

# Global Steel Trade Monitor

## Steel Exports Report: Netherlands

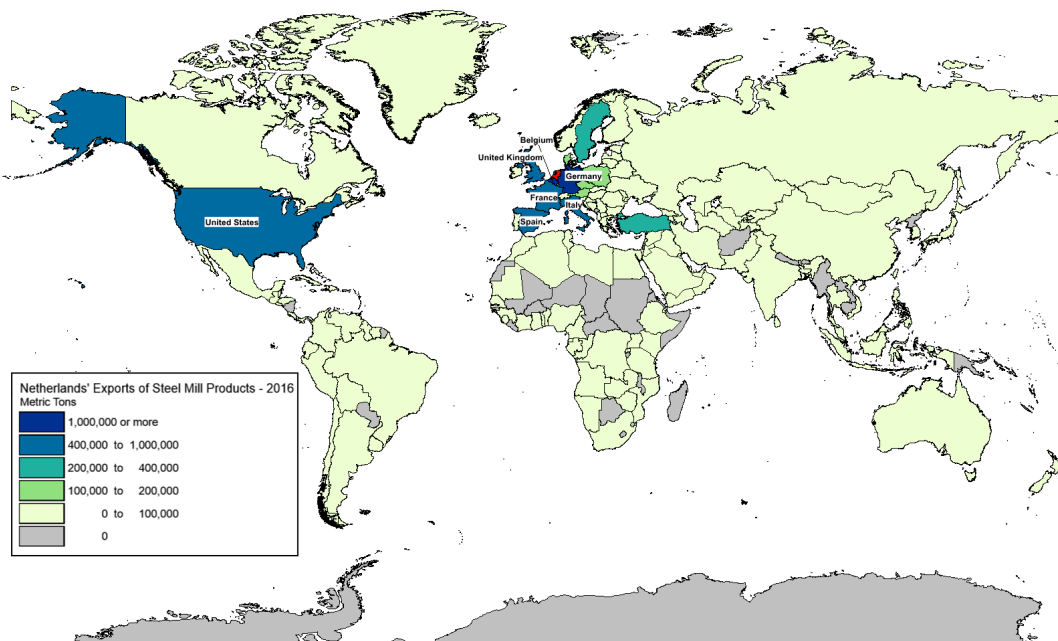
### Background

May 2017

The Netherlands is the world's thirteenth-largest steel exporter. The country exported 10.7 million metric tons of steel, a 3 percent decrease from 11 million metric tons in 2015. Exports from the Netherlands represented about 2 percent of all steel exported globally in 2015, based on available data. The volume of the Netherlands' 2016 steel exports was just about one-tenth that of the largest exporter, China. In value terms, steel represented just 1.5 percent of the total amount of goods the Netherlands exported in 2016.

The Netherlands exports steel to more than 160 countries and territories. The 7 countries labeled in the map below represent the top markets for the Netherlands' exports of steel, receiving more than 400 thousand metric tons each and accounting for 81 percent of the Netherlands' steel exports in 2015.

### Netherlands' Exports of Steel Mill Products - 2016



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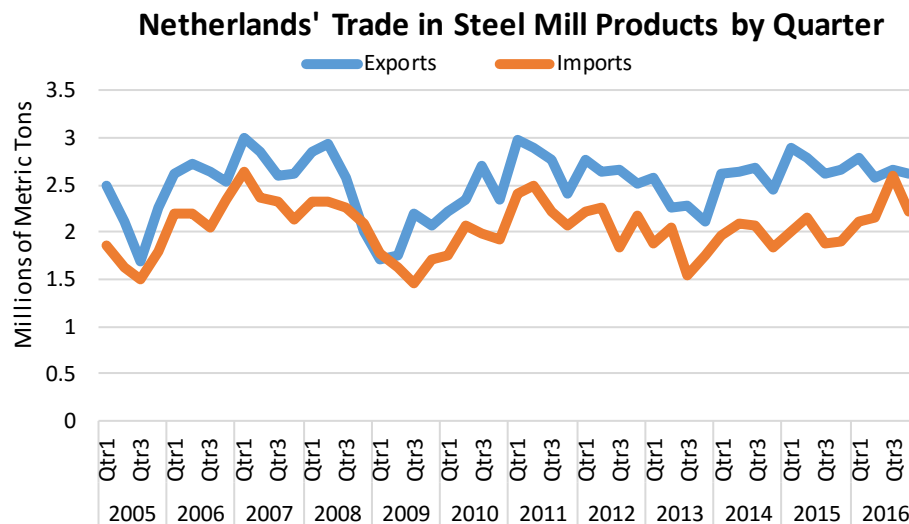
### Quick Facts:

- World's 13th-largest steel exporter: 10.7 million metric tons in 2016
- 38% growth in steel exports since 2009
- Exports as a share of production down from 156.9% in 2015 to 154.1% in 2016
- Year-on-year export volume down 3% while export value down 5%
- Top three markets: Germany, Belgium, France
- Largest producers: Tata Steel, Nedstaal
- 6 trade remedies in effect involving steel mill imports from the European Union

# Steel Exports Report: Netherlands

## Steel Trade Balance

The Netherlands has maintained a moderate trade surplus in steel products since 2005, averaging 1.9 million metric tons on an annual basis. Exports fell faster than imports in the wake of the global recession in 2008, leading to a short trade deficit at the end of 2008 and early 2009. The steel trade balance surplus increased 24 percent in 2015, but narrowed 48 percent in 2016 from 3.0 million metric tons to 1.6 million metric tons.

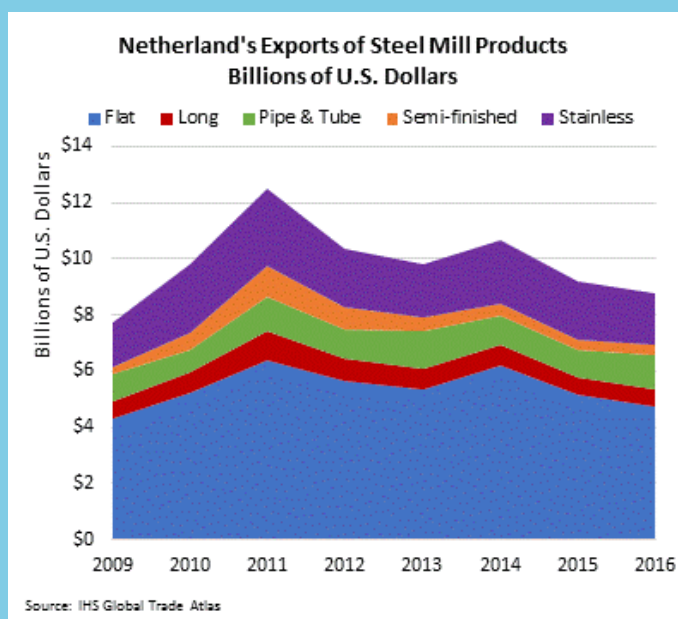
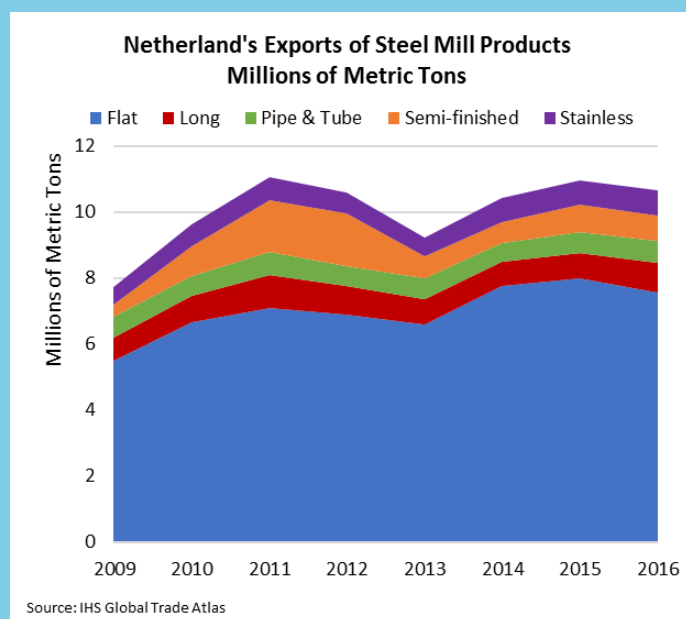


Source: IHS Global Trade Atlas

## Export Volume, Value, and Product

While steel exports from the Netherlands increased 19 percent between 2013 and 2015 — a growth of 1.7 million metric tons, in 2016, exports decreased 3 percent to 10.7 million metric tons. In value terms, the Netherlands' steel exports decreased by 5 percent to \$8.8 billion in 2016 from \$9.2 billion in 2015.

Flat products accounted for 71 percent of the Netherlands' steel exports by volume at 7.6 million metric tons in 2016. Moving up to the second position (fourth in 2015), long products accounted for 8 percent of exports (896 thousand metric tons). Semi-finished products represented 7.4 percent of exports, up one position (789 thousand metric tons), while stainless steel, down one position, accounted for 7.1 percent of exports (757 thousand metric tons), and pipe and tube accounted for 6 percent of exports (664 thousand metric tons), still in the fifth spot.



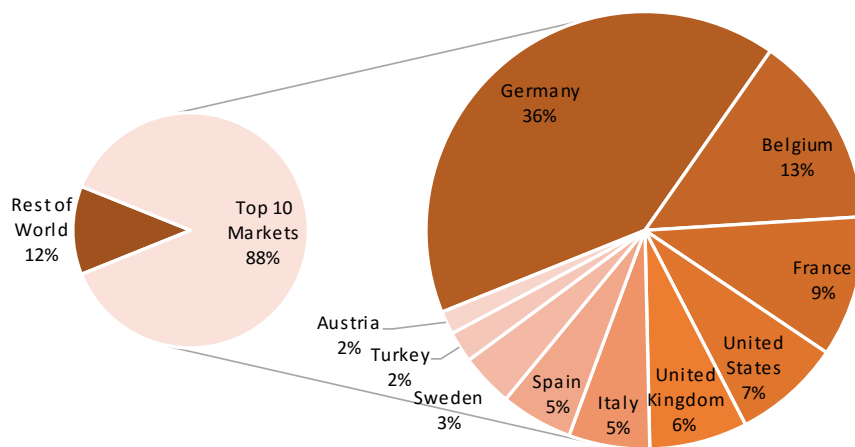
# Steel Exports Report: Netherlands

## Exports by Top Market

Netherlands' exports to its top 10 steel markets represented 88 percent of its steel export volume in 2016, or 9.4 million metric tons (mmt). Germany received just over a third of the Netherlands' exports at 36 percent (3.8 mmt), followed by Belgium at 13 percent (1.3 mmt), and France at 9 percent (0.98 mmt).

The United States and Turkey were the only two non-European Union countries in the Netherlands' top 10 export markets for steel, receiving 7 percent (747 thousand metric tons) and 2 percent (215 thousand metric tons), respectively, of exports in 2016.

**Netherlands' Steel Exports - Top 10 Markets**  
2016 - Millions of Metric Tons



Source: IHS Global Trade Atlas

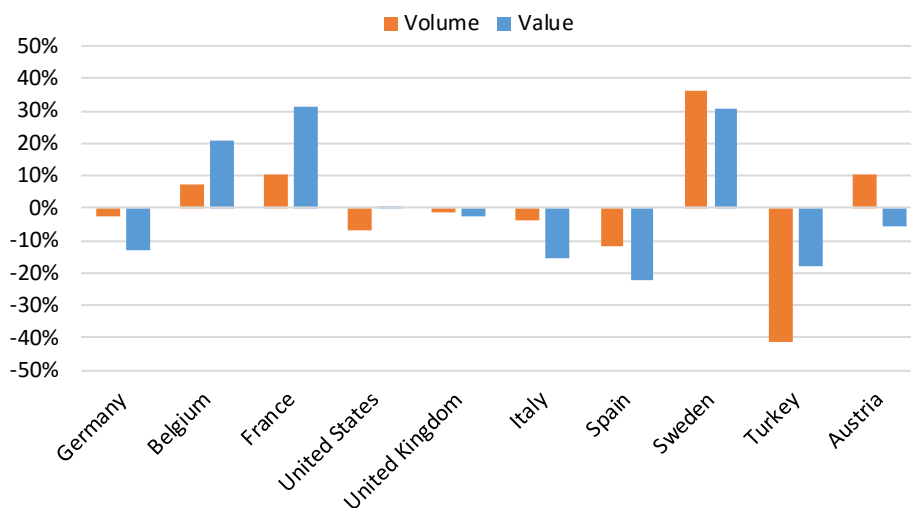
## Trends in Exports to Top Markets

Between 2015 and 2016, exports to the Netherlands' top 10 markets decreased in volume to just over half of the country's top 10 markets. Export volumes decreased the most to Turkey (down 41.5% from 2015). Other declines included Spain (down 12.1%) and the United States (down 7.1%). Exports to Sweden saw the largest increase in volume, up 36.4 percent from 2015, followed by Austria (up 10.3%), France (up 10.2%), and Belgium (up 7.3%).

The change in the overall value of the Netherlands' exports was mixed, with exports to six of the 10 markets decreasing in steel value in 2016. The largest export declines occurred in Spain (down 22.1%), Turkey (down 17.9%), Italy (down 15.7%) and Germany (down 13%). The markets that had export value increases were Sweden and France (up 31% and 30.9%, respectively), followed by Belgium (up 21%) and the United States (up a minor 0.2%).

Outside of the top 10 markets, other notable changes in the Netherlands' volume of steel exports included exports to 12th-ranked Denmark (down 33.9% from 2015), 17th-ranked Switzerland (down 23.2%), and 21st-ranked Pakistan (up 96.8%).

**Percent Change in Exports to Top 10 Markets (2015 to 2016)**



Source: IHS Global Trade Atlas

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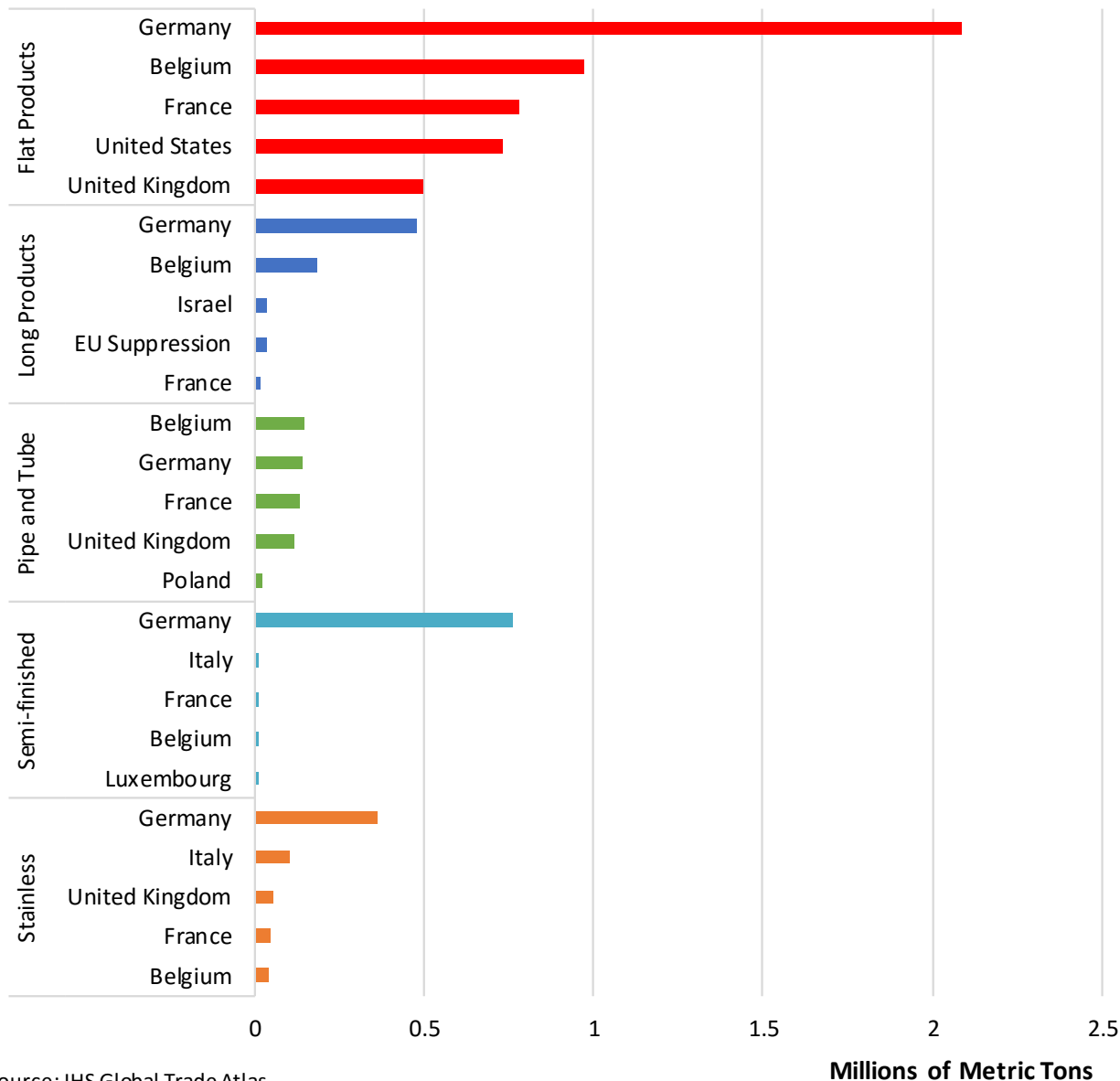
## Top Markets by Steel Product Category

In 2016, the Netherlands’ top export market by volume was Germany for every steel product category except pipe and tube products. Germany received 28 percent of the Netherlands’ exports of flat products (2.1 million metric tons), 53 percent of long product exports (475 thousand metric tons), 97 percent of semi-finished exports (761 thousand metric tons), and 47 percent of stainless steel exports (359 thousand metric tons).

The Netherlands’ sent the largest share of pipe and tube exports to Belgium in 2016 with 21 percent (142 thousand metric tons). Germany was a close second with 20 percent (135 thousand metric tons) of exports.

Flat products was the only product category for which the United States was a top-five export destination, capturing 10 percent (728 thousand metric tons).

Netherlands' Top 5 Export Markets by Product - 2016



Source: IHS Global Trade Atlas

# Steel Exports Report: Netherlands

## Netherlands' Import Market Share in Top Destinations

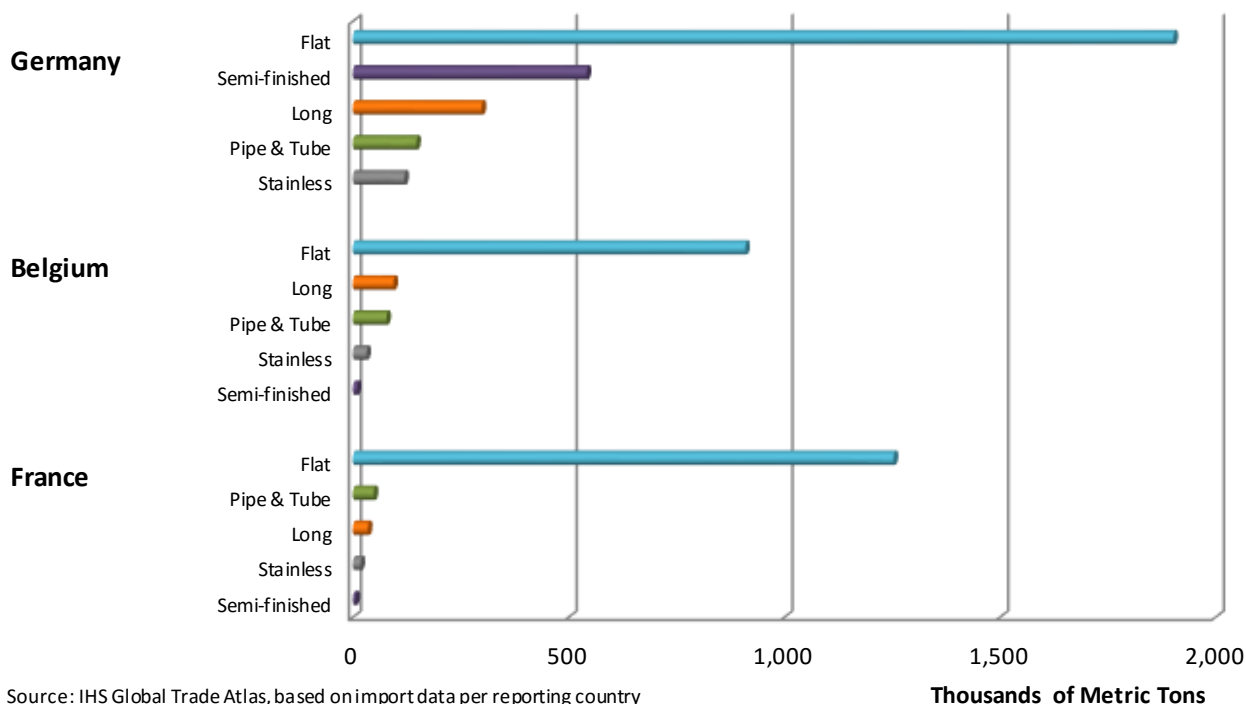
In 2015, the import market share for the Netherlands' steel products increased in half of its top export destinations. Sweden's share of imports from the Netherlands saw the largest increase (up 1.7 percentage points from 2014), while France, the United Kingdom, Turkey, and Poland all showed increases of less than one percentage point. The share of imports from the Netherlands in Belgium and Italy showed the largest decreases, down 1.8 percentage points in Belgium and 1.6 percentage points in Italy.

Among the Netherlands' top export markets, Germany, Belgium, and France received the largest shares of their steel imports from the Netherlands in 2015 at 11.9, 9.3, and 9.7 percent, respectively. Flat products accounted for the largest share of steel imports from the Netherlands in all three markets, with the share of Germany's imports at 63 percent (1.9 million metric tons), Belgium's at 81 percent (910 thousand metric tons), and France's at 92 percent (1.3 million metric tons).

Netherlands' Steel Import Market Share				
Top 10 Export Destinations (2015)	Share of Imports from Netherlands - 2014	Netherlands' Rank in 2014	Share of Imports from Netherlands - 2015	Netherlands' Rank in 2015
Germany	11.9%	4	11.9%	4
Belgium	11.1%	5	9.3%	5
France	8.9%	4	9.7%	4
United States	2.1%	13	2.1%	13
United Kingdom	8.3%	4	8.5%	5
Italy	4.0%	8	2.4%	12
Spain	4.8%	6	4.7%	6
Turkey	1.2%	15	1.4%	14
Sweden	4.5%	8	6.2%	5
Poland	1.6%	14	2.1%	12

Source: IHS Global Trade Atlas, based on import data per reporting country

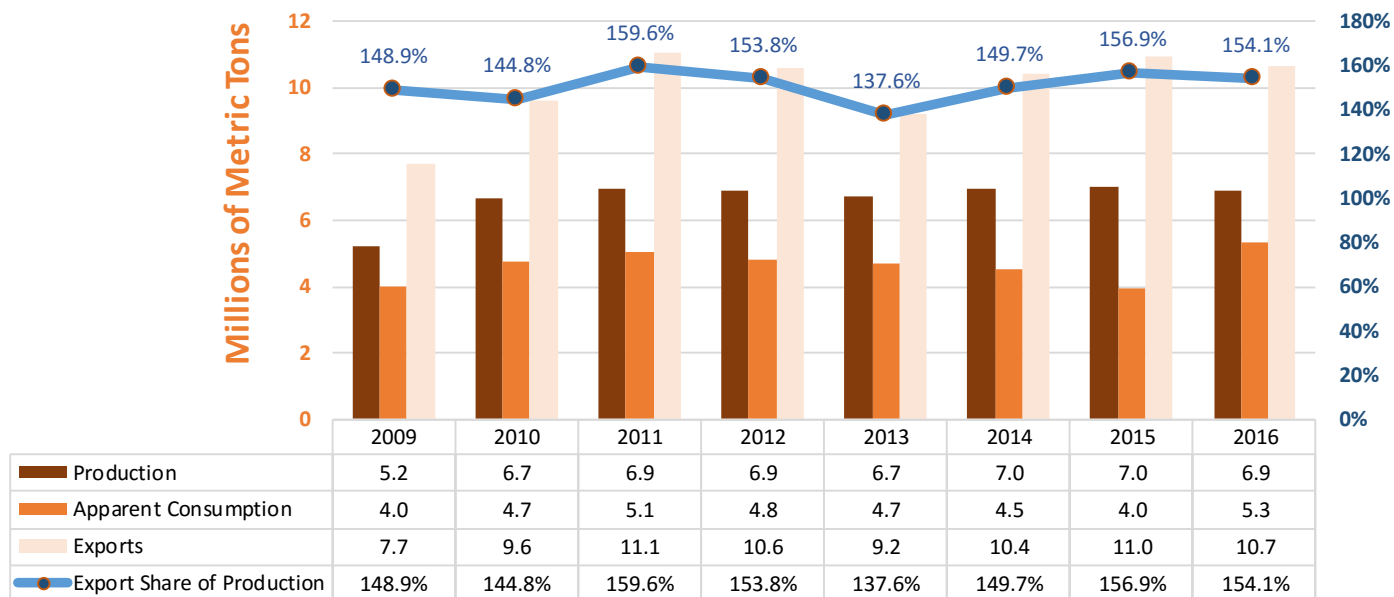
## Steel Import Composition of Top Market-Share Countries - 2015



# Steel Exports Report: Netherlands

## Overall Production and Export Share of Production

### Netherlands' Export Share of Steel Production



Sources: World Steel Association; IHS Global Trade Atlas

Crude steel production in the Netherlands increased by 34 percent between 2009 and 2011 to 6.9 million metric tons. Production held steady at an average of 6.9 million metric tons between 2011 and 2015. This continued into 2016 where production decreased by 1 percent to 6.9 million metric tons from 7.0 million metric tons in 2015. Production has consistently outpaced apparent consumption (a measure of steel demand), and the gap between the two more than doubled between 2009 and 2015. This gap narrowed in 2016 as apparent consumption increased 35 percent to 5.3 million metric tons. Steel exports as a share of production in the Netherlands averaged 151 percent between 2009 and 2016. In 2016, exports as a share of production decreased 3 percentage points to 154.1 percent. The Netherlands exported an average of 3.4 million metric tons more than it produced between 2009 and 2016.

### Top Producers

The Netherlands' has two main companies producing crude steel: foreign-owned Tata Steel and domestically-owned Nedstaal. India's Tata Steel acquired the IJmuiden steelworks (formerly owned by Corus Steel) to become the largest steel producer in the Netherlands with an estimated production capacity of 7 million metric tons.

Netherlands' Steel Producers			
Rank	Company	Capacity (mmt)	Main Products
1	Tata Steel (IJmuiden)	7	Hot-rolled, cold-rolled, coated strip, slab
2	Nedstaal	N/A	Semi-finished

Sources: Metal Bulletin, *Iron and Steelworks of the World Directory 2014*; Company websites

# Steel Exports Report: **Netherlands**

## Trade Remedies in the Steel Sector

Antidumping duties (AD), countervailing duties (CVD), associated suspension agreements, and safeguards are often referred to collectively as trade remedies. These are internationally agreed upon mechanisms to address the market-distorting effects of unfair trade, or serious injury or threat of serious injury caused by a surge in imports. Unlike anti-dumping and countervailing measures, safeguards do not require a finding of an “unfair” practice. Before applying these duties or measures, countries investigate allegations and can remedy or provide relief for the injury caused to a domestic industry. The tables below provide statistics on the current number of trade remedies various countries have against steel mill products from the Netherlands and from the European Union, which includes the Netherlands.

Steel Mill Trade Remedies in Effect Against the European Union				
Country	AD	CVD	Suspension Agreements and Undertakings	Total
China	2			2
India	3			3
Morocco	1			1
<b>TOTAL</b>	<b>6</b>	<b>0</b>	<b>0</b>	<b>6</b>
Source: World Trade Organization, through December 1, 2016				

Global Steel Mill Safeguards in Effect	
Country	Product(s)
Egypt	Steel rebar
India	1) Hot-rolled steel in coils; 2) Hot-rolled steel flat sheets and plates
Indonesia	1) Articles of finished casing and tubing; 2) Flat-rolled products of iron or non-alloy steel; 3) I and H sections of other alloy steel; 4) Bars and rods, hot-rolled, in irregularly wound coils
Malaysia	Hot-rolled steel plate
Morocco	1) Cold-rolled sheets and plated or coated sheets; 2) Reinforcing bars and wire rods
Philippines	Steel angle bars
Thailand	1) Hot-rolled steel flat products with certain amounts of alloying elements; 2) Unalloyed hot-rolled steel flat products in coils and not in coils; 3) Structural hot-rolled H-beams with alloy
Vietnam	Semi-finished and certain finished products of alloy and non-alloy steel
Source: World Trade Organization, through February 24, 2017	



# Steel Exports Report: Glossary

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**Apparent Consumption:** Domestic crude steel production plus steel imports minus steel exports. Shipment data are not available for all countries, therefore crude steel production is used as a proxy.

**Export Market:** Destination of a country's exports.

**Flat Products:** Produced by rolling semi-finished steel through varying sets of rolls. Includes sheets, strips, and plates. Used most often in the automotive, tubing, appliance, and machinery manufacturing sectors.

**Import Penetration:** Ratio of imports to apparent consumption.

**Import Source:** Source of a country's imports.

**Long Products:** Steel products that fall outside the flat products category. Includes bars, rails, rods, and beams. Used in many sectors but most commonly in construction.

**Pipe and Tube Products:** Either seamless or welded pipe and tube products. Used in many sectors but most commonly in construction and energy sectors.

**Semi-finished Products:** The initial, intermediate solid forms of molten steel, to be re-heated and further forged, rolled, shaped, or otherwise worked into finished steel products. Includes blooms, billets, slabs, ingots, and steel for castings.

**Stainless Products:** Steel products containing at minimum 10.5% chromium (Cr) offering better corrosion resistance than regular steel.

**Steel Mill Products:** Carbon, alloy, or stainless steel produced by either a basic oxygen furnace or an electric arc furnace. Includes semi-finished steel products and finished steel products. For trade data purposes, steel mill products are defined at the Harmonized System (HS) 6-digit level as: 720610 through 721650, 721699 through 730110, 730210, 730240 through 730290, and 730410 through 730690. The following discontinued HTS codes have been included for purposes of reporting historical data (prior to 2007): 722520, 722693, 722694, 722910, 730410, 730421, 730610, 730620, and 730660.

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**Global Steel Trade Monitor:** The monitor provides global import and export trends for the top countries trading in steel products. The current reports expand upon the early release information already provided by the Steel Import Monitoring and Analysis (SIMA) system that collects and publishes data on U.S. imports of steel mill products. Complementing the SIMA data, these reports provide objective and current global steel industry information about the top countries that play an essential role in the global steel trade. Information in these reports includes global exports and import trends, production and consumption data and, where available, information regarding trade remedy actions taken on steel products. The reports will be updated quarterly.

**Steel Import Monitoring and Analysis (SIMA) System:** The Department of Commerce uses a steel import licensing program to collect and publish aggregate data on near real-time steel mill imports into the United States. SIMA incorporates information collected from steel license applications with publicly released data from the U.S. Census Bureau. By design, this information provides stakeholders with valuable information on the steel trade with the United States. For more information about SIMA, please go to <http://enforcement.trade.gov/steel/license/>.



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