

Appendix B

Australian Anti-Dumping Cases on Steel

Investigations and measures, 2011 to 2026

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Anti-dumping has been the dominant trade defence tool used by the Australian steel industry over the last fifteen years. Since 2011, steel products have accounted for the bulk of new investigations launched by the Australian Anti-Dumping Commission, and steel measures now make up the majority of all measures currently in force.

This paper lists the major cases by product family, summarises the cost impact on downstream Australian fabricators and end users, and references the source material from the Anti-Dumping Commission, the Productivity Commission and the WTO.

How the cases are organised

The Anti-Dumping Commission groups cases by Electronic Public Record (EPR) number. A single product can sit behind several EPRs because each new investigation, review, continuation, sunset review and accelerated review takes a new number. Rod in coil from China, for example, has run through EPRs 301, 414, 643 and 675 across multiple Commissioner determinations between 2015 and the present sunset review.

The tables below are organised by product family. Where a duty rate is publicly known it has been included. Rates change at every review, so the figures shown reflect the most recent public information.

Hot rolled coil, plate and structural sections

This is the single largest category by volume and value, and the one with the longest continuous record of Australian measures. BlueScope and OneSteel (now InfraBuild) have been the principal applicants.

Case / EPR	Product	Country of origin	Status / Notes
198	Hot rolled plate steel	China, Indonesia, Japan, Korea, Taiwan	Measures continued through multiple reviews
287	Hot rolled coil steel	Japan, Korea, Malaysia, Taiwan	Original investigation, continuation inquiries followed
658	Hot rolled coil steel	China	Current investigation

Case / EPR	Product	Country of origin	Status / Notes
506	Quenched and tempered (Q&T) plate	Finland, Japan, Sweden	Measures imposed and reviewed
234, 578	Q&T plate	USA, Japan, Sweden, Finland	Subsequent investigations and continuation
HRS sections	Hot rolled structural sections	Japan, Korea, Taiwan, Thailand	Second sunset review currently running

Flat rolled steel, current investigation

The October 2025 BlueScope application opened a fresh investigation against Chinese and South Korean flat rolled product, with a parallel countervailing case against China. The investigation period is 1 July 2024 to 30 June 2025 and the final report is due to the Minister for Industry and Science by 30 March 2026.

Case / EPR	Product	Country of origin	Status / Notes
Initiated Oct 2025	Flat rolled steel	China, South Korea	Anti-dumping investigation, BlueScope applicant
Initiated Oct 2025 (CVD)	Flat rolled steel	China	Parallel countervailing case

Reinforcing bar

Rebar has been a recurring target of Australian anti-dumping action, driven by InfraBuild and previously OneSteel. The most recent investigation, initiated in September 2024, was partially terminated in December 2025 in respect of Vietnamese exporter Hoa Phat.

Case / EPR	Product	Country of origin	Status / Notes
EPR 300 series	Steel reinforcing bar (rebar)	Greece, Spain, Indonesia, Korea, Taiwan, Thailand, Turkey	Greece duty 42.1 percent, Spain 6.3 percent
563	Steel reinforcing bar	China	Measures in force
Initiated 24 Sep 2024	Hot rolled deformed rebar	Indonesia, Thailand, Malaysia, Turkiye, Vietnam	Partially terminated 16 Dec 2025 (no measures against Vietnam Hoa Phat)

Wire rod and rod in coil

Rod in coil from China is the textbook example of stacked Australian measures. The original duty of 37.4 to 53.1 percent imposed in April 2016 was reduced to 39.5 percent in February 2019, continued at 33.1 percent from December 2020, and is now subject to a further continuation inquiry due before the measures expire in April 2026.

Case / EPR	Product	Country of origin	Status / Notes
301	Rod in coil	China	Original investigation 2015
414	Rod in coil	China	Review, duty reduced to 39.5 percent in 2019
643	Rod in coil	China	Continuation, duty continued at 33.1 percent from 25 Dec 2020
675	Rod in coil	China	Continuation inquiry, decision due before April 2026 expiry
416	Rod in coil	Indonesia, Korea, Vietnam	Measures applied to multiple exporters

Hollow structural sections, pipe and tube

Pipe, tube and hollow structural sections cover both welded and seamless product. Australian Tube Mills, Orrcon and ANZ Stainless have lodged the principal applications. Measures have applied at various times to product from China, Korea, Malaysia, Taiwan, Vietnam, India and the UAE.

Case / EPR	Product	Country of origin	Status / Notes
177	Hollow structural sections (HSS)	Multiple Asian origins	Original investigation 2012
320	Hollow structural sections	India, UAE	Measures imposed
590	ERW pipe and tube (CHS, RHS)	China, Korea, Malaysia, Taiwan	Continuation, sunset review pathway
550	Precision pipe and tube	China, Korea, Taiwan, Vietnam	Measures, Vietnam later terminated
689	Precision pipe and tube	China, Korea	Current investigation

Galvanised and aluminium zinc coated steel

Coated coil is BlueScope's core franchise, and Australia's measures against Zinalume and galvanised product have been some of the most contested cases at the WTO. Continuation reviews have kept the original measures in force well beyond the standard five year term.

Case / EPR	Product	Country of origin	Status / Notes
190a	Zinc coated (galvanised) steel	China, Korea, Taiwan	Original investigations
193b	Aluminium zinc coated steel (Zinalume)	China, Korea, Taiwan	Original investigations
410	Aluminium zinc coated steel	China	Continuation
558	Aluminium zinc coated steel (greater than or equal to 600mm)	Korea, Taiwan, Vietnam	Measures imposed

Specialty and derivative steel products

Beyond the headline categories, anti-dumping measures have been used against a long tail of derivative and specialty products. Several of these are tightly defined niche items where one or two Australian manufacturers have driven the application.

Case / EPR	Product	Country of origin	Status / Notes
659	Strata steel bolts	China	Measures notified 2026
Ceiling and wall frames	Cold formed framing	China	10 percent duty imposed February 2026
Corner beads and angles	Plastering accessories	China	27.8 percent duty
Wind towers	Utility scale steel towers	China	Measures expired 16 April 2024
Railway wheels	Forged railway wheels	China	Continued at 13.3 percent from 17 July 2024
Stainless sinks	Deep drawn stainless sinks	China	Revoked generally 25 June 2024
Grinding balls	Forged steel grinding media	China	Measures in force

Summary statistics

The Productivity Commission and the Anti-Dumping Commission publish aggregate figures that give a useful sense of scale.

- Steel products accounted for around 86 percent of new investigations in 2014-15 and now make up over 60 percent of all measures in force.
- Australia has approximately 44 anti-dumping measures in place on 12 steel products from 14 countries.
- Around 84 percent of all measures imposed in the decade to 2014-15 applied to products from Asia. Almost one third of those measures applied to product from China.
- The average dumping duty imposed between 2009 and 2015 was 17 percent, more than three times Australia's maximum scheduled tariff rate of 5 percent.
- Approximately 60 percent of measures eligible for renewal between 2008-09 and 2014-15 were continued. Several Australian measures have been in force for more than 15 years through successive continuations.
- China challenged a basket of Australian measures at the WTO in 2021 (DS603) covering wind towers, deep drawn stainless steel sinks and railway wheels.

Cost impact on Australian steel users

Anti-dumping duties protect domestic producers, but the cost is paid by everyone downstream. For Australian fabricators, structural steel contractors, pipe and tube users, mining service providers, construction contractors and ultimately end clients, the impact falls into four buckets.

Direct input cost increase

A duty added at the border is paid by the importer of record and passed through the supply chain. On rod in coil from China the cumulative effect of consecutive measures has been an input cost premium of 30 to 50 percent above benchmark world prices through most of the post 2016 period.

The Productivity Commission has separately estimated the broader cost of input tariff protection at around 8.1 billion dollars across the economy in 2007-08. Steel sits inside this aggregate as a major contributor.

Lifted domestic price benchmarks

Once measures are in place against the cheapest sources, domestic mills can price up to the duty inclusive landed cost of the next cheapest alternative. The average duty rate on dumped imports rose from around 5 percent in 2006 to 2011 to 15 percent in 2012 to 2015. That is a step change in the price floor for downstream buyers.

Compliance and supply chain cost

Anti-dumping is not free for the user. Importers, fabricators and contractors carry the cost of monitoring measures, lodging exporter declarations, managing accelerated review applications, defending circumvention allegations, and dealing with retrospective assessment outcomes.

Project competitiveness and lost work

Australian fabricators bidding against off-shore competitors on engineered steel work feel the duties twice. Local fabricators pay the duty inclusive input price for steel sourced through dumping affected supply chains. Off-shore fabricators in Asia source the same input at world prices, fabricate, and ship the finished structure to Australia at a landed cost that the local fabricator cannot match.

Estimated total cost order of magnitude

There is no single official figure for the cost of steel anti-dumping to Australian users. A reasonable working estimate for the steel specific cost to downstream Australian users sits in the hundreds of millions to low billions per year, depending on how indirect effects are scoped.

Price comparison, Australian domestic vs imported steel, with and without duty

The table below shows where Australian steel pricing sits relative to true world benchmark and to the duty inclusive landed cost of the cheapest comparable import. All figures are indicative AUD per tonne, ex-mill or DDP equivalent, as at May 2026.

The un-tariffed column is the landed cost of imported product before any anti-dumping duty is applied. This is the genuine international benchmark. The tariff adjusted column adds the relevant anti-dumping duty for that product. The two right hand columns express the Australian price as a percentage premium over each.

The premium versus world price is the total cost penalty borne by Australian steel users. The premium versus tariff adjusted price isolates the additional uplift Australian mills capture on top of the duty inclusive landed cost, which is the local market power effect.

Product	Australian price (AUD/t)	Imported, un-tariffed (AUD/t)	Imported, tariff adjusted (AUD/t)	Aus premium vs world price	Aus premium vs tariff price
Hot rolled coil (HRC)	\$1,350 to \$1,550	\$750 to \$900	\$1,000 to \$1,150	+76%	+35%
Hot rolled plate	\$1,800 to \$2,000	\$950 to \$1,100	\$1,250 to \$1,400	+90%	+43%
Quenched and tempered plate	\$2,600 to \$2,900	\$1,800 to \$2,000	\$2,150 to \$2,400	+45%	+21%
Hot rolled structural sections	\$1,550 to \$1,750	\$900 to \$1,050	\$1,150 to \$1,300	+69%	+35%
Steel reinforcing bar (rebar)	\$1,250 to \$1,400	\$875 to \$1,000	\$1,050 to \$1,200	+41%	+18%
Rod in coil (wire rod)	\$1,150 to \$1,300	\$700 to \$850	\$950 to \$1,100	+58%	+20%
Hollow structural sections (CHS, RHS)	\$1,800 to \$2,100	\$1,050 to \$1,200	\$1,350 to \$1,550	+73%	+34%
Precision pipe and tube	\$2,200 to \$2,500	\$1,300 to \$1,500	\$1,700 to \$1,950	+68%	+29%
Galvanised coil	\$1,750 to \$1,950	\$1,000 to \$1,150	\$1,300 to \$1,500	+72%	+32%
Aluminium zinc coated coil (Zincalume)	\$2,000 to \$2,250	\$1,150 to \$1,300	\$1,500 to \$1,700	+73%	+33%
Steel ceiling and wall framing	\$2,400 to \$2,700	\$1,850 to \$2,100	\$2,050 to \$2,300	+29%	+17%

On a like for like basis, Australian steel sits 30 to 90 percent above true world benchmark depending on product. Even after the anti-dumping duty has lifted the imported price, Australian mills are pricing a further 17 to 43 percent above that. The structural sections, hollow sections and coated coil categories show the

largest gap, which aligns with the categories carrying the heaviest stack of measures and the most concentrated domestic supply.

Read internationally, that places Australia among the highest priced steel markets in the developed world. The OECD average for HRC sits in the range of 1.10 to 1.25 times world benchmark. Australia sits closer to 1.70 to 1.90 times. That is the cost the downstream Australian economy carries to keep two domestic mills in business.

Sources

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