



# Global Steel Trade Monitor

## Steel Imports Report: Germany

April 2018

### Background

Germany is the world's second-largest steel importing country. In 2017, Germany imported 27.5 million metric tons of steel, a 5 percent increase from 26.1 million metric tons in 2016. Germany's imports represented about 7 percent of all steel imported globally in 2016. The volume of Germany's 2017 steel imports was just under 7 million metric tons less than that of the world's largest importer, the United States. In value terms, steel represented just 2.2 percent of the total goods imported into Germany in 2017.

Germany imports steel from over 80 countries and territories. The seven countries highlighted 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 74 percent of Germany's steel imports in 2017.

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



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

### Quick Facts:

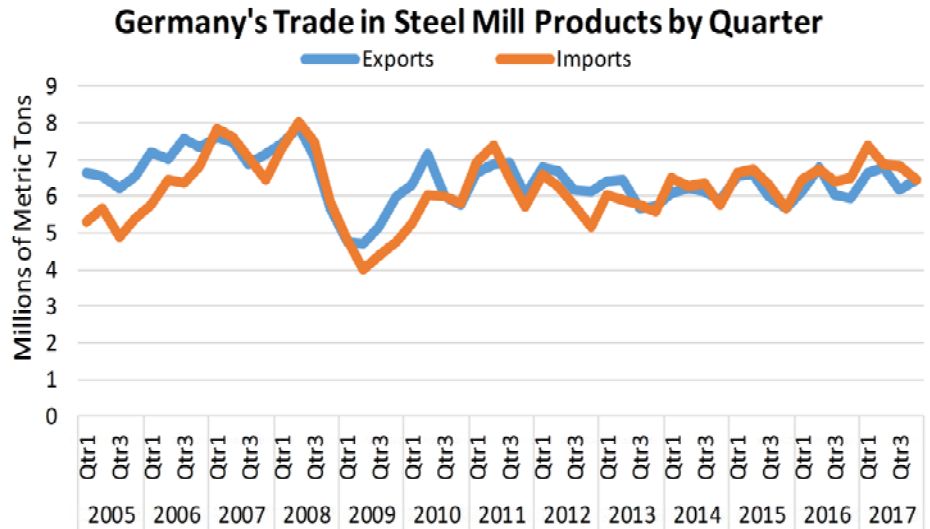
- World's second-largest steel importer: 27.5 million metric tons
- 53% steel import growth since 2009
- 2017 import volume up 5% while import value up 23%
- Import penetration at 61.6% in 2017
- Top three import sources: Belgium, Italy, France
- Largest producers: ThyssenKrupp, ArcelorMittal, and Salzgitter
- 33 European Union trade remedies in effect against imports of steel mill products

# Steel Imports Report: Germany

## Steel Trade Balance

Germany has posted a slight steel trade surplus for the majority of quarters in the past decade. 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  $-1.2$  million metric tons in 2016. In 2017, the steel trade deficit totaled  $-1.4$  million metric tons.

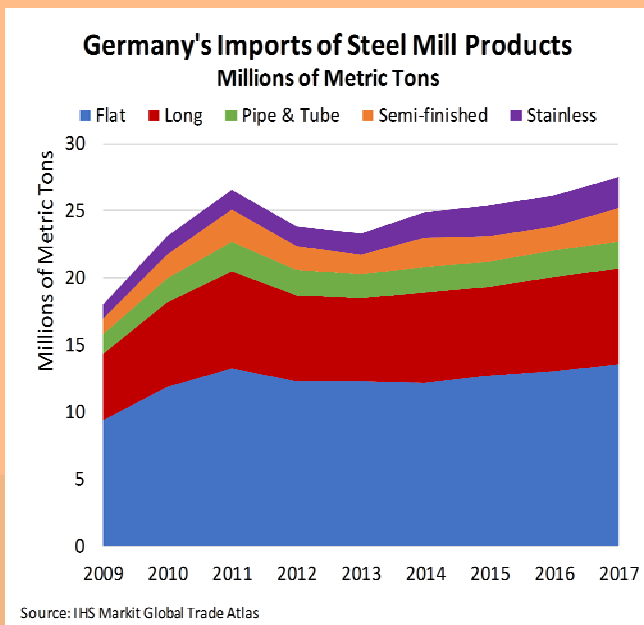


Source: IHS Markit Global Trade Atlas

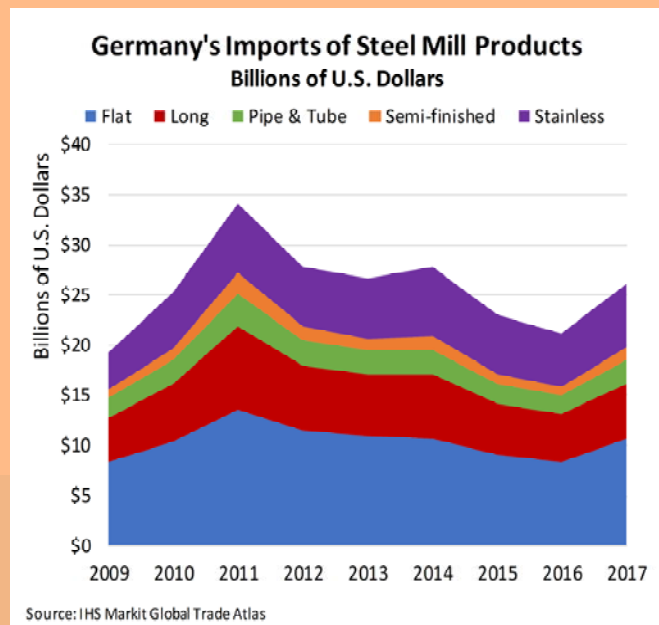
## Import Volume, Value, and Product

Germany's imports of steel products hit a new recent peak in 2017 at 27.5 million metric tons, compared to the 2011 peak of 26.5 million metric tons. Between 2012 and 2016, imports averaged 24.7 million metric tons per year. In 2017, the volume of Germany's steel imports has increased by 5 percent to 27.5 million metric tons from 26.1 million metric tons in 2016. Between 2011 and 2016, import value fell by 38 percent, from \$34.1 billion to \$21.2 billion. In 2017, the value of Germany's steel imports increased by 23 percent to \$26.2 billion from \$21.2 billion in 2016.

In 2017, flat products accounted for nearly half of Germany's steel imports, or 13.5 million metric tons. Long products accounted for 26 percent, or 7.2 million metric tons, of Germany's imports, followed by semi-finished steel at 9 percent (2.4 million metric tons), stainless steel at 9 percent (2.3 million metric tons), and pipe and tube at 7 percent (2 million metric tons).



Source: IHS Markit Global Trade Atlas



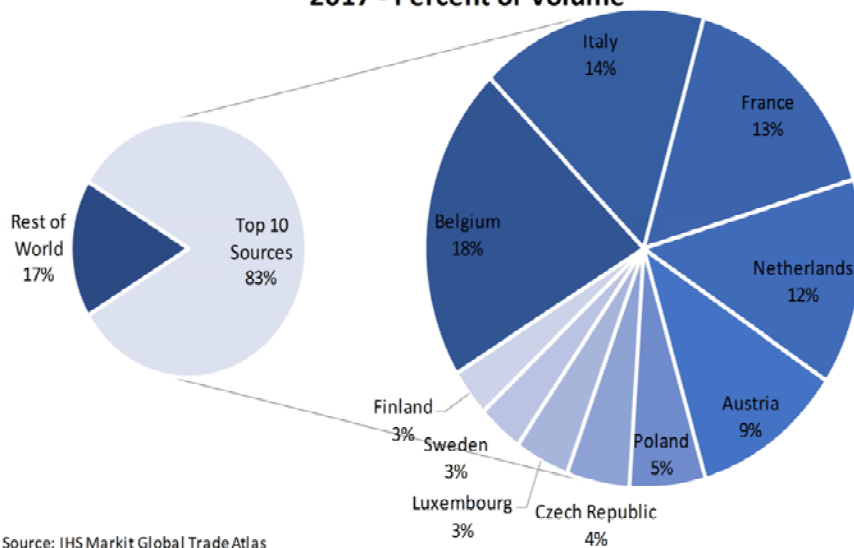
Source: IHS Markit Global Trade Atlas

# 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 2017 at 22.7 million metric tons (mmt). Belgium accounted for the largest share of Germany's imports by source country at 18 percent (4.8 mmt), followed by Italy at 14 percent (3.8 mmt), France at 13 percent (3.6 mmt), the Netherlands at 12 percent (3.2 mmt), and Austria at 9 percent (2.5 mmt).

Germany's Steel Imports - Top 10 Sources  
2017 - Percent of Volume



Source: IHS Markit Global Trade Atlas

The United States ranked 31st as a source for Germany's steel imports in 2017, representing just 0.1 percent of imports (39 thousand metric tons).

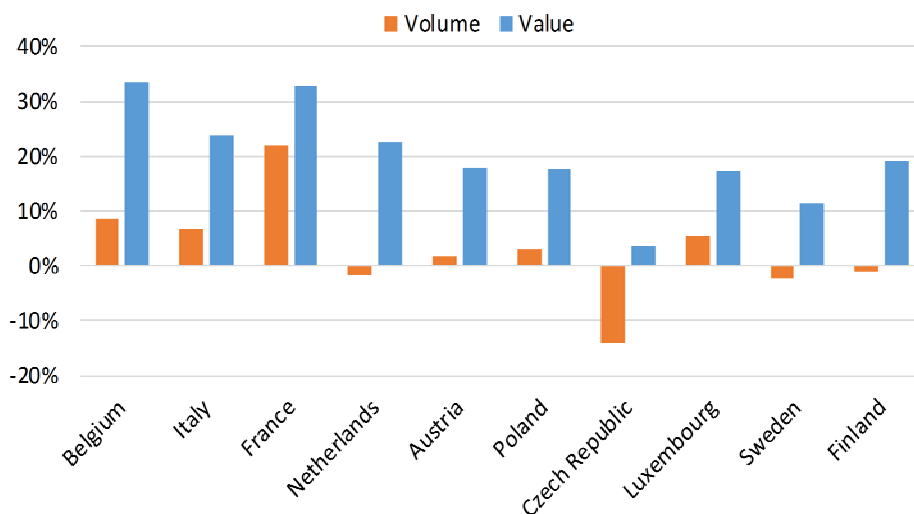
## Trends in Imports from Top Sources

Between 2016 and 2017, the volume of Germany's imports increased from six of the country's top 10 source countries. Imports from France showed the largest volume increase, up 22 percent in 2017, followed by Belgium (up 9%) and Italy (up 9%). Germany's imports from the Czech Republic, Sweden, the Netherlands, and Finland decreased in volume in 2017, down 14 percent, 2 percent, 2 percent, and 1 percent, respectively.

The overall value of Germany's imports increased from all of its top 10 sources. Germany's import value from Belgium increased the most in 2017, up 34 percent, followed by France (up 33%), Italy (up 24%), the Netherlands (up 22%), and Finland (up 19%).

Outside the top 10 sources, other notable volume changes included Germany's imports from Brazil (up 184%), Turkey (up 42%), and Hungary (down 54%).

Percent Change in Imports from Top 10 Markets (2016 to 2017)



Source: IHS Markit Global Trade Atlas

# Steel Imports Report: Germany

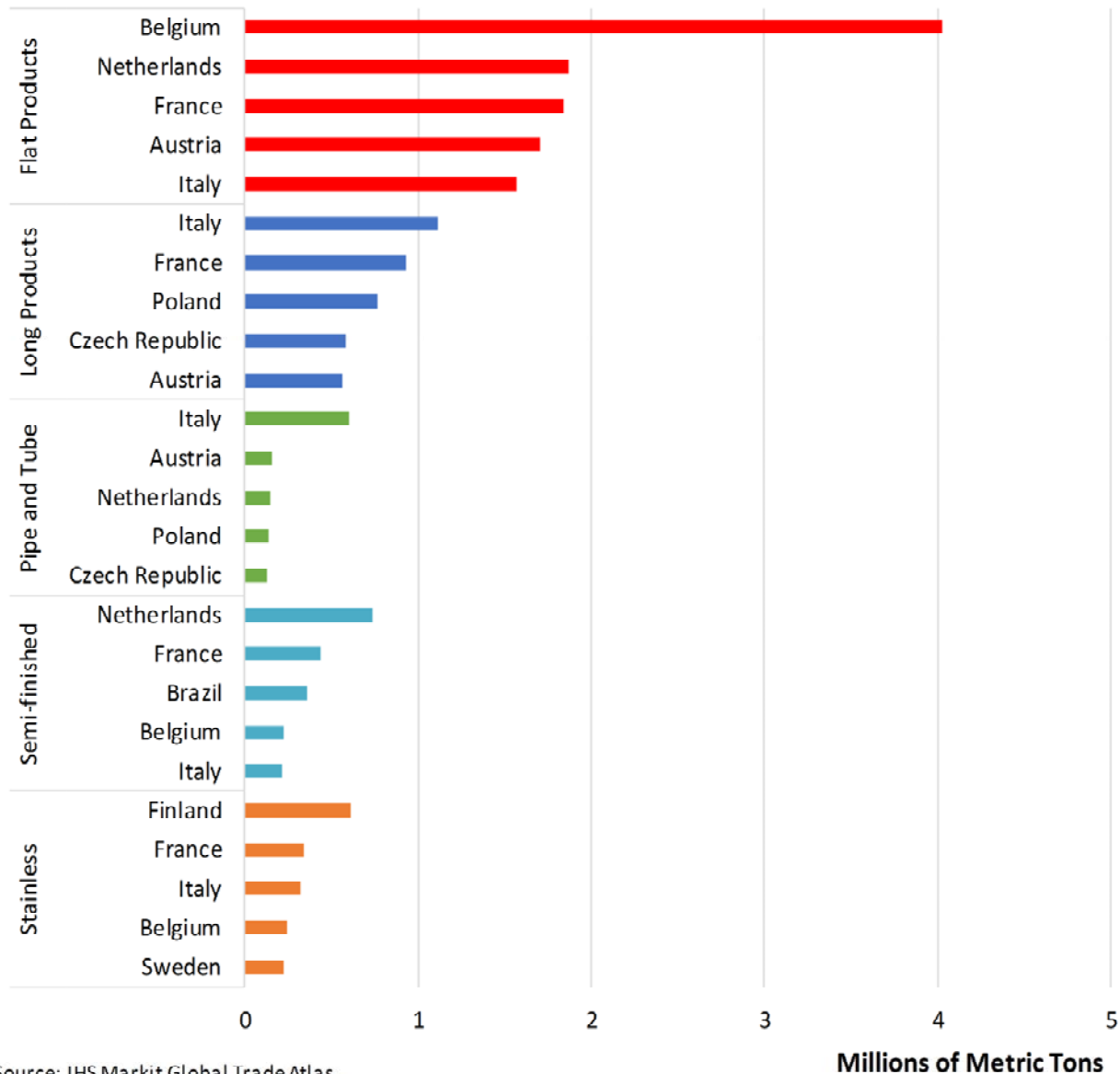
## Top Sources by Steel Product Category

The top source countries for Germany's imports by volume vary across types of steel products. Belgium accounted for 30 percent (4 million metric tons) of Germany's imports of flat products in 2017.

Germany imported the largest shares of both long products and pipe and tube products from Italy in 2017 at 16 percent (1.1 million metric tons) and 30 percent (598 thousand metric tons), respectively. Germany imported 30% of semi-finished steel from the Netherlands (732 thousand metric tons), while Finland accounted for the largest share of Germany's imports of stainless products at 26 percent (612 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 - 2017



Source: IHS Markit Global Trade Atlas

# Steel Imports Report: Germany

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

In 2017, the share of steel exports sent to Germany from its top import sources increased in five of the top 10 sources. The share of France's steel exports to Germany showed the largest increase (up 2.75 percentage points, followed closely by Luxembourg (up 2.7 percentage points), and Italy (up 1.5 percentage points). Export shares to Germany in Finland, and Belgium each increased by less than one percentage point. Export shares in Poland, the Czech Republic, Austria, Sweden, and the Netherlands decreased in 2017. Of note, Germany ranks as the number one export destination in all of its top import sources, except for Finland.

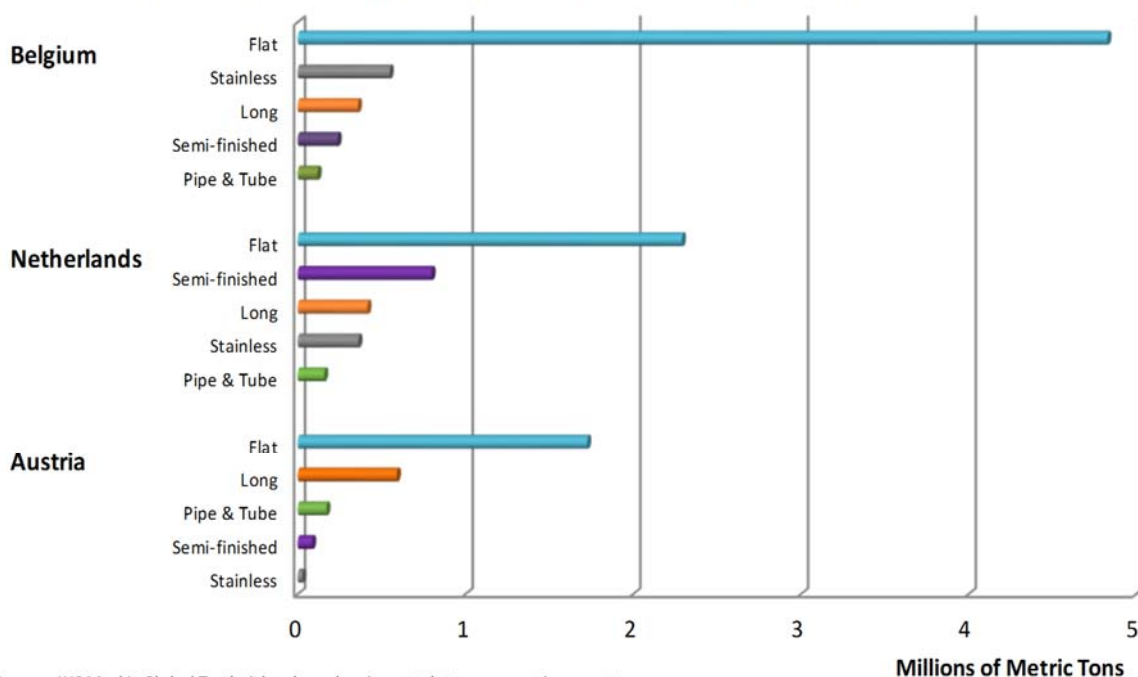
Among Germany's top sources, Belgium, the Netherlands, and Austria each sent more than 30 percent of their total steel exports to Germany in 2017.

Flat products accounted for significant shares of steel exports to Germany in each Belgium at 79 percent (4.8 million metric tons), the Netherlands at 57 percent (2.3 million metric tons), and Austria at 66 percent (1.7 million metric tons).

Germany's Steel Export Market Share				
Top 10 Import Sources	Share of Exports to Germany - 2016	Germany's Rank in 2016	Share of Exports to Germany - 2017	Germany's Rank in 2017
Belgium	33.3%	1	33.7%	1
<b>Italy</b>	<b>21.4%</b>	<b>1</b>	<b>22.9%</b>	<b>1</b>
France	21.2%	1	23.9%	1
<b>Netherlands</b>	<b>36.0%</b>	<b>1</b>	<b>35.5%</b>	<b>1</b>
Austria	36.0%	1	33.5%	1
<b>Poland</b>	<b>26.8%</b>	<b>1</b>	<b>23.9%</b>	<b>1</b>
Czech Republic	26.7%	1	24.1%	1
<b>Luxembourg</b>	<b>20.1%</b>	<b>1</b>	<b>22.8%</b>	<b>1</b>
Sweden	21.9%	1	21.0%	1
<b>Finland</b>	<b>24.5%</b>	<b>2</b>	<b>24.8%</b>	<b>2</b>

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

Steel Export Composition of Top Market-Share Countries - 2017

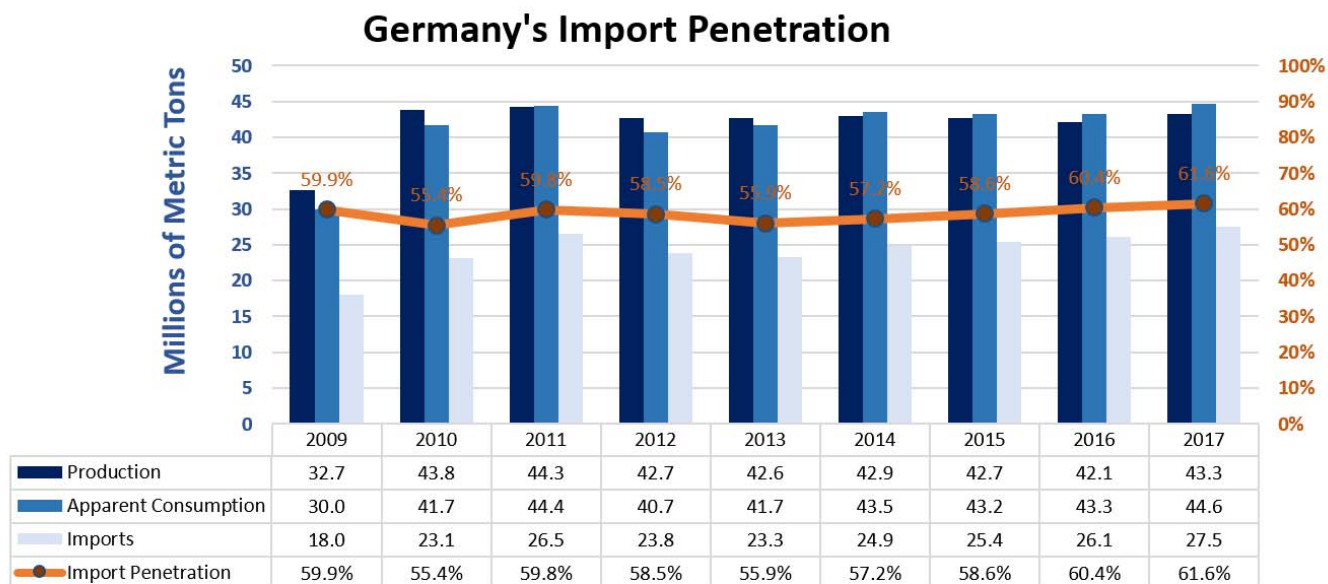


Source: IHS Markit Global Trade Atlas, based on import data per reporting country



# Steel Imports Report: Germany

## Overall Production and Import Penetration



Sources: World Steel Association; IHS Global Trade Atlas

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 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 2014 and slightly outpaced production in 2015, 2016, and 2017. The import penetration level in 2017 increased by 1.2 percentage points to 61.6 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

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.

<b>Germany's Top Steel Producers in 2016</b>			
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 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	2			2
Brazil	1			1
China	13	2		15
India	1	2		3
Iran	1			1
Japan	1			1
Russia	5		1	6
South Korea	1		1	2
Taiwan	1			1
Ukraine	2			2
United States	1		1	2
<b>TOTAL</b>	<b>29</b>	<b>4</b>	<b>4</b>	<b>33</b>

Source: World Trade Organization, through December 31, 2017

# 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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