



# Global Steel Trade Monitor

## Steel Exports Report: Poland

May 2018

### Background

Poland is the world's twentieth-largest steel exporter. In 2017, Poland exported 6 million metric tons of steel, a 15 percent increase from 5.2 million metric tons in 2016. Exports from Poland represented about 1.1 percent of all steel exported globally in 2016, based on available data. The volume of Poland's 2017 steel exports was roughly one-twelfth the size of the world's largest exporter, China. In value terms, steel represented just 1.9 percent of the total amount of goods Poland exported in 2017.

Poland exports steel to more than 100 countries and territories. The seven countries highlighted in the map below represent the top markets for Poland's exports of steel, receiving more than 150 thousand metric tons each and accounting for 74 percent of Poland's steel exports in 2017.

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



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

### Quick Facts:

- World's 20th-largest steel exporter: 6 million metric tons (2017)
- 49% growth in steel exports since 2009
- Year-on-year export volume up 15% while export value up 32%
- Exports as a share of production at 57.6% in 2017
- Top three markets: Germany, Czech Republic, Italy
- Largest producers: ArcelorMittal, Celsa Group, CMC, Cognor SA
- 1 trade remedy in effect involving steel mill imports from Poland; 5 trade remedies in effect involving steel mill imports from the European Union

# Steel Exports Report: Poland

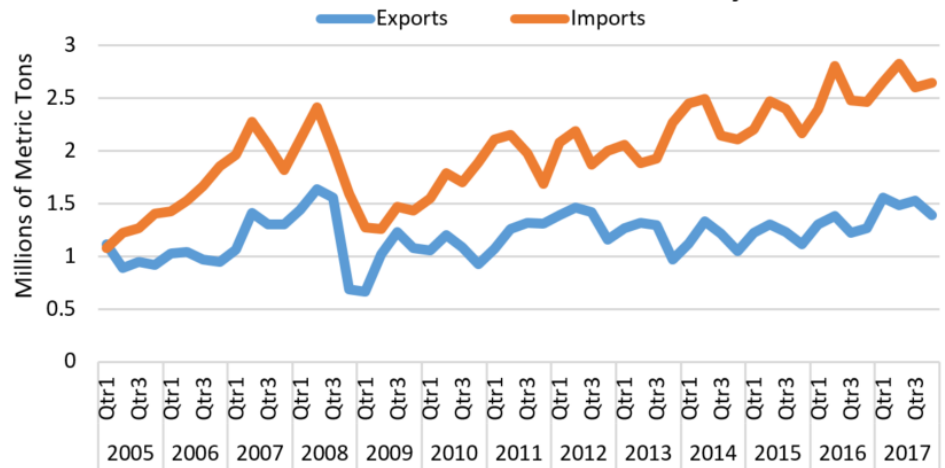
## Steel Trade Balance

Since 2005, Poland has maintained a growing trade deficit in steel products. During the global recession in 2008, imports and exports both dropped, before eventually recovering. Between 2009 and 2017, imports grew 98 percent while exports grew 49 percent.

As imports grew faster than exports, Poland's steel trade deficit grew 301 percent between

2009 and 2017. In 2017, the trade deficit amounted to -4.8 million metric tons — down from -5 million metric tons in 2016.

Poland's Trade in Steel Mill Products by Quarter



Source: IHS Markit Global Trade Atlas

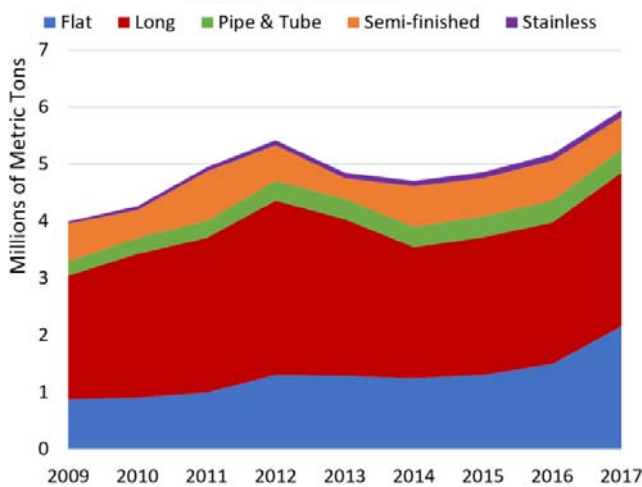
## Export Volume, Value, and Product

Poland's volume of steel exports averaged 4.8 million metric tons between 2009 and 2016, peaking at 5.4 million metric tons in 2012. Exports in 2017 reached a new peak, increasing by 15 percent to 6 million metric tons from 5.2 million metric tons in 2016. In value terms, Poland's steel exports increased by 32 percent to \$4.5 billion in 2017 from \$3.4 billion in 2016.

Long products accounted just under half of Poland's steel exports by volume at 45 percent (2.7 million metric tons) in 2017. Flat products accounted for 36 percent of exports (2.2 million metric tons), followed by semi-finished steel at 9 percent (563 thousand metric tons), pipe and tube products at 7 percent (409 thousand metric tons), and stainless steel at 2 percent (128 thousand metric tons).

Poland's Exports of Steel Mill Products

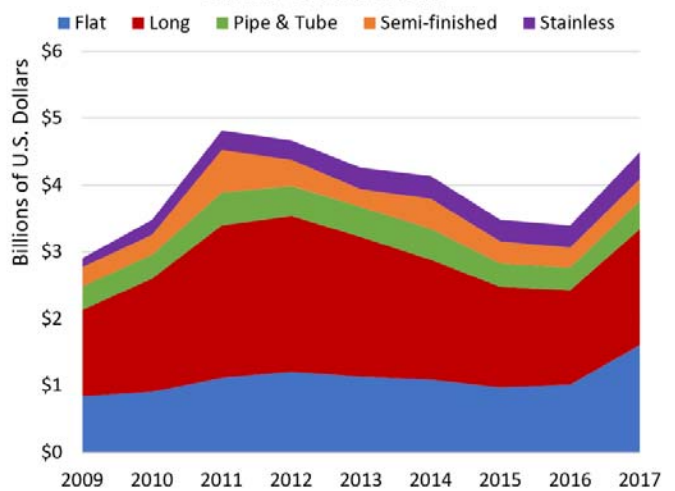
Millions of Metric Tons



Source: IHS Markit Global Trade Atlas

Poland's Exports of Steel Mill Products

Billions of U.S. Dollars



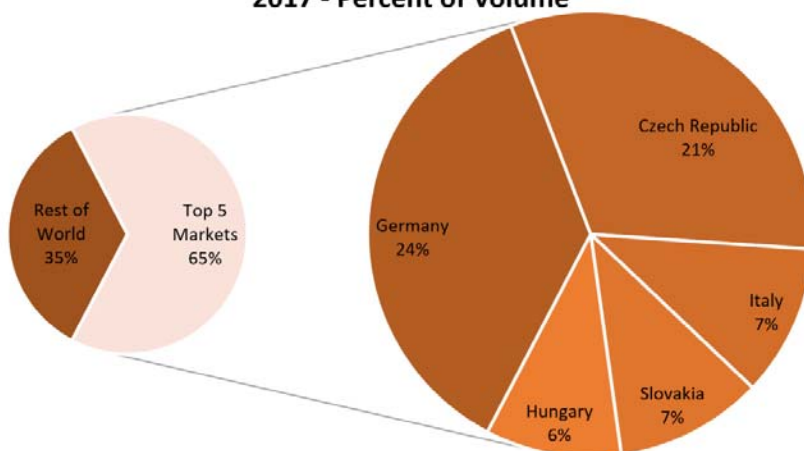
Source: IHS Markit Global Trade Atlas

# Steel Exports Report: Poland

## Exports by Top Market

Poland's exports to its top 5 steel markets represented 65 percent of its steel export volume in 2017 at 3.9 million metric tons (mmt). Germany received the largest share of exports from Poland with 24 percent (1.4 mmt), followed by the Czech Republic at 21 percent (1.2 mmt), Italy at 7 percent (0.43 mmt), Slovakia at 7 percent (0.42 mmt), and Hungary at 6 percent (0.38 mmt).

Poland's Steel Exports - Top 5 Markets  
2017 - Percent of Volume



The United States ranked 36th as a destination for Poland's exports of steel in 2017 at just 0.1 percent of exports (9 thousand metric tons).

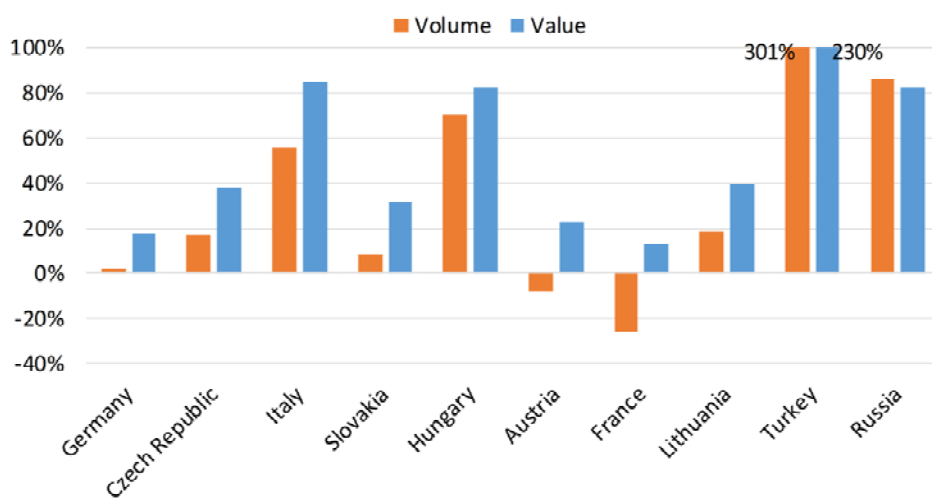
Source: IHS Markit Global Trade Atlas

## Trends in Exports to Top Markets

Between 2016 and 2017, export volumes increased to eight of the top ten markets, with exports to Turkey showing the largest increase (up 301%), followed by exports to Russia (up 86%), Hungary (up 70%), and Italy (up 56%). Exports to France from Poland showed the largest decrease in 2017, down 26 percent by volume, followed by exports to Austria (down 8%).

All of Poland's top 10 markets experienced an increase in export value in 2017. Those markets with the largest volume increases also showed some of the largest value increases, with export values to Turkey up 230 percent, followed by export values to Italy (up 84%), Russia (up 83%), and Hungary (up 83%). Other increases in export value included Lithuania (up 39%), the Czech Republic (up 38%), and Slovakia (up 31%).

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



Source: IHS Markit Global Trade Atlas

Outside of the top 10 sources, other significant volume changes in 2017 included Poland's exports to 14th-ranked Luxembourg (up 40%), 18th-ranked Spain (down 47%), 20th-ranked Finland (up 45%), and 21st-ranked Macedonia (up 1136%).

# Steel Exports Report: Poland

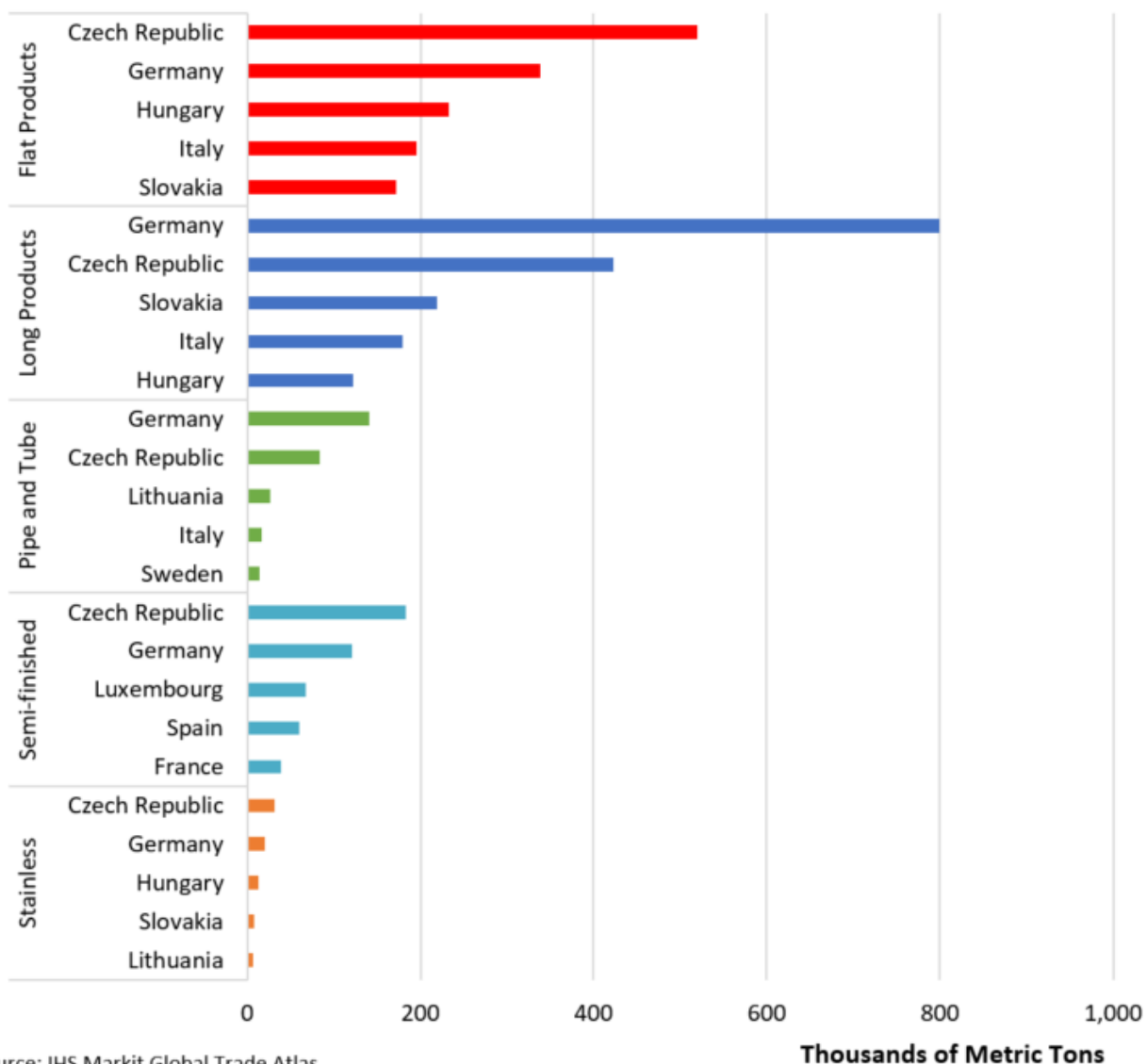
## Top Markets by Steel Product Category

Poland's top export markets by volume vary across types of steel products, though the Czech Republic and Germany held the top two spots in every category. Poland exported the largest shares of flat products, semi-finished products, and stainless steel to the Czech Republic in 2017 at 24 percent (520 thousand metric tons) and 32 percent (183 thousand metric tons), and 24 percent (31 thousand metric tons), respectively.

Germany accounted for the largest export shares of long products and pipe and tube products at 30 percent (799 thousand metric tons) and 34 percent (140 thousand metric tons), respectively.

The United States was not a top-five export destination for any product category.

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



Source: IHS Markit Global Trade Atlas

# Steel Exports Report: Poland

## Poland's Import Market Share in Top Destinations

In 2017, the import market share for Poland's steel products increased in six of the country's top 10 export destinations. The share of imports from Poland in Hungary showed the largest increase (up 5.2 percentage points from 2016), followed by Lithuania (up 2.6 percentage points). Shares in the Czech Republic, Italy, Turkey, and Russia all increased by less than one percentage point. The share of imports from Poland in Austria decreased by 2 percentage points. Shares in France, Germany, and Slovakia all decreased by less than 0.5 percentage points.

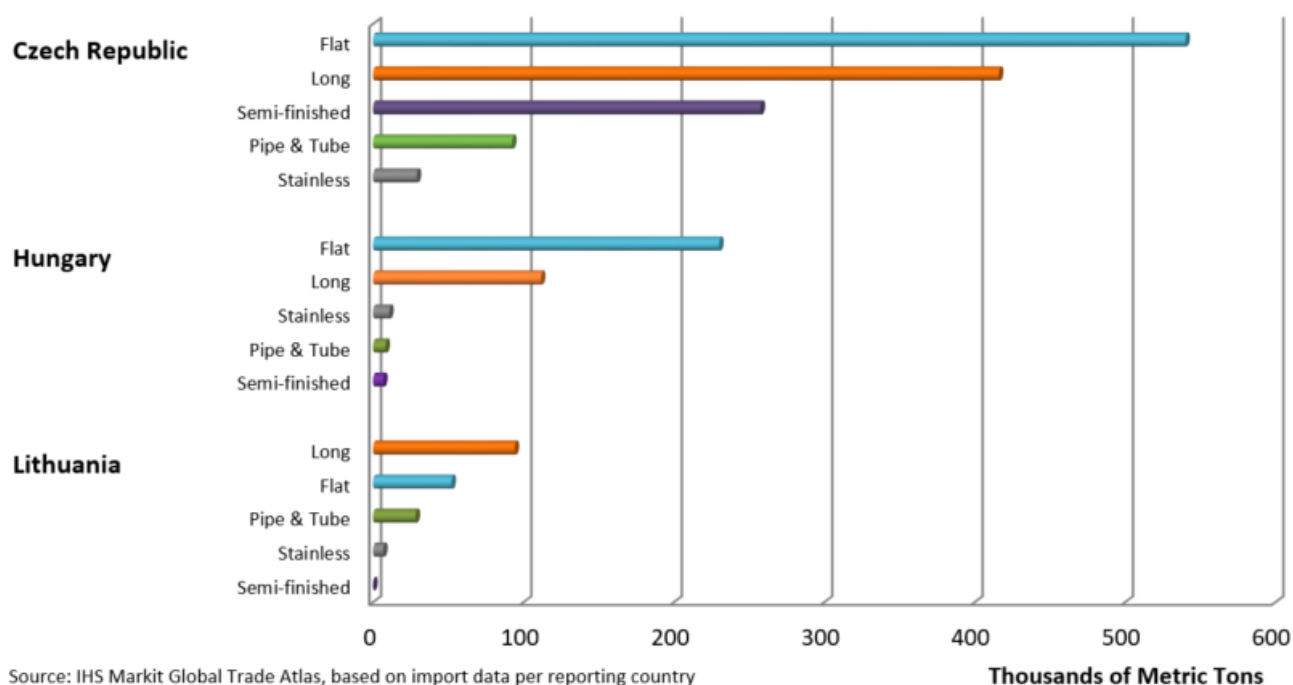
Among Poland's top export markets, the Czech Republic, Hungary, and Lithuania received the largest shares of their steel imports from

Poland's Steel Import Market Share				
Top 10 Export Destinations	Share of Imports from Poland - 2016	Poland's Rank in 2016	Share of Imports from Poland - 2017	Poland's Rank in 2017
Germany	4.7%	6	4.6%	6
Czech Republic	18.3%	2	19.2%	2
Italy	1.6%	17	2.1%	13
Slovakia	11.3%	3	11.2%	3
Hungary	7.9%	6	13.2%	4
Austria	6.2%	4	4.2%	6
France	1.4%	9	1.0%	10
Lithuania	14.8%	3	17.5%	2
Turkey	0.4%	20	1.0%	15
Russia	1.4%	8	1.9%	8

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

Poland in 2017 at 19.2, 13.2, and 17.5 percent, respectively. Flat products accounted for the largest share of steel imports from Poland in the Czech Republic at 40 percent (540 thousand metric tons) and Hungary at 63 percent (230 thousand metric tons). Long products accounted for the largest share of steel imports from Poland in Lithuania at 52 percent (94 thousand metric tons).

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

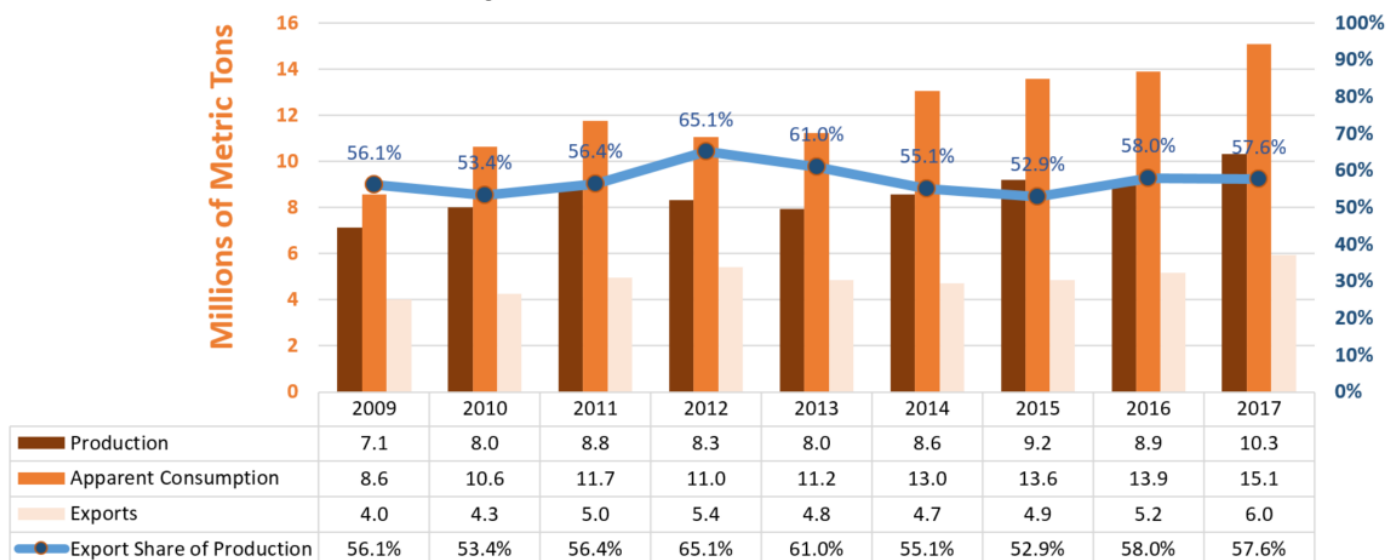


Source: IHS Markit Global Trade Atlas, based on import data per reporting country

# Steel Exports Report: Poland

## Overall Production and Export Share of Production

### Poland's Export Share of Steel Production



Sources: World Steel Association; IHS Markit Global Trade Atlas

Poland's crude steel production increased by 25 percent between 2009 and 2016 — a total gain of 1.8 million metric tons. Production in 2017 increased by 16 percent to 10.3 million metric tons from 8.9 million metric tons in 2016. Apparent consumption (a measure of steel demand) has consistently exceeded production since 2009, and the gap between the two has grown. In 2017, demand exceeded production by 4.8 million metric tons. Poland's steel exports as a share of production peaked at 65.1 percent in 2012 before decreasing to 58 percent by 2016. Exports as a share of production stood at 57.6 percent in 2017, down 0.4 percentage points from 2016, as production increased faster than the increase in exports.

### Top Producers

Poland's steel production is a mix of domestic and foreign-owned companies and is concentrated among a handful of producers, with ArcelorMittal alone accounting for about 70 percent of Poland's steelmaking capacity. The company is also one of the largest Polish exporters and producers of coke in Europe and in the entire ArcelorMittal group.

### Poland's Top Steel Producers in 2017

Rank	Company	Production (mmt)	Main Products
1	ArcelorMittal Poland	7.6	Flat and long products
2	Celsa Group	N/A	Bars, sections, castings
3	CMC Poland	N/A	Billets, bars, wire rod, sections
4	Cognor SA	N/A	Flat and long products, semi-finished steel

Sources: Metal Bulletin, *Iron and Steelworks of the World Directory 2017*; Polish Steel Association (HIPH); Company websites

# Steel Exports Report: Poland

## 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 Poland and from the European Union, which includes Poland.

Steel Mill Trade Remedies in Effect Against Poland				
Country	AD	CVD	Suspension Agreements and Undertakings	Total
United States	1			1
<b>TOTAL</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>1</b>

Source: World Trade Organization, through December 31, 2017

Steel Mill Trade Remedies in Effect Against the European Union				
Country	AD	CVD	Suspension Agreements and Undertakings	Total
China	2			2
India	2			2
Morocco	1			1
<b>TOTAL</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>5</b>

Source: World Trade Organization, through December 31, 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; 2) I and H sections of other alloy steel; 3) 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 HTS 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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