

China's steel exports likely to rise y-o-y in CY'25 despite US tariffs, trade barriers

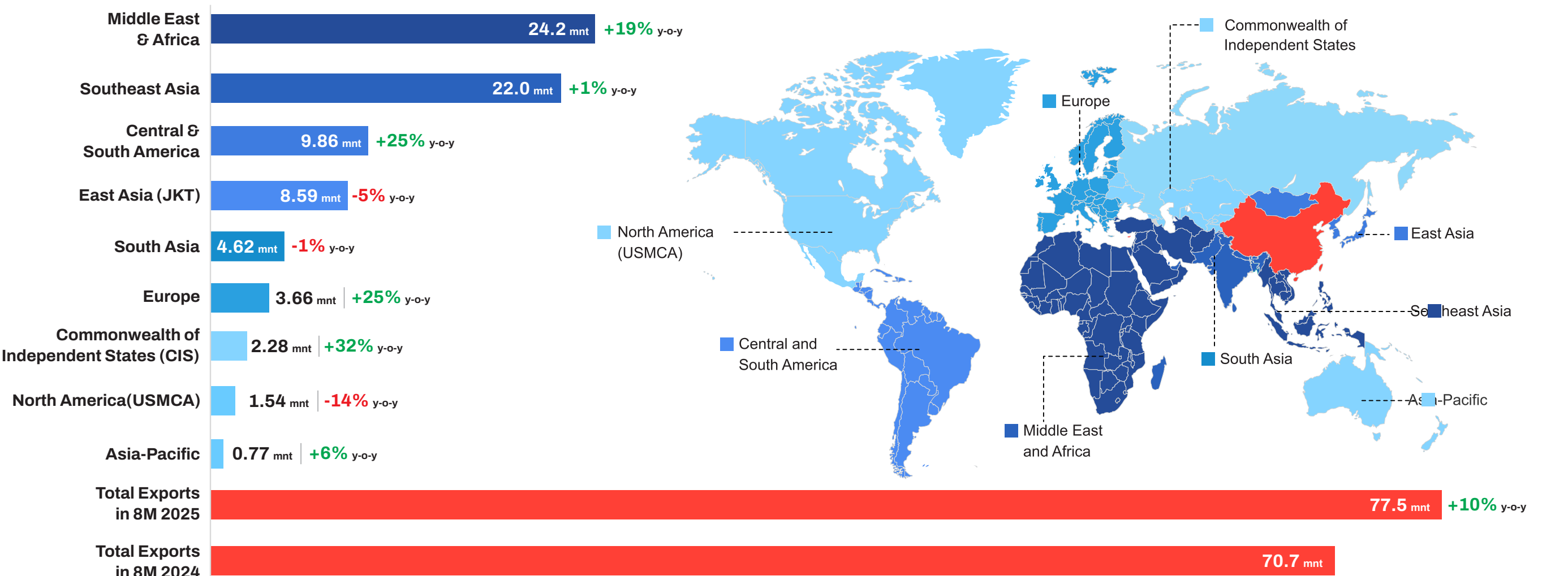


China's steel exports maintained their uptrend over January-August 2025 (8MCY'25), totalling 77.5 million tonnes (mnt). Volumes were higher by a strong 10%, buoyed by persistent domestic demand weakness.

Chinese steelmakers have been forced to offload goods overseas to alleviate the supply pressure in the domestic market. US-China tariff tensions have also driven aggressive front-loading, and expectations are that China will close the year with robust export growth y-o-y, reaching a new peak.

China has consistently defied expectations of a y-o-y moderation in steel export volumes. With the final quarter of the year already here, there is no reason to suspect that the y-o-y uptrend will suddenly reverse. Analysts also suggest that exports will hit a new peak in 2025, with protectionist backlash forcing commodity and geographical diversification rather than restraint.

China's Region-wise Steel Exports in 8M 2025 (Jan-Aug)



JKT: Japan, South Korea, Taiwan | USMCA: United States–Mexico–Canada Agreement
All above figures are rounded off. | Quantity in million tonnes (mnt) | % change in year-on-year (y-o-y) | Source: China Customs, BigMint

Region-wise list of exporting countries

Country	Exports in Aug'25	Exports in Jul'25	% change in m-o-m	Total Exports in 8M 2025	Total Exports in 8M 2024	% change	Total Exports in 2024 (Jan-Dec)
Middle East and Africa							
United Arab Emirates	0.51 mnt	0.41 mnt	+24% m-o-m	3.76 mnt	3.44 mnt	+9% y-o-y	5.50 mnt
Saudi Arabia	0.34 mnt	0.51 mnt	-33% m-o-m	3.41 mnt	2.95 mnt	+16% y-o-y	4.77 mnt
Türkiye	0.24 mnt	0.32 mnt	-23% m-o-m	2.67 mnt	2.74 mnt	-3% y-o-y	4.12 mnt
Egypt	0.17 mnt	0.12 mnt	+50% m-o-m	0.92 mnt	1.00 mnt	-8% y-o-y	1.48 mnt
South Africa	0.08 mnt	0.08 mnt	-2% m-o-m	0.73 mnt	0.82 mnt	-11% y-o-y	1.37 mnt
Others	1.53 mnt	1.60 mnt	-4% m-o-m	12.68 mnt	9.31 mnt	+36% y-o-y	15.84 mnt
Total	2.87 mnt	3.03 mnt	-5% m-o-m	24.18 mnt	20.27 mnt	+19% y-o-y	33.08 mnt

Southeast Asia							
Vietnam	0.71 mnt	0.77 mnt	-8% m-o-m	6.29 mnt	7.92 mnt	-21% y-o-y	12.77 mnt
Thailand	0.39 mnt	0.42 mnt	-7% m-o-m	3.83 mnt	3.54 mnt	+8% y-o-y	5.12 mnt
Philippines	0.49 mnt	0.48 mnt	+4% m-o-m	3.72 mnt	3.38 mnt	+10% y-o-y	5.05 mnt
Indonesia	0.41 mnt	0.36 mnt	+15% m-o-m	3.13 mnt	2.99 mnt	+5% y-o-y	4.84 mnt
Malaysia	0.25 mnt	0.24 mnt	+2% m-o-m	1.99 mnt	1.87 mnt	+7% y-o-y	2.90 mnt
Others	0.30 mnt	0.29 mnt	+1% m-o-m	3.06 mnt	2.00 mnt	+53% y-o-y	3.02 mnt
Total	2.56 mnt	2.57 mnt	0% m-o-m	22.01 mnt	21.71 mnt	+1% y-o-y	33.69 mnt

Central and South America							
Brazil	0.18 mnt	0.32 mnt	-43% m-o-m	2.28 mnt	2.38 mnt	-4% y-o-y	3.76 mnt
Peru	0.17 mnt	0.22 mnt	-23% m-o-m	1.53 mnt	1.12 mnt	+36% y-o-y	1.79 mnt
Colombia	0.15 mnt	0.14 mnt	+10% m-o-m	1.06 mnt	0.97 mnt	+9% y-o-y	1.39 mnt
Chile	0.15 mnt	0.19 mnt	-19% m-o-m	1.21 mnt	0.90 mnt	+34% y-o-y	1.54 mnt
Ecuador	0.07 mnt	0.11 mnt	-37% m-o-m	0.69 mnt	0.39 mnt	+76% y-o-y	0.65 mnt
Others	0.51 mnt	0.33 mnt	+53% m-o-m	3.10 mnt	2.13 mnt	+46% y-o-y	3.63 mnt
Total	1.24 mnt	1.32 mnt	-6% m-o-m	9.86 mnt	7.89 mnt	+25% y-o-y	12.77 mnt

East Asia (JKT)							
South Korea	0.63 mnt	0.68 mnt	-8% m-o-m	5.07 mnt	5.66 mnt	-11% y-o-y	8.19 mnt
China Hong Kong	0.19 mnt	0.16 mnt	+25% m-o-m	1.32 mnt	0.78 mnt	+69% y-o-y	1.45 mnt
Taiwan, China	0.09 mnt	0.06 mnt	+62% m-o-m	0.83 mnt	1.33 mnt	-37% y-o-y	1.97 mnt
Japan	0.11 mnt	0.09 mnt	+16% m-o-m	0.84 mnt	0.79 mnt	+6% y-o-y	1.27 mnt
Mongolia	0.07 mnt	0.06 mnt	+25% m-o-m	0.47 mnt	0.42 mnt	+14% y-o-y	0.55 mnt
Others	0.01 mnt	0.01 mnt	+31% m-o-m	0.06 mnt	0.06 mnt	-1% y-o-y	0.09 mnt
Total	1.11 mnt	1.06 mnt	+5% m-o-m	8.59 mnt	9.04 mnt	-5% y-o-y	13.52 mnt

South Asia							
Pakistan	0.17 mnt	0.20 mnt	-13% m-o-m	2.02 mnt	1.63 mnt	+24% y-o-y	2.41 mnt
India	0.17 mnt	0.20 mnt	-18% m-o-m	1.45 mnt	2.07 mnt	-30% y-o-y	3.02 mnt
Bangladesh	0.10 mnt	0.10 mnt	-6% m-o-m	0.79 mnt	0.67 mnt	+19% y-o-y	1.09 mnt
Sri Lanka	0.05 mnt	0.04 mnt	+18% m-o-m	0.33 mnt	0.25 mnt	+28% y-o-y	0.38 mnt
Nepal	0.003 mnt	0.002 mnt	+24% m-o-m	0.03 mnt	0.02 mnt	+48% y-o-y	0.03 mnt
Total	0.49 mnt	0.55 mnt	-11% m-o-m	4.62 mnt	4.65 mnt	-1% y-o-y	6.94 mnt

Europe							
Italy	0.15 mnt	0.13 mnt	+15% m-o-m	0.80 mnt	0.82 mnt	-2% y-o-y	1.13 mnt
Belgium	0.10 mnt	0.10 mnt	+6% m-o-m	0.55 mnt	0.47 mnt	+17% y-o-y	0.75 mnt
Spain	0.06 mnt	0.05 mnt	+22% m-o-m	0.35 mnt	0.29 mnt	+20% y-o-y	0.42 mnt
Poland	0.04 mnt	0.04 mnt	+18% m-o-m	0.31 mnt	0.22 mnt	+42% y-o-y	0.34 mnt
Netherlands	0.02 mnt	0.05 mnt	-66% m-o-m	0.24 mnt	0.15 mnt	+60% y-o-y	0.27 mnt
Others	0.21 mnt	0.24 mnt	-13% m-o-m	1.41 mnt	0.98 mnt	+44% y-o-y	1.54 mnt
Total	0.58 mnt	0.60 mnt	-4% m-o-m	3.66 mnt	2.93 mnt	25% y-o-y	4.44 mnt

Commonwealth of Independent States (CIS)							
Russia	0.15 mnt	0.13 mnt	+15% m-o-m	0.83 mnt	0.85 mnt	-3% y-o-y	1.27 mnt
Kazakhstan	0.06 mnt	0.08 mnt	-30% m-o-m	0.43 mnt	0.24 mnt	+79% y-o-y	0.38 mnt
Uzbekistan	0.06 mnt	0.06 mnt	+11% m-o-m	0.41 mnt	0.32 mnt	+26% y-o-y	0.57 mnt
Kyrgyzstan	0.05 mnt	0.04 mnt	+17% m-o-m	0.19 mnt	0.06 mnt	+212% y-o-y	0.11 mnt
Tajikistan	0.02 mnt	0.02 mnt	-19% m-o-m	0.11 mnt	0.05 mnt	+116% y-o-y	0.10 mnt
Others	0.04 mnt	0.06 mnt	-23% m-o-m	0.31 mnt	0.20 mnt	+57% y-o-y	0.34 mnt
Total	0.38 mnt	0.38 mnt	-2% m-o-m	2.28 mnt	1.72 mnt	+32% y-o-y	2.77 mnt

North America (USMCA)							
Mexico	0.09 mnt	0.10 mnt	-8% m-o-m	0.69 mnt	0.76 mnt	-9% y-o-y	1.17 mnt
U.S.	0.05 mnt	0.08 mnt	-43% m-o-m	0.53 mnt	0.57 mnt	-7% y-o-y	0.89 mnt
Canada	0.06 mnt	0.05 mnt	+10% m-o-m	0.32 mnt	0.46 mnt	-30% y-o-y	0.68 mnt
Others	0.0002 mnt	0.0002 mnt	+11% m-o-m	0.002 mnt	0.002 mnt	+10% y-o-y	0.003 mnt
Total	0.20 mnt	0.24 mnt	-16% m-o-m	1.54 mnt	1.79 mnt	-14% y-o-y	2.74 mnt

Asia-Pacific							
Australia	0.06 mnt	0.07 mnt	-10% m-o-m	0.52 mnt	0.51 mnt	+1% y-o-y	0.78 mnt
Papua New Guinea	0.01 mnt	0.01 mnt	+22% m-o-m	0.08 mnt	0.07 mnt	+17% y-o-y	0.11 mnt
New Zealand	0.01 mnt	0.01 mnt	-5% m-o-m	0.08 mnt	0.07 mnt	+7% y-o-y	0.12 mnt
Fiji	0.004 mnt	0.005 mnt	-9% m-o-m	0.02 mnt	0.02 mnt	+39% y-o-y	0.03 mnt
Maldives	0.004 mnt	0.003 mnt	+23% m-o-m	0.02 mnt	0.01 mnt	+66% y-o-y	0.02 mnt
Others	0.006 mnt	0.007 mnt	-13% m-o-m	0.05 mnt	0.04 mnt	+11% y-o-y	0.07 mnt
Total	0.10 mnt	0.10 mnt	-5% m-o-m	0.77 mnt	0.73 mnt	+6% y-o-y	1.12 mnt

Grand Total	9.51 mnt	9.84 mnt	-3% m-o-m	77.5 mnt	70.7 mnt	+10% y-o-y	111 mnt
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All above figures are rounded off. | Quantity in million tonnes (mnt) | % change in month-on-month (m-o-m)
% change in year-on-year (y-o-y) | Source: BigMint

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