



# Global Steel Trade Monitor

## Steel Exports Report: Germany

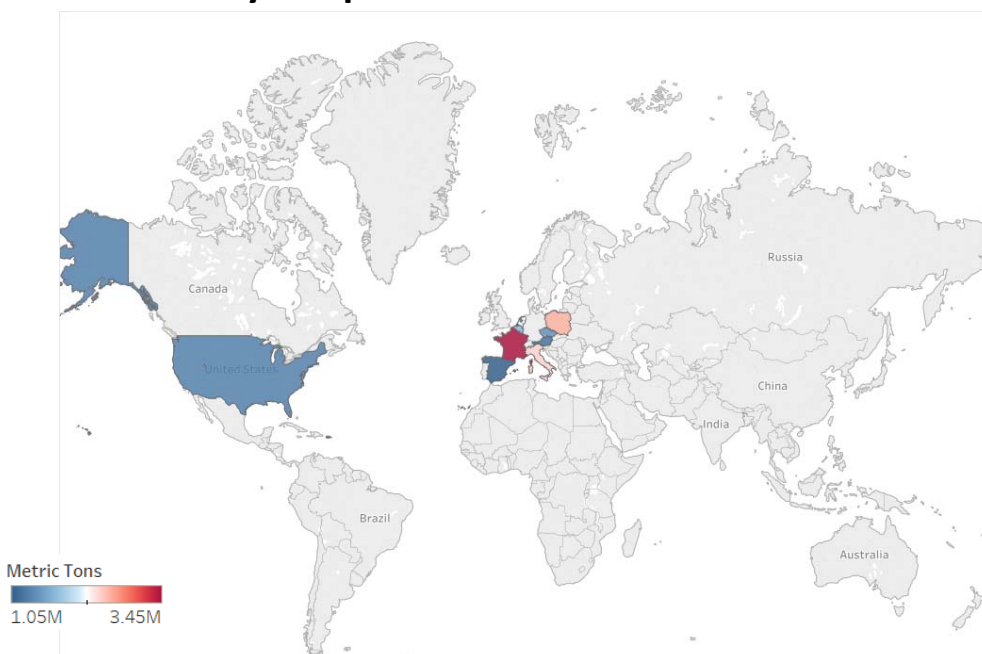
April 2018

### Background

Germany is the world's fifth-largest steel exporter. In 2017, Germany exported 26.1 million metric tons of steel, a 5 percent increase from 24.9 million metric tons in 2016. Germany's exports represented about 5 percent of all steel exported globally in 2016. The volume of Germany's 2016 steel exports was about a third the size of the world's largest exporter, China. In value terms, steel represented just 1.8 percent of the total amount of goods Germany exported in 2017.

Germany exports steel to more than 180 countries and territories. The nine countries highlighted 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 2017.

### Germany's Exports of Steel Mill Products - 2017



Data Source: Global Trade Atlas; Copyright © IHS Markit Global Atlas 2018. All rights reserved.

### Quick Facts:

- World's fifth-largest steel exporter: 26.1 million metric tons
- 27% steel export growth since 2009
- Export volume up 5% while export value up 18%
- Top three markets: France, Poland, Italy
- Largest producers: ThyssenKrupp, ArcelorMittal, Salzgitter
- 5 trade remedies in effect in 3 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 has posted a slight steel trade surplus for the majority of quarters since 2005. Both imports and exports fell in 2009 and have recovered since then, increasing 53 percent and 27 percent, respectively, between 2009 and 2017.

With imports growing at a faster rate, Germany posted a steel trade deficit for the past four years, amounting to -997 thousand metric tons in 2016.

In 2017, the steel trade deficit totaled -1.4 million metric tons up 37% from 2016.

Germany's Trade in Steel Mill Products by Quarter



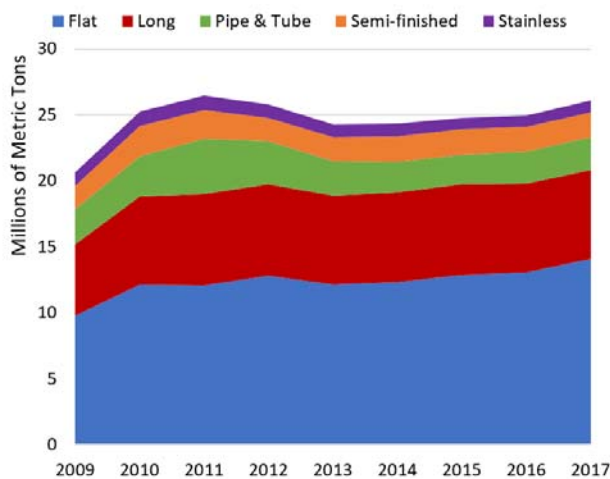
Source: IHS Markit Global Trade Atlas

## Export Volume, Value, and Product

In recent years, Germany's level of steel exports by volume has remained relatively flat, averaging 24.9 million metric tons a year since 2013. In 2016, Germany exported 24.9 million metric tons of steel, a 0.6 percent increase from 24.8 million metric tons in 2015. In 2017, exports were up 5 percent to 26.1 million metric tons. By contrast, the value of Germany's steel exports declined every year between 2011 and 2016. In 2017, Germany has seen an increase in export value — up 18 percent to \$26 billion from \$21.9 billion in 2016.

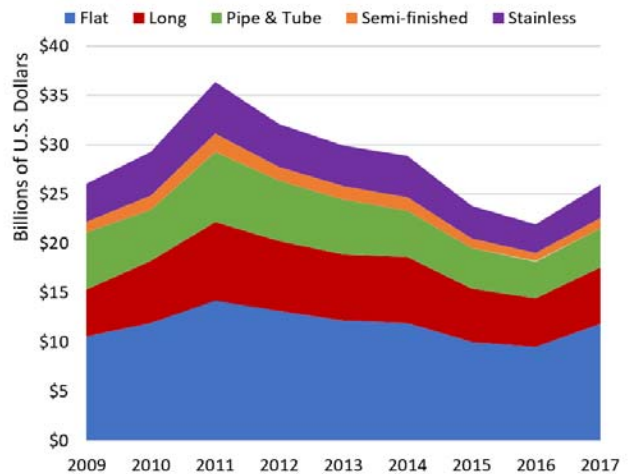
Flat products accounted for just over half of Germany's steel exports in 2017 at 54 percent — a total of 14.1 million metric tons. Long products accounted for 26 percent, or 6.8 million metric tons, of exports, followed by pipe and tube products at 9 percent (2.5 million metric tons), semi-finished steel at 7 percent (1.9 million metric tons), and stainless products at 4 percent (918 thousand metric tons).

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



Source: IHS Markit Global Trade Atlas

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



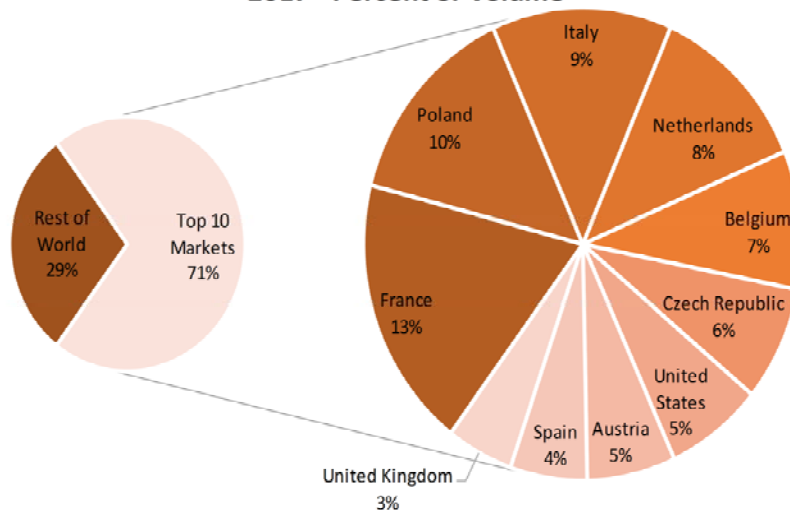
Source: IHS Markit Global Trade Atlas

# Steel Exports Report: Germany

## Exports by Top Market

Exports to Germany's top 10 steel markets represented 71 percent of Germany's steel export volume in 2017 at 18.4 million metric tons (mmt). France was the largest market for Germany's exports at 13 percent (3.4 mmt), followed by Poland at 10 percent (2.6 mmt), Italy at 9 percent (2.4 mmt), the Netherlands at 8 percent (2.2 mmt), and Belgium at 7 percent (1.8 mmt).

Germany's Steel Exports - Top 10 Markets  
2017 - Percent of Volume



Source: IHS Markit Global Trade Atlas

The United States ranked seventh as a destination for Germany's steel exports in 2017, accounting for 5 percent of exports (1.3 million metric tons).

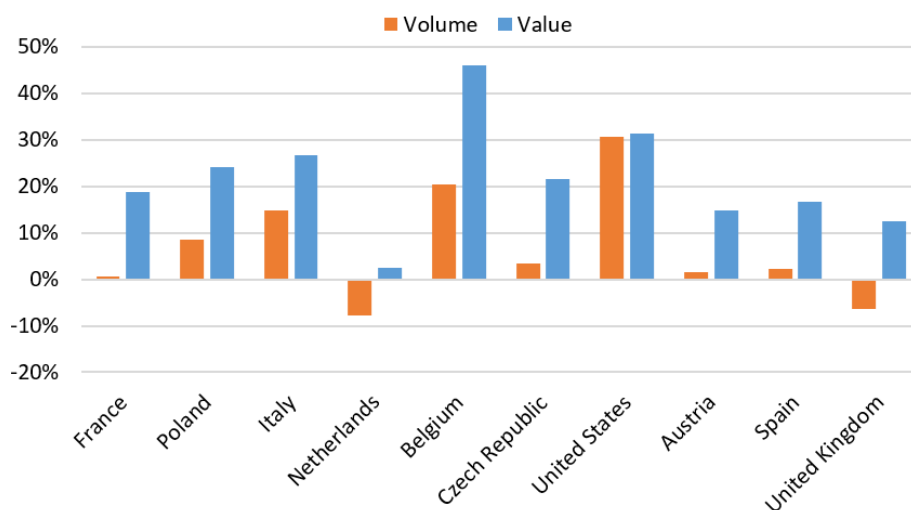
## Trends in Exports to Top Markets

Between 2016 and 2017, the volume of Germany's steel exports increased to eight of the country's top 10 export markets. Among top export markets, Germany's exports to the United States have increased the most in 2017, up 31 percent by volume, followed by exports to Belgium (up 20%), Italy (up 15%), and Poland (up 8%). Exports to the Netherlands and the United Kingdom decreased in 2017 — down 8 percent and 6 percent respectively, from 2016.

Export values increased to all of Germany's top markets, with Belgium showing the largest increase (up 46%). Other notable value increases included Germany's exports to the United States (up 31%), Italy (up 27%), Poland (up 24%), and the Czech Republic (up 22%).

Outside the top 10 export markets, other substantial volume changes in YTD 2017 included Germany's exports to China (up 27%), Mexico (up 53%), and Russia (up 174%).

Percent Change in Exports to Top 10 Markets (2016 to 2017)



Source: IHS Markit Global Trade Atlas

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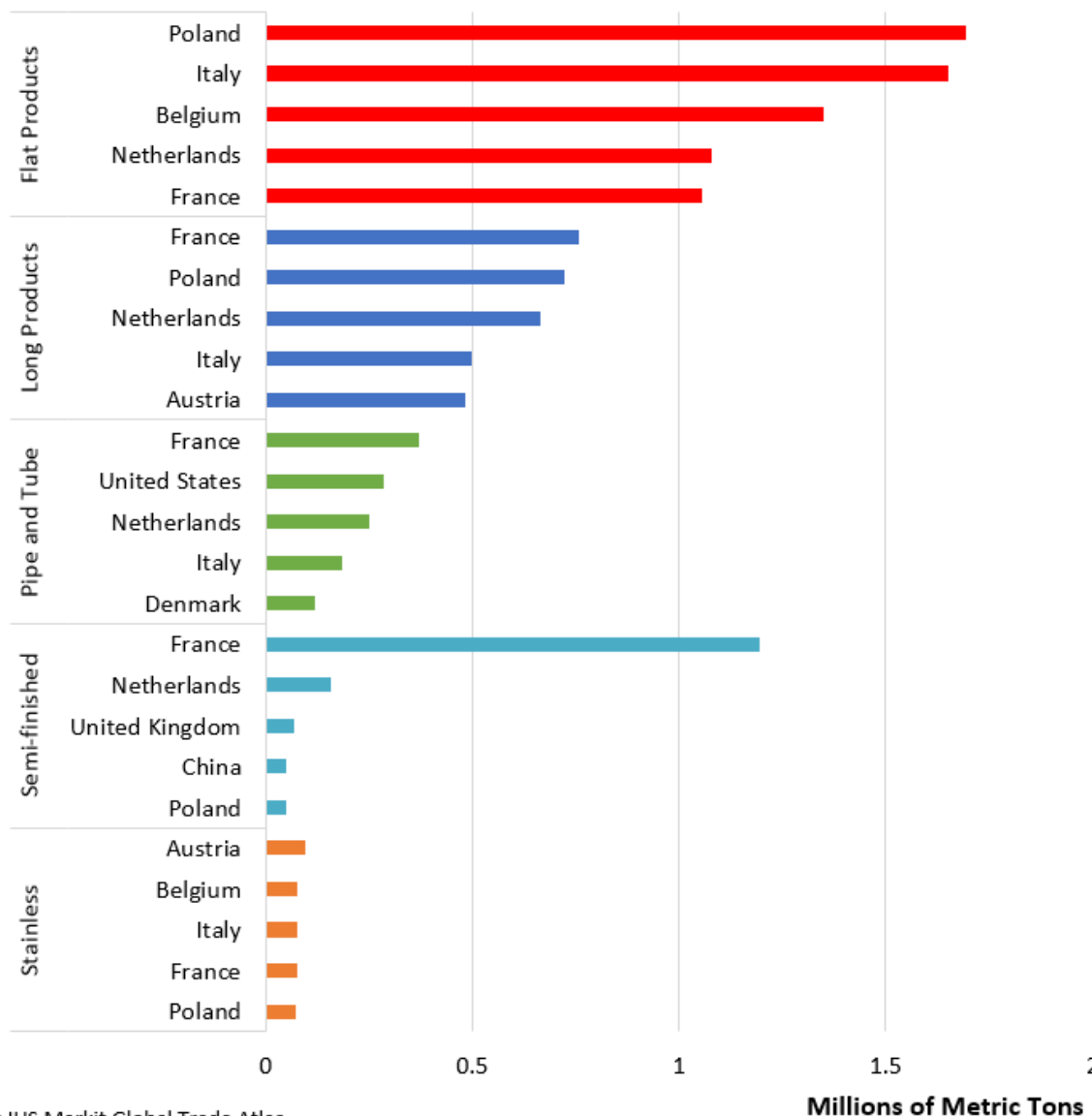
## Top Markets by Steel Product Category

Germany's top export markets by volume vary across types of steel products. In 2017, Germany exported the largest share of flat products to Poland at 12 percent (1.7 million metric tons), followed closely by Italy at 11.7 percent (1.6 million metric tons).

France was the largest market for Germany's long product exports in 2017 at 11 percent (756 thousand metric tons), pipe and tube exports at 15 percent (371 thousand metric tons), and semi-finished steel exports at 63 percent (1.2 million metric tons). Germany sent 11 percent of stainless exports to Austria (97 thousand metric tons), followed by Belgium at 9 percent (78 thousand metric tons).

Pipe and tube was the only product category for which the United States was a top-five export destination in 2017 with 12 percent (283 thousand metric tons).

### Germany's Top 5 Export Markets by Product - 2017



Source: IHS Markit Global Trade Atlas

# Steel Exports Report: Germany

## Germany's Import Market Share in Top Destinations

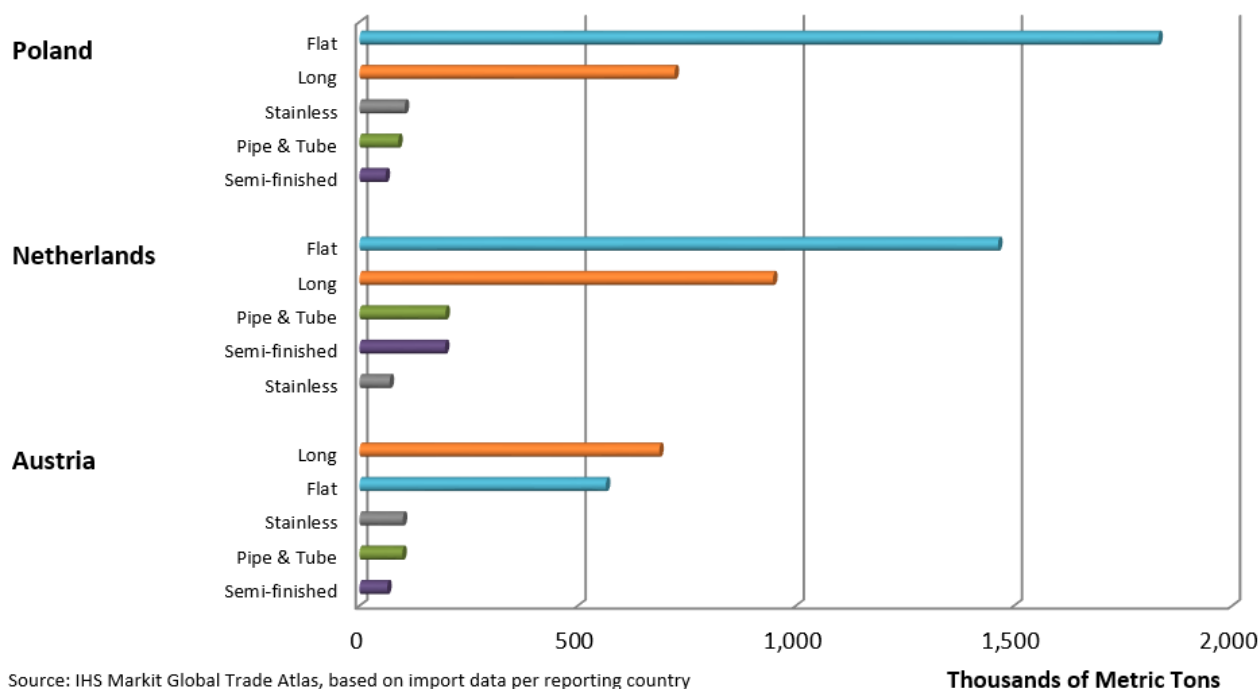
In 2017, the import market share for Germany's steel products increased for eight of Germany's top 10 export destinations. The share of imports from Germany in the United Kingdom showed the largest decline (down 1.4 percentage points from 2016), followed by Spain (down .8 percentage points). Import shares from Germany in the Netherlands increased by 2.4 percentage points, while import shares from Germany in Austria, Belgium, Italy, Poland, the Czech Republic, France, and the United States all increased by one percentage point or less.

Germany's Steel Import Market Share				
Top 10 Export Destinations	Share of Imports from Germany - 2016	Germany's Rank in 2016	Share of Imports from Germany - 2017	Germany's Rank in 2017
France	24.4%	2	24.7%	2
Poland	25.6%	1	26.2%	1
Italy	11.9%	1	12.6%	1
Netherlands	26.4%	1	28.9%	1
Belgium	13.5%	3	14.5%	2
Czech Republic	22.9%	1	23.5%	1
United States	3.6%	8	3.8%	8
Austria	32.4%	1	33.4%	1
Spain	11.3%	3	10.5%	3
United Kingdom	13.9%	1	12.5%	1

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

Among Germany's top export markets, Poland, the Netherlands, and Austria received more than a quarter of their total steel imports from Germany in 2017. Flat products accounted for the largest share of steel imports from Germany in both Poland at 65 percent (1.8 million metric tons) and the Netherlands at 51 percent (1.5 million metric tons), while long products accounted for the largest share of Austria's imports from Germany at 45 percent (687 thousand metric tons).

### Steel Import Composition of Top Market-Share Countries - 2017



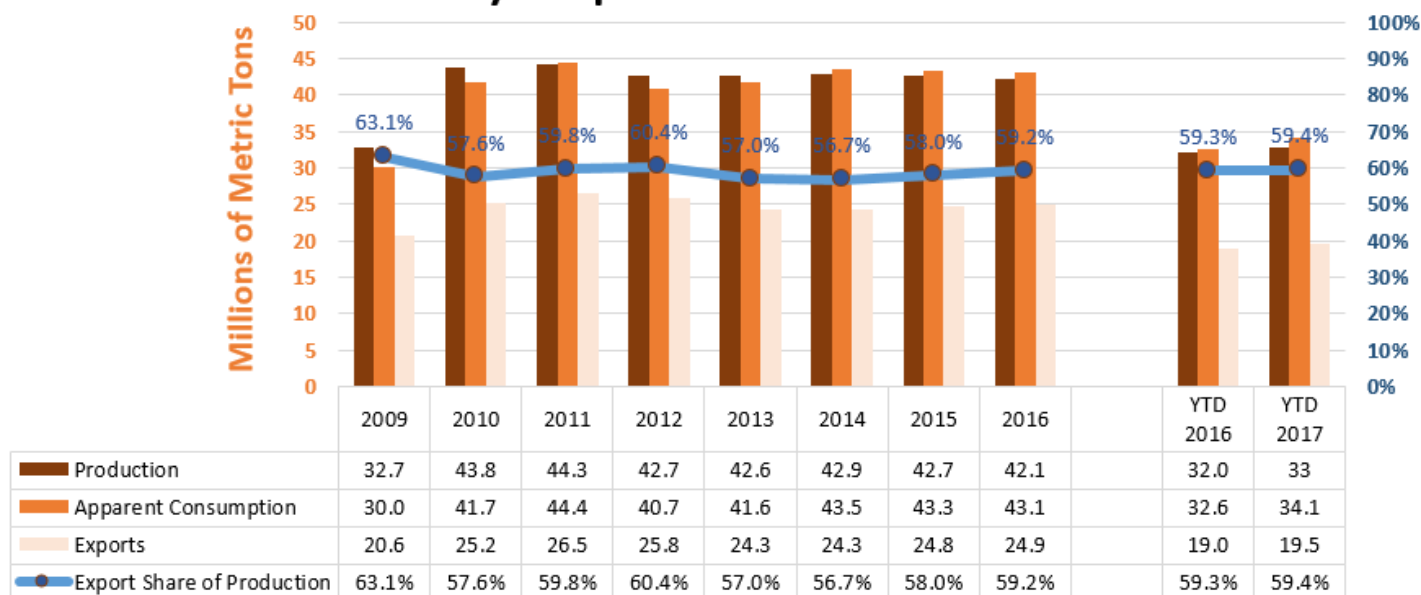
Source: IHS Markit Global Trade Atlas, based on import data per reporting country

Thousands of Metric Tons

# Steel Exports Report: Germany

## Overall Production and Export Share of Production

### Germany's Export Share of Production



Sources: World Steel Association; IHS Global Trade Atlas  
YTD through September 2017

Germany's crude steel production increased by 36 percent between 2009 and 2011 before maintaining a steady average of 42.9 million metric tons through 2016. Production in 2017 has increased 3 percent compared to 2016 to a total of 43.3 million metric tons. Apparent consumption (a measure of steel demand) was either on par with or slightly less than production between 2009 and 2013 and has slightly outpaced production since through 2017. Germany's steel exports as a share of production declined slightly since 2009 but remained consistently over 50 percent — amounting to 60.3 percent in 2017. Despite having a high level of exports relative to production, Germany imported a similar percentage, which helped to keep demand in line with production.

### Top Producers

According to the German Steel Federation, 14 steel producers accounted for 99 percent of Germany's total steel production in 2016 — with the top six listed here accounting themselves for 85 percent of production. Production among Germany's top companies is heavily skewed towards electric arc furnace technology.

### Germany's Top Steel Producers in 2016

Rank	Company	Production (mmt)	Main Products
1	ThyssenKrupp	12.1	Strip, sheets, plate, coated products, electrical, stainless
2	ArcelorMittal	7.8	Flat, long, tube
3	Salzgitter	7	Strip, plates, sections, pipe and tube
4	HKM	3.8	Semi-finished
5	Saarstahl	2.5	Wire rods, bars, semi-finished
6	Badische Stahlwerke	2.4	Rebar, wire rod, wire

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.

### Steel Mill Trade Remedies in Effect Against Germany

Country	AD	CVD	Suspension Agreements and Undertakings	Total
Brazil	1			1
Mexico	1			1
United States	3			3
<b>TOTAL</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>5</b>

Source: World Trade Organization, through June 30, 2017

### Steel Mill Trade Remedies in Effect Against the European Union

Country	AD	CVD	Suspension Agreements and Undertakings	Total
China	3			3
India	2			2
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, 2017

### Global Steel Mill Safeguards in Effect

Country	Product(s)
India	1) Hot-rolled steel in coils; 2) Hot-rolled steel flat sheets and plates
Indonesia	1) 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	1) Hot-rolled steel plate; 2) Steel concrete reinforcing bar; 3) Steel wire rod and deformed bar in coil
Morocco	1) Cold-rolled sheets and plated or coated sheets; 2) Reinforcing bars and wire rods
Philippines	Steel angle bars
South Africa	Hot-rolled steel flat products
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 28, 2018

# 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/>.



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