



# Global Steel Trade Monitor

## Steel Imports Report: Germany

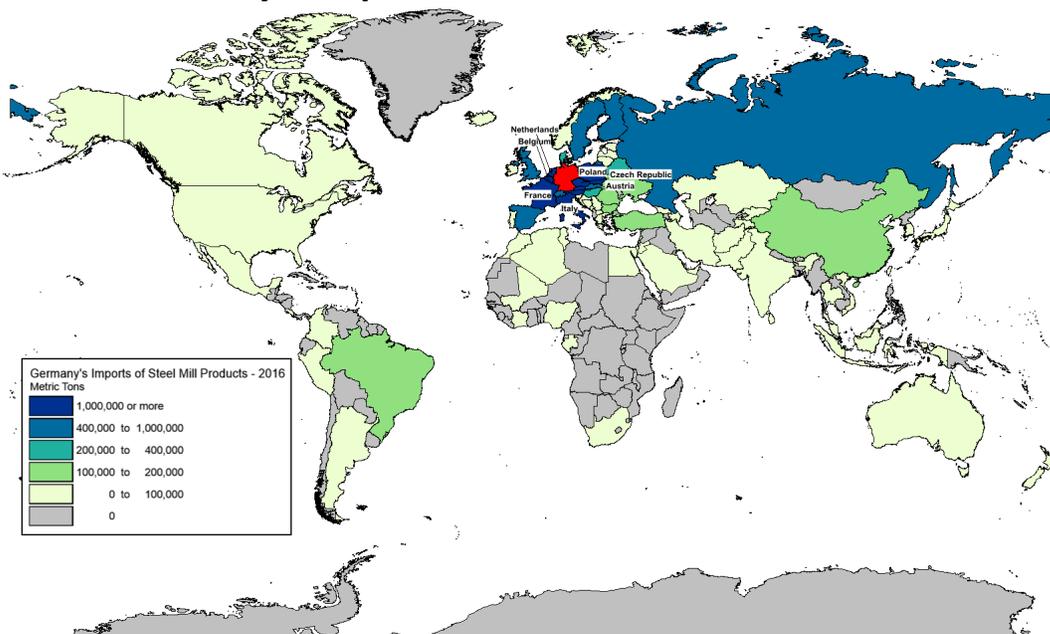
March 2017

### Background

Germany is the world's second-largest steel importer. In 2016, Germany imported 25.7 million metric tons of steel, a 1 percent increase from 25.4 million metric tons in 2015. Germany's imports represented about 7 percent of all steel imported globally in 2015, based on available data. The volume of Germany's 2016 steel imports was just over 4 million metric tons less than that of the world's largest importer, the United States. In value terms, steel represented just 2 percent of the total goods imported into Germany in 2016.

Germany imports steel from over 130 countries and territories. The seven countries labeled in the map below represent the top import sources for Germany's imports of steel, with Germany receiving more than 1 million metric tons from each and together accounting for 73 percent of Germany's steel imports in 2016.

Germany's Imports of Steel Mill Products - 2016



Data Source: Global Trade Atlas; Copyright © IHS Global Inc. 2017. All rights reserved.

### Quick Facts:

- World's second-largest steel importer: 25.7 million metric tons (2016)
- 43% steel import growth since 2009
- Year-on-year import volume up 1% while import value down 9%
- Import penetration at 59.8% in 2016
- Top three import sources: Belgium, Italy, and the Netherlands
- Largest producers: ThyssenKrupp, ArcelorMittal, and Salzgitter
- 20 European Union trade remedies in effect against imports of steel mill products

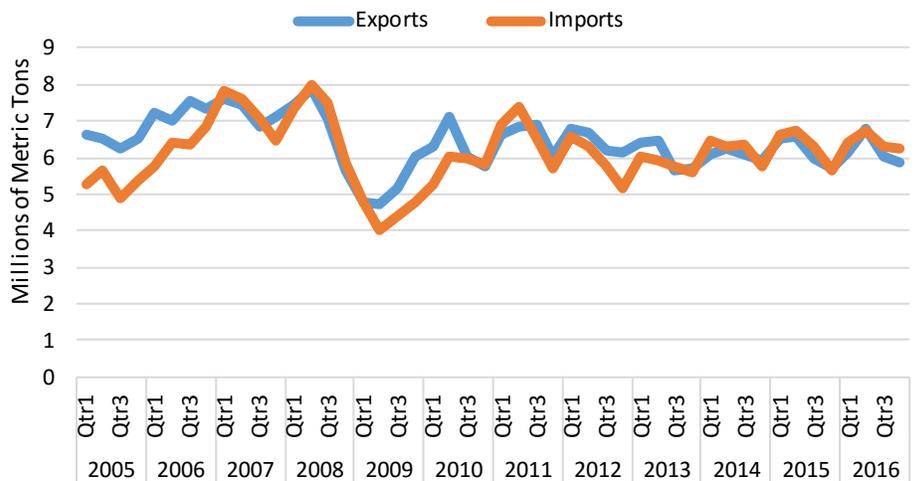
# Steel Imports Report: Germany

## Steel Trade Balance

Germany has maintained a slight steel trade surplus for much of the past decade. Both imports and exports fell in 2009 and have recovered since then, increasing 43 percent and 20 percent, respectively, between 2009 and 2016.

With imports growing at a faster rate, Germany has posted a steel trade deficit in the past three years, amounting to -892.3 thousand metric tons in 2016.

Germany's Trade in Steel Mill Products by Quarter



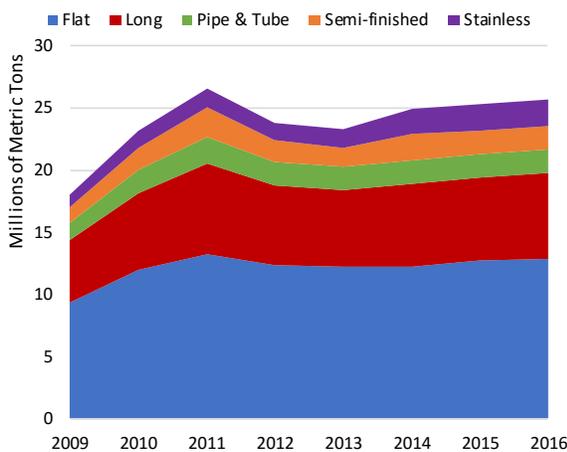
Source: IHS Global Trade Atlas

## Import Volume, Value, and Product

Germany's imports of steel products hit a recent peak in 2011, at 26.5 million metric tons, before declining through 2013. Imports rose in 2014 by 7 percent and again in 2015 by 2 percent. In 2016, the volume of Germany's steel imports increased by 1 percent from 2015 to 25.7 million metric tons. By contrast, the value of Germany's steel imports has decreased nearly every year since 2011. Between 2011 and 2016, import value fell by 38 percent, from \$34.1 billion to \$20.9 billion. In 2016, the value of Germany's steel imports decreased by 9 percent to \$20.9 billion from \$23.1 billion in 2015, which can be attributed to a significant drop in global steel prices.

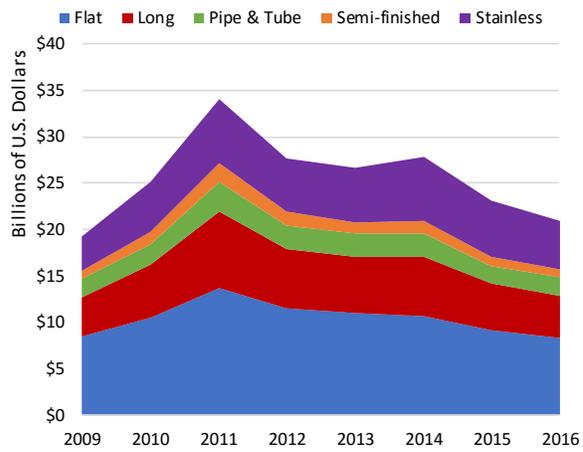
In 2016, flat products accounted for half of Germany's steel imports, or 12.8 million metric tons. Long products accounted for 27 percent, or 6.8 million metric tons, of Germany's imports, followed by stainless (9% or 2.2 million metric tons), pipe and tube (8% or 2 million metric tons), and semi-finished products (7% or 1.8 million metric tons).

Germany's Imports of Steel Mill Products  
Millions of Metric Tons



Source: IHS Global Trade Atlas

Germany's Imports of Steel Mill Products  
Billions of U.S. Dollars



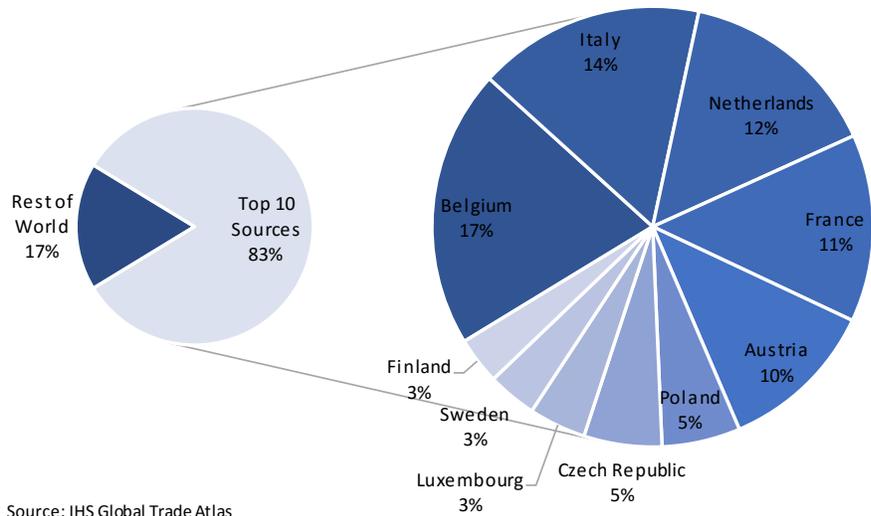
Source: IHS Global Trade Atlas

# Steel Imports Report: Germany

## Imports by Top Source

The top 10 source countries for Germany's steel imports represented 83 percent of the total steel import volume in 2016 at 21.2 million metric tons (mmt). Belgium accounted for the largest share of Germany's imports by source country at 17 percent (4.3 mmt), followed by Italy at 14 percent (3.5 mmt), the Netherlands at 12 percent (3.2 mmt), France at 11 percent (2.9 mmt), and Austria at 10 percent (2.5 mmt).

**Germany's Steel Imports - Top 10 Sources**  
2016 - Millions of Metric Tons



The United States ranked 32<sup>nd</sup> as a source for Germany's steel imports, representing just 0.1 percent of imports (31 thousand metric tons) in 2016.

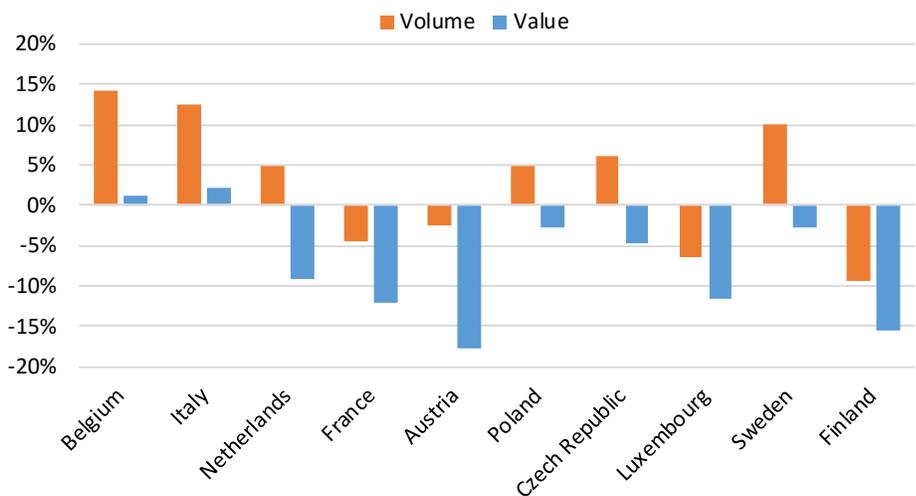
## Trends in Imports from Top Sources

Between 2015 and 2016, the volume of imports increased from six of Germany's top 10 source countries. Imports from Belgium showed the largest volume increase, up 14.2 percent from 2015, followed by Italy (up 12.5%) and Sweden (up 10.1%). Imports from Finland showed the largest volume decrease, down 9.3 percent from 2015, followed by Luxembourg (down 6.4%) and France (down 4.6%).

Outside the top 10 sources, other notable volume changes included Germany's imports from the United Kingdom (down 40.5%), Denmark (up 29.7%), and Brazil (down 30.2%).

The overall value of Germany's imports decreased from 8 of its top 10 sources, reflecting the decline in global steel prices. Imports from Austria, Finland, and France showed the largest decreases in value in 2016, down 17.9 percent, 15.5 percent, and 12.2 percent, respectively. Only imports from Italy and Belgium increased in value, up 2.2 percent and 1.1 percent, respectively, from 2015.

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



Source: IHS Global Trade Atlas

# Steel Imports Report: **Germany**

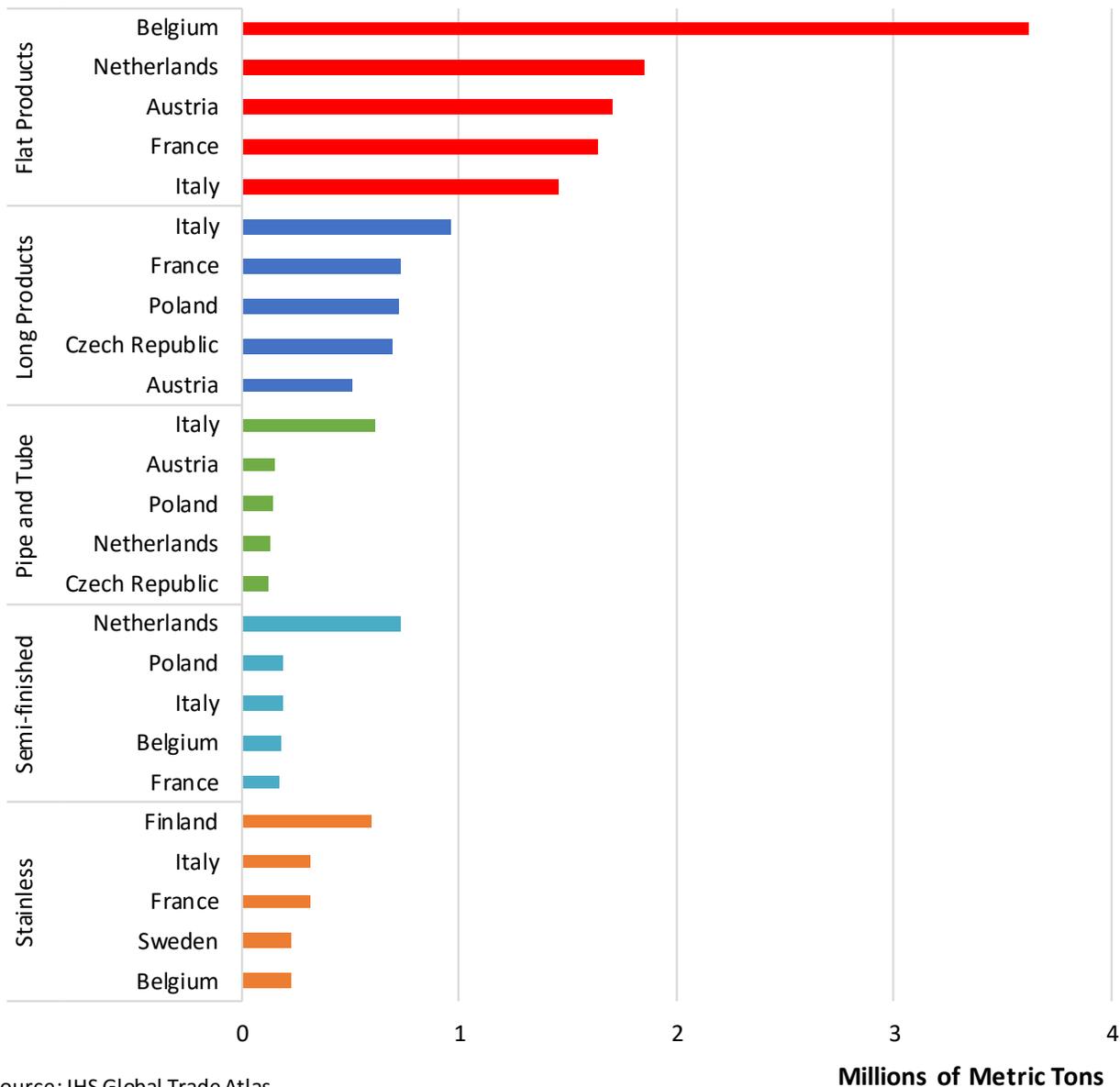
## Top Sources by Steel Product Category

The top source countries for Germany’s imports by volume vary across types of steel products. Belgium accounted for 28 percent (3.6 million metric tons) of Germany’s imports of flat products in 2016, followed by the Netherlands at 14 percent (1.8 million metric tons).

In 2016, Italy represented the largest shares of both Germany’s long product imports at 14 percent (964 thousand metric tons) and its pipe and tube imports at 31 percent (612 thousand metric tons). The Netherlands represented the largest share of Germany’s semi-finished steel imports in 2016 at 40 percent (733 thousand metric tons), while Finland represented the largest share of Germany’s imports of stainless products at 27 percent (593 thousand metric tons).

The United States was not a top-five import source for any product category.

### Germany's Top 5 Import Sources by Product - 2016



Source: IHS Global Trade Atlas

# Steel Imports Report: Germany

## Germany's Export Market Share from Top Source Countries

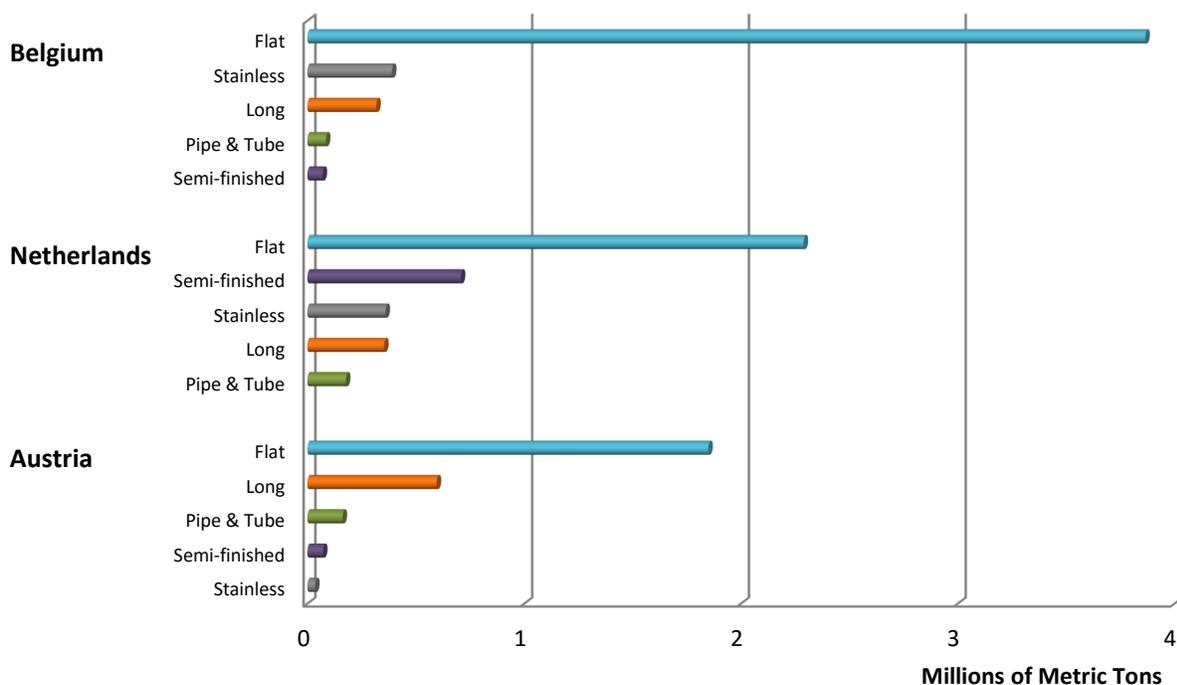
In 2015, the share of steel exports sent to Germany from its top import sources increased from all but three of the top 10 sources. In 2015, the share of Finland's steel exports to Germany showed the largest increase (up 4.7 percentage points from 2014), followed by Austria (up 2.9 percentage points), and Belgium (up 1.7 percentage points). Italy, France, and Poland showed decreases in their share of steel exports to Germany, decreasing 1.1, 0.4, and 0.8 percentage points, respectively. Of note, Germany ranks as the number one export destination in nearly all of its top import sources.

Germany's Steel Export Market Share				
Top 10 Import Sources	Share of Exports to Germany - 2014	Germany's Rank in 2014	Share of Exports to Germany - 2015	Germany's Rank in 2015
Belgium	29.0%	1	30.8%	1
Italy	21.2%	1	20.1%	1
France	21.0%	1	20.5%	1
Netherlands	35.2%	1	35.7%	1
Austria	34.2%	1	37.1%	1
Poland	27.1%	1	26.2%	1
Czech Republic	24.9%	1	26.5%	1
Luxembourg	20.3%	1	20.4%	1
Finland	22.0%	2	26.7%	2
United Kingdom	9.8%	5	11.2%	2

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

Among Germany's top sources, Belgium, the Netherlands, and Austria each sent more than 30 percent of their total steel exports to Germany. In 2015, flat products accounted for the largest share of steel exports to Germany from all three sources. Flat products accounted for 82 percent (3.9 million metric tons) of Belgium's steel exports to Germany, 59 percent of exports from the Netherlands (2.3 million metric tons), and 68 percent of exports from Austria (1.8 million metric tons).

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

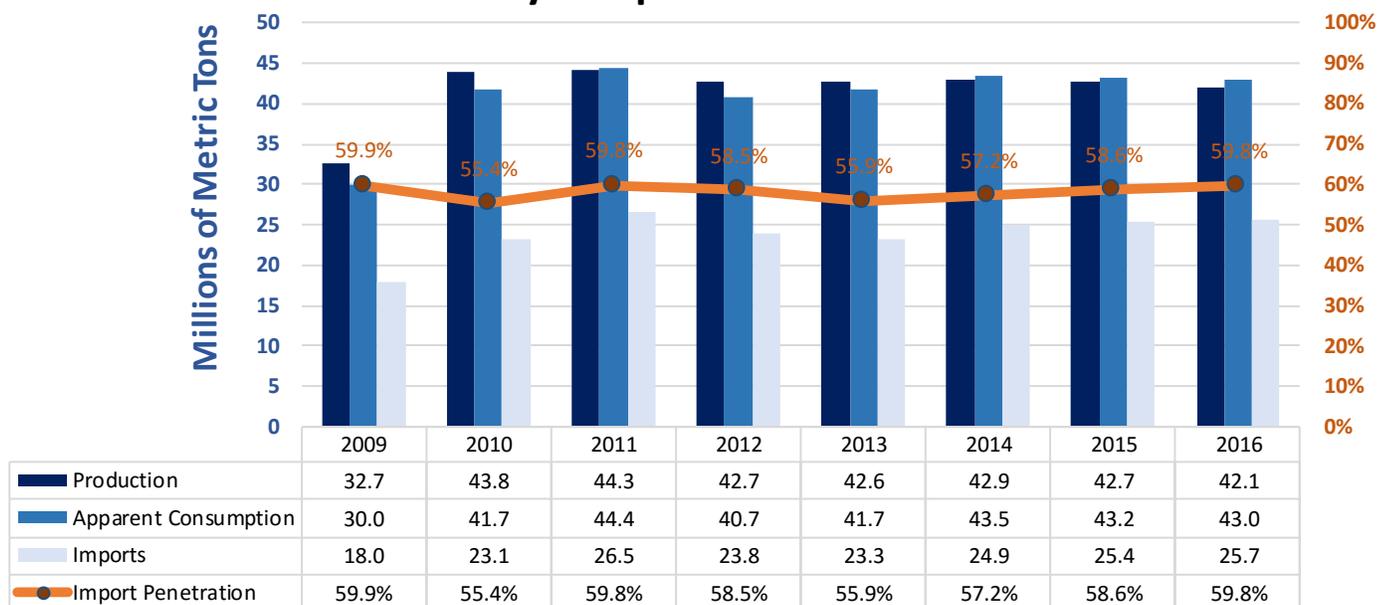


Source: IHS Global Trade Atlas, based on import data per reporting country

# Steel Imports Report: Germany

## Overall Production and Import Penetration

### Germany's Import Penetration



Sources: World Steel Association; IHS Global Trade Atlas

After increasing 34 percent between 2009 and 2010, crude steel production in Germany remained steady at an average of 43 million metric tons per year. Production decreased slightly to 42.1 million metric tons in 2016, from 2015's total of 42.7 million metric tons. Apparent consumption (a measure of steel demand) has slightly outpaced production in recent years. The import penetration level in 2016 increased by 1.2 percentage points to 59.8 percent. Despite such high import penetration levels, Germany exported a similar percentage of its production, which helped to keep demand in line with production.

### Top Producers

Germany's steel production is a mix of domestic and foreign-owned companies and is concentrated among a handful of producers, with the country's top six producers accounting for 33.7 million metric tons, or 79 percent of total 2015 production, based on available data.

Germany's Top Steel Producers in 2015			
Rank	Company	Production (mmt)	Main Products
1	ThyssenKrupp	9.3	Strip, plate, tinplate, electrical, stainless
2	ArcelorMittal	7.8	Flat, long, tube
3	Salzgitter	5.3	Strip, plates, sections, pipe and tube
4	HKM	4.6	Semi-finished
5	Saarstahl	4.3	Wire rods, bars, semi-finished
6	Dillinger Hüttenwerke	2.4	Heavy plate

Sources: German Steel Federation; MarketLine; Company websites

# Steel Imports Report: **Germany**

## 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 table below provides statistics on the current number of trade remedies the European Union, which includes Germany, has against imports of steel mill products from various countries. The European Union has no steel mill safeguards in effect.

<b>European Union Trade Remedies in Effect Against Steel Mill Imports</b>				
<b>Country</b>	<b>AD</b>	<b>CVD</b>	<b>Suspension Agreements and Undertakings</b>	<b>Total</b>
Belarus	1			1
China	7	1		8
India	1	2		3
Japan	1			1
Russia	3			3
South Korea	1			1
Taiwan	1			1
Ukraine	1			1
United States	1			1
<b>TOTAL</b>	<b>17</b>	<b>3</b>	<b>0</b>	<b>20</b>

Source: World Trade Organization, through December 1, 2016

# Steel Imports 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 HS codes have been included for purposes of reporting historical data (prior to 2007): 722520, 722693, 722694, 722910, 730410, 730421, 730610, 730620, and 730660.

**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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