

# Global Steel Trade Monitor

## Steel Exports Report: Germany

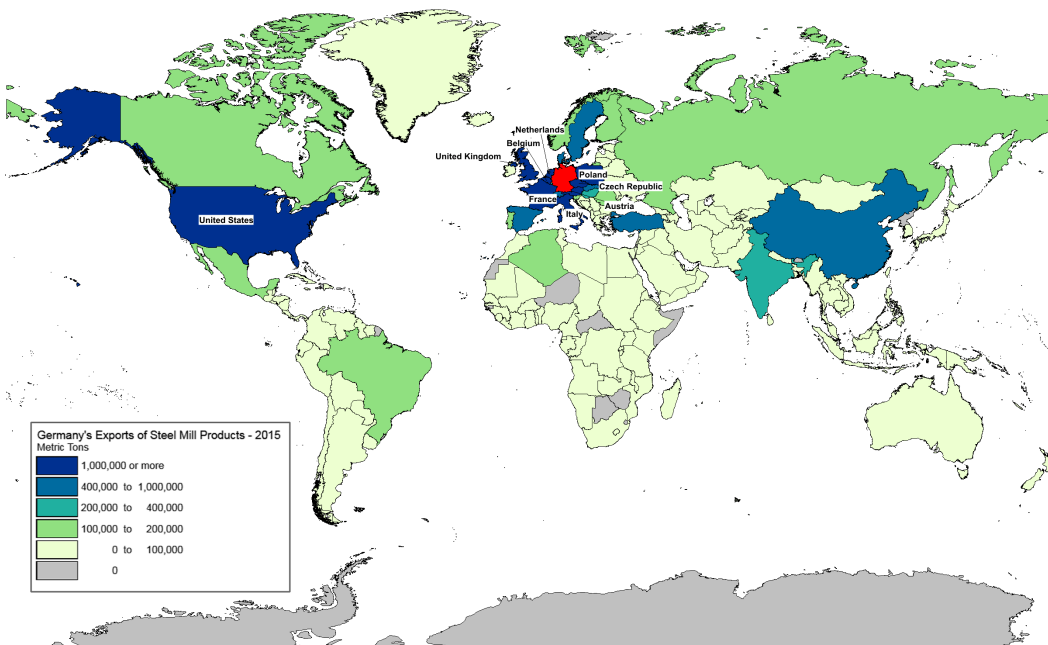
September 2016

### Background

Germany is the world's fifth-largest steel exporter. In year to date 2016 (through June), Germany exported 12.8 million metric tons of steel, a 2.2 percent decrease from 13.1 million metric tons in YTD 2015. Germany's exports represented about 5 percent of all steel exported globally in 2015. The volume of Germany's 2015 steel exports was less than a quarter of the world's largest exporter, China. In value terms, steel represented just 2 percent of the total amount of goods Germany exported in 2015.

Germany exports steel to more than 200 countries and territories. The nine countries labeled in the map below represent the top markets for Germany's exports of steel, receiving more than 1 million metric tons each and accounting for 67 percent of Germany's steel exports in 2015.

**Germany's Exports of Steel Mill Products - 2015**



Data Source: Global Trade Atlas; Copyright © IHS Global Inc. 2016. All rights reserved.

### Quick Facts:

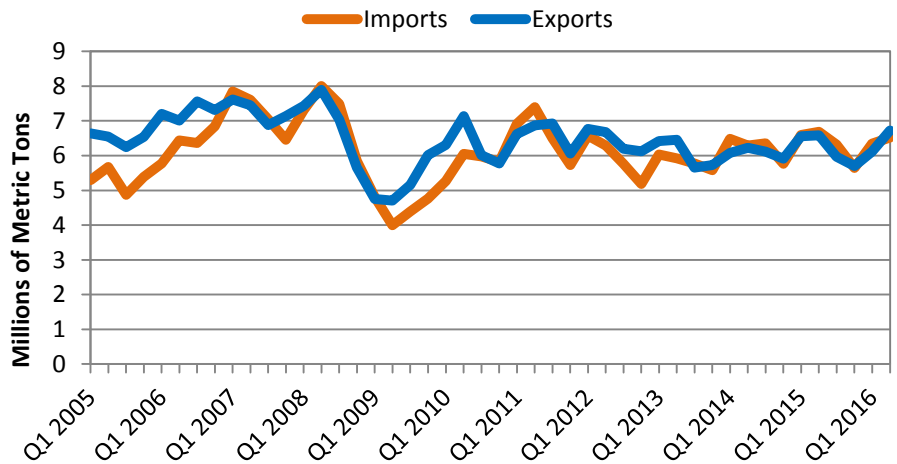
- World's fifth-largest steel exporter: 12.8 million metric tons (YTD 2016)
- 43% steel export growth since Q2 2009
- YTD export volume down 2.2% while export value down 12.2%
- Top three markets: France, Netherlands, Poland
- Largest producers: ThyssenKrupp, ArcelorMittal, and Salzgitter
- 5 trade remedies in effect in 4 countries involving steel mill imports from Germany; 6 trade remedies in effect in 3 countries involving steel mill imports from the European Union

# Steel Exports Report: Germany

## Steel Trade Balance

Germany's steel imports and exports have tracked relatively closely together for much of the past decade, and the country has posted a trade surplus in steel products for the majority of quarters. Both imports and exports fell in 2009 and have recovered since then, increasing 63 percent and 43 percent, respectively, between Q2 2009 and Q2 2016. With imports growing at a faster rate, Germany has posted a slight steel trade deficit in YTD 2016 of -26 thousand metric tons.

Germany's Trade in Steel Mill Products by Quarter



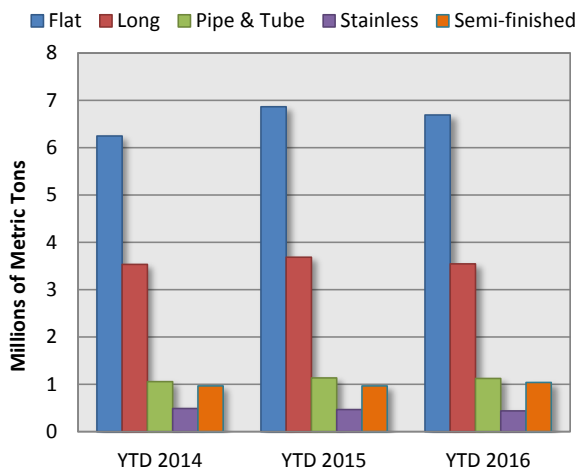
Source: IHS Global Trade Atlas

## Export Volume, Value, and Product

In recent years, Germany's level of steel exports by volume has remained relatively flat. In 2015, Germany exported 24.8 million metric tons of steel, a 2 percent increase from 24.3 million metric tons in 2014. YTD 2016 exports were down 2.2 percent compared to YTD 2015, from 13.1 million metric tons to 12.8 million metric tons. By contrast the value of Germany's YTD 2016 steel exports have declined by a greater amount, down 12.2 percent to \$11.1 billion from \$12.7 billion in YTD 2015.

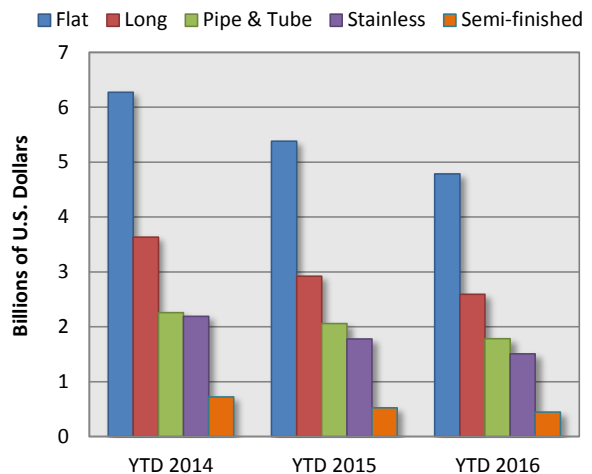
Flat products account for just over half of Germany's steel exports, amounting to 6.7 million metric tons in YTD 2016. Long products accounted for 28 percent, or 3.5 million metric tons, of Germany's exports of steel in YTD 2016, followed by pipe and tube products (9% or 1.1 million metric tons), semi-finished steel (8% or 1 million metric tons), and stainless products (3% or 441 thousand metric tons).

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



Source: IHS Global Trade Atlas  
YTD through June

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



Source: IHS Global Trade Atlas  
YTD through June

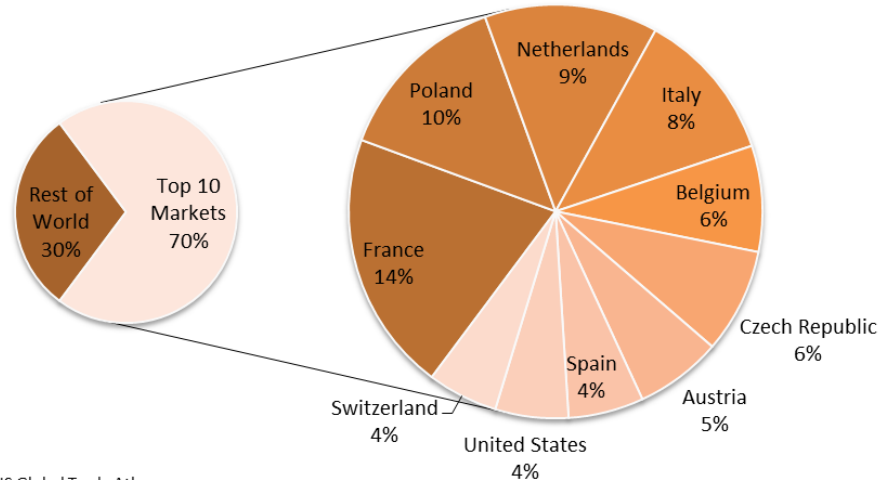
# Steel Exports Report: Germany

## Exports by Top Market

Exports to Germany's top 10 steel markets represented 70 percent of Germany's steel export volume in YTD 2016 at 9 million metric tons (mmt). France received the largest share of Germany's exports with 14 percent (1.8 mmt), followed by Poland at 10 percent (1.3 mmt), the Netherlands at 9 percent (1.2 mmt), and Italy at 8 percent (1.1 mmt).

The United States ranked ninth as a destination for Germany's steel exports in YTD 2016, receiving 4 percent of exports, down from sixth in YTD 2015. Germany exported 518 thousand metric tons to the United States in YTD 2016, a 24.3 percent decline from 684 thousand metric tons in YTD 2015.

**Germany's Steel Exports - Top 10 Markets**  
YTD 2016- Millions of Metric Tons



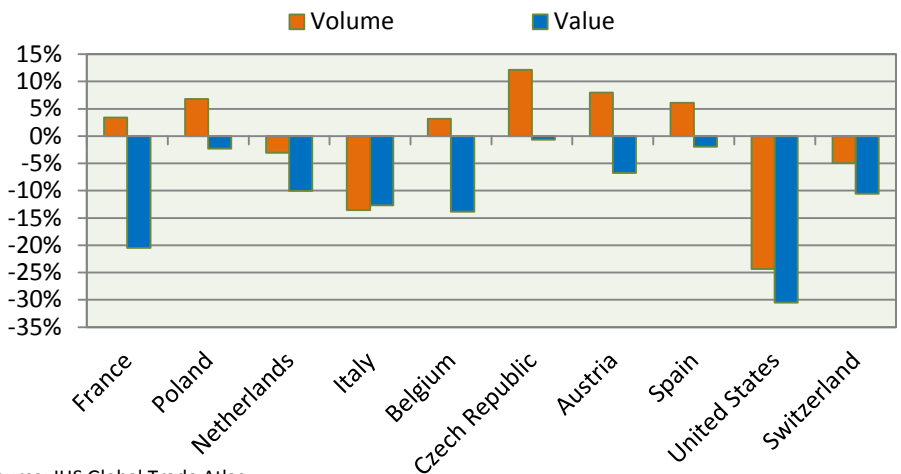
Source: IHS Global Trade Atlas  
YTD through June

## Trends in Exports to Top Markets

While the volume of Germany's steel exports increased in half of Germany's top 10 steel export markets between YTD 2015 and YTD 2016, the overall value of Germany's steel exports decreased in all of its top 10 markets, reflecting the decline in global steel prices. Markets that experienced considerable decreases in steel value between YTD 2015 and YTD 2016 included the United States (down 30.5%), France (down 20.5%), Belgium (down 13.8%), and Italy (down 12.7%).

The United States and Italy saw the largest decreases in Germany's export volume in YTD 2016, down 24.3 percent and 13.6 percent, respectively. Sizeable increases in Germany's steel export volume occurred in Czech Republic (up 12.1% from YTD 2015), Austria (up 8%), and Poland (up 6.8%).

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



Source: IHS Global Trade Atlas  
YTD through June

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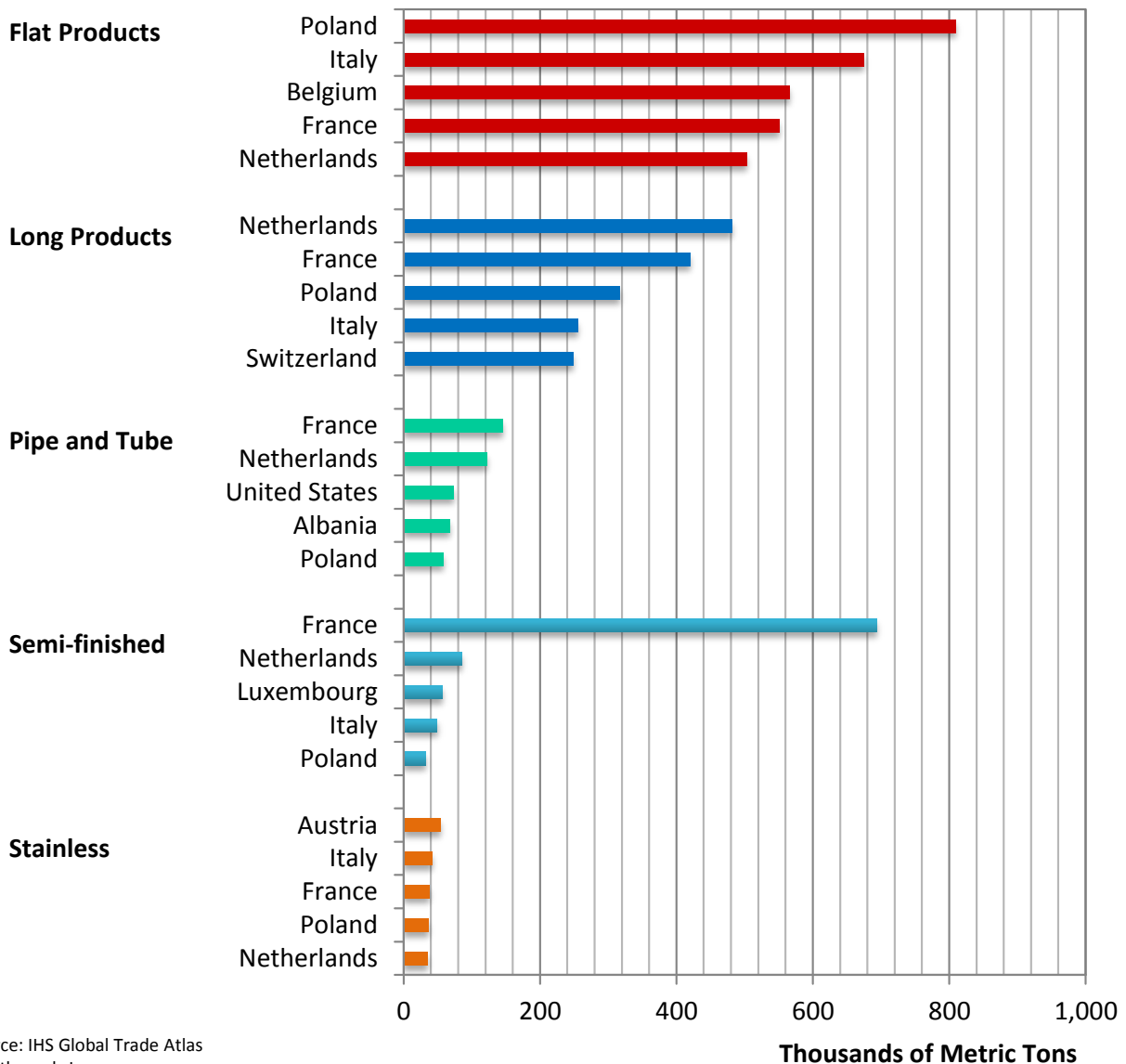
## Top Markets by Steel Product Category

Germany's top export markets by volume vary across types of steel products. Poland accounted for the largest share of Germany's exports of flat products in YTD 2016, receiving 12 percent (810 thousand metric tons), followed closely by Italy at 10 percent (675 thousand metric tons).

The Netherlands received the largest share of Germany's long product exports in YTD 2016 at 14 percent (482 thousand metric tons), while France received the largest share of both pipe and tube exports at 6 percent (145 thousand metric tons) and semi-finished exports at 67 percent (693 thousand metric tons). Austria received the largest share of stainless exports at 12 percent (53 thousand metric tons).

Pipe and tube was the only category for which the United States was a top 5 export market.

### Germany's Top 5 Export Markets by Product - YTD 2016



Source: IHS Global Trade Atlas  
YTD through June

# Steel Exports Report: Germany

## Germany's Import Market Share in Top Destinations

In 2015, the import market share for Germany's steel products decreased in the majority of Germany's top export destinations. Austria's share of imports from Germany saw the largest decline (down 3.7 percentage points from 2014), followed by Italy (down 2.5 percentage points), and France (down 0.9 percentage points).

Import shares from Germany in the Netherlands, the Czech Republic, and Belgium each decreased by less than one percentage point.

In 2015, the share of steel imports from Germany increased in Poland, the United States, the United Kingdom, and Switzerland.

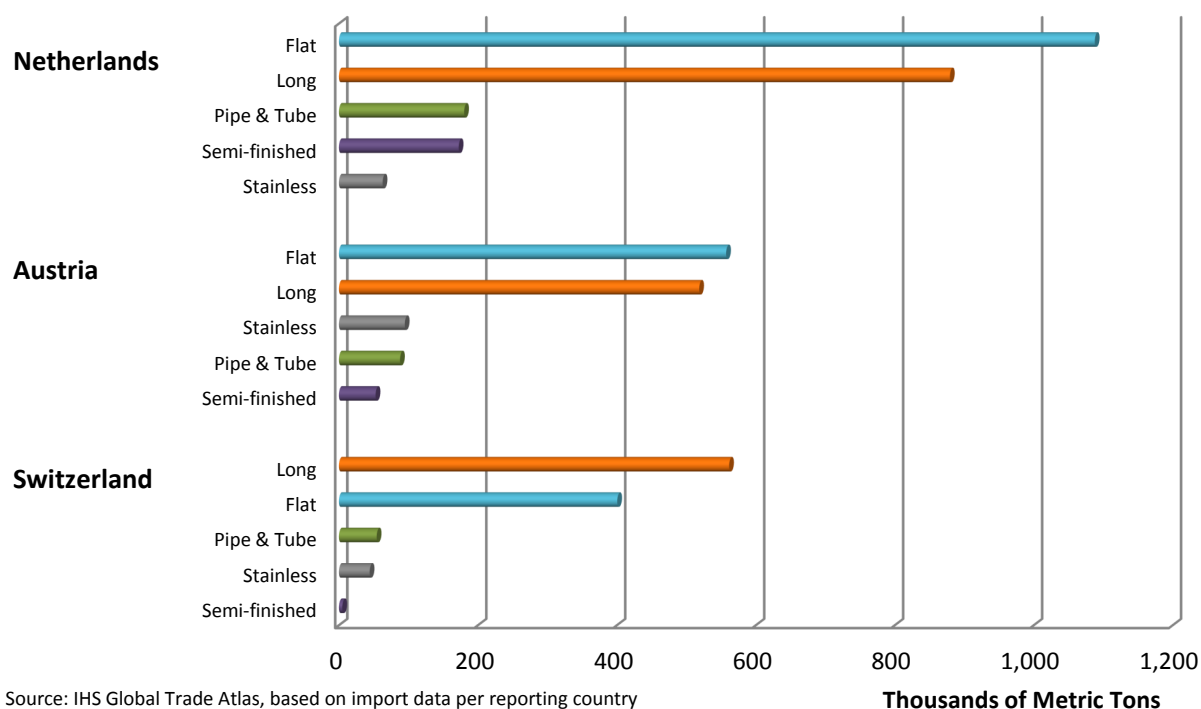
Among Germany's top export markets, the Netherlands, Austria, and Switzerland

received more than 30 percent of their total steel imports from Germany. In 2015, flat products accounted for the largest share of steel imports from Germany in the Netherlands (46% or 1.1 million metric tons) and Austria (42% or 557 thousand metric tons), while long products accounted for the largest share of Switzerland's imports from Germany (53% or 562 thousand metric tons).

Germany's Steel Import Market Share				
Top 10 Export Destinations	Share of Imports from Germany - 2014	Germany's Rank in 2014	Share of Imports from Germany - 2015	Germany's Rank in 2015
France	26.9%	1	26.0%	1
Netherlands	32.4%	1	31.7%	1
Poland	25.5%	1	25.7%	1
Italy	14.3%	1	11.8%	2
Czech Republic	23.5%	1	22.9%	1
Belgium	13.4%	3	13.2%	4
United States	3.0%	10	4.0%	9
Austria	36.0%	1	32.3%	1
United Kingdom	14.8%	1	15.8%	1
Switzerland	44.4%	1	45.2%	1

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

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

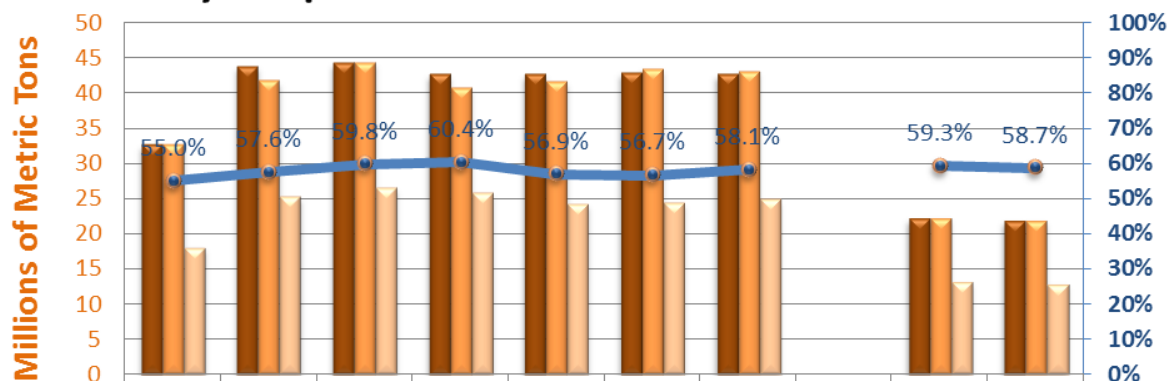


Source: IHS Global Trade Atlas, based on import data per reporting country

# Steel Exports Report: Germany

## Overall Production and Export Share of Production

### Germany's Export Share of Steel Production



	2009	2010	2011	2012	2013	2014	2015	YTD 2015	YTD 2016
Production	32.7	43.8	44.3	42.7	42.6	42.9	42.7	22.2	21.9
Apparent Consumption	32.7	41.7	44.4	40.7	41.7	43.5	43.1	22.3	21.9
Exports	18.0	25.2	26.5	25.8	24.3	24.3	24.8	13.1	12.8
Export Share of Production	55.0%	57.6%	59.8%	60.4%	56.9%	56.7%	58.1%	59.3%	58.7%

Source: World Steel Association; IHS Global Trade Atlas  
YTD through June

Germany's crude steel production increased by 36 percent between 2009 and 2011 and maintained a steady average of 42.7 million metric tons through 2015. Production in YTD 2016 was down 1.2 percent from YTD 2015. Apparent consumption (a measure of steel demand) was either on par with or slightly less than production between 2009 and 2015, and in YTD 2016, production was equal to demand. Germany's steel exports as a share of production has remained consistently over 50 percent – amounting to 58.7 percent in YTD 2016.

### 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.

#### 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 Exports 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 tables below provide statistics on the current number of trade remedies various countries have against steel mill products from Germany and from the European Union, which includes Germany.

<b>Steel Mill Trade Remedies in Effect Against Germany</b>				
<b>Country</b>	<b>AD</b>	<b>CVD</b>	<b>Suspension Agreements and Undertakings</b>	<b>Total</b>
Brazil	1			1
Mexico	1			1
Pakistan	1			1
United States	2			2
<b>TOTAL</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>5</b>

Source: World Trade Organization, through June 30, 2016

<b>Steel Mill Trade Remedies in Effect Against the European Union</b>				
<b>Country</b>	<b>AD</b>	<b>CVD</b>	<b>Suspension Agreements and Undertakings</b>	<b>Total</b>
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 June 30, 2016

<b>Global Steel Mill Safeguards in Effect</b>	
<b>Country</b>	<b>Product(s)</b>
Chile	Steel wire rod
India	1) Seamless pipes, tubes and hollow profiles of iron or non-alloy steel (other than cast iron and stainless steel); 2) Hot-rolled steel in coils
Indonesia	1) Articles of finished casing and tubing; 2) Articles of iron or steel wire; 3) Flat-rolled products of iron or non-alloy steel; 4) I and H sections of other alloy steel
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
Ukraine	Casing and pump compressor seamless steel pipes
Vietnam	Semi-finished and certain finished products of alloy and non-alloy steel

Source: World Trade Organization, through August 22, 2016

# 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 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/>.



INTERNATIONAL  
**TRADE**  
ADMINISTRATION

**Steel Import Monitoring and Analysis**  
1401 Constitution Ave., NW, Room 21006  
Washington, D.C. 20230

T 202.482.2105

F 202.501.1377

Email [ECCGlobalSteelStats@trade.gov](mailto:ECCGlobalSteelStats@trade.gov)

[trade.gov/steel](http://trade.gov/steel)