

# Global Steel Trade Monitor

## Steel Exports Report: Netherlands

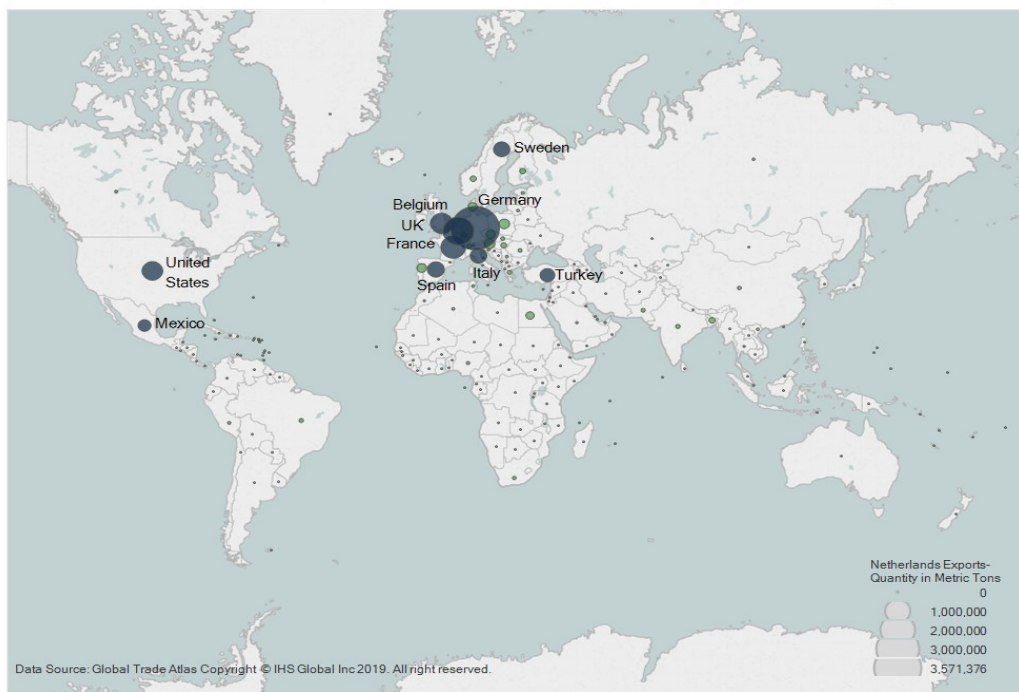
June 2019

### Background

The Netherlands, as of 2017, is the world's fourteenth-largest steel exporter. In 2018, the Netherlands exported 10.7 million metric tons of steel, a 5 percent decrease from 11.4 million metric tons in 2017. Dutch exports represented about 3 percent of all steel exported globally in 2017. The volume of the Netherlands' 2018 steel exports was 1/6th the size of the world's largest exporter, China, and less than 1/3rd that of the second-largest exporter, Japan. In value terms, steel represented just 1.5 percent of the total amount of goods the Netherlands exported in 2018.

The Netherlands exports steel to more than 150 countries and territories. The 10 countries labeled in the map below represent the top markets for Dutch exports of steel, receiving more than 200 thousand metric tons each. The top 10 countries accounted for 85 percent of the Netherlands' steel exports in 2018.

Netherlands Exports of Steel Mill Products-2018 (Top Ten in Blue)



### Quick Facts:

- Exported 10.7 million metric tons (2018)
- 39% steel export growth since 2009
- 2018 export volume down 5% while export value up 4%
- Exports as a share of production down from 167.4% in 2017 to 157.5% in 2018
- Top three markets: Germany, Belgium, France
- Top Producers: Tata Steel IJmuiden, Van Merksteijn International BV, Wuppermann Staal Nederland BV
- 1 trade remedy in effect involving steel mill imports from the Netherlands

# Steel Exports Report: Netherlands

## Steel Trade Balance

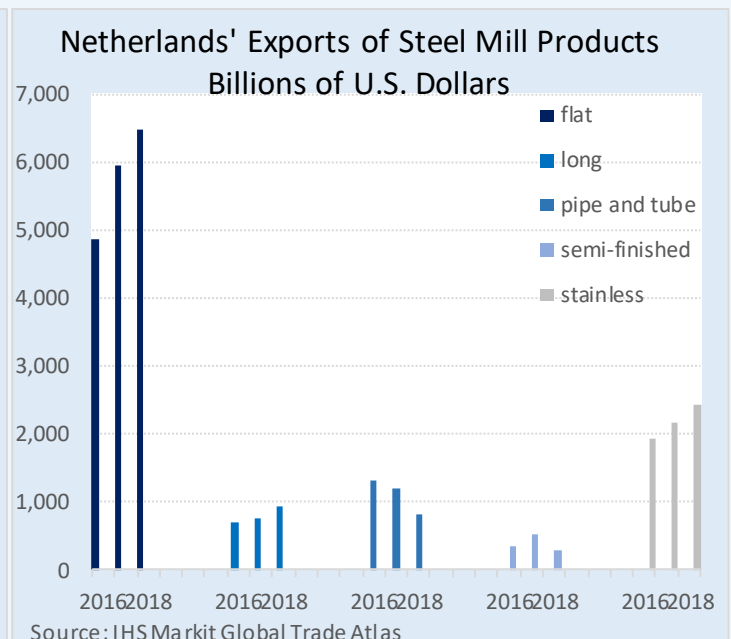
The Netherlands has maintained a persistent trade surplus in steel mill products since at least 2005. Since 2009, the volume of exports has increased 39 percent, while the volume of imports has increased 55 percent. Since 2009, the Netherlands has maintained an average annual surplus of 1.7 million metric tons. The Netherlands trade surplus grew steadily between 2009 and 2015 to peak at 3.0 million metric tons, before shrinking to just 694 thousand metric tons in 2016. During 2018, the Netherlands' trade surplus in steel narrowed by 63 percent, from 1.5 million metric tons in 2017 to 556 thousand metric tons in 2018.



## Export Volume, Value, and Product

In 2018, the Netherlands exports of steel mill products decreased 5 percent to 10.7 million metric tons from 11.4 million metric tons in 2017. The value of 2018 steel exports increased by 4 percent to \$11 billion from \$10.6 billion in 2017.

Flat products accounted for the vast majority of the Netherlands' steel exports in 2018 at 75 percent, or 8 million metric tons. Long products accounted for 9 percent, or 986 thousand metric tons, of Dutch exports of steel in 2018, followed by stainless products at 7 percent (780 thousand metric tons), pipe and tube products at 5 percent (508 thousand metric tons), and semi-finished steel at 4 percent (449 thousand metric tons).

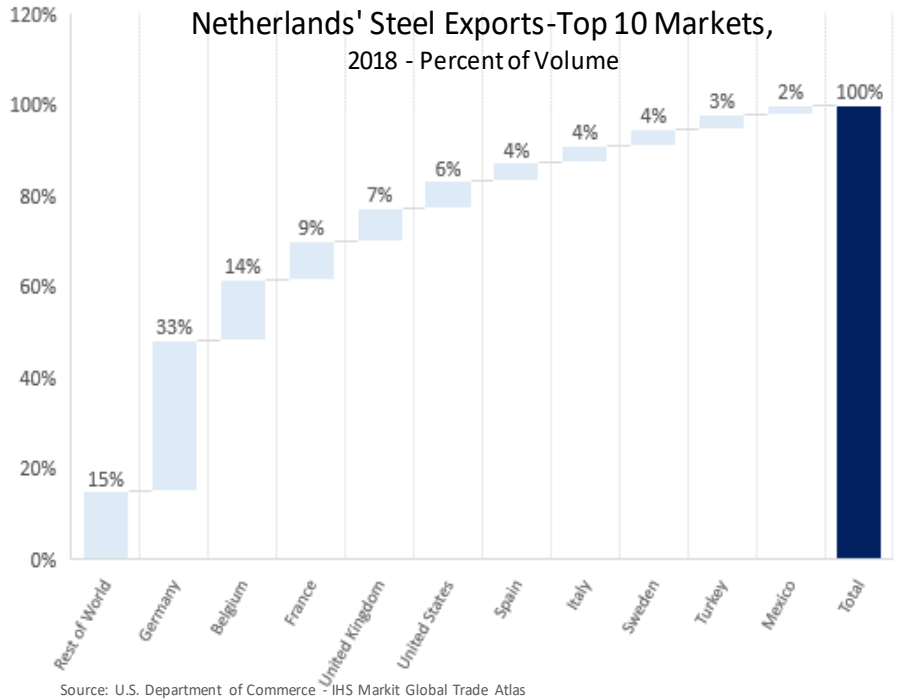


# Steel Exports Report: Netherlands

## Exports by Top Market

Exports to the Netherlands' top 10 markets represented 85 percent of its steel export volume in 2018 at 9.1 million metric tons (mmt). Germany was the largest market for Dutch steel exports with 33 percent (3.6 mmt), followed by Belgium at 14 percent (1.5 mmt), France at 9 percent (913 thousand metric tons), and the United Kingdom at 7 percent (755 thousand metric tons).

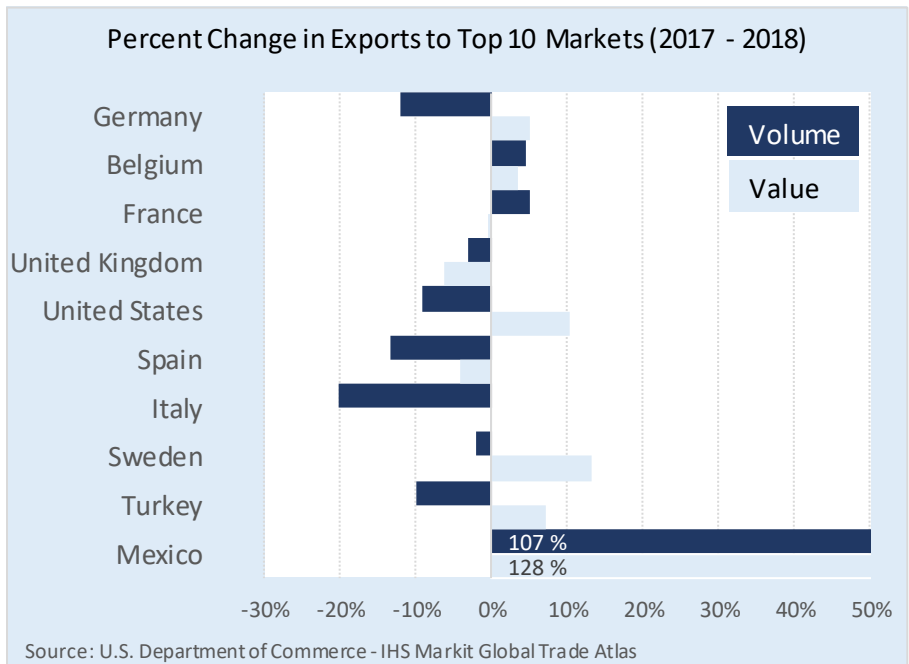
The United States was the 5th largest destination for the Netherlands steel exports in 2018, receiving 639 thousand metric tons of steel mill products.



## Trends in Exports to Top Markets

Between 2017 and 2018, the volume of the Netherlands' steel exports decreased in seven of the country's top 10 steel export markets. The Netherlands' exports to Italy saw the largest decrease in volume (-20% from 2017), followed by exports to Spain (-14%), Germany (-12%), Turkey (-10%), United States (-9%), United Kingdom (-3%), and Sweden (-2%). Dutch exports increased the most to Mexico, up 107 percent, followed by Belgium and France (both up 5%).

The value of the Netherlands' exports between 2017 and 2018 increased in six of the top 10 markets. Export values increased the most to Mexico (128%), followed by Sweden (13%), the United States (10%), Turkey (7%), Germany (5%), and Belgium (4%). The value of the Netherlands' exports declined to the United Kingdom (-6%), and Spain (-4%), while Dutch exports to Italy and France remained practically unchanged, decreasing by less than one percent.



Outside of the top 10 markets, other notable volume changes in 2018 included exports to 11th-ranked Austria (-15%), 16th-ranked Egypt (199%), 24th-ranked India (182%), and 41st-ranked Vietnam (634%).

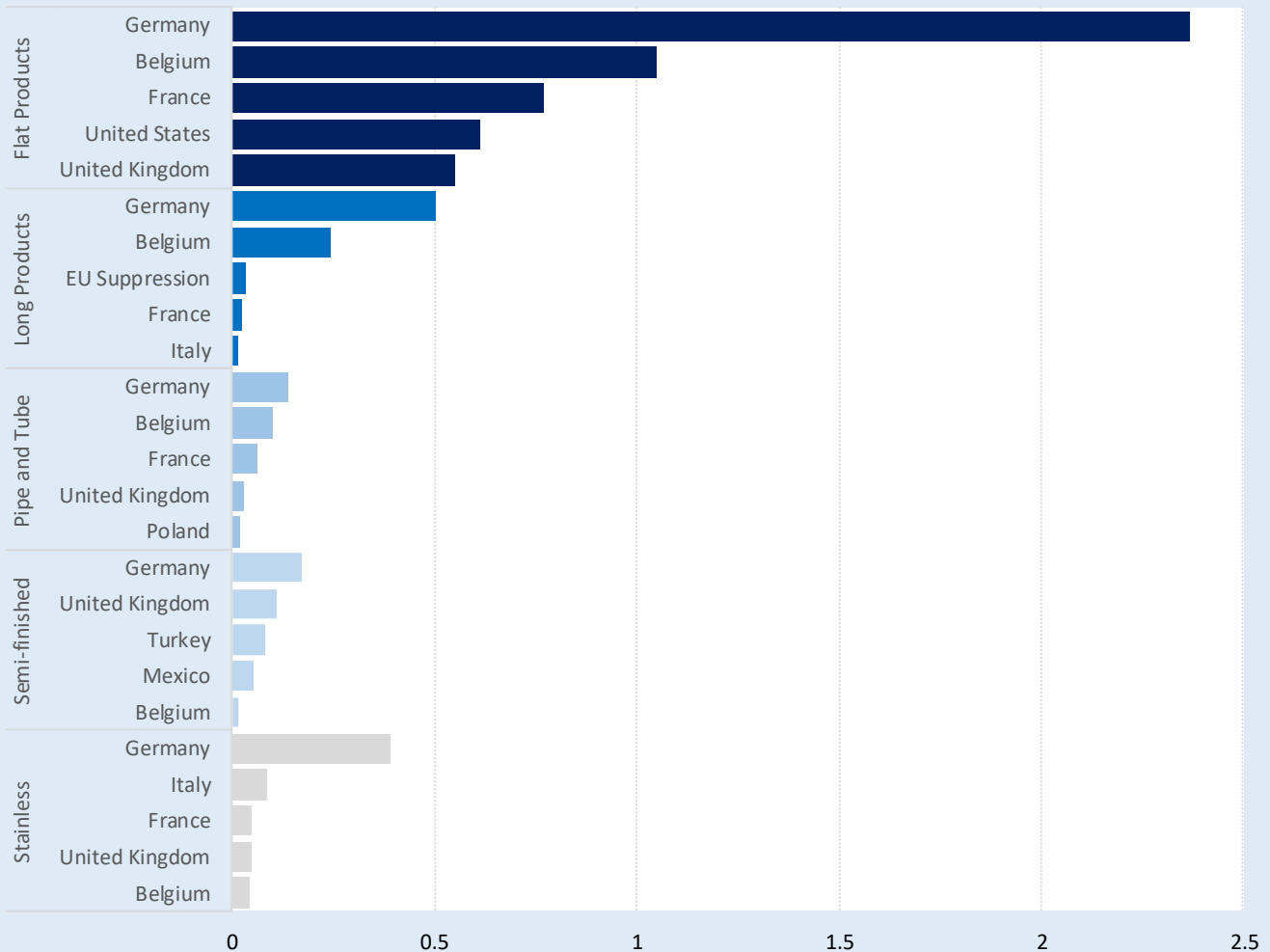
# Steel Exports Report: Netherlands

## Top Markets by Steel Product Category

The Netherlands' top export markets by volume vary across types of steel products, though Germany occupies the top spot in every product category. In 2018, 30 percent of the Netherlands' exports of flat products went to Germany (2.4 million metric tons), while Belgium received 13 percent (1.0 million metric tons). The United States was the fourth largest destination for the Netherlands' flat product exports, receiving 8 percent (612 thousand metric tons). This was the only major category for which the U.S. was a top export destination. Germany was the largest recipient of the Netherlands' long product exports, receiving 51 percent (502 thousand metric tons), followed by Belgium, which received 25 percent (243 thousand metric tons).

28 percent (141 thousand metric tons) of the Netherlands' pipe and tube exports went to Germany, while 20 percent (103 thousand metric tons) went to Belgium. The largest share of the Netherlands' semi-finished steel exports went to Germany, at 39 percent (173 thousand metric tons), followed by the United Kingdom at 24 percent (110 thousand metric tons). 50 percent of the Netherlands' stainless steel products went to Germany (389 thousand metric tons), while 11 percent (89 thousand metric tons) went to Italy.

Netherlands' Top 5 Export Markets by Product - 2018



Source: U.S. Department of Commerce - IHS Markit Global Trade Atlas

Millions of Metric Tons

# Steel Exports Report: Netherlands

## Netherlands' Import Market Share in Top Destinations

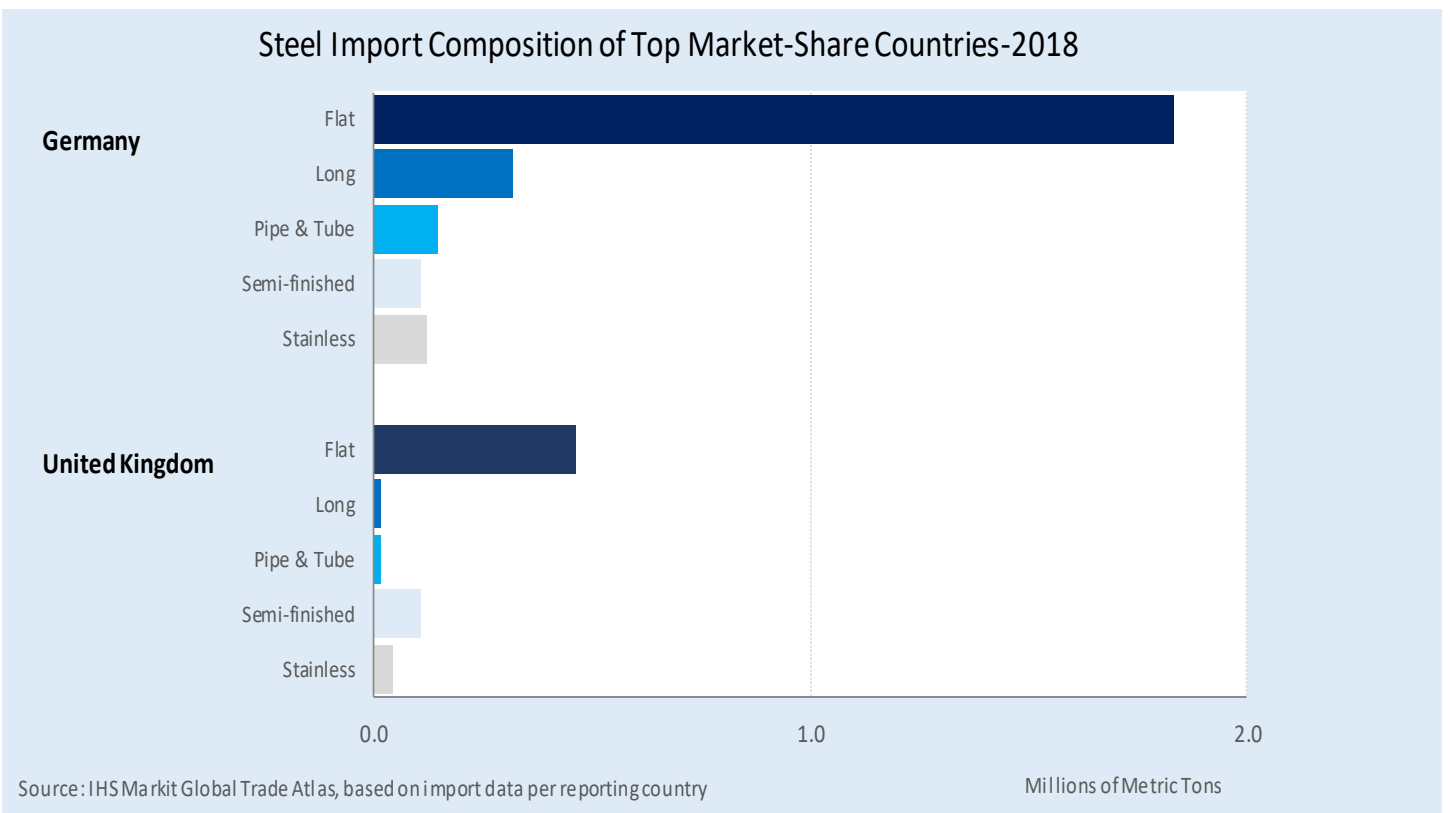
In 2018, the import market share for the Netherlands' steel products decreased slightly or remained unchanged in seven of its top export destinations. The share of steel imports from the Netherlands decreased the most in Germany, down 2.2 percentage points from 2017, followed by Belgium (-0.9 percentage points), Sweden (-1.0 percentage points), Italy (-0.8 percentage points), Spain (-0.6 percentage points), and France (-0.1 percentage points). The share of Dutch imports in the US remained unchanged.

Netherlands' Steel Import Market Share						
Top 10 Export Markets	Share of Imports from Netherlands - 2017	Netherlands' Rank in 2017	Share of Imports from Netherlands - 2018	Netherlands' Rank in 2018	Change in Share	
Germany	11.6%	4	9.5%	4	↓	
Belgium	9.3%	4	8.4%	4	↓	
France	6.9%	5	6.8%	5	↓	
United Kingdom	8.7%	3	9.0%	4	↑	
United States	1.8%	13	1.8%	13	↓	
Spain	3.9%	8	3.3%	11	↓	
Italy	2.5%	12	1.7%	15	↓	
Sweden	8.7%	3	7.7%	3	↓	
Turkey	1.2%	13	2.2%	12	↑	
Mexico	1.1%	12	1.7%	10	↑	

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

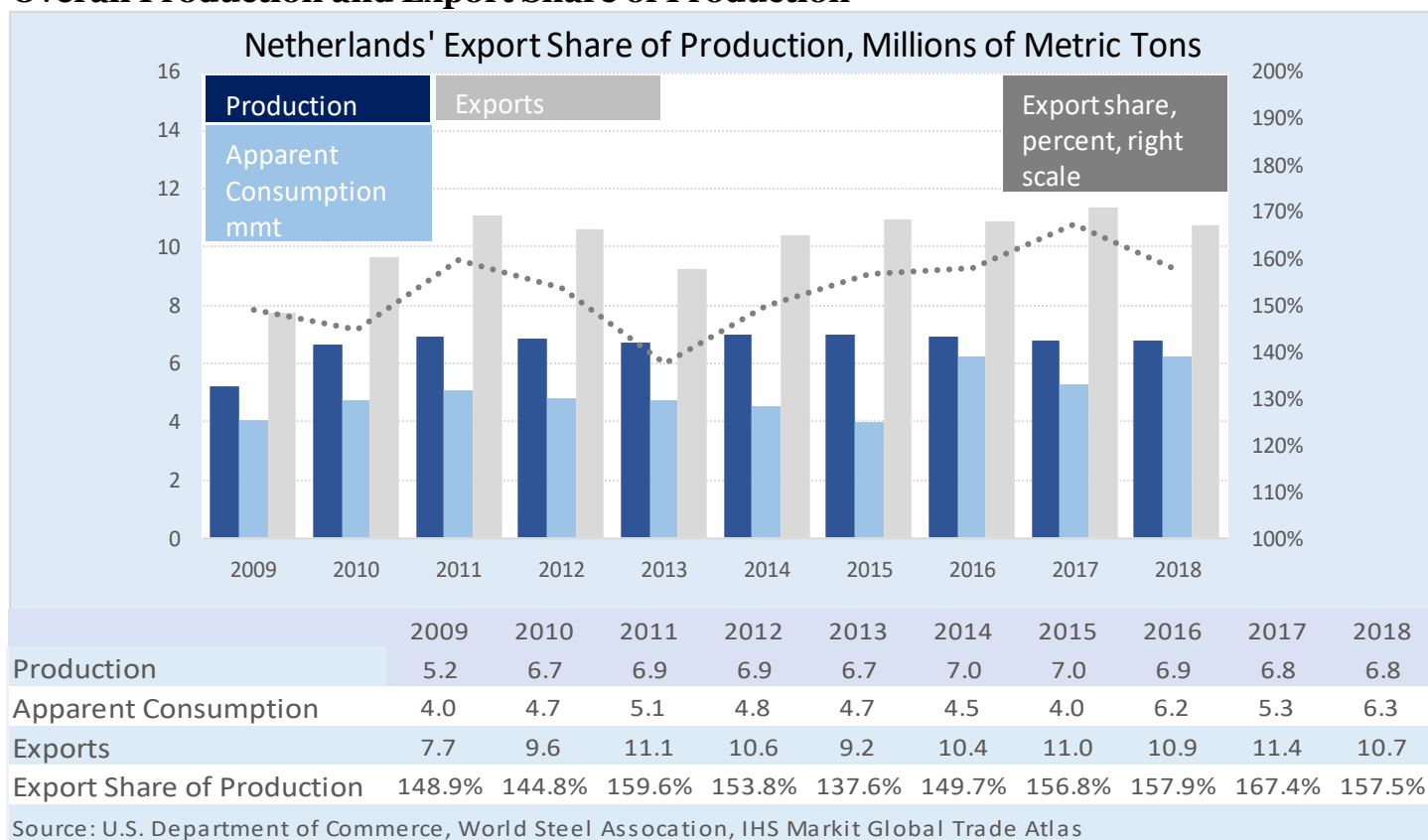
The share of imports from the Netherlands increased in Turkey (1.0 percentage points), followed by Mexico (0.6 percentage points), and the UK (0.3 percentage points).

Among the Netherlands' top export markets, Germany and the UK each received the largest share of their imports from the Netherlands, at 9.5 percent, and 9.0 percent, respectively, of their total steel imports from the Netherlands. In 2018, flat products accounted for the largest share of steel imports from the Netherlands in both Germany (73% or 1.8 million metric tons) and the UK (72% or 461 thousand metric tons).



# Steel Exports Report: Netherlands

## Overall Production and Export Share of Production



Crude steel production in the Netherlands increased by 34 percent between 2009 and 2011 to 6.9 million metric tons. Between 2011 and 2018, the Netherlands' steel production held steady, and averaged 6.9 million metric tons per year. Production in 2017 and 2018 was 6.8 million metric tons. The Netherlands' steel production has consistently outpaced apparent consumption (a measure of steel demand), and the gap between the two more than doubled between 2009 and 2015, to reach 3.0 million metric tons. This gap narrowed to just 0.7 million metric tons in 2016, as apparent consumption increased 35 percent to 6.2 million metric tons. Steel exports as a share of production in the Netherlands averaged 153.4 percent between 2009 and 2018. In 2018, exports as a share of production decreased 9.9 percentage points from 167.4 percent in 2017 to 157.5 percent.

### Top Producers

The top steel producers in the Netherlands are subsidiaries of foreign, privately-owned companies. Tata Steel, one of the world's largest steel-producing firms, dominates steel production in the Netherlands, accounting for most of its output.

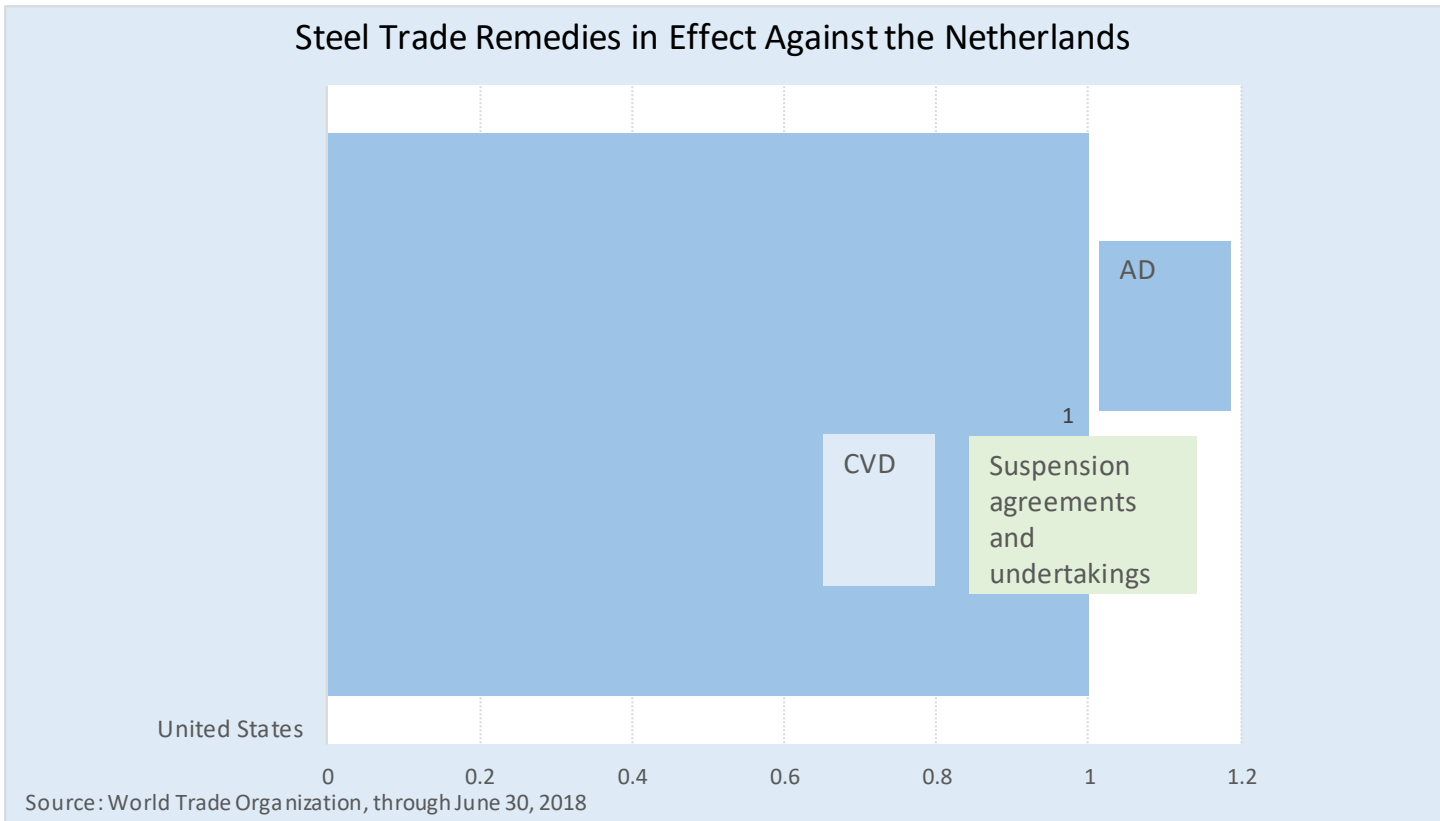
Netherlands Top Steel Producers in 2018			
Rank	Company	Production (mmt)	Main Products
1	Tata Steel IJmuiden	7	Hot-rolled, cold-rolled, sheets, strips, rolls
2	Van Merksteijn International BV	0.9	Wire rod, fence panels
3	Wuppermann Staal Nederland BV	0.5	Galvanized strips

Source: Iron and Steelworks of the World Directory (2019 edition); Company websites

# Steel Exports Report: Netherlands

## 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 various countries have against steel mill products from the Netherlands.



# Steel Exports Report: Glossary

---

**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)