
Solidarity

Irvin Jim is the General Secretary of the National Union of Metalworkers of South Africa. He is currently serving his third term as General Secretary, having been re-elected to serve the metalworkers in its December 2016 elective congress, following his first election in October 2008 and re-election in June 2012.



Irvin Jim
NUMSA
General Secretary

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SPEAKERS

Lucio Trentini is the Chief Executive Officer at SEIFSA, until his appointment in August 2021 he was the Operations Director at SEIFSA. He has been with SEIFSA since 1990 and over the last two decades, he has been involved at management and executive level at SEIFSA and has been actively involved in the leadership of the Federation. He has gained extensive experience in the metals and engineering industries and has developed sound working relationships with all industry stakeholder



Lucio Trentini
SEIFSA
Chief Executive Officer

Tafadzwa Chibanguza is SEIFSA's Chief Operations Officer and works closely with SEIFSA's CEO. He was previously employed as an Economist at the Minerals Council South Africa. Prior to the mining sector, he worked as a Senior Economist at SEIFSA and as a Technical Wealth and Investment Analyst at Rand Merchant Bank.



Tafadzwa Chibanguza
SEIFSA
Chief Operating Officer

Elias Monage is the Executive Chairman of Arabela Holdings (Pty) Ltd and Afika Holdings (Pty) Ltd. He is a member of the BRICS Business Council South Africa and President of the Black Business Council. He is currently serving as SEIFSA President and Chairperson of the SEIFSA Board.



Elias Monage
SEIFSA
President



The underlying problem is the lack of demand from an economy which has not been growing sufficiently fast. The lack of domestic demand has been aggravated by an increased market share from imports, both of primary steel and of value-added products. The global glut in steel production and the well-financed and coordinated export effort by especially Chinese companies into Africa has also affected the export markets” (The South African Steel and Metal Fabrication Master Plan 1.0, 2021, P.10)

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SPEAKERS

Phillipa Rodseth is the Executive Director of the Manufacturing Circle. The Manufacturing Circle engages with key stakeholders to advocate manufacturing as the engine of growth for our economy, influence policy and highlight opportunities and key priorities for the sector. In pursuit of these objectives, the Manufacturing Circle meets periodically with government ministers, heads of key state-owned entities, provincial and local government leaders and other business sector leaders.



Phillipa Rodseth
Manufacturing Circle
Executive Director

Dr Bernie Fanaroff has been the Deputy Director-General in The Office of former President Nelson Mandela, the Head of the office for the Reconstruction and Development Programme, the Deputy Director-General of the Department of Safety and Security, the Chair of the Integrated Justice System Board and the Steering Committee for Border Control and the Project Director of South Africa's Square Kilometer Array (SKA) bid and the construction of the Karoo Array Telescope. He served in all these positions with the single focus of making South Africa stand out in the global community.



Dr Bernard Fanaroff
Special Advisor to the
Minister

Harry Kassel joined The Reclamation Group in 2001. In 2007 he was appointed Chief Operating Officer for the group's inland operations. In 2013 he conceptualized and headed up the strategic, technical and operational development of the group's downstream beneficiation business. He has been a long standing executive member on the group board of directors. In 2017 he was appointed as the Group Chief Executive Officer and currently serves as a member of the Minister's Steel Oversight Council of South Africa.



Harry Kassel
Reclamation Group
Group Chief Executive Officer



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SPEAKERS

Thandi Phele is the Acting Deputy Director General of the Industrial Competitiveness and Growth Branch at the Department of Trade, Industry and Competition. She has been providing thought leadership to South African industrial policy and driving key programmes aimed at industrialization and localization. she continues to lead the development and implementation of various master-plans led by the dtic: Automotives; Retail-Clothing, Textiles, Footwear and Leather; Poultry; Sugar; Steel and Metal Fabrication; and Furniture.



Thandi Phele
DTIC - Acting Deputy
Director General

Henk Langenhoven is the Chief Economist at the Minerals Council South Africa responsible for tracking the mining sectors performance and research and advocacy on operational, regulatory, legal as well as policy issues affecting the sector. He actively participates in and serves on various forums such as NEDLAC, BUSA, the South African Reserve Bank, and others.



Henk Langenhoven
Chief Economist - Minerals
Council South Africa

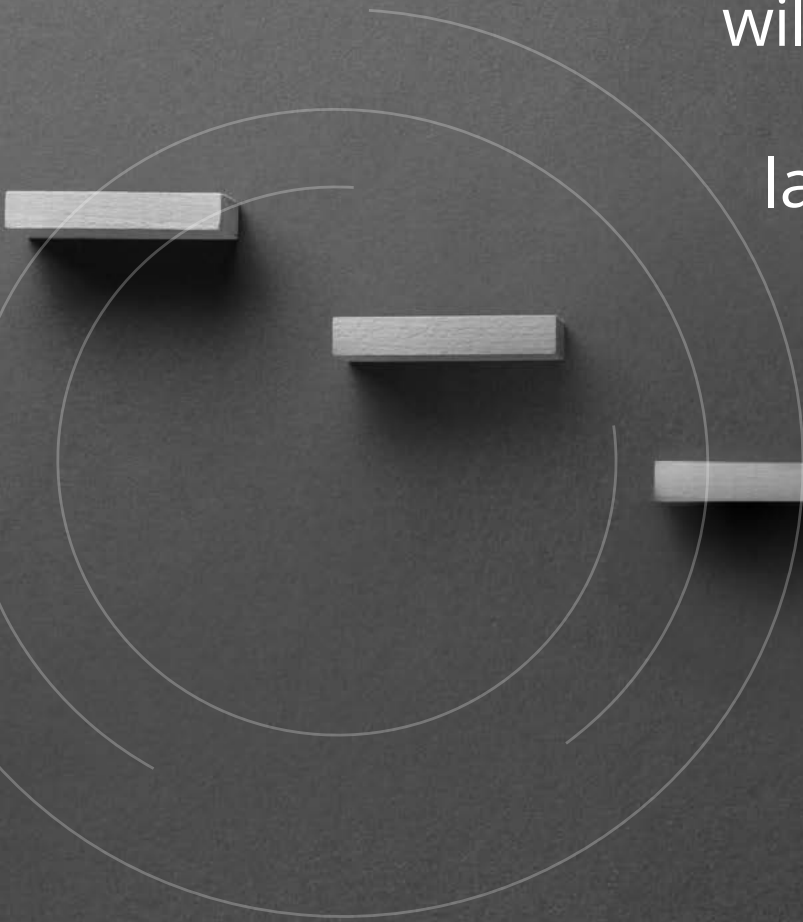
Mike Benfield joined Macsteel in September 2015. After years of operating in a declining South African market, Macsteel looked to Mike's decisive leadership style to steer the steel giant towards competitiveness and sustainability into the future.



Mike Benfield
Macsteel - Group Chief
Executive Officer

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SPEAKERS

Charles Dednam is Secretary General of SAISI. The steel industry has been his passion for almost his entire working career of 43 years. Since he left the corporate environment in 2011, he has analyzed the interaction between the different parts of the steel value chain, deepening his understanding of the industry's deficiencies and improving the transparency of information to all stakeholders. He is active as part of the analytical team in the roll-out of South Africa's Steel Master Plan and he offers his services as Principal of CD Research and Director of the Commodity Trade Observer.



Charles Dednam
SA Iron and Steel Institute
Secretary General

Mahendra is an economic and trade policy specialist working towards creating value-adding innovation and economic growth - while implementing climate change mitigation strategies and focusing on South Africa's minerals beneficiation, processing, and construction sectors.



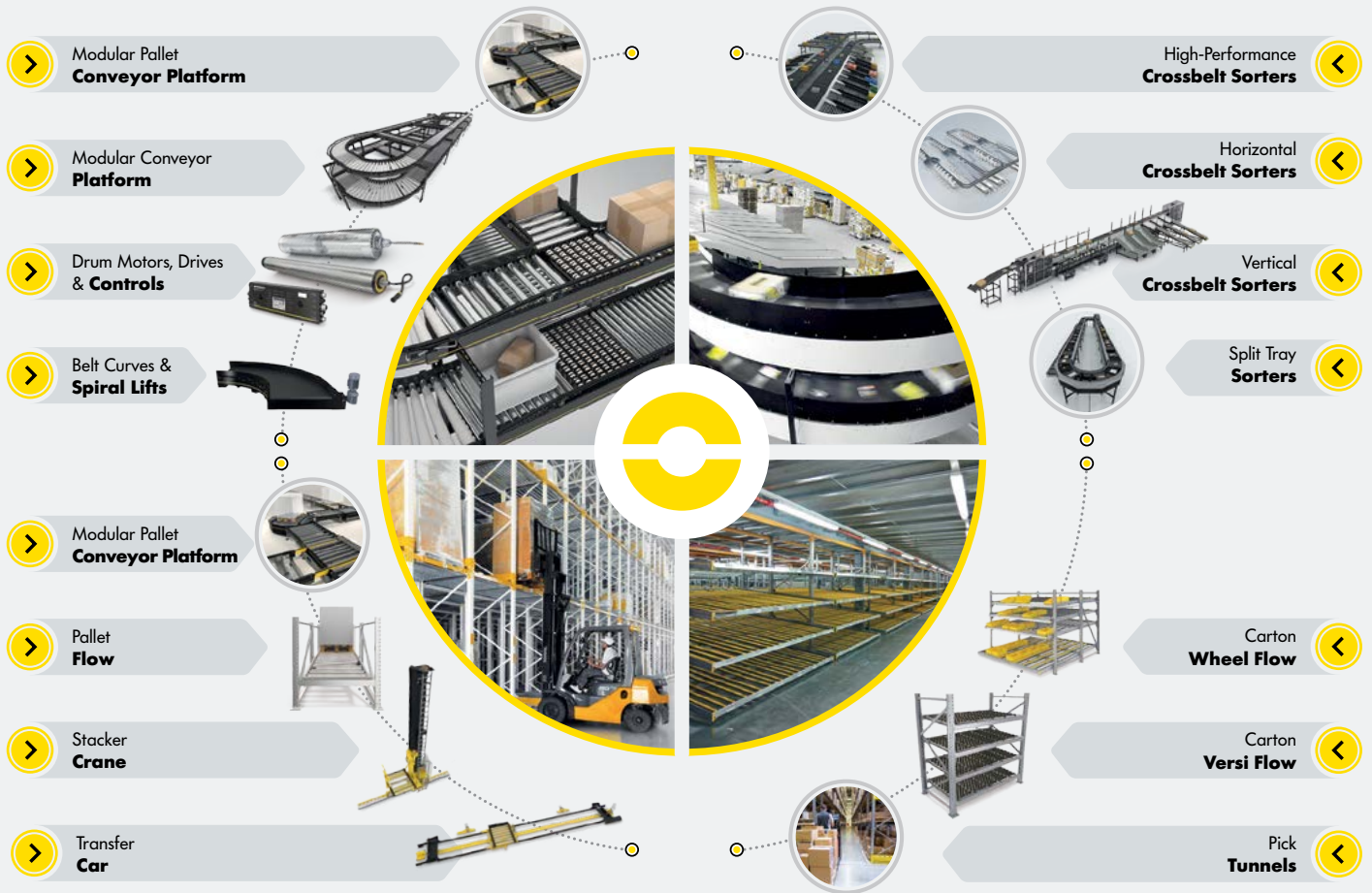
Mahendra Shunmoogam
DTIC - Director

Tumi Tsehlo is the Chief Executive Officer of Dynamic Fluid Control (Pty) Ltd. He has 23 years' experience in senior management positions in the electrical and technology fields, was the Managing Director of the South African Mint Company for seven years and has served on various other Boards. He also serves as a Board member of SEIFSA.



Tumi Tsehlo
Dynamic Fluid Control
Chief Executive Officer

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SPEAKERS

Wayne Adams is the Chief Executive Officer of the Manufacturing, Engineering and Related Services Sector Education and Training Authority (merSETA). He has been active in the skills development arena since 1997, first as a Senior Advisor on Quality within the Corporate Human Resource Division of Eskom. He was then seconded by Eskom to assist in the set-up of the ETQA division within the Energy SETA.



Wayne Adams
Chief Executive Officer
MerSETA

Nonkonzo is a shareholder and an Executive Director at Aberdare Cables (Pty) Ltd, which is a member of the Heng tong Group and the largest power cables manufacturer in Sub Saharan Africa. She is the chair of the HR Working Group of the Steel Oversight Council and is also the chairperson of the Industrialization Working Group of the BRICS Women's Business Alliance (South African Chapter).



Nonkonzo Molai
Aberdare
Executive Director

Sebolelo Sybil Chabane is the Director: PSET System Planning at the Department of Higher Education and Training. She is the Programme Manager for the implementation of the Economic Reconstruction and Recovery Plan Skills Strategy, which seeks to ensure that skills will not be a constraint to the economic recovery of the country following the COVID 19 pandemic.



Sebolelo Sybil Chabane
DHET - Director

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SPEAKERS

Mervyn is a Professional Electrical Engineer and registered with the Engineering Council of South Africa. He has been with the ACTOM Group for 21 years, having previously served as Divisional CEO of LH Marthinusen and Reid & Mitchell, an Executive Director of Savcio Holdings and various other Senior Management positions within the Group. Mervyn serves as a Board member of SEIFSA, an Executive Member of the Manufacturing Circle of South Africa and is extensively involved in various community and social responsibility initiatives.



Mervyn Naidoo
ACTOM Group
Chief Executive Officer

Umeesha Naidoo is currently responsible for industry planning and development in the Mining, Metals & related sectors at the IDC. The role entails leading the development and implementation of industry development plans aligned to industrial policy.



Dr Umeesha Naidoo
IDC
Industrial Planning

Sagren Moodley is the Chairperson and Chief Executive Officer of Metpress, a power line hardware manufacturer and OEM steel fabricator across a variety of industries. Sagren is also the current chairperson of the Power Line Association of SA (POLASA) and a member of the Steel Council of SA.



Sagren Moodley
Chairman and CEO
Metpress



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SPEAKERS

Trudi Hartzenberg is the Executive Director of the Trade Law Centre (tralac). She is responsible for the development of the tralac strategy, resource mobilization and engagement with African governments, regional, continental and international organisations.



Trudi Hartzenberg
Executive Director
tralac - Trade Law Centre NPC

Mr John Rocha is the Chief Director: Trade Invest Africa at the Department of Trade and Industry of the Republic of South Africa. Prior to assuming this role, Mr Rocha worked as business advisor and consultant. In this capacity he was acting as the Project Manager for the Southern Africa Regional Gas Task Force at the NEPAD Business Foundation where he was responsible for driving the development of the SADC Regional Gas Master Plan.



John Rocha
Chief Director
Trade Invest Africa

“

The Steel Master Plan importantly identifies that there are burning platform issues that threaten the immediate viability of the sector versus the longer-term growth initiatives for the sector. A prerequisite to growing the sector is saving the existing capacity from further contraction. The long-term growth drivers of the sector are vested in the country's infrastructure drive, development of industry value chains and the greening of the industry to make it resilient in the climate change debate. ”

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**Day 1:
Thursday, 19 May 2022**

Time	Topic	Presenter
08h00 - 09h00	Registration	All
09h00 - 09h15	Welcome and Introductory Remarks	Lucio Trentini SEIFSA, Chief Executive Officer
09h15 - 09h30	Opening Address	Elias Monage SEIFSA, President
09h30 - 10h00	Key Note Address: The Steel Master Plan guiding the stabilisation and progress of the industry	Ebrahim Patel Minister of Trade Industry and Competition
10h00 - 10:30	Aligning the SMP's objectives to NUMSA's strategic vision for the industry	Irvin Jim NUMSA General Secretary
10h30 - 11h00	Why the SMP cannot fail Regardless of the complexities involved in working together and balancing the needs of downstream and upstream fabricators and producers	Marius Croukamp Solidarity Deputy General Secretary
11h00 - 11h30	Tea, Coffee and Comfort Break	All
11h30 - 12h00	Setting the Scene: The Master Plan includes six priority areas namely: Demand-side measures; Supply-side measures; African Continental Free Trade Area Agreement; Transformation, Human Resources, a Shared Vision; Resource Mobilisation and the Steel Fund	Dr Bernard (Bernie) Fanaroff Special Advisor to the Minister
12h00 - 12h30	Demand-Side Measures, Localisation and Illicit Trade Thandi Phele DTIC Acting Deputy Director General	Panelists: Henk Langenhoven Chief Economist Minerals Council South Africa Mike Benfield Macsteel Group Chief Executive Officer Phillipa Rodseth Manufacturing Circle Executive Director
12h30 - 13h00	Panel Discussion	Michael Avery
13h00 - 14h00	Lunch	All



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Day 1:
Thursday, 19 May 2022

Time	Topic	Presenter
14h00-14h30	<p>Supply-Side Measures</p> <p>Harry Kassel Reclamation Group Group Chief Executive Officer</p>	<p>Panelists:</p> <p>Charles Dednam SA Iron and Steel Institute Secretary General</p> <p>Mahendra Shunmoogam DTIC Director</p>
14h30 - 15h00	Panel Discussion	Michael Avery
15h00- 15h30	<p>Transformation, Human Resources and Shared Vision</p> <p>Tumi Tsehlo On Transformation Dynamic Fluid Control Chief Executive Officer</p> <p>Wayne Adams On Human Resources Chief Executive Officer MerSETA</p>	<p>Panelists:</p> <p>Nonkonzo Molai Aberdare Executive Director</p> <p>Sebolelo Sybil Chabane DHET Director</p> <p>Mervyn Naidoo ACTOM Group Chief Executive Officer</p>
15h30 - 16h00	Panel Discussion	Michael Avery
16h00 - 16h15	Wrap-up for the day, Reflections, Key Takeaways and Closure	Tafadzwa Chibanguza SEIFSA Chief Operating Officer

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Day 2: Friday, 20 May 2022

Time	Topic	Presenter
08h30 - 09h00	Arrival, Tea, Coffee and Refreshments	All
09h00 - 09h30	Welcome, Recapping of Key Reflections from Day One and Setting the Scene for Day Two	Tafadzwa Chibanguza SEIFSA Chief Operating Officer
09h30 - 10h00	Resource Mobilisation and the Steel Industry Development Fund Charles Dednam South African Iron and Steel Institute Secretary General	<u>Panelists:</u> Dr Umeesha Naidoo IDC Industrial Planning Sagren Moodley Chairman and CEO Metpress
10h00 - 10h30	Panel Discussion	Michael Avery

10h30 - 11h00	Tea, Coffee and Comfort Break	All
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Time	Topic	Presenter
11h00 - 11h30	African Continental Free Trade Agreement Market and New Market Access Elias Monage Afika Power Chief Executive Officer	<u>Panelists:</u> Trudi Hartzenberg Executive Director t r a l a c - Trade Law Centre NPC John Rocha DTIC, Chief Director Trade Invest Africa
11h30 - 12h00	Panel Discussion	Michael Avery
12h00 - 12:15	Overall reflections on the two day proceedings	Michael Avery
12h15 - 12h30	Final Comments and Closure	Lucio Trentini SEIFSA Chief Executive Officer
12h30	Lunch	All

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Steel Oversight Council

Thursday, 25 November 2021



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2. CONTEXT IN WHICH THE MASTERPLAN IS IMPLEMENTED
3. ACHIEVEMENTS TO DATE
4. PROGRESS REPORTS FROM THE WORK-STREAMS
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6. MATTERS FOR UNLOCKING
7. KEY FOCUS AREAS/ PRIORITIES FOR THE NEXT 3-6 MONTHS

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Palesa Molise
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Eleen Snyman
Economic and
Commercial Officer
eleen@seifsa.co.za

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Recap on the Master Plan



MASTER PLAN OBJECTIVES

- This Steel and Metal Fabrication Master Plan is a social compact to guide the stabilisation, progress, and innovation of the value chain
- Key focus on continuous improvement and collaboration between Industry, Government and Organised Labour in order to maintain the sustainability of the Steel and Metal Fabrication Industry
- 73 implementation actions guide the Implementation Plan which actioned into Key Focus Areas
 - Supply-side; Demand-side; AfCFTA/Export Markets; Resource Mobilisation; Transformation; and HR development
- Turnaround action-oriented plan based on identified competitiveness improvements in the firms, measures to reduce levels of imports and reposition the industry to be resilient in the intense global pressures
 - Social compact to stabilise and grow the steel and steel products industry
 - Enable increased competitiveness and productivity, including especially training and mentoring to increase professionalism, expertise and know-how
 - Increase demand
 - Stop leakages due to illicit trade and circumvention of designated products
 - Retain and increase decent jobs
 - Transformation of the industry
 - Ensure the industry and workers are prepared for the 4IR and green economy



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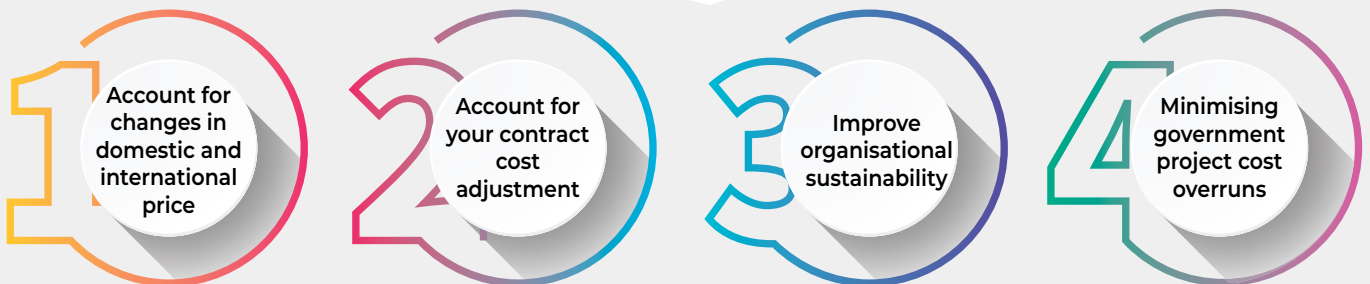
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DEBIT ORDER FACILITY AVAILABLE

How Companies benefit from using SEIFSA PIPS

- By using SEIFSA PIPS, a buyer in a contract can be certain that market-related increases are paid out to suppliers (as determined by a Contract Price Adjustment calculation), ensuring the sustainability or improvement of organisation profitability.
- Companies/trading partners can protect their profit margins from their existing or new contracts by using the SEIFSA PIPS.
- Municipalities, SOEs and government departments and mining companies in South Africa have done exactly that – i.e. make use of SEIFSA PIPS in their Contract Price Adjustment.

NOTE: The Theory and Calculation of Contract Price Adjustment is now offered digitally, embracing the 4th Industrial Revolution.

MASTER PLAN FOCUS AREAS

Projects being implemented

SUPPLY-SIDE	DEMAND-SIDE	AFCTA/ EXPORT MKT	TRANSFORMATION	RESOURCE MOBILISATION	HR
<p>Input costs reductions in the value chain</p> <ul style="list-style-type: none"> Administered prices (electricity, rail, port tariffs) Raw material Labour and productivity Steel pricing across the value chain <p>Overcapacity</p> <ul style="list-style-type: none"> Improve steel supply matching demand Improve competitiveness Product standards R&D/Innovation 	<ul style="list-style-type: none"> Infrastructure Program <p>Import replacement</p> <ul style="list-style-type: none"> Designations Trade administration Trade Policy SOE's procurement Buy Local <ul style="list-style-type: none"> Exports New product value chains Mining digitisation 	<ul style="list-style-type: none"> Export readiness roadmap SA/ SACU tariff offers and acceptances to be made against clear Rules of Origin Import Analysis for localisation opportunities Strategic use of the trade remedies. 	<ul style="list-style-type: none"> Analysis of transformation levels Determine status quo in the industry and develop support options Worker empowerment BBBEE Level Targets and skills transfer to SMME's 	<ul style="list-style-type: none"> Incentives Greening the steel industry Steel Industry Development Fund Investment support and facilitation 	<ul style="list-style-type: none"> Improve industrial relations in the sector Optimise training and skills development Improve development of HDSA's

5

CONTEXT IN WHICH THE MASTERPLAN IS IMPLEMENTED

Key challenges faced by the sector/ value chain

- Reduced domestic and global competitiveness exacerbated by steep increase in production costs (raw materials, electricity, logistics)
- Unstable energy supply and escalating energy costs
- Transportation & logistics: unreliable and cost of rail transport infrastructure, heavy reliance on Road transport
- Delays infrastructure rollout programme → depressed demand
- Increased imports and the escalation of illicit/illegal trade (Asian and global over-capacity and over-production resulting in pressure on both primary steel value added products)
- Increased deployment of trade remedy measures globally – negatively impacting SA competitiveness in the export markets
- Capacity under utilisation – plant closures and job losses
- Climate Change mitigation – export markets gearing for changes – local industry is very carbon intensive
- COVID 19 impact and vaccine reluctance: impact on industry work force due to vaccine reluctance and increase number of infections.
- Events of July 2021
- Recent wage negotiation that lead to strikes actions



6

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- Shopfloor;
- Arbitration;
- Basic Conditions of Employment Act / employment contracts;
- Sick Leave and Absenteesm
- Equal Pay for Equal Value Provisions
- Labour Law matters;
- Dispute resolution;
- Conciliation;
- Labour court;
- Retrenchments.

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Contact our experts



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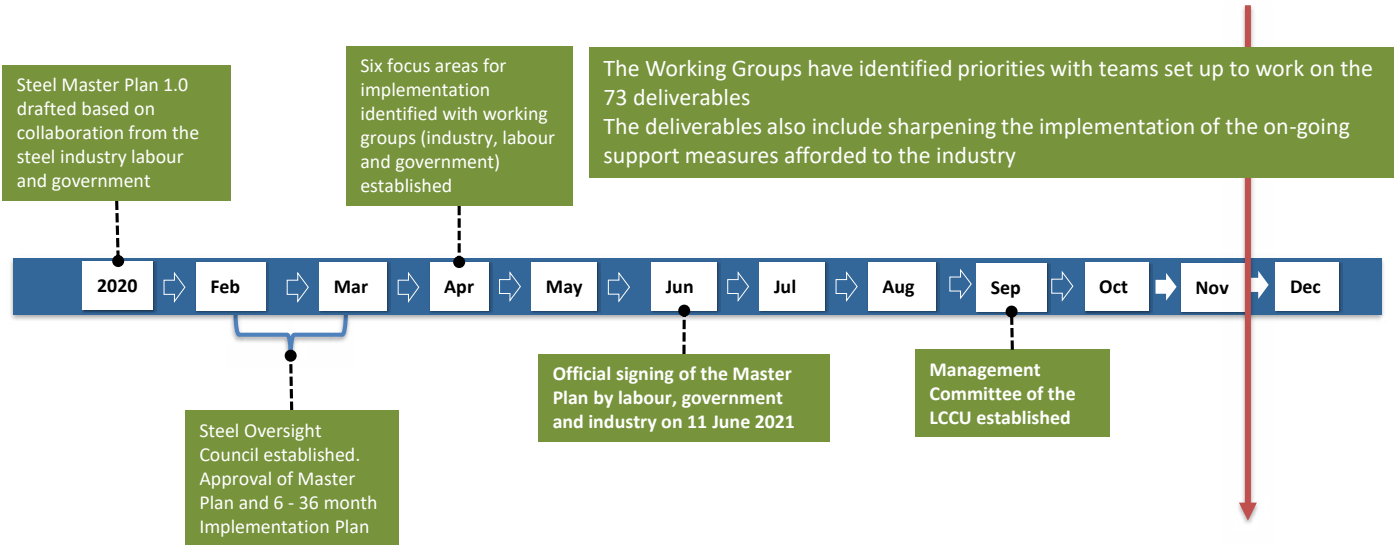
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SEIFSA
Steel and Engineering Industries
Federation of Southern Africa

April – Nov 2021: Key Deliverables Overview



Key Successes Overview

Steel and Metal Fabrication Master Plan

Support and Anchor the Reimagined Industry Strategy & Economic Reconstruction and Recovery Plan

- Trade Instruments**
To support local industry & attaching reciprocal commitments, e.g.: improve industries' overall competitiveness; increase productive capacity; investments; retain and create jobs; enhance skills development
- Preferential Price System & Export Tax**
Impact of Steel PPS & Export Tax: Better Availability of the input material for the local market. New market players/production lines are emerging and new products for localisation
- Illicit Trade**
Progress made on addressing illicit trade: mis-declaration and under invoicing under the Inter-Agency Working Group, led by SARS
- Localisation**
Localisation interventions bearing fruit: supporting Black Industrialists; Jobs and Deepening of SA capabilities
- Industrial Financing Support**
11 projects supported in the value chain. R209 Million disbursements
R1.3 Billion Investments & R576 million in domestic procurement
- Highveld Industrial Park**
Increased Investment in the Highveld Industrial Park: business rescue practitioner to Highveld recently announced the acquisition of the remaining iron and steelmaking assets of Highveld by Highveld Robusteel Proprietary Limited ("Robusteel"). This transaction will contribute significantly towards the local economy of eMalaheni, 900 new jobs to be created, the upskilling of local labour, artisanal and engineering personnel and also providing localised supplier development opportunities.

Implementation

LET US TAKE CARE OF YOUR HUMAN CAPITAL AND SKILLS DEVELOPMENT NEEDS



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- Workplace Skills Plan (WSP);
- Employment Equity Committee training and submission training;
- Change Management;
- Diversity and Social inclusion;
- Performance Management;
- Talent Management & Succession planning training;
- Self-motivated teams;
- HR Audit.

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Contact our expert



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Key Successes: Trade Support

1. Additional Trade Support Afforded: Already in Implementation:

- In August 2021, the **safeguard duties on other screws fully threaded with hexagon heads made of steel (set screws)** was extended for a period of 3 years and will be implemented at the following rates: 2 August 2021-1 August 2022: 35.6%; 2 August 2022-1 August 2023: 30.6%; and 2 August 2023-1 August 2024: 25.61%
- In August 2021, a **safeguard duty on certain flat rolled products, whether in or not in coils, expired and a decision was made not to further extend it**. Factors considered include: concerns over supply shortages; the level of the liberalised duty; improved financial position of the primary steel producers given market conditions and pricing; period the duty had already been in place
- In August 2021, **import duty on grinding balls** and similar articles for mills under the tariff sub-heading 7325.91 was increased from duty-free to 15%. Effective and timely tariff support can potentially resuscitate demand for locally manufactured grinding media, protect existing jobs while increasing job creation in the value chain
- In November 2021, **import duty on certain tubes, pipes and hollow profiles, seamless, of iron** (excluding cast iron) or steel, classifiable under tariff subheadings 7304.19.90, 7304.23.90, 7304.29.90, and 7304.39.35 was increased from 10 to 15%

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Trade Support

1. Trade Support: In the Pipeline

- In the 1st phase, significant support was provided to the upstream segment of the industry. Through the masterplan, there is a policy shift to consider streamlined trade policy tools to enhance downstream competitiveness
- A number of rebate facilities are under consideration to improve primary steel supply and cost competitiveness in the affected value chains
- Various Anti-dumping reviews; rebates and tariff adjustment recommendations are currently under consideration (in sub-sectors: fasteners; various steel and stainless steel applications)

As a member of an Association federated to SEIFSA, you will enjoy the following affiliated benefits:

EXPERT ADVICE AND ASSISTANCE OVER THE PHONE ON

- ▶ Industrial relations issues
- ▶ Legal issues
- ▶ Bargaining Council Agreements and MIBFA queries
- ▶ Safety, Health, Environment & Quality issues
- ▶ Economics and Commercial issues
- ▶ Human Capital & Skills Development matters, including grant claims from the merSETA

REPRESENTATION ON NATIONAL AND INDUSTRY FORUMS

- ▶ Business Unity South Africa (BUSA)
- ▶ Manufacturing, Engineering and Related Services Education and Training Authority (merSETA)
- ▶ Metal and Engineering Industries Bargaining Council (MEIBC)
- ▶ Metal Industries Benefit Funds Administrators (MIBFA)
- ▶ National Economic, Development and Labour Council (NEDLAC)
- ▶ National Skills Authority (NSA)
- ▶ Human Resource Development Council (HRDC)

MANDATE

- ▶ As a member, you are able to give SEIFSA a mandate for legislative changes and for wage negotiations, through your respective Associations, so that your voice is heard at the highest level

BENEFIT FUNDS

- ▶ Representation of members' interests on the following industry benefit funds:
 - ▶ Engineering Industries Pension Fund
 - ▶ Metal Industries Provident Fund
 - ▶ Sick Pay Fund
 - ▶ Metal and Engineering Industries Permanent Disability Scheme

NEGOTIATIONS

- ▶ Expert negotiators conduct national negotiations on behalf of members at the level of the MEIBC (e.g. Main Agreement)
- ▶ SEIFSA represents sectors in the negotiation of sectoral agreements (e.g. Lift Industry Agreement)
- ▶ SEIFSA experts represent members in a range of plant-level negotiations

SEIFSA AND INDUSTRY NEWS

- ▶ Copy of *SEIFSA NEWS*, a print and electronic newsletter covering the latest industry news
- ▶ Unlimited access to the SEIFSA website, including updates on the latest Industry developments

For all the Association news, information and / or meeting dates

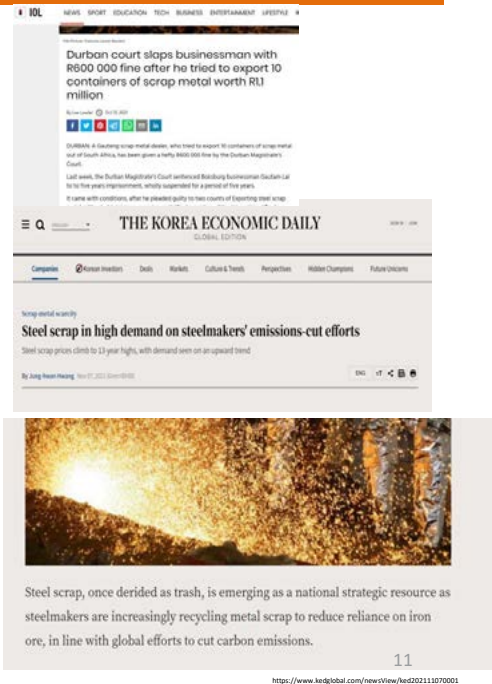
- Theresa Crowley: 011 298 000
- Khumo Kodisang: 011 298 000
- Christa Smith: 011 298 000

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Key Successes: Scrap Metal Interventions

2. Scrap metals Interventions: Contribution to Local beneficiation

- An export duty on scrap metal was launched 1 Aug 2021 and through the ITA Act the Price Preference System (PPS) was extended to 31 July 2023. The 2 instruments are implemented concurrently to ensure adequate quality scrap metals (strategic resource) is available at competitive pricing for local processing by steel mini mills; secondary smelters and foundries
- These measures will contribute towards local beneficiation of scrap metals and restore supply stability for the industry which is mainly located in the Ekurhuleni Municipality; Ethekwini Municipality; City of Cape Town
- **Example of enforcement:** Scrap metal dealer, who tried to export 10 containers of scrap metal out of South Africa without the necessary permits has been given a R600 000 fine by the Durban Magistrate's Court. The dealer pleaded guilty to two counts of Exporting steel scrap metal without obtaining an export permit (Contravention of the ITA Act) and two counts of making a False declaration (Contravention of the Customs and Excise Act)
- **Impact on the profitability and pricing:**
 - Better affordability of strategic recourse, as it is an import feedstock in the production of downstream metal due to the relatively lower energy consumption (also its has a lower carbon footprint). Direct impact is low cost – as input material is now cheaper – manufactured product becomes cheaper
 - Concurrent system encourages expansions downstream
 - Promoting circular economy (greening the industry)



Scrap Metal

Scrap Dealers/ Merchants

- Scrap processors reporting double digit growth and financial performance. For example: Insimbi (JSE listed scrap merchant) highlights of their financial performance for 12 months ending August 2021 include:
 - Revenue up 47.6% (from contracts with customers) for the interim period increased to R3.1 billion (2020: R2.1 billion)
 - Gross profit up 41.8% growing to R274.9 million (2020: R193.8 million)
 - Operating profit up 181.7% to R95.2 million (2020: R33.8 million)

Steel Mills

- The access to quality scrap at competitive prices has contributed to the sustainability of the local long products steel mills
- The enhancement of sustainability in their operations has increased competition and the competitiveness has been transferred into the pricing which support the downstream sector
- Long products in SA are now priced on a cost basis and this move yielded significant benefits. By illustration:
 - Scaw is selling locally manufactured equivalent wire rod product at a net ex-steel works price that is approximately 5% below the Chinese FOB price (source: SBB Platts (an S&P Global commodities information publication) and Scaw Metals)

Downstream

- Reduction in the SA long products pricing to prices below those available in China (on a dollar basis) has created an internationally competitive downstream wire and wire rod products manufacturing sector → for the first time in over a decade, SA can increase its capacity and supply to the South African and Southern African markets

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Safety, Health, Environment
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Federation of Southern Africa

Key Successes: Combatting Illegal Imports

3. Progress on the Inter-Agency Working Group

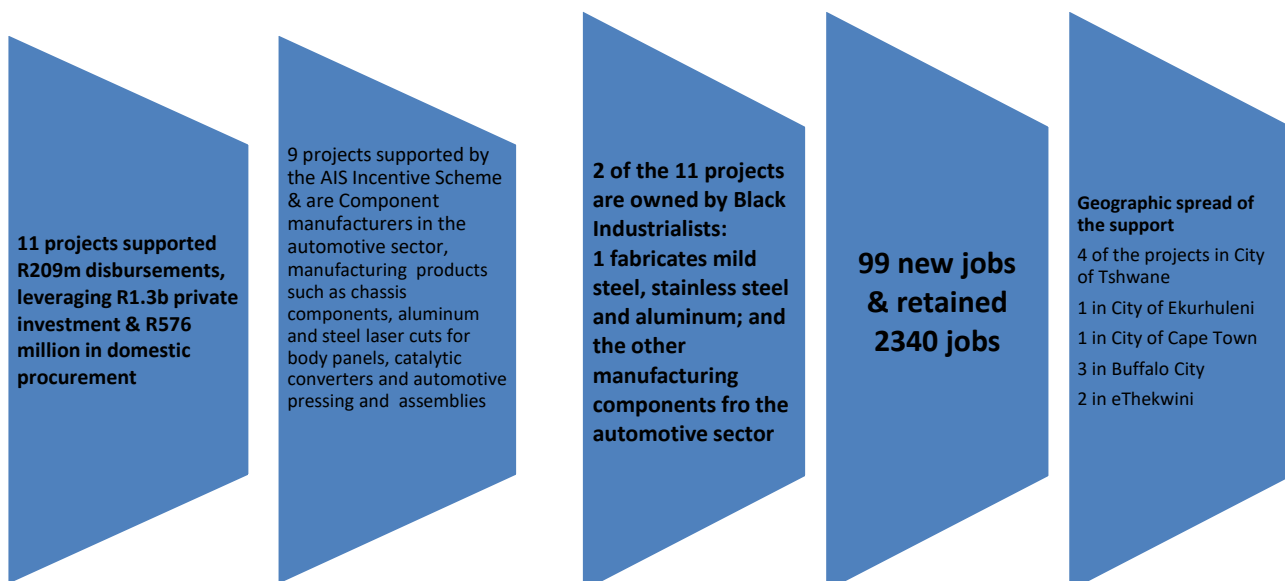
- During the period November 2020 to October 2021 , the below interventions have been initiated by SARS in the Steel and Scrap metal sector: that have resulted in the following:
 - There are 14 active risk rules for testing the level of compliance
 - A total of 4858 alerts on the declarations processed
 - 1079 physical inspections
 - 953 declarations that have been released as entered
 - A total of 126 vouchers of corrections (VOC's) processed*
 - Over R1.8 million in additional duty and over R380 000 in VAT has been recovered
- **Corrugated Iron sheeting:** 5 corrugated sheet entities identified that might be grossly undervaluing their imports. 4 of the 5 entities, Reserve Bank payments to suppliers exceeded the amounts declared to SARS Customs. The clients' values declared to SARS customs and the Reserve Bank payments do not correspond

**This is processed either by the clients' own initiative or SARS to correct the original declaration

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Key Successes: Industrial Financing Support

4. the dtic Industrial Financing Branch support



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Key Successes: Further Investments in the Highveld Industrial Park

5. Highveld Steel

- Was in business rescue since 2015
- Acquired by Highveld Robusteel Proprietary limited 2nd week of November 2021 for R1.65 Billion (USD 105 million)
- At full production, Robusteel will produce vanadium bearing pig-iron, various flat steel products, vanadium pentoxide slag and structural blooms
- Robusteel is jointly held by Bonheur Ventures Proprietary Limited and Amplico Resource Management Limited
- Reopening of Highveld Robusteel Proprietary limited → 900 new jobs to be created, the upskilling of local labour, artisanal and engineering personnel and also providing localised supplier development opportunities
- Highveld Industrial Park: employs 1 500 people. Once the of Highveld Robusteel's project is fully commissioned, 2 400 people will be employed



Selaelo Ramusi, the CEO of Bonheur and Robusteel said: "This acquisition underpins inclusive economic growth and transformation through local beneficiation of resources by a black-owned entity in the heavy industrial sector. Given the nature of the assets acquired, this is an important step towards the re-industrialisation of the economy and the establishment of a competitive steel and manufacturing facility in South Africa. Our acquisition is in-line with the recently-published Steel Master Plan."

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Key Successes: Contribution to Localisation Programme

6. Over the reporting period, a number of initiatives have been implemented to support localisation and deepening of SA capabilities

6.1 Localisation in the rail recapitalisation programmes

- Transnet has recently issued **Letters of Awards a 5 year wheels** (forged and cast) tender to local manufacturers. Of approx. R5.5b total contract, a split awarded is considered on 34' wheels to Cast Products SA (ex. Scaw) and Naledi Ringrollers (a Black Industrialist) to the value of R2.5billion and 30% of 36' wheels is considered for award to Naledi Ringrollers. Transnet Engineering and the suppliers are in contract negotiations stage, with the final outcome anticipated in early 2022. Transnet Engineering is yet to make a decision on the remainder of the 36' wheel allocation. This has been possible due to the designation of wheels under the rolling stock local content requirements
- In 2013, Gibela Rail Transportation was awarded a tender by PRASA to supply 3 600 passenger coaches (600 train-sets) with incremental local content commitments. As part of the OEM localisation strategy, the consortium has converted its training centre (3600sqm) into a **Traction Motors manufacturing facility**. This workshop will produce 4 traction motors a day and create 90 new jobs. Currently, the traction motors utilised in the train production line are procured from France. This investment was officially launched by Minister of Transport on 29 October 2021
- Secured support from Transnet to consider a **developmental approach in their scrap disposal strategy** to ensure the availability of affordable scrap metal for the consuming industry. First round of the procurement closed in October 2021 and only local processors (i.e. mills; secondary smelters and foundries) will be considered

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Key Successes: Contribution to Localisation Programme

6.3 Accreditation and Certification Support to deepen SA capabilities

Cullin Africa

- **The dtic** with the support of DPE facilitated discussions with Eskom KZN to support the localisation efforts of Cullin Africa, a local IPCs manufacturer with a production facility in Cape Town
- Cullin Africa invested R1.2 million in the production line of IPC, succeeded in acquiring the necessary approvals from Eskom (including certification on the new SANS 50483 specifications) and was subsequently awarded about R1m work by Eskom. Eskom is the process of issuing RFQs for the same product

LVSA Group

- LVSA Group is approved with standards to design, development, manufacturing, and supply of industrial valves. In Sept. 2021, LVSA was also audited and recommended by the American Petroleum Institute (API) for the approval of manufacturing and producing valves for the oil, gas and petroleum sector
- LVSA Group, a black owned Valve manufacturer located in KZN, supported by the IDC with a loan of R105m, R35m from the Black Industrialist Scheme (BIS) and Shareholders' contribution of R48 million in Property and R24 million in Plant and Stock

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Key Successes: Contribution to Localisation Programme

6.3 Localisation of automotive components:

- The National Foundry Technology Network (NFTN) – Competitiveness Improvement Programme of **the dtic to support import replacement**, provided R700 000 support to Prevail Engineering Foundry based in Vereeniging. The intervention together with an investment of R7m on new tooling from the company resulted in the company:
 - securing 7 year supply contracts for automotive components with four Auto OEMs for mirror base and wiper pivot castings for local and export markets
 - securing a contract from a Lighting company to supply LED Light Fitting Housings
- The contracts have resulted in the 55 job retention with opportunities to re-absorb 22 workers (previously retrenched) when the Ford SA contract commences in July 2022 ; and additional investment in machining capacity

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FOCUS AREA: SUPPLY SIDE

Key Priorities and Deliverables Achieved to date

Interventions to improve input costs and supply across the value chain

- ✓ Rotational load-sharing programme is completed, companies requested to postpone the pilot until June 2022 to be able to participate in a current strong demand cycle
- ✓ Scrap metal export tax has come into effect from 1 August 2021
- ✓ The Price Preference System (PPS) has been extended for 2 years until July 2023 to complement the implementation of the export tax and ensure local market preference before exports
- ✓ Standards: Industry has drafted a specification on roof-sheeting products, NRCS is reviewing. SABS focus on capacitating labs – Industry engagements with SABS have identified standards requirements and further testing support required
- ✓ Working with IDC to identify opportunities – some programmes underway

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FOCUS AREA: SUPPLY SIDE

Key Priorities and Deliverables Achieved to date

Improve steel supply across the value chain

- ✓ Various rebate investigations to address primary steel non-availability and/or shortages have been completed ITAC and under consideration by the department
- ✓ Workshop held with ITAC on current value added export rebates – several industry players are now aware
- ✓ AMSA has reviewed the value added export rebate offering for the downstream industry and is agreeing to extend application timelines and develop a streamlined system that is able to better respond to value added exporters
- ✓ Analysis and development a proposal on iron ore and coking coal pricing – report with recommendations completed and interdepartmental consultations to commence btw. DTIC & DMRE
- ✓ A monthly communication piece – reporting the availability and supply lead-times of the primary steel mills – was launched in August 2021 and is well received by the players in the value chain
- ✓ Supply and Demand Matrix developed. South Africa's Steelmakers have sufficient production capability to supply the regional demand. (Note: Recent closures can be reversed; can be the flagship and industry leading footprint compared to global standards – Green steel in Saldanha)
- ✓ Diversification of long product mill to include hot rolled coil production complete – transaction with IDC in progress

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FOCUS AREA: SUPPLY SIDE

Key Priorities and Deliverables Achieved to date

Collaborative work with the IDC

SUPPLY	IDC FOCUS AREAS	IDC INITIATIVES	POTENTIAL IMPACT
Input Prices	Interventions to improve input costs and supply across the value chain	Direct Reduced Iron Manufacturing: <ul style="list-style-type: none"> Masorini Direct reduced iron (DRI) manufacturing project at bankable feasibility (hot commissioning to be concluded end Jan) Exploring other opportunities with mining companies 	<ul style="list-style-type: none"> Novel technology to exploit use of otherwise unusable iron ore fines to produce low-cost metallic units for steel industry. 200 jobs Input into Green Steel production
		Metallurgical Coal local Supply <ul style="list-style-type: none"> Makhado Project feasibility 	<ul style="list-style-type: none"> Access to affordable coking coal inputs reducing the reliance on imports 800 jobs
		Scrap availability <ul style="list-style-type: none"> Green Ship Recycling at bankable feasibility study (Saldanha) 	<ul style="list-style-type: none"> Supply and access to additional scrap as input into metal and downstream manufacturing 400 jobs
Long steel overcapacity	Improve steel supply across the value chain	Steel diversification and localisation strategy (study to identify market matching opportunities)	<ul style="list-style-type: none"> Potential for diversification of IDC portfolio into competitive products needed for mining, automobiles, rail and exports
Demand/Supply mismatch		Long steel mill diversification into flat steel	<ul style="list-style-type: none"> Transaction in progress

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FOCUS AREA: DEMAND SIDE

Key Priorities and Deliverables Achieved to date

Infrastructure: Stimulate steel demand through infrastructure development programme, SOEs, Mining and Buy Local Programme

- ✓ Draft Infrastructure Project List completed based on priority areas, Water, Energy, Roads/Bridges + Sasol Clean Fuels II
- ✓ Initial discussions held with Presidential Infrastructure Office commitment to align projects and localisation requirements
- ✓ OEMs on the SA Automotive Steel Localisation Road Map & alignment to Steel and Metal Fabrication master plan
- ✓ Scope defined for steel products with private sector partners:
 - ✓ Construction-driven value chains → Engineered Products, Steel Products and Steel Piping
- ✓ Blueprint of Local Content Compliance Unit set-up and collaboration with Proudly SA and SABS to improve the effectiveness including local content verification

Stem illegal imports, under-invoicing and mis-declaration of steel products

- ✓ Increased support working with the Inter-Agency Working Group on illegal and illicit goods to seize and search cargo including increased surveillance on scrap metals export containers
- ✓ Prior Surveillance system to track imports has been recommended by the work-stream. Due to a surge of imports in corrugated roof sheeting, a recommendation is made to ITAC to pilot this product
- ✓ SARS Inter-Agency is already driving various activities:
 - There are currently over 118 cases that are within the audit and investigation space with proposed revenue potential around R 55 Million
 - 8 out of 12 cases reported are under investigation
 - **Fasteners:** 6 cases pending. The 4 clients have submitted documents that are currently being reviewed by SARS. 2 cases still pending. On the one case, the client paid a penalty for failing to submit documents. Additionally, R 2.1m letter of intent issued and SARS awaiting representations from the client
 - **Corrugated Iron sheeting:** 3 further cases received and will be audited in November 2021. SARS has already allocated cases and working through the risk profile

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FOCUS AREA: DEMAND SIDE

Key Priorities and Deliverables Achieved to date

Collaborative work with IDC

DEMAND	IDC FOCUS AREAS	IDC INITIATIVES	POTENTIAL IMPACT
Infrastructure	Focus on Designated products that will benefit from infrastructure investments	Rail Track Localisation Project Options analysis to be concluded end November	<ul style="list-style-type: none"> A techno-economic study to assess capability, minimum viable capacity requirements and technical gaps to meet requirements for manufacturing of heavy-rail in SA. Localisation 77 000 tons/annum
Linkage with other supply chains	Supply of steel products into Renewable Energy Projects	<ul style="list-style-type: none"> Drive OEM support for local products Co-fund development of high grade galvanised steel product 	<ul style="list-style-type: none"> Localisation of specialised steel required by OEM's
Exports to rest to Africa	Automotive sector localisation	Co-fund development of specialised high surface finish steels with mills	<ul style="list-style-type: none"> Localisation of specialised steel required by OEM's Estimated renewable and autos localisation 140 000 tons/annum
	Support funding products that will assist access to new markets	<ul style="list-style-type: none"> Intra Africa Trade Facility Pilot ECIC/IDC facility to be implemented as a pilot project and upon successful implementation, rolled out on a fuller scale. 	<ul style="list-style-type: none"> Capex and working capital funding to SA manufacturers to fulfil export orders Direct lending to foreign buyers of SA capital goods and services Guarantees to lenders to cover repayment risks against foreign buyer default Export credit insurance, which covers political and/or commercial risks.

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FOCUS AREA: RESOURCE MOBILISATION

Key Priorities and Deliverables Achieved to date

Incentives & Greening the Industry

1. Steel Funds

- An agreement reached with the Steel Mills for a contribution of a R2.00 per tonne on crude steel production to kick-start the Steel Development Fund (to be launched in January 2022). As immediate priority, the Fund will support the Compliance Unit activities
- NPC has been formally established and registered – Interim Board appointed

2. Downstream Steel Competitiveness Industry Fund

- IDC working on the amendments of the Fund to provide, among others, blended funding and credit guarantee to SMMEs to access steel as a key input material

3. Greening of the Industry for domestic and export markets in support of decarbonisation

- Green Hydrogen Panel set-up to drive catalytic projects
- Engagements with DSI and DEAFF to apply for Global Green Funds to support industry Greening
- Collaboration with sister departments to support Industry via their specific mandates to align instruments and interventions
- IDC considering support for feasibility studies for green steel manufacturing such as the repurposing of Saldanha Steel
- Working with international community to find co-financing programmes

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FOCUS AREA: AfCFTA and EXPORTS

Key Priorities and Deliverables Achieved to date

Export-oriented growth strategy for the steel value chain

*** much of this work is still in process***

- ✓ SA Inc. Export Strategy: agreed that no-one-size-fits-all strategy will meet the diverse industry export drive
 - ✓ Agreed to focus an export strategy on specific segments of Industry
 - ✓ Exports Rebates to be used support a greater export effort (both ITAC and AMSA)
 - ✓ All steel mills and merchants to consider how they can contribute towards pooled funds
 - ✓ Immediate focus should be on building on the current export strength – increase exports of successful sub-sectors (commodity type products, consumables, ect.)
 - ✓ The fabrication sector require special attention given its complexity

- ✓ First draft of Export Readiness Document developed and consultation with Industry are on-going to identify few countries, projects and programmes that can be prioritised

- ✓ Export Readiness Surveys were prepared and sent out for response via Industry Associations as well as Export Councils – Responses received

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FOCUS AREA: AfCFTA

Key Priorities and Deliverables Achieved to date

Collaborative work with IDC

EXPORTS	IDC FOCUS AREA	IDC INITIATIVES	POTENTIAL IMPACT
Exports to rest to Africa	Support funding products that will assist access to new markets	<ul style="list-style-type: none"> • Intra Africa Trade Facility Pilot • ECIC/IDC facility to be implemented as a pilot project and upon successful implementation, rolled out on a fuller scale. 	<ul style="list-style-type: none"> • Capex and working capital funding to SA manufacturers to fulfil export orders • Direct lending to foreign buyers of SA capital goods and services • Guarantees to lenders to cover repayment risks against foreign buyer default • Export credit insurance, which covers political and/or commercial risks.

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AGOA and Section 232

African Growth and Opportunity Act (AGOA); U.S. trade policy toward sub-Saharan Africa since 2000, including South Africa. It is non-reciprocal U.S. trade preference programme that provides duty-free access to the U.S. market for most exports from eligible sub-Saharan African countries

Section 232 duties imposed during the Trump Administration

- 23 March 2018, USA announced the decision to impose a tariff of 25% on imports of steel and of 10% on imports of aluminium, applicable to all importers into the US market (Chapter 72, 73 and 76 tariff lines)
- While a country exemption was not granted, SA companies approached US buyers to apply for product exemptions. Some stainless steel (Columbus) and aluminium (Hulamin) niche products were granted exemptions but all other applications were rejected. Exemptions are only valid for a period of 12 months with a possibility for renewal

Current Status

- Last Ministerial Meeting between SA and the USA agreed that Senior officials from dtic & US team to meet. The main purpose is to review the EU conditions of the lifting of 232, draw learnings and its applicability to South Africa – meeting expected to occur in Early December 2021
- As it stands Section 232 is operational and only those applicable exempted companies can export duty free

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FOCUS AREA: HR

Key Priorities and Deliverables Achieved to date

**Much of the work in this pillar is still in process

Improve industrial relations in the sector analysis of transformation levels across industry

- ✓ Labour (NUMSA and Solidarity) and Industry agreed to work with Productivity SA as to lead the productivity improvement programmes, i.e.: productivity, wage stability, job retention
- ✓ A draft proposal tabled, currently under consideration by the work-stream
- ✓ industrial relations and HR challenges survey completed - developing a set of recommendations underway
- ✓ Ongoing discussions between Industry and Unions on stabilization, career paths and worker participation

Optimize Training and skills development

- ✓ Initiated collaboration with the Dept. of Higher Education and Training to identify key trades for piloting; jointly develop and roll-out programmes to enhance skill development and training; update the curriculum; and develop TVET colleges technical infrastructure
- ✓ Industry to identify the Trades and gaps in the system
- ✓ *(Note: ongoing discussions on restoring BBBEE points for technical & artisanal training which can also assist to open-up more training facilities)*

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DECISIONS TO BE NOTED/ ENDORSED BY THE COUNCIL

- As part of the social compact, reciprocal commitments are to be negotiated and MoAs entered into for trade instruments requested by industry for consideration. To re-emphasise, trade support should be viewed as short-term interventions and industry to really raise the overall competitiveness to compete in both the domestic and export markets
- The scrap metals interventions are yielding the desired outcomes. Industry to publicise the impact of the interventions
- The Inter-Agency Working Group on combatting illegal imports is making good progress and can be up-scaled to make the required impact. However, additional technical support and industry surveillance are urgently required to bolster the SARS capacity – including SARS technology upgrading
- A recommendation to adopt an Import Surveillance System and pilot it with imports of roof-sheeting → industry to avail technical and financial support for the development and roll-out of the system
- The Steel Fund to be launched in January 2022
- Establishment of a Local Content Compliance Unit, with a Management Committee reporting to a Steel Fund Board
- Industry to support the localisation drive, contribute independently to the public debates and assist in the policy advocacy for sharpening the localisation tools and implementing local content requirements (in both public and private projects)
- Greening of the Industry to be prioritised and accelerated – support working with DFIs, Int. orgs & foreign governments
- Progress across the work-streams is uneven. Greater industry and labour involvement and direction is required in the export; HR and Transformation programmes. In addition, the Council to support an Export strategy that focus on industry in segments and not a one-size-fits all export strategy

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MATTERS TO BE UNLOCKED

SUPPLY SIDE

- Input costs and impact on the value chain: iron ore prices; electricity and rail performance
- High-quality long steel and flat steel in development stage to embrace the localisation drive (Retain and enable capacity utilisation for the high-quality local production of flat and long products such as required by the auto and appliance industry)
- IDC applications in the face of overcapacity concerns → repurpose IDC investments to enable balancing of the demand-supply challenges and improve the competitiveness for current assets
- Consideration for the interventions on scrap metals to be legislated rather than regulated → legislative framework
- Greening of the Industry to be prioritised – working with DFIs and sister departments

DEMAND SIDE

- Although the governance of the Steel fund has been resolved, operational issues to be given more focus
- **Infrastructure Project Pipeline:** A high-level intervention is required to unblock the challenge of securing detailed project information, from the Presidential Infrastructure Office
- This information is required to provide sufficient forewarning for production planning, beginning with the mills to then supply into the rest of the steel value chain

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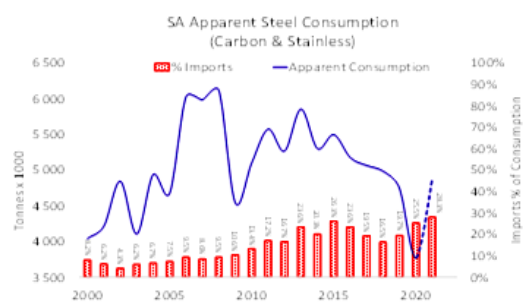
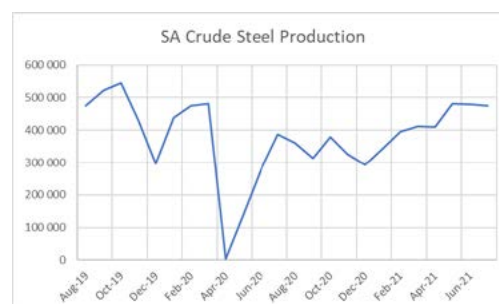
KEY FOCUS AREAS/ PRIORITIES FOR THE NEXT 3-6 MONTHS

- **the dtic** is re-tooling to provide greater support and attention to the primary steel work-programme AND deepen the implementation platforms of the masterplan
- Strengthen implementation actions via the Programme Management Office, which still requires good project managers to effectively drive the masterplan implementation
- Operationalise the Steel Funds – Development Fund and as well as the Industry Growth Fund
- IDC- the dtic-NT to finalise the Downstream Steel Competitiveness Industry amendments and roll-out the improved Fund
- Demand-side measures, i.e. identification and prioritization of key projects, must be intensified to increase aggregate demand
- Launch of skills development and training programmes pilots
- Accelerate greening the industry
- Industry Export strategy for specific products
- Capacitating and aligning key institutions: SABS, NRCS, SARS

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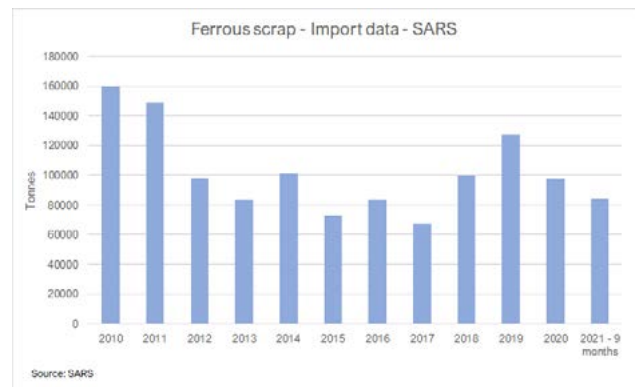
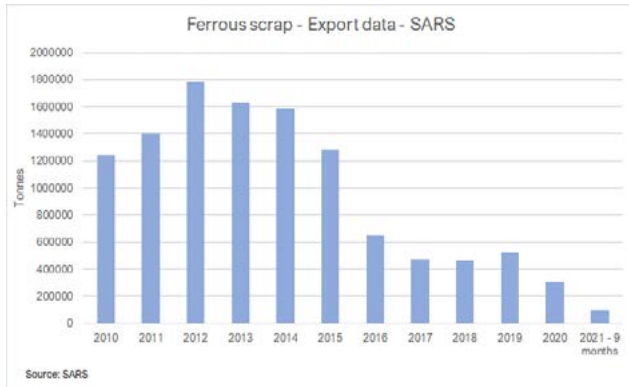
2020/21 KEY PERFORMANCE

- SA steel users experienced steel shortages and long lead times, similar to global markets. While globally there are still supply chain disruptions, inventories have normalised and surpluses can be expected from Q3-2021
- SA crude steel production increased above the 450 Kt towards the mid-2021, on par with the pre Covid-19 levels
- The basic iron and steel industry operates at a 64,6% utilisation of its available capacity and at 84% of its active capacity in 2021, making the industry capable to supply substantially more demand growth. The opportunity exists to employ the additional marginal capacity competitively
- In 2021 primary steel imports increased to 28% of domestic steel consumption, matching the levels experienced in 2015 before the introduction of safeguard measures
- Articles of Iron or Steel (i.e. downstream products: wire and wire products, Tube & pipe, Fasteners, Structures and other) experience similar import trends as that in the primary steel industry.
- The imports of articles of steel increased by 38,4% during the first 8 months of 2021 compared with the corresponding period during 2020 (SARS data)

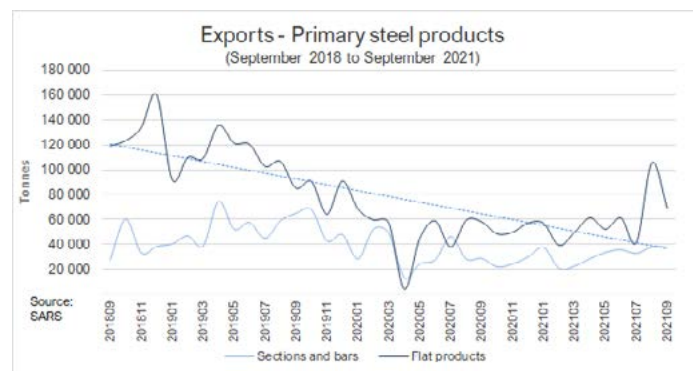
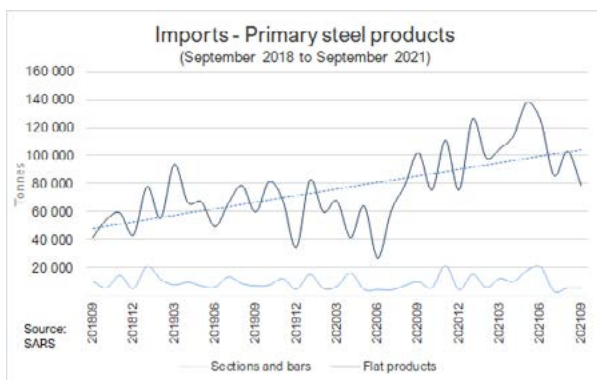


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SARS trade data: ferrous scrap



SARS trade data: primary steel





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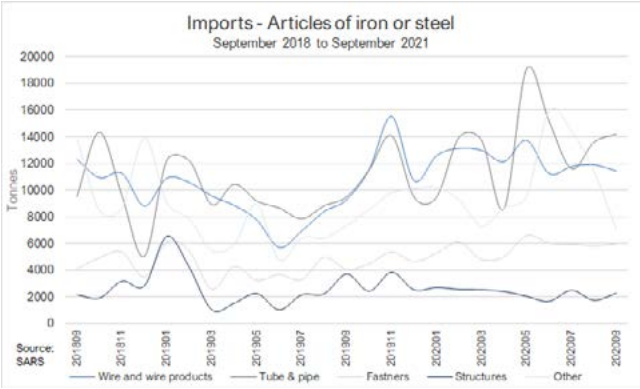
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SARS trade data: articles of steel



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