

KALLANISH PRESENTS THE 3RD ANNUAL

# ASIA STEEL MARKETS 2019



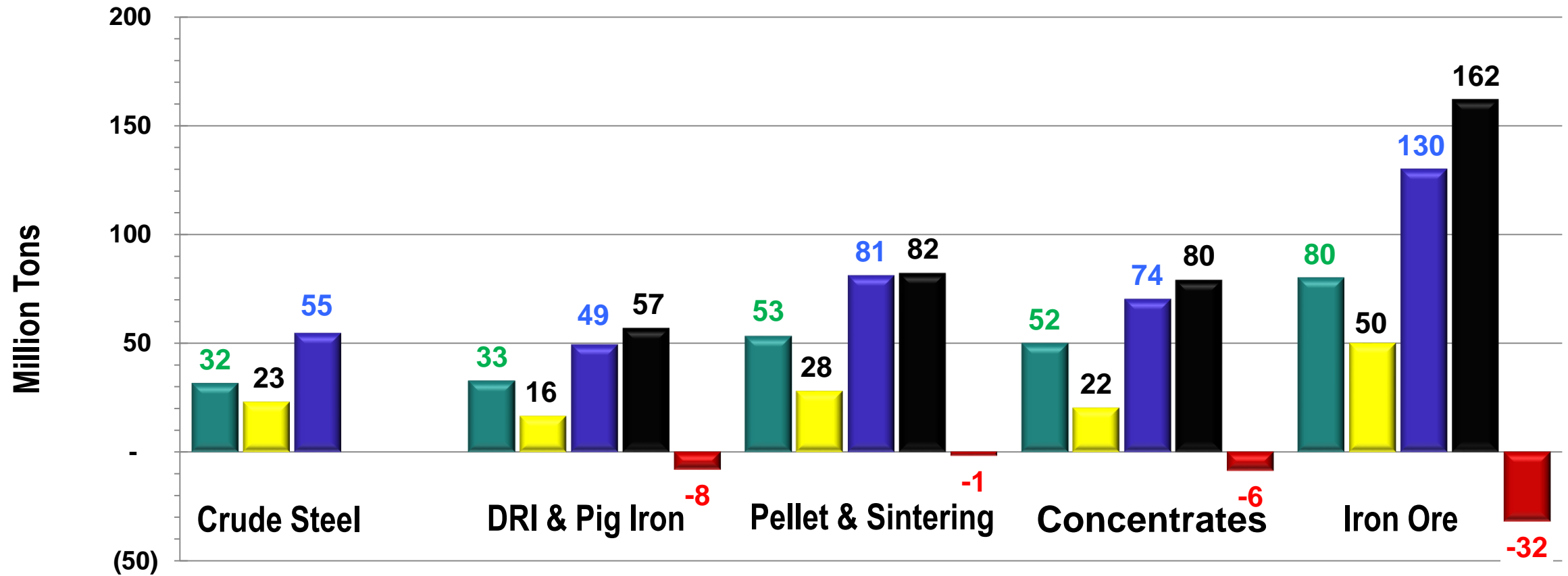
## Iranian Investments & Capacity Expansion Plans 2025 during Sanctions



**Keyvan Jafari Tehrani**  
CEO & Senior Int'l Market Analyst

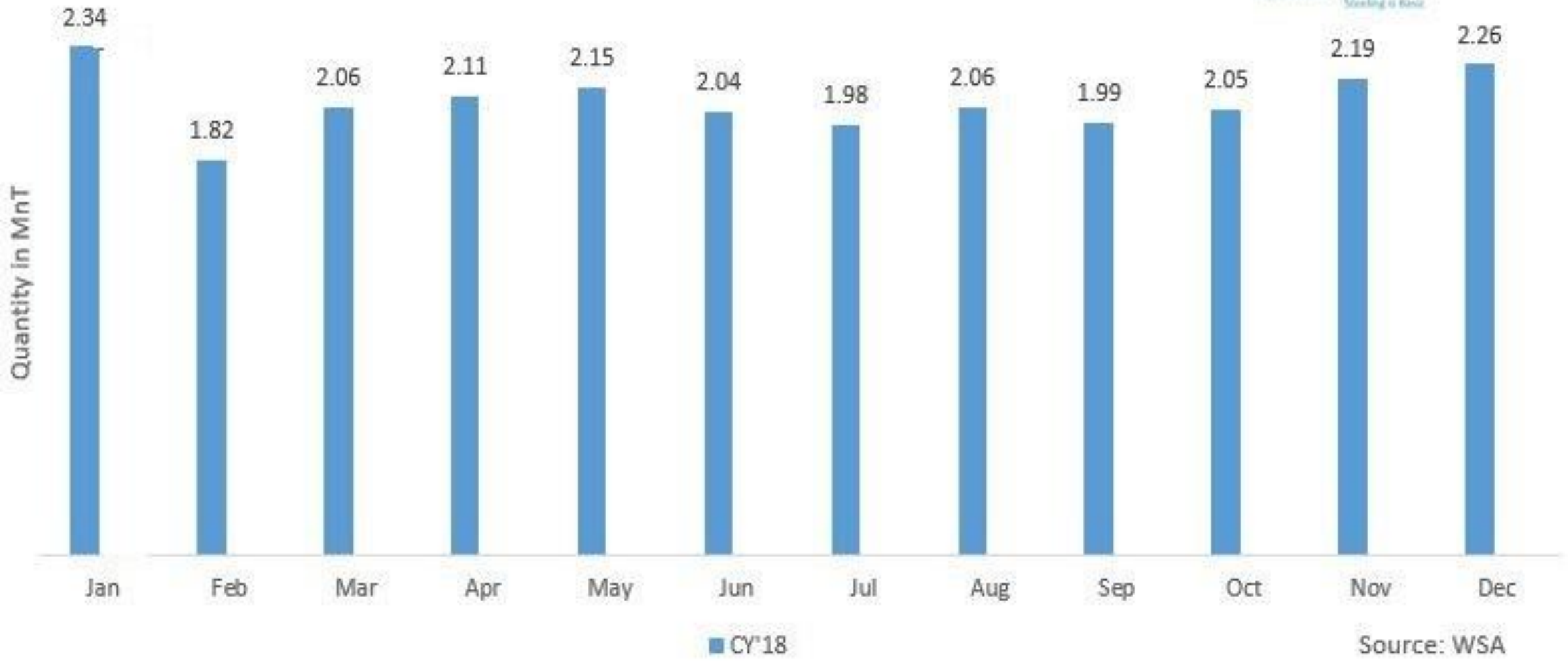
- 1 Iranian Investments and Capacity Expansion Plans (2025)
- 2 Steel and Raw Materials Trade Flows
- 3 Export Changes in Seasonal Demand
- 4 Sanctions, Protection, Policy Changes and the new ways of doing Business
- 5 How have Sanctions affected 2025 Plan

# Iranian Investment & Capacity Expansion Plans (2025)



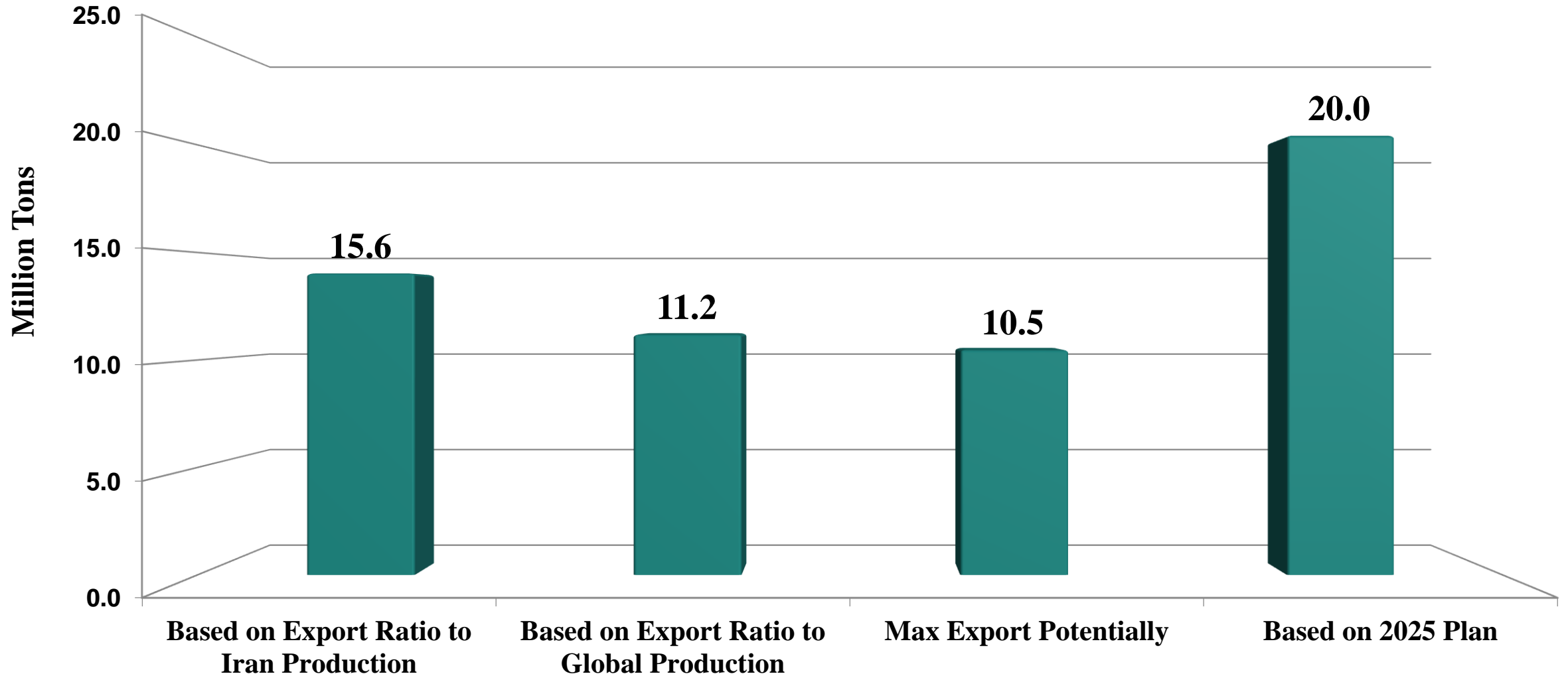
■ Active Plan   
 ■ Under-construction Plan   
 ■ Total   
 ■ Demand   
 ■ Balance to Complete the Chain

# Iran Crude Steel Production



Source: WSA

# Different Scenarios of Iran Steel Export in 2025 Plan



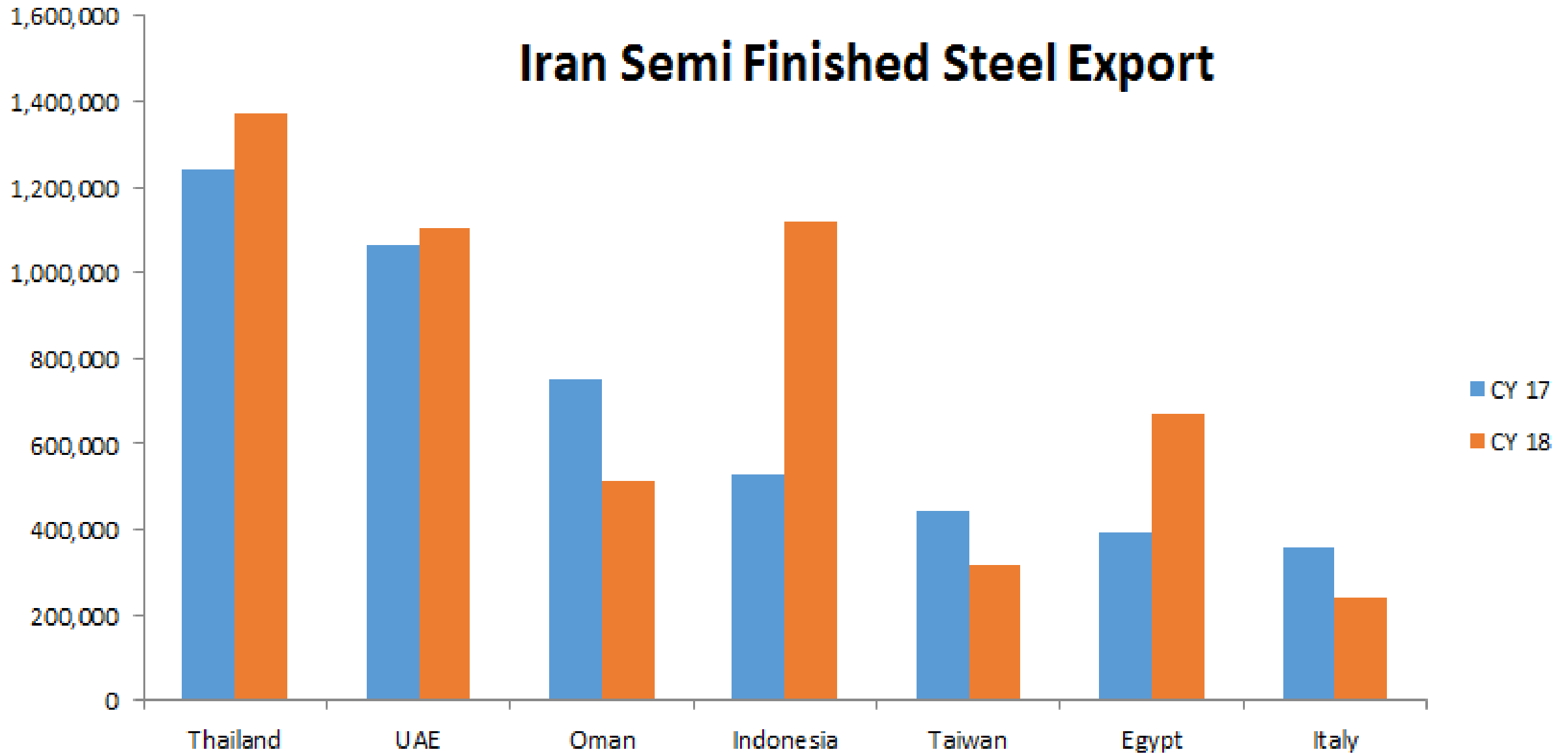
# Iran Steel Exports in 11 Months



Export in 11 Months of Persian Year

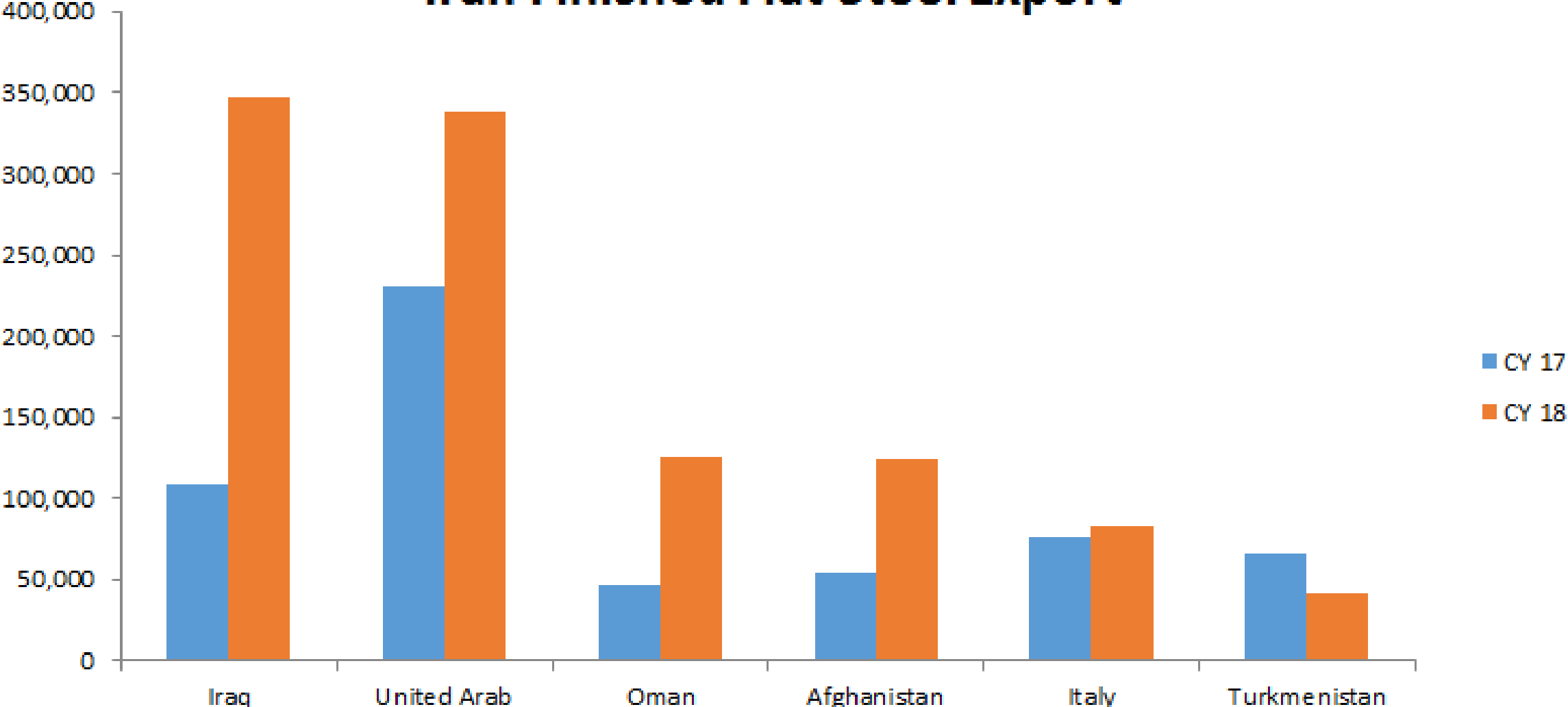


# Iran Semi Finished Steel Export



Quantity in MT  
Source: Iran Customs

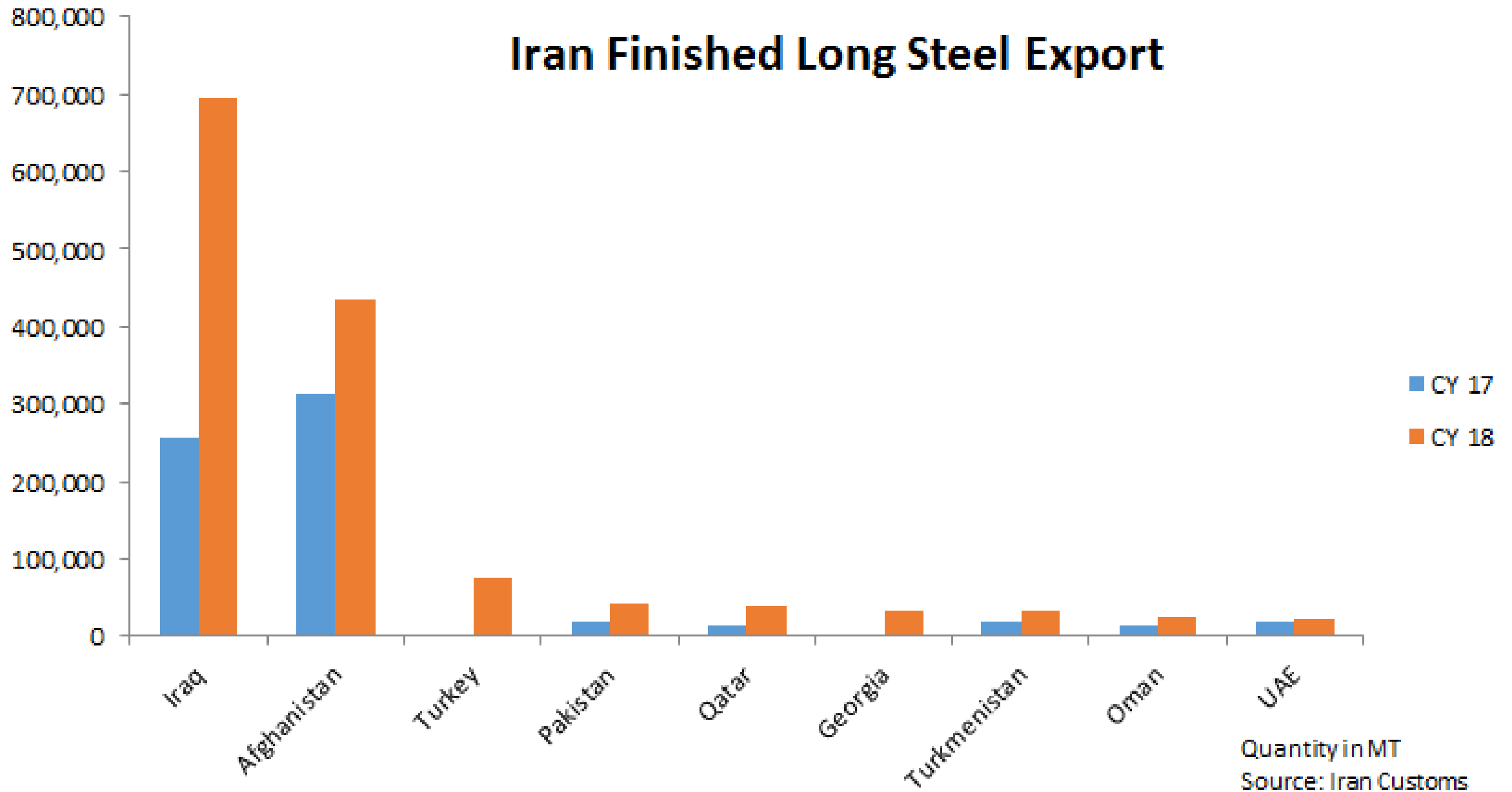
# Iran Finished Flat Steel Export



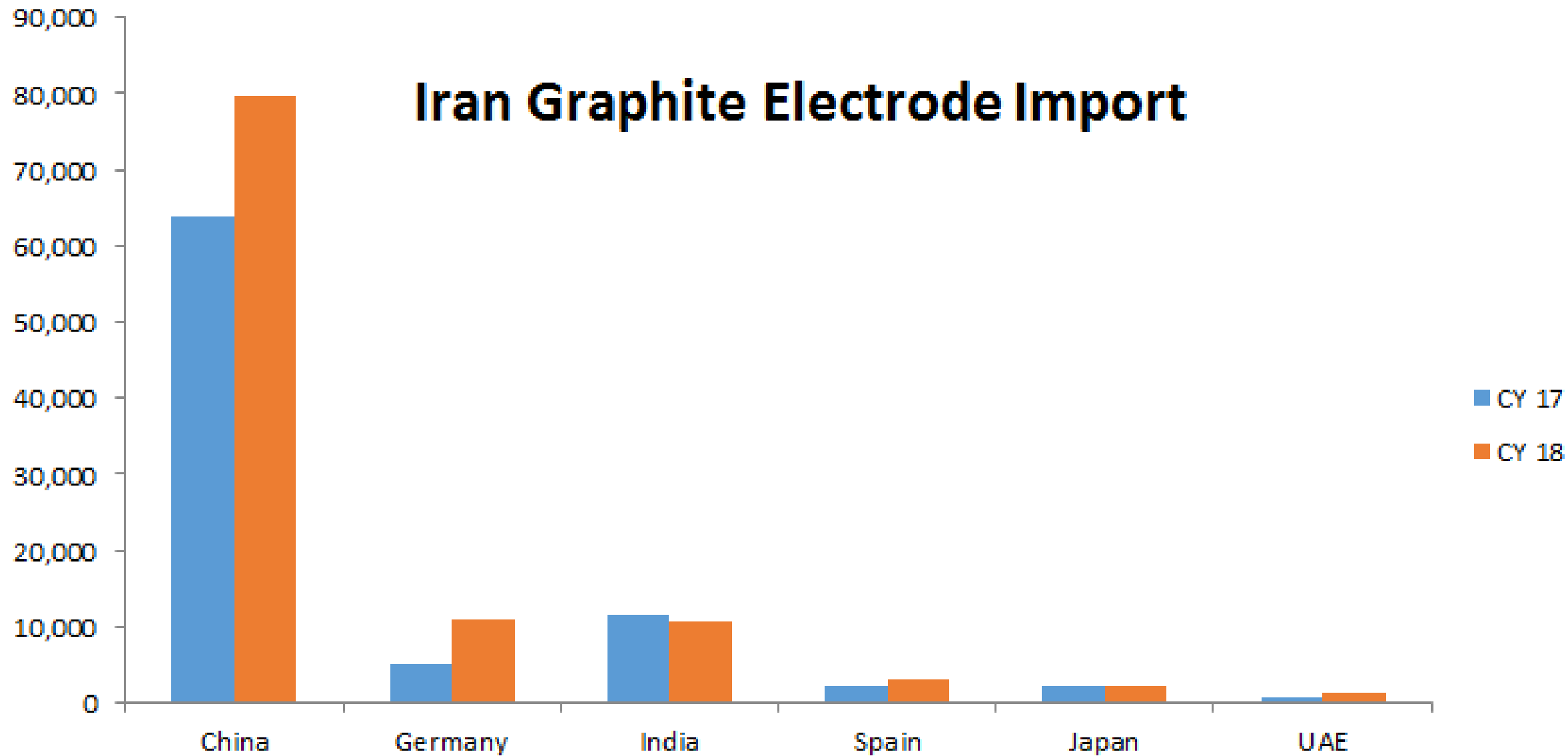
Quantity in MT  
Source: Iran Customs



# Iran Finished Long Steel Export



# Iran Graphite Electrode Import



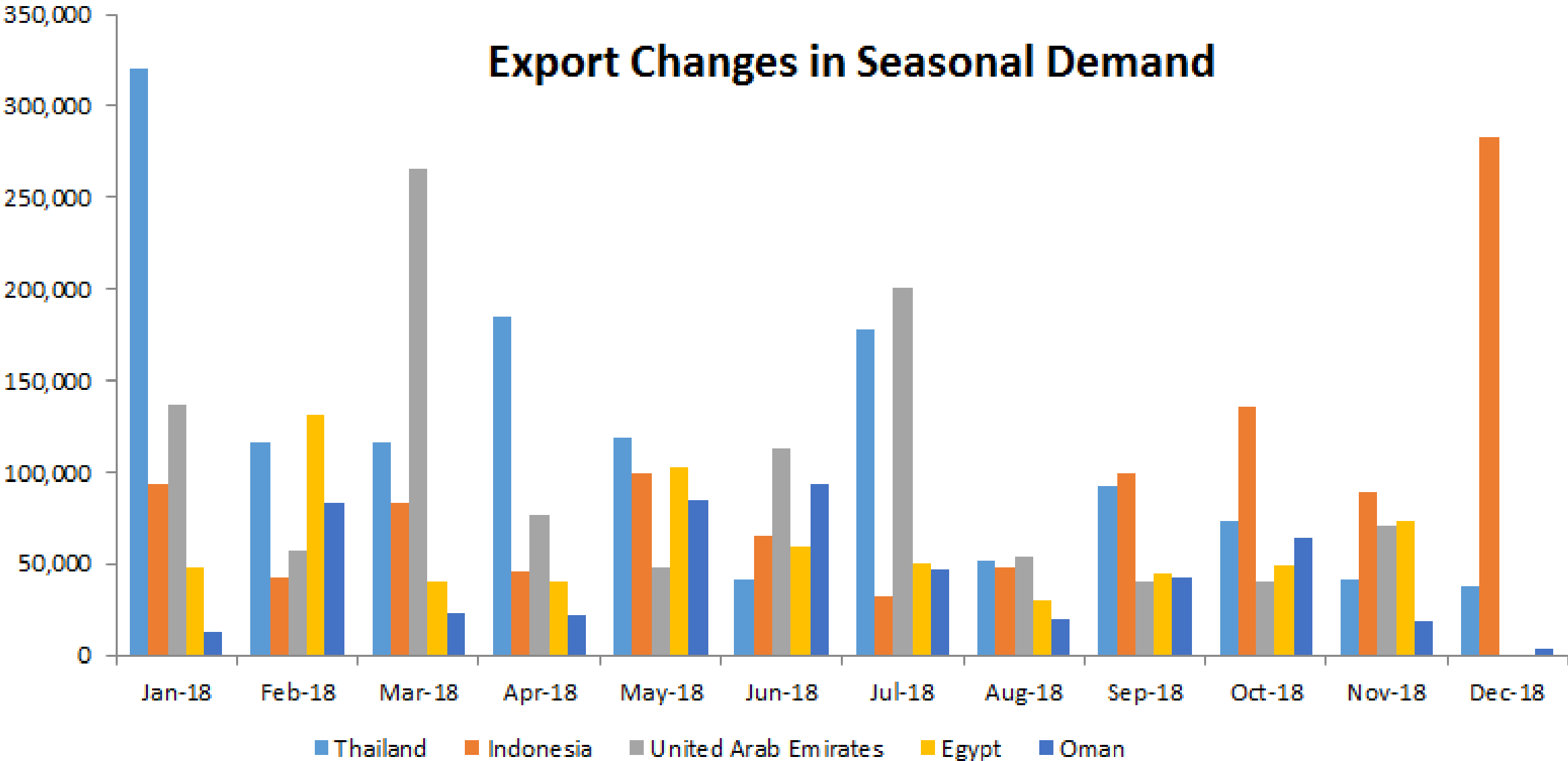
Quantity in MT  
Source: Iran Customs

# Iran Iron Ore Exports Apr'18-Mar'19



Provisional Data  
Source: SteelMint Stats, Keyvan Jafari Tehrani

# Export Changes in Seasonal Demand



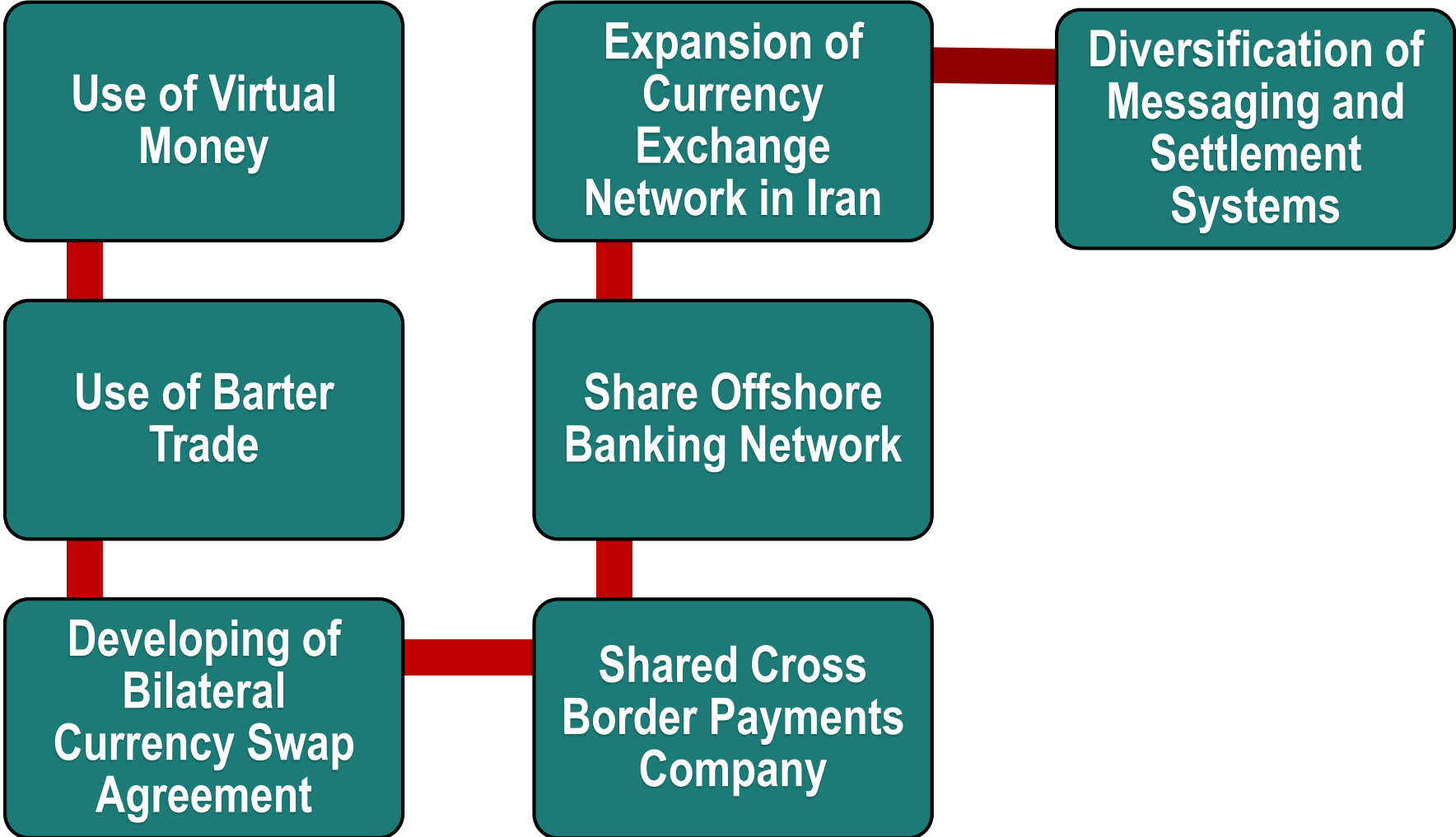
Iran Semi Finished Steel Export in CY'18

Source: Customs  
Quantity in MT

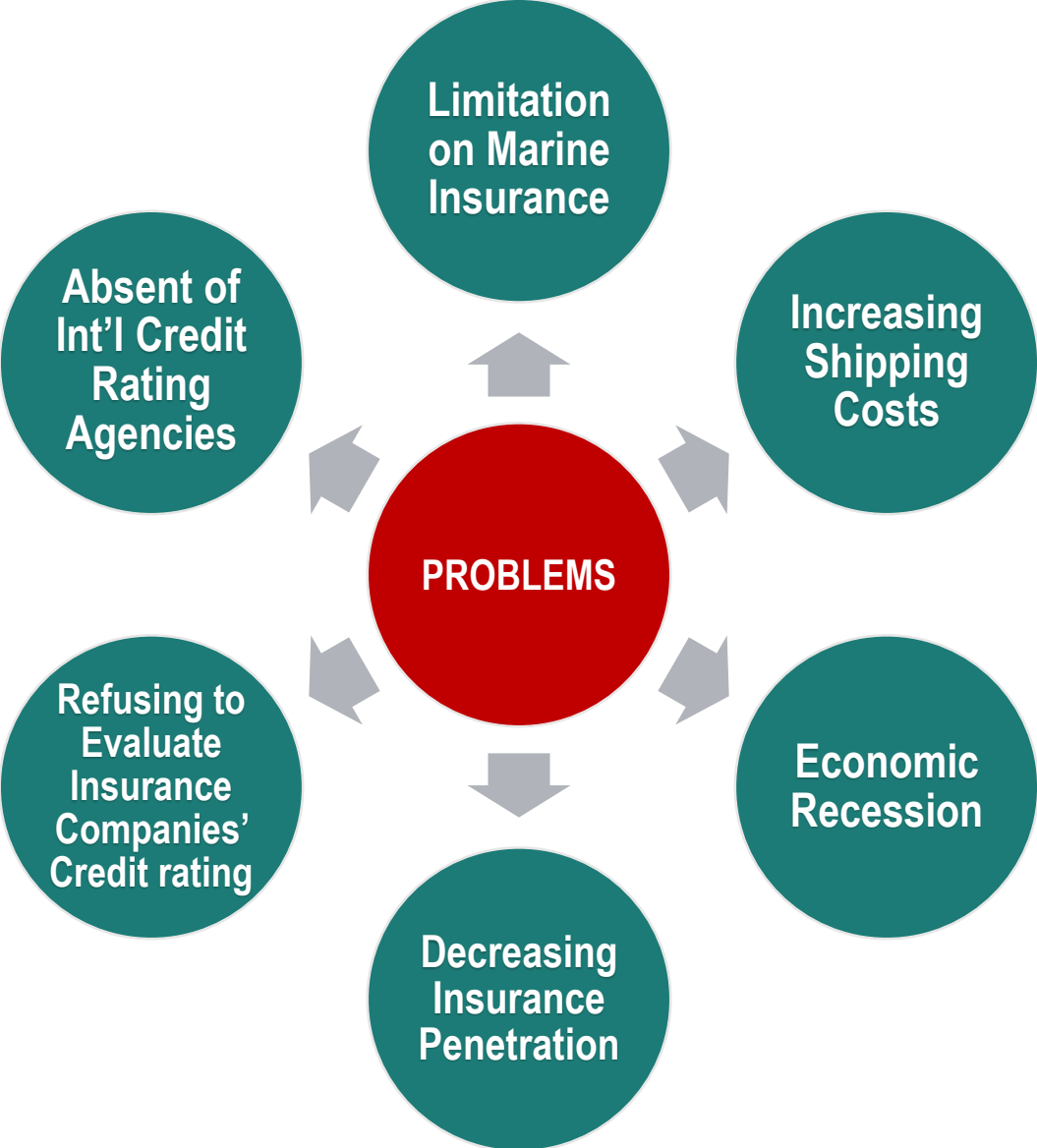
# Sanctions, Protection, Policy Changes and the new ways of doing Business



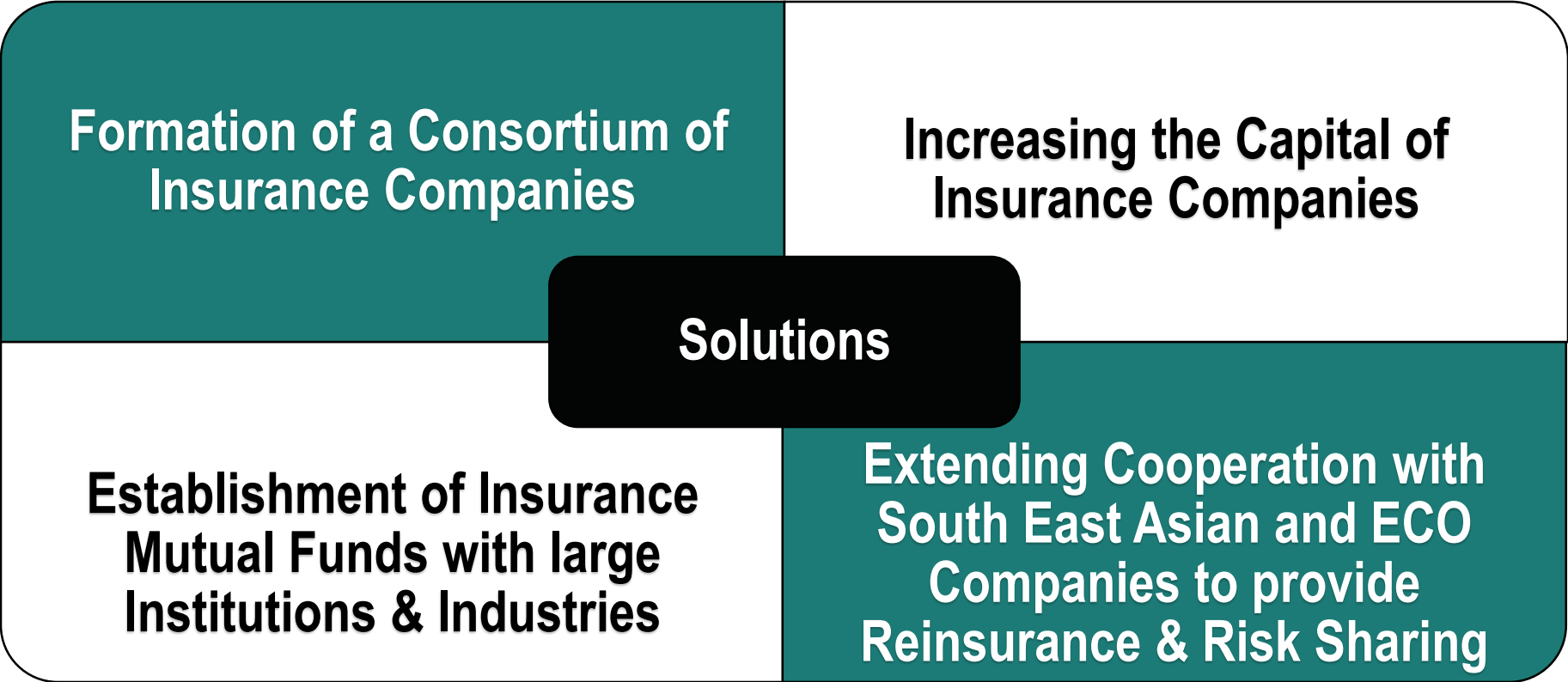
# Short-term & Long-term Potential Solutions for Confronting/Solving Problems caused by US Banking Sanctions



# Problems & Limitations arising from Insurance Sanctions



# Short-term & Long-term Potential Solutions for Confronting/Solving Problems caused by US Insurance Sanctions





# Sanctionable Transportation Activities

**Iranian Vessel  
Owning, Chartering &  
Operating**

**Selling, Supplying or  
Shipping the certain  
materials to be used  
in Iranian Shipping or  
Shipbuilding Sectors**

**Selling, Leasing, or  
Providing a Vessel to  
ship any  
Commodities to or  
from Iran**

**To be applied when  
shipping Crude Oil  
from Iran to Other  
Countries**

**To be applied when  
conceals the Iranian  
Crude Oil or Refined  
Petroleum Products  
Origin**

## How have Sanctions affected 2025 Plan

Commodity	Mineral Output		Annual Growth (percent)	
	2014	2025	2004-2014	2015-2025
<b>Aluminum</b>	0.4	1.5	5	14
<b>Cement</b>	66.4	120	8	6
<b>Copper, cathode<sup>1</sup></b>	194	800	2	14
<b>Gold<sup>2</sup></b>	3.3	10	33	11
<b>Iron ore, iron content</b>	23.7	66.2	10	10
<b>Steel, crude</b>	16.3	52	7	11
<b>Zinc, refined<sup>1</sup></b>	142	300	3	7

1. Thousand Tons

2. Tons

**Iran's Commodities Production and Average Annual Growth, Actual and Targeted**

# Mining & Minerals Value-added in Iran 6<sup>th</sup> Development Program

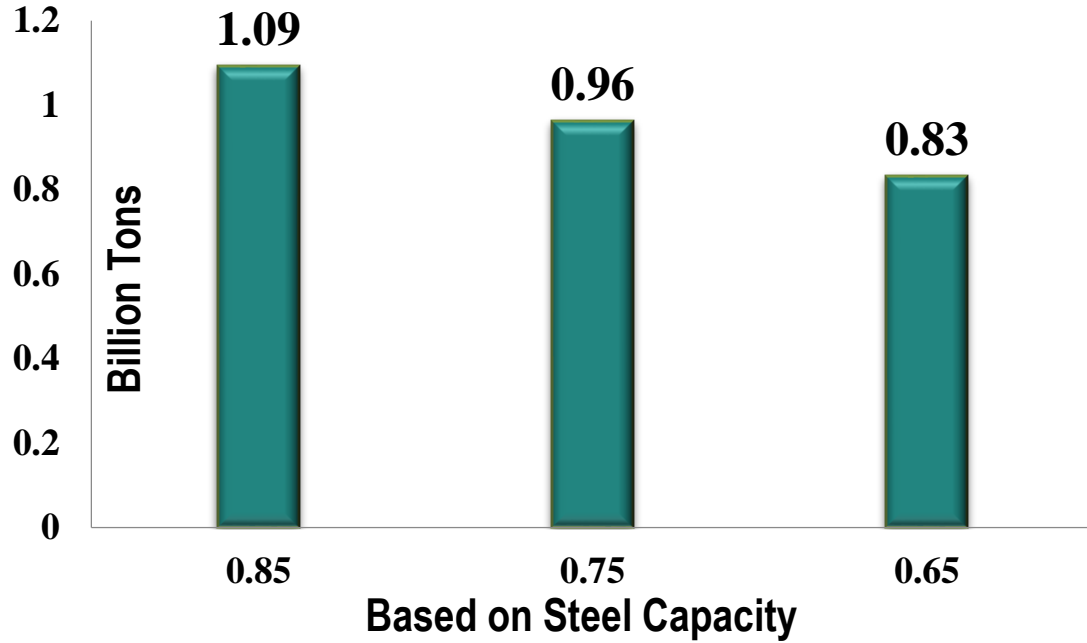
## Mining & Industry Value-added in Iran 6<sup>th</sup> Development Program

- The average of annual mining value-added growth rate: 8.8%
- The average of annual industry value-added growth rate: 9.3%

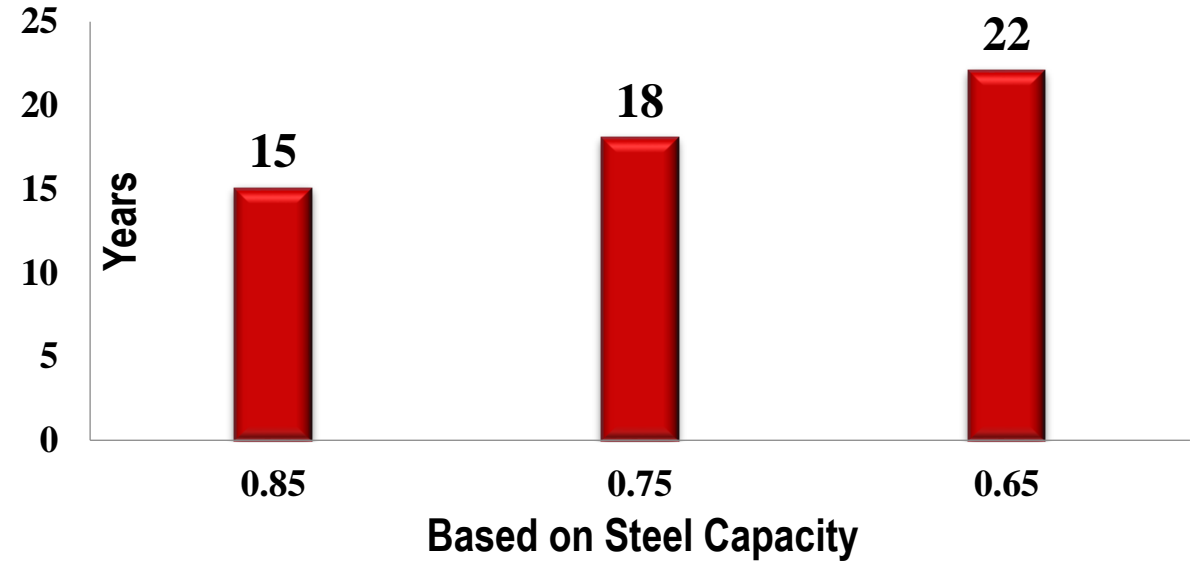
## Investment in Mining & Industry Sector in Iran 6<sup>th</sup> Development Program

- The average of annual investment growth rate in mining and industry: 18.8%
- Foreign Resources: 22% (US\$ 46 Billion)
- Country demand for Investment in Mining & Minerals: US\$ 15 Billion

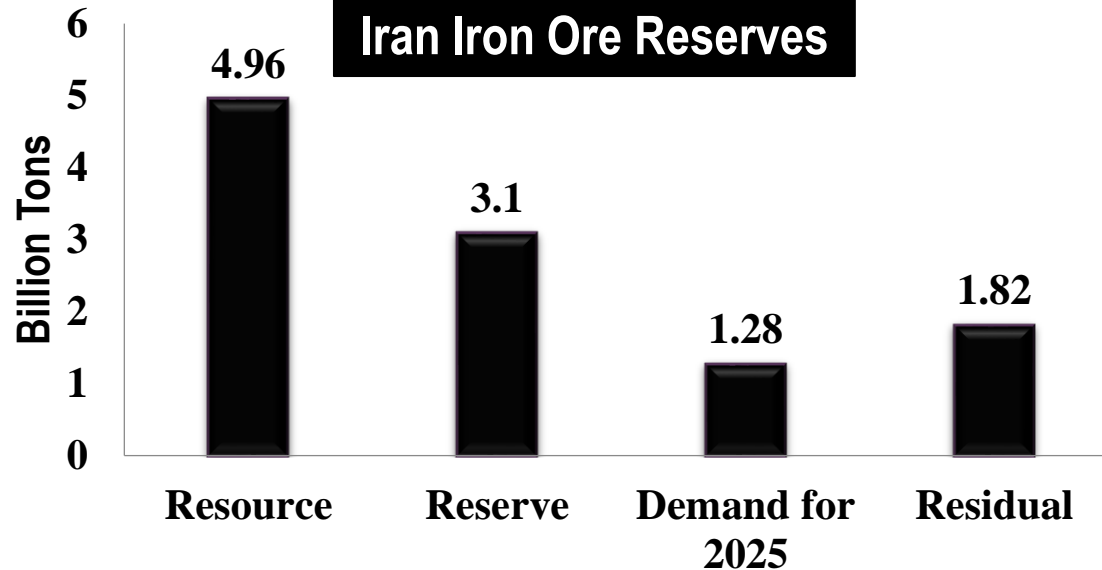
### Iron Ore Requirements in 2025 Plan



### Iron Ore Remaining Reserves 2025 Onward



### Iran Iron Ore Reserves



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10-11 APRIL 2019 | HO CHI MINH, VIETNAM



**Thank You!**

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