

# Global Steel Trade Monitor

## Steel Exports Report: Germany

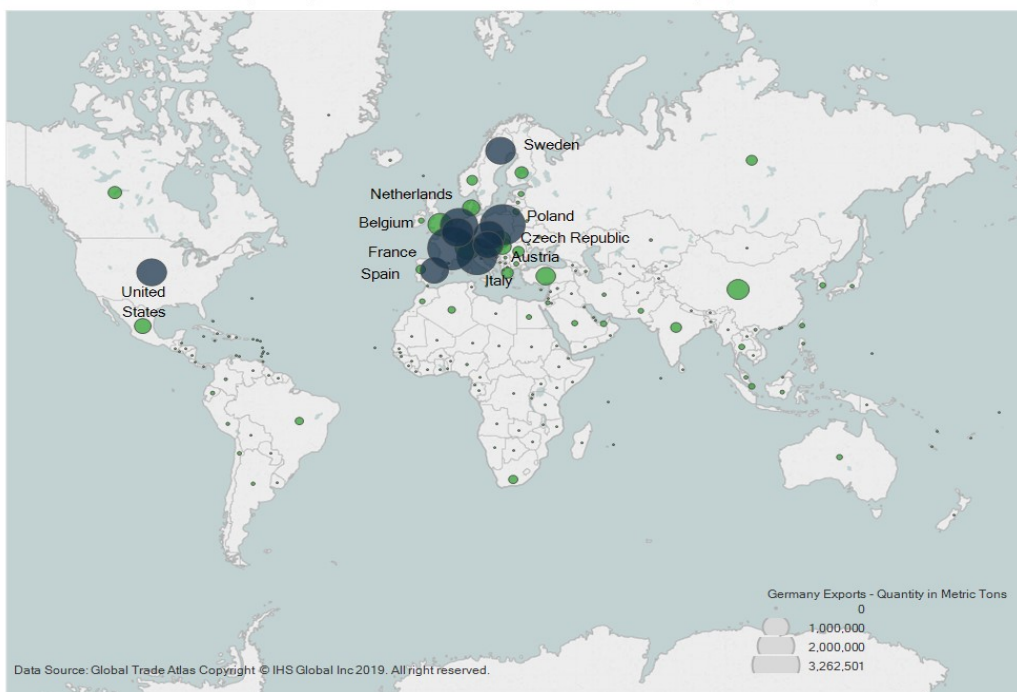
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### Background

Germany was the world's 5th-largest steel exporter in 2017. In 2018, Germany exported 25.6 million metric tons of steel, a 3 percent decrease from 26.5 million metric tons in 2017. Germany's exports represented about 6 percent of all steel exported globally in 2017. The volume of Germany's 2018 steel exports was a little more than a third of the volume exported by China, the world's largest exporter of steel. In value terms, steel represented just 1.8 percent of the total amount of goods Germany exported in 2018.

Germany exports steel to more than 180 countries and territories. The 10 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 70 percent of Germany's steel exports in 2018.

Germany's Exports of Steel Mill Products-2018 (Top Ten in Blue)



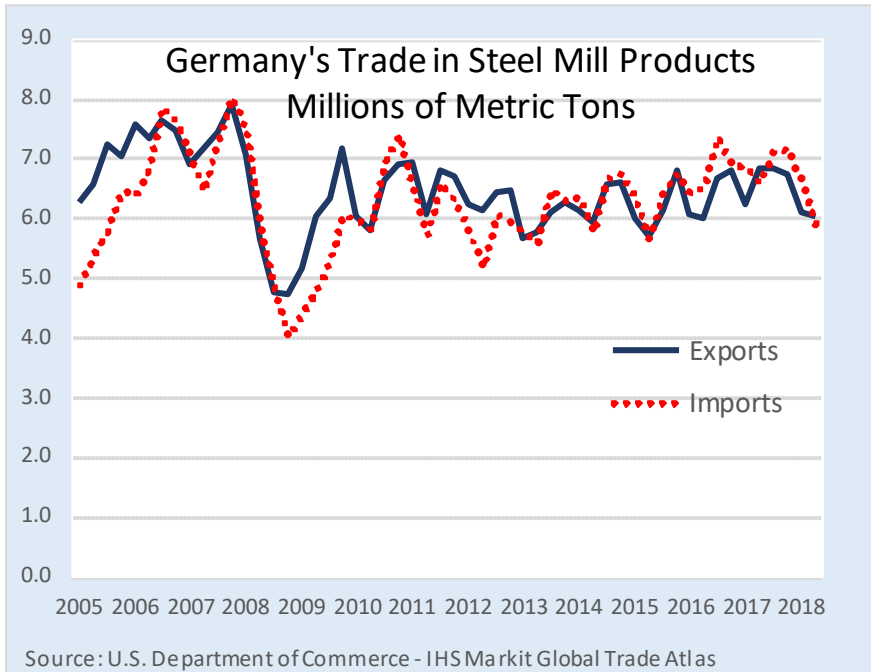
### Quick Facts:

- Exported 25.6 million metric tons in 2018
- 24% steel export growth since 2009
- 2018 export volume down 3% and export value up 10% since 2017
- Exports as a share of production down from 61.1% in 2017 to 60.4% in 2018
- Top three markets: France, Poland, Italy
- Largest producers: ThyssenKrupp, ArcelorMittal, Salzgitter, HKM
- 6 trade remedies in effect involving steel mill imports from Germany

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## Steel Trade Balance

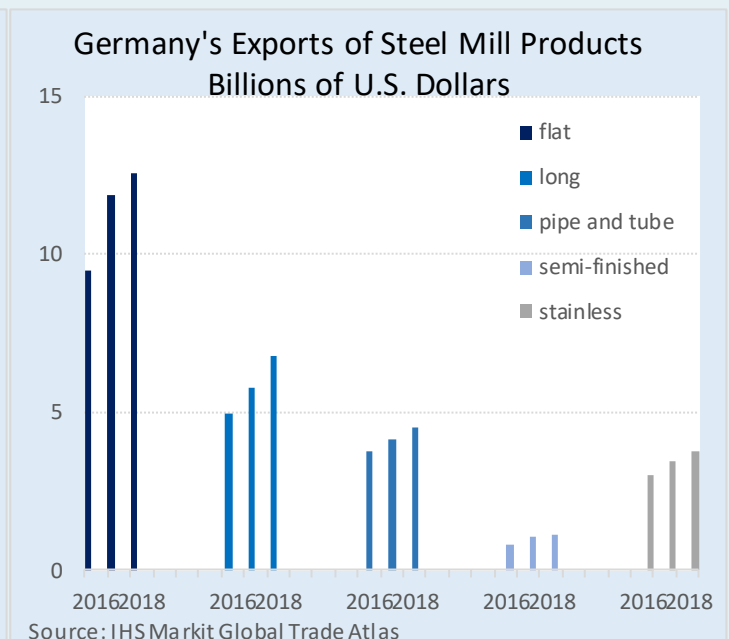
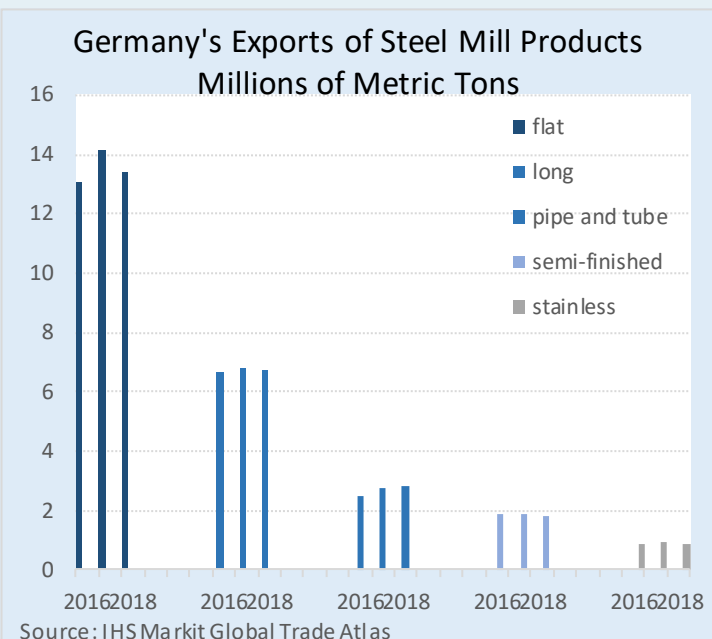
Throughout the last decade, Germany has maintained relative balance in its trade in steel. Following the global recession in 2008, Germany maintained a trade surplus in 2009 and 2010, in addition to 2012 and 2013. Since 2014, however, Germany has experienced a trade deficit in steel products. Since 2009, exports by volume have increased by 24 percent, with imports increasing by 49 percent over the same period. In 2018, the trade deficit slightly decreased to -1.1 million metric tons from -1.2 million metric tons in 2017.



## Export Volume, Value, and Product

In 2018, Germany's exports by volume have fallen 3 percent to 25.6 million metric tons compared to 2017. By contrast, the value of Germany's steel exports have increased by 10 percent from \$26.2 billion in 2017 to \$28.7 billion in 2018.

Flat products accounted for just over half of Germany's steel exports in 2018 at 52 percent (13.4 million metric tons). Long products accounted for 26 percent (6.7 million metric tons), followed by pipe and tube products at 11 percent (2.8 million metric tons), semi-finished at 7 percent (1.8 million metric tons), and stainless steel at 3 percent (860 thousand metric tons).



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## Exports by Top Market

Exports to Germany's top 10 steel markets represented 70 percent of its steel export volume in 2018 at 17.9 million metric tons (mmt). France was the largest market for Germany's exports at 13 percent (3.3 mmt), followed by Poland at 11 percent (2.8 mmt), Italy at 9 percent (2.2 mmt), Netherlands at 8 percent (2.0 mmt), and Belgium at 6 percent (1.4 mmt).

The United States ranked 8th as a destination for Germany's steel exports, receiving 1.2 million metric tons in 2018, a 7 percent decrease from 2017.



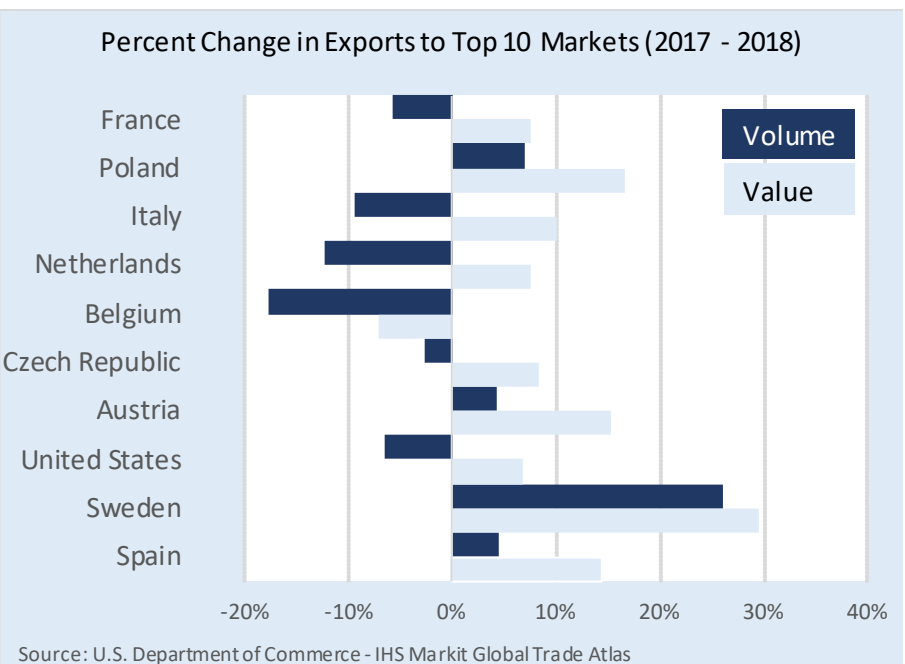
Source: U.S. Department of Commerce - IHS Markit Global Trade Atlas

## Trends in Exports to Top Markets

Between 2017 and 2018, Germany's exports decreased in volume to 6 of its top 10 export markets. Export volumes to Belgium showed the largest decrease, down 18 percent from 2017, followed by exports to the Netherlands (-12%), Italy (-9%), the United States (-7%), France (-6%), and the Czech Republic (-3%). Over the same period, German exports to Sweden increased 26 percent in volume, followed by Poland (7%), Spain (5%), and Austria (4%).

The value of Germany's exports increased to 9 of its top 10 export markets in 2018, due to rising global steel prices. Sweden had the largest increase, rising 30 percent. This is followed by Poland (17%), Austria (15%), Spain (14%), Italy (10%), Netherlands (8%), France (8%), Czech Republic (8%), and the United States (7%). Of its top 10 markets, Germany's exports by value only decreased to Belgium, down 7 percent from 2017.

Outside of the top 10 export markets, other notable changes in export volumes included 14th-ranked Turkey (-23%), 19th-ranked Canada (68%), and 24th-ranked Russia (-40%).



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

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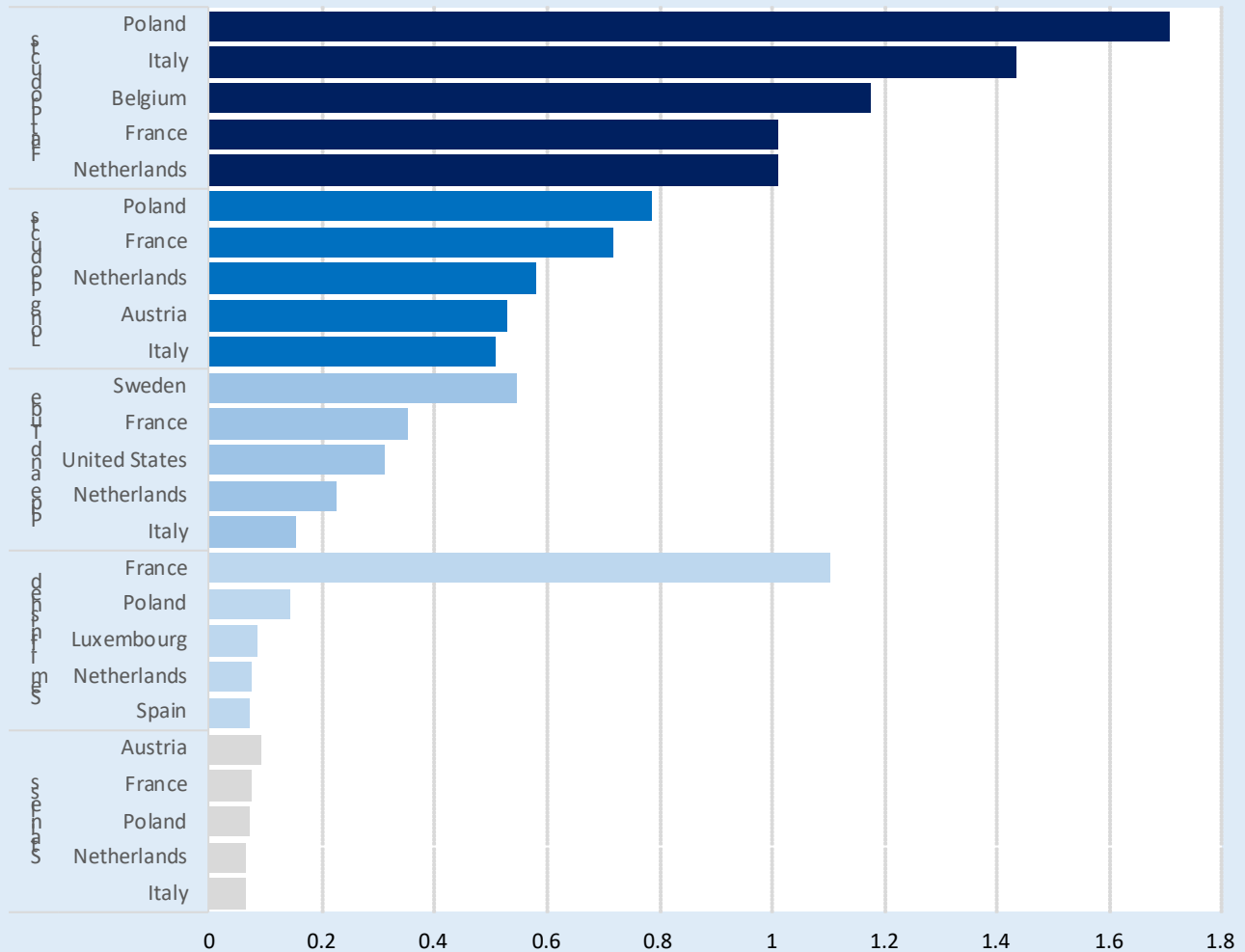
## Top Markets by Steel Product Category

Germany's top export markets by volume vary across types of steel products, with Poland capturing the largest share in two product categories. Poland received the largest share of Germany's flat products in 2018 at 13 percent (1.7 million metric tons) and long products at 12% (788 thousand metric tons).

Sweden received the largest share of German pipe and tube products at 20 percent (547 thousand metric tons). France received the largest share of Germany's semi-finished exports at 61 percent (1.1 million metric tons), and was a top-5 destination for all major categories of German steel exports. Austria received the largest share of Germany's stainless steel exports at 11 percent (94 thousand metric tons).

The United States was a top-five export destination for Germany's pipe and tube exports at 11 percent (313 thousand metric tons).

Germany's 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: Germany

## Germany's Import Market Share in Top Destinations

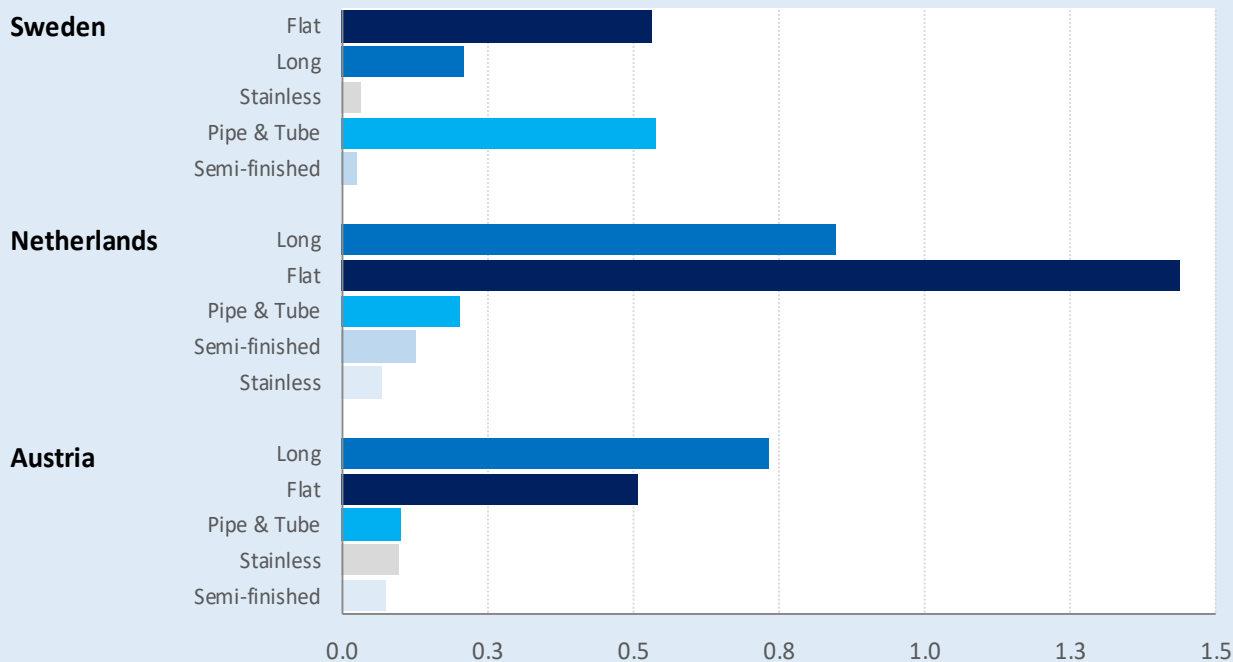
In 2018, the import market share for Germany's steel products decreased in 8 of Germany's top 10 export destinations. The share of Poland's steel imports from Germany showed the largest decrease in 2018, down 2.7 percentage points from 2017, followed by import shares in the Netherlands (-2.5 percentage points), Belgium (-2.4 percentage points), Czech Republic (-2.4 percentage points), and Italy (-1.6 percentage points). The share of imports from Germany in Sweden and the United States increased in 2018, up 2.6 and 0.2 percentage points, respectively.

Germany's Steel Import Market Share					
Top 10 Export Markets	Share of Imports from Germany 2017	Germany's Rank in 2017	Share of Imports from Germany 2018	Germany's Rank in 2018	Change in Share
France	24.7%	2	23.3%	2	↓
Poland	26.2%	1	23.5%	1	↓
Italy	12.6%	1	10.9%	2	↓
Netherlands	28.9%	1	26.4%	1	↓
Belgium	15.4%	2	13.0%	3	↓
Czech Republic	23.0%	1	21.5%	1	↓
Austria	33.4%	1	32.3%	1	↓
United States	3.8%	8	4.0%	7	↑
Sweden	26.4%	1	29.0%	1	↑
Spain	10.6%	3	9.9%	4	↓

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

Among Germany's top export markets, Austria, the Netherlands and Sweden received more than 25 percent of their total steel imports from Germany in 2018. Flat products accounted for the largest share of steel imports from Germany in the Netherlands (54% or 1.4 million metric tons) while long products accounted for the largest share of Austria's imports from Germany (48% or 732 thousand metric tons), and pipe and tube products accounted for the largest share of Sweden's steel imports from Germany (40% or 540 thousand metric tons).

Steel Import Composition of Top Market-Share Countries-2018



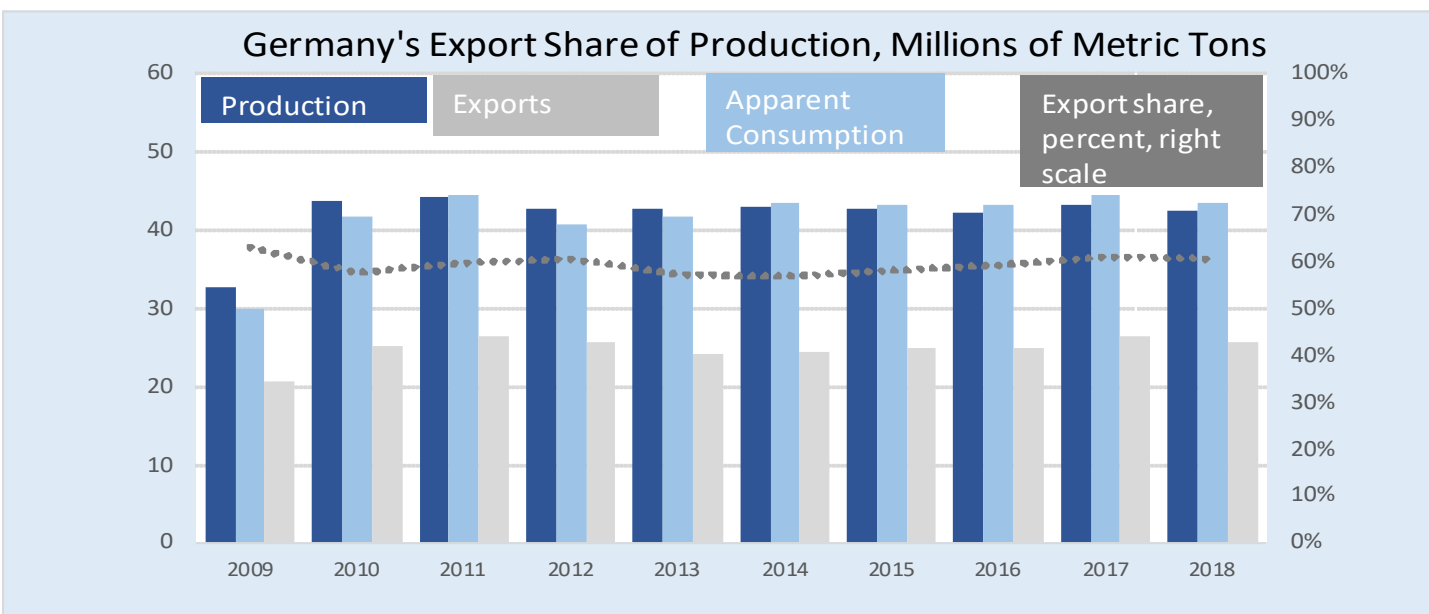
Source: IHS Markit Global Trade Atlas, based on import data per reporting country

Millions of Metric Tons

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## Overall Production and Export Share of Production

Germany's crude steel production has remained relatively stagnant since 2012. In 2018, production decreased 2 percent to 42.4 million metric tons from 43.3 million metric tons in 2017. The gap between production and apparent consumption (a measure of steel demand) slightly narrowed to – 1.1 million metric tons in 2018. Germany's steel exports as a share of production steadily increased from 2014 to 2017, from 56.7 percent to 61.1 percent. In 2018, however, the export share of production decreased by 0.7 percentage points to 60.4 percent.



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Production	32.7	43.8	44.3	42.7	42.6	42.9	42.7	42.1	43.3	42.4
Apparent Consumption	30.0	41.7	44.4	40.7	41.6	43.5	43.3	43.3	44.5	43.5
Exports	20.6	25.2	26.5	25.8	24.3	24.3	24.8	24.9	26.5	25.6
Export Share of Production	63.1%	57.6%	59.8%	60.4%	57.0%	56.7%	58.0%	59.2%	61.1%	60.4%

Source: U.S. Department of Commerce, World Steel Association, IHS Markit Global Trade Atlas

## Top Producers

Germany's steel production is dominated by privately-owned domestic and foreign-owned firms. ThyssenKrupp is by far Germany's largest steel-producing firm, followed by Luxembourg-based steel giant ArcelorMittal. The remainder of Germany's steel production is mostly concentrated among various domestic firms, including Salzgitter and HKM.

Rank	Company	Production (mmt)	Main Products
1	ThyssenKrupp	12.0	Sheet, strip, plate, loated flat products products
2	ArcelorMittal*	7.00	flat, long and tube strip, plates, sections, and pipe and tubes
3	Salzgitter	7	and tubes
4	HKM	3.8	semi-finished

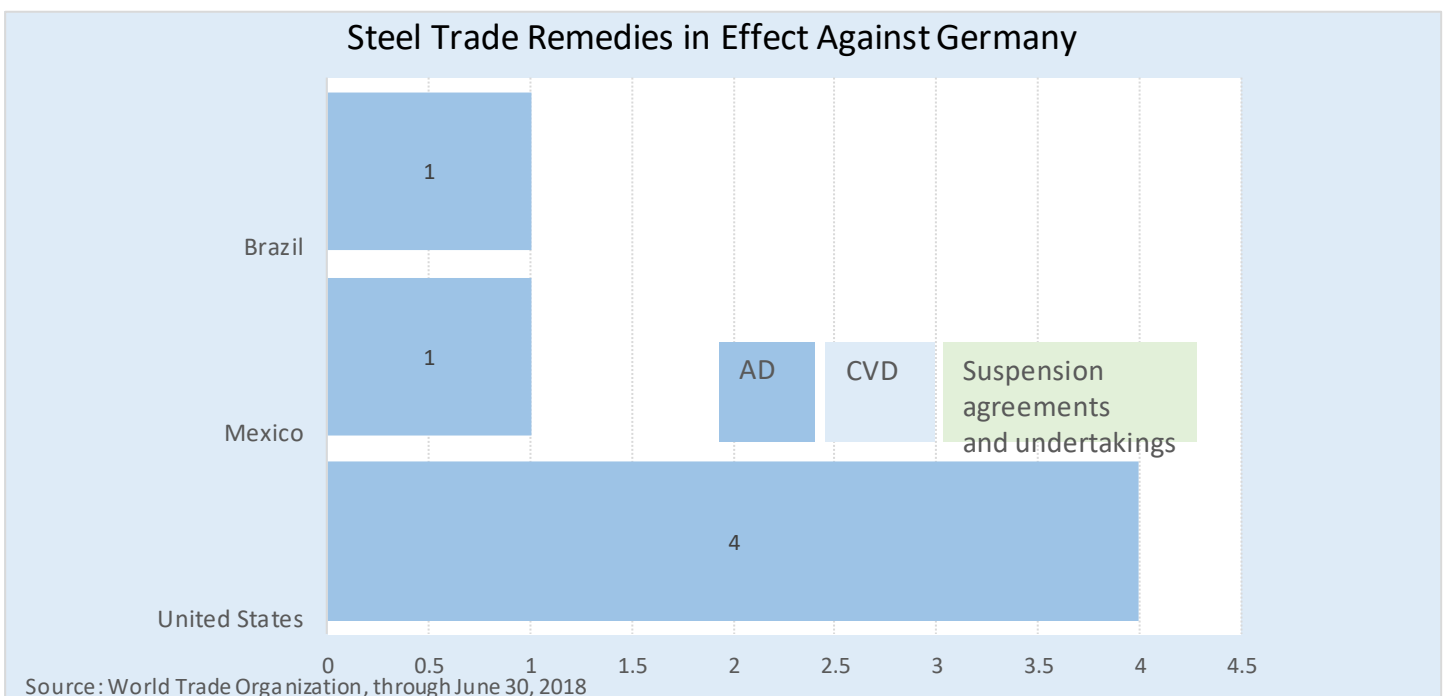
Source: German Steel Federation; Company websites

\*Denotes foreign-owned producer

# 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 table below provides statistics on the current number of trade remedies various countries have against steel mill products from Germany. There are currently no safeguards in effect against imports from Germany.



Global Steel Mill Safeguards in Effect	
Country	Product(s)
Gulf Cooperation Council	Flat-rolled steel
India	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
Malaysia	1) Steel concrete reinforcing bar; 2) 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	1) Semi-finished and certain finished products of alloy and non-alloy steel; 2) Pre-painted galvanized steel sheet and strip

Source: World Trade Organization, through September 30, 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.

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**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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