

Benefits of membership





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Introduction to the ISSF

The International Stainless Steel Forum (ISSF) is a not-for-profit research and development organisation which was founded in 1996 and serves as the focal point for the global stainless steel industry.

Vision

Sustain our future with stainless steels

Membership of the ISSF

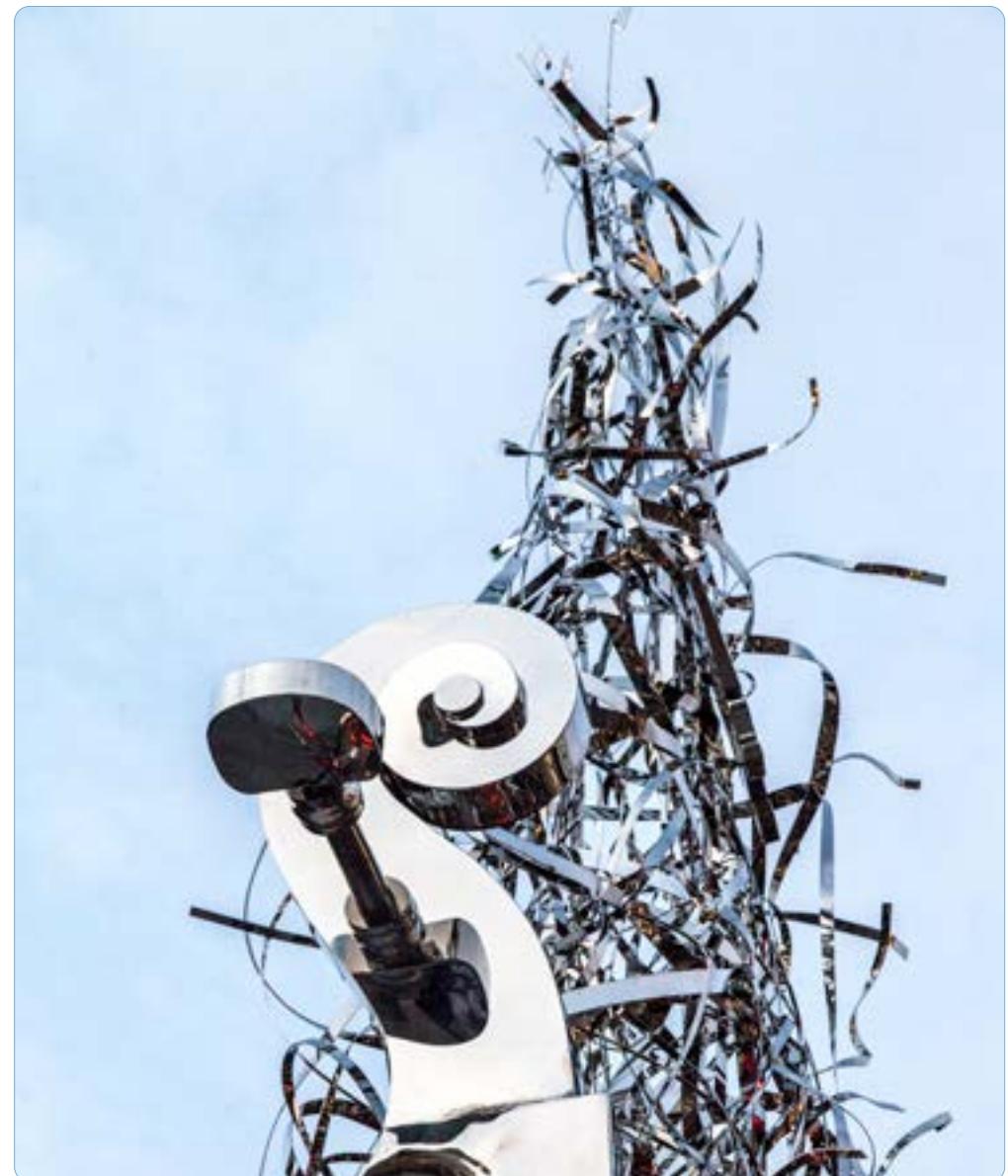
ISSF has two categories of membership namely:

- a. **company members** who are producers of stainless steels (integrated mills and re-rollers)
- b. **affiliated members** who are national or regional stainless steels industry associations.

The ISSF now has 57 members in 26 countries. Collectively they represent approximately 90% of the total production of stainless steels.

Website

worldstainless.org



L'Anima della Città in Cremona, Italy. Picture courtesy of Mattia Aquila



The Benefits of Membership: An Overview

The ISSF provides a focal point for the global stainless steels industry and an opportunity to combine resources on matters of shared interest, including;

1. The development of industry health, safety and environmental processes
2. Sustainability developments
3. The expansion of existing markets
4. The development of new markets
5. Research into raw materials

Members benefit from access to the discussions, actions, sharing of best practices and other outputs from these five workstreams.

The ISSF also promotes the use of stainless steels to;

This means that key decision-making groups (current and future) and the general population, gain on an ongoing basis, more guidance about the appropriate uses of stainless steels

1. Users and material specifiers
2. Governmental and regulatory bodies
3. The media
4. Schools and universities
5. The general public

The ISSF also works very closely with the regional Stainless Steel Development Associations (SSDAs) and the Associations representing the Raw Materials Producers.

Accurate industry statistics are provided free of charge to members.

1 Growing the Market

To identify opportunities to grow the global demand for stainless steels through thoroughly researched and life-cycle costed;

- new applications of stainless steels
- new uses for stainless steels in established applications.
- easily transferrable concepts from other markets

The cornerstones of the ISSF's market development policy are;

- a. educating users, specifiers and the general public about the types of, the benefits of, and how to effectively specify and use stainless steels
- b. identify global opportunities for new applications of stainless steels
- c. identify global opportunities to significantly expand the demand for existing uses of stainless steels
- d. promoting the benefits of life-cycle costing and the recycling credentials of stainless steels

The ISSF aims to grow the overall market for stainless steels and to promote the use of appropriate steel grades for individual applications. This goal is achieved through education (of stainless specialists, material specifiers, governmental / regulatory bodies and the general public) and by promoting stainless steel and its potential applications to other key decision makers.

Centralised market development work, not only delivers an efficient approach for the benefit of ISSF members, but also identifies those market opportunities with true global reach.



Current ISSF projects include:

- Sustainable Stainless programme where recent brochures include:
 - a. Clean cooking with Stainless Steels
 - b. Stainless Steels in drinking water supply
 - c. Stainless steels in infrastructural applications
 - d. Stainless steels in street furniture
 - e. Stainless steels - the sustainable choice
- Stainless Steels in Architecture,
- Care equipment for the ageing society
- Book of New Applications and the new Applications Awards
- Stainless Steels in bridges
- Stainless Steels for re-enforcement bar (rebar) products
- Non-corrosion resistance properties of stainless steels for designers
- Workshop for Stainless Steel Development Associations
- Stainless Steel in sports and leisure equipment
- Martensitic Stainless Steels
- Duplex Stainless Steels



2 Developing global approaches & responses for Health, Safety and Environmental Processes

- Bring the average LTIFR of the current ISSF members to the worldsteel level of 0.93 by the end of 2022
- Optimise the global stainless producers' environmental footprint

Benefits arise directly from involvement in the HSE Committee and its active task forces which aim to support all members to improve their HSE performance through best practice sharing, free of charges audits and discussion of learnings from recent HSE events within our industry.

- a. Health & safety concerns and environmental protection are among the most pressing issues facing the world today.
- b. The ISSF is committed to assess the environmental and health & safety impact of the manufacture and use of stainless steels.
- c. This information is passed on to the stainless steels community worldwide so that ISSF members can deliver fact-based, coherent messages to local regulators, customers and project partners.
- d. **Climate Change** is a very important feature which informs our environmental protection.

The ISSF is very active in this area together with the World Steel Association and the stainless steels industry's most important raw material supplier organisations.

- e. Our key objectives include reducing operational emissions by increasing production process efficiency, increasing recycling and a growing use of durable, high strength stainless steels.
- f. The ongoing safety of the staff and contractors who work in the stainless steels industry is also a key priority.

Today, the industry's health & safety performance is at benchmark levels worldwide, however we will continue to work with member companies to share best industry practices and support specific needs to further improve health and safety performance.

- g. The ISSF HSE Committee collects and spreads information on safety within the industry.

Current ISSF HSE projects include:

- Annual safety survey and report detailing current industry performance information in many safety categories.
- Promotion of the Annual Safety Day at all member companies
- CO₂ annual data collection and reporting
- LCI (Life Cycle Inventory) and LCA (Life Cycle Assessment)
- By-products, their use and re-use potential
- Sustainable Stainless Awards
- Bio-study on Stainless Steel in food contact applications (in cooperation with the Royal Institute of Technology, Stockholm, Sweden)
- Analysis of the global stainless steel cycles in cooperation with the Center for Industrial Ecology of the Yale School of Forestry and Environmental Studies



3 Stainless steel statistics from the leading global source

To provide members with the most reliable global historic and medium-term future economic and stainless steel consumption market analysis, consequently developing the ISSF further as a key global industry information source.

The ISSF is the voice of the global stainless steels industry, ensuring that its views are presented in a forceful, consistent and coordinated way to policymakers, the business and financial communities and the general public.

Through its committee on Economics and Statistics (E&S), the ISSF collects detailed economic and statistical data on the stainless steel sector. The information is disseminated to ISSF members, to the industry, and to the general public via media contacts around the world, the ISSF website: worldstainless.org

Our statistical report updates include:

Short Track Business Report

Frequency = Monthly

The only report covering producer orders, shipments, production and sentiment data on a global scale from up to 40 producers.

It is the fastest available report of its kind with the previous month's data available 15-18 working days following each month-end. It is available in both English and Chinese languages.

The clear benefit for our members is the opportunity to benchmark their own company with peers in their geographical region.



Stainless Steels Consumption Forecast

Frequency = Bi-annually

A 24 months consumption forecast including cold rolled (CR) products, hot rolled (HR) products, long products (LP) and LP semi-finished products based on data from 27 countries. The historical figures stretch back over 18 years.

Market Summary

Frequency = Monthly

A comprehensive report covering all stainless steels market relevant topics including;

- OECD economic data
- ISSF demand index development
- Short track report data
- Stainless steels consumption forecast (SCF) summary,
- Foreign trade data
- Melt shop production by country
- Melt shop production by grade
- Nickel (LME)

Other Statistics Data

- The Composite Leading Indicator (CLI); A prediction of the direction of short-term economic movements in future months
- The Business Confidence Index (BCI); A prediction of future industry development based on opinion surveys covering changes in production levels, order levels and finished good stocks.
- The Consumer Confidence Index (CCI); A prediction of the level of optimism or pessimism of household consumers. An optimistic outcome will indicate a tendency to purchase more goods and services which in turn should stimulate the whole economy.
- Foreign Trade Stainless Steel Product Data; Around 75 countries reporting (monthly) products (CF bars, CR FP, HR bars, HR flat coils, HR flat plates and sheets, Quarto plates, Semi-finished FP, Semi-finished LP, Wire rod & Wire)
- Foreign Trade Raw Materials Data; Around 75 countries reporting (monthly) products (FeCr, FeMn, FeMo, FeNi, FeSiCr, FeSiMn, Ni-ore, other waster and scrap; (turnings, Shavings, chips, milling waste, remelting scrap ingots, waste and scrap from alloy steels, stainless steels and other steels)
- China Monthly Report; Covers Chinese economic and stainless steel developments
- Melting Shop Production 1; by country
- Melting Shop Production 2; by grade (not available from any other source)
- Stainless Steels Stock Statistics; Covering Europe, USA, Canada, Japan, South Korea and China (Foshan / Wuxi)
- Public Realm Capacity Archive; Data on 228 producer groups, 265 companies, flat / long melting shop capacities, CR flat products, bars & sections, wire rod products, semi-finished products (direct use) and capacity data.

4 Making informed decisions on raw materials

To provide a solid global understanding for our members of

- The wider context of demand for our traditional RMs (ie; not in stainless steels)
- The environmental impact of the production of our key RMs
- The technical features of key RM production

The ISSF Raw Materials Committee (RMC) investigates the expected future availability of raw materials and looks into the expected demand volatility and its consequences for the stainless steels industry markets and their growth.

The RMC also aims to identify new sources of sustainable raw materials either as part of recovering more key metals and alloys from industry waste streams or as part of newly identified recycling routes. Additionally, the substitution possibilities of certain raw materials are explored. Furthermore, the expected future raw materials risks for the stainless steels industry are assessed.

Actions are developed to overcome, mitigate and/or explore any major concerns or opportunities identified.

The work of the committee will lead to a global vision of the supply chain and the life cycle of raw materials and scrap, which should allow all ISSF members to make better informed decisions.



Our current focus areas include;

- Understanding the wider context of the demand for our traditional raw materials
- Improved information about the stainless scrap market availability drivers, scrap tourism, environmental footprint
- Explanation of the technical and operational features of Nickel Pig Iron (NPI) production
- NPI production and supply ... what is the CO₂ impact of the route?
- FCEV future development both vehicles and infrastructure (FCEV = Fuel Cell Electric Vehicles)

5 Team Stainless

To primarily explore balanced collaborative efforts on market development. Furthermore Team Stainless also undertakes work associated with both industry safeguarding and market defence in cases where the behavior of stainless steel alloys is not completely understood.

Team Stainless was formed in 2002 and is a structured network of development associations focused primarily on market development work for the stainless steels industry.

The core membership includes:

- The International Chromium Development Association (ICDA)
- The International Stainless Steel Forum (ISSF)
- The Nickel Institute
- The International Molybdenum Association (IMoA)

The wider membership includes:

- The International Nickel Study Group (INSG)
- EuRIC; The European Recycling Industries Confederation
- Eurofer

The Team Stainless website is: teamstainless.org



Current projects in cooperation with the Team Stainless partners are:

- Stainless Steel for Water Supply Systems
- Life Cycles of Stainless Steels – in cooperation with Yale University aka “Comprehensive Multilevel Cycles of Stainless Steels”
- AISC Structure Code for Stainless Steels in Structural Applications
- Highway Bridges
- ASTM E60; Sustainability in regulations and standards – relevance for the stainless steels industry

6 Networking

The annual conference of ISSF is held each year, normally in May. The location of the May conference moves, each year, on a rotation basis between the Americas, Europe and Asia. A more focused ISSF conference is also held in October each year and is bolted-on to the World Steel Association conference. The conference brings together the heads of the world's major stainless steel enterprises and those of the national and regional associations.

Approximately 50 chairmen, chief executive officers and other senior managers of ISSF member companies attend.

As part of the annual conference, the following elements are regular features;

- A workshop of SSDAs
- Health, Safety and Environment Committee meeting **
- Market Development Committee meeting ^^
- Long Products Committee meeting ^^
- Economics & Statistics Committee meeting ^^
- Raw Materials Committee meeting **
- Annual General Meeting of Members
- An Open Panel Session **

Meetings marked ** normally include expert guest speakers from within the industry and/or academia.

Meetings marked ^^ normally include presentations from ISSF staff on specific projects relevant to the industry

These meetings provide members with a chance to hear about the work of ISSF as well as topical subjects that are affecting the stainless steels industry. The ISSF meetings provide the only opportunity where the majority of the world's producers of stainless steel come together at least once a year (and more often for those who are active on the Board or the Committees) and get the opportunity to exchange views and opinions on matters of common interest.



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About ISSF

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More information

For more information about ISSF, please consult our website worldstainless.org.

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