

China Is at the Heart of Trump Tariffs on Steel and Aluminum

Existing American tariffs already restrict steel and aluminum shipments from China, which is now flooding other markets with its exports instead.



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President Trump's promise to impose 25 percent tariffs on Monday on all U.S. imports of steel and aluminum would primarily target American allies, but at their heart they strike at his longtime nemesis: China.

The top five suppliers of steel to the American market in January were Canada, followed by Brazil, Mexico, South Korea and Germany. Canada has also led in aluminum exports to the United States, while the United Arab Emirates, Russia and China are far behind.

China does not export a lot of steel or aluminum directly to the United States. A succession of presidents and Commerce Department rulings have already imposed many tariffs on steel from China. Tariffs have also gone up lately on Chinese aluminum. Just last September, President Joseph R. Biden raised existing tariffs on many Chinese steel and aluminum products by up to 25 percent.

But China dominates the global steel and aluminum industry. Its vast, modern mills make as much or more of both metals each year as the rest of the world combined. Most of it is used within China's borders, to build everything from high-rises and ships to washing machines and cars.

Yet lately, China's steel and aluminum exports are on the rise because its economy is struggling, sapping domestic demand. Many of these low-cost exports have gone to American allies like Canada and Mexico, which in turn export significant shares of their own more expensive output to the United States. Other Chinese metal exports have gone to developing countries like Vietnam, which now buys enormous quantities of semi-processed steel from China, finishes it and then re-exports it as Vietnamese steel to buyers around the globe.

China's rising exports have upset producers and labor unions in the United States.

"China's overcapacity is swamping world markets and severely injuring U.S. producers and workers," said Michael Wessel, the longtime trade adviser to the United Steelworkers of America.



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