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LA COMMUNITY DELL'ACCIAIO

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Editor Kallanish
Collaboratore Siderweb

Evoluzione dei mercati internazionali dell'acciaio:
Materie prime e prodotti piani

con il supporto di

ABS

Acciaieria Arvedi

ACCIAIERIE VENETE SPA

DANIELI

Duferco TRAVI E PROFILATI

FERALPI GROUP

bendotti 1916

GRUPPO gabrielli STEEL SERVICE NETWORK

LACISA Innovative Logistics

MADE IN STEEL

MARCEGAGLIA

metallurgica legnanese s.p.a.

MORANDI STEEL OVER THE TUBES

ORI MARTIN

PIPEX Italia

RICREA CONSORZIO NAZIONALE RICICLO E RECUPERO IMBALLAGGI ACCIAIO

SAS ENGINEERING AND PLANNING

Sideralba The steel you need

SLINGOFER 60 YEARS 1961 - 2021

Zaninoni INTERNATIONAL FORWARDING AGENT SPA

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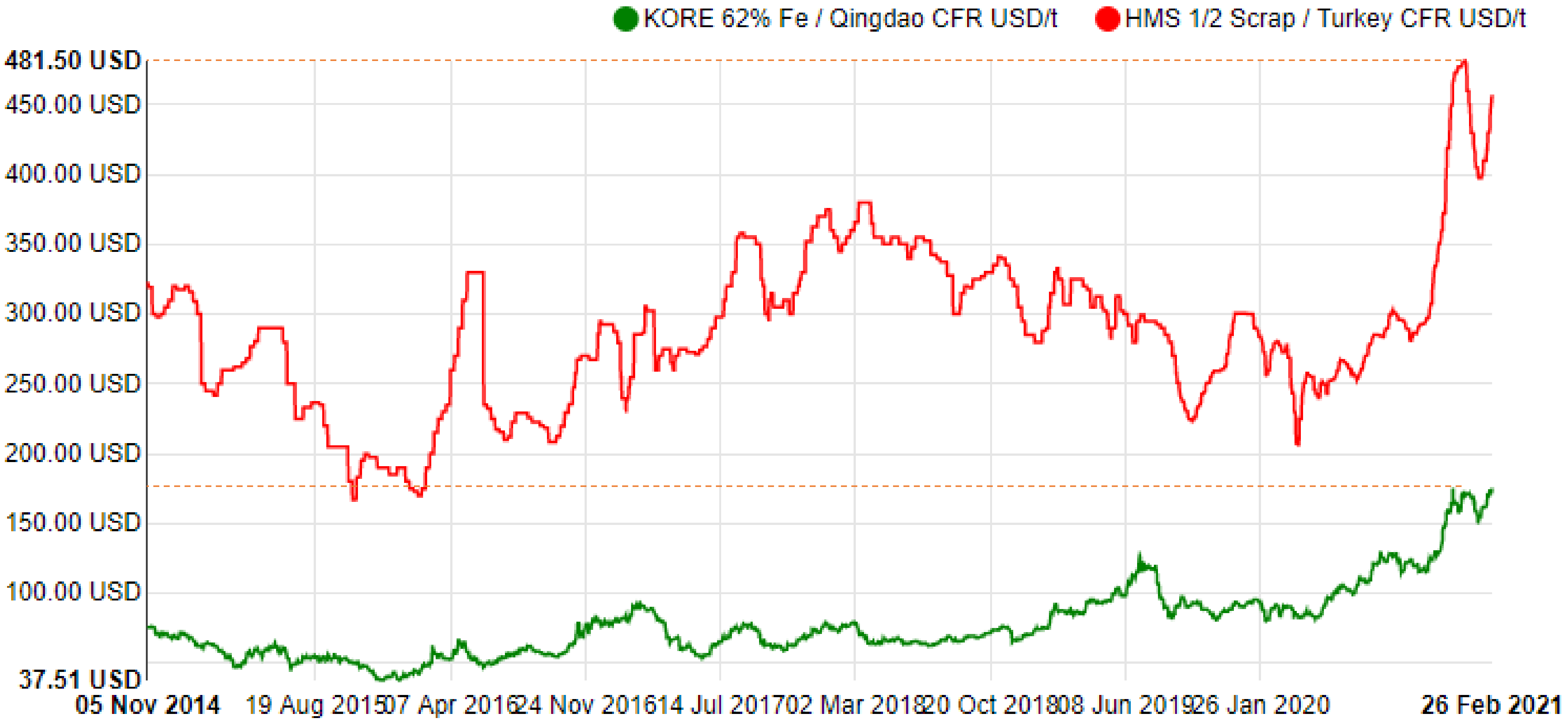
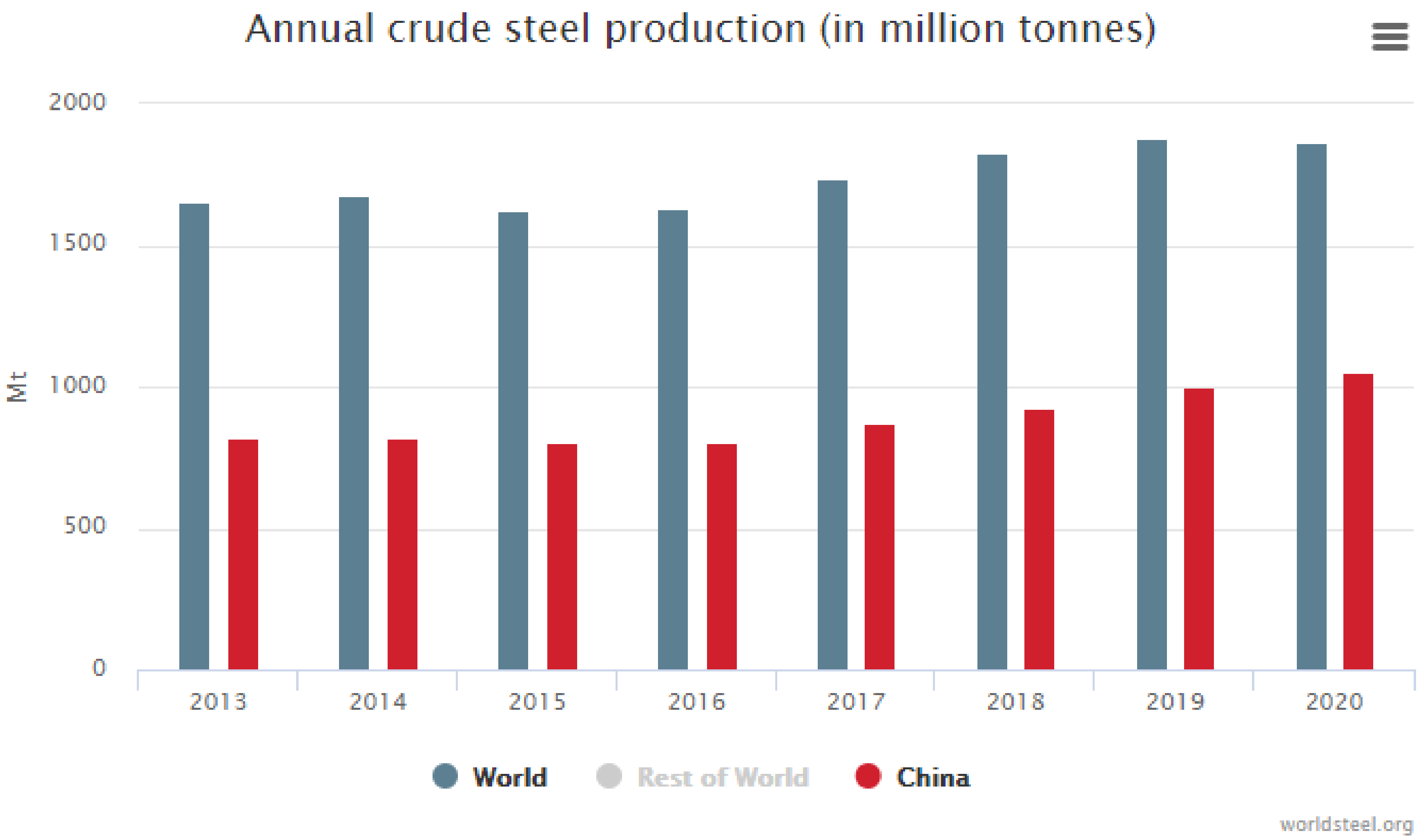


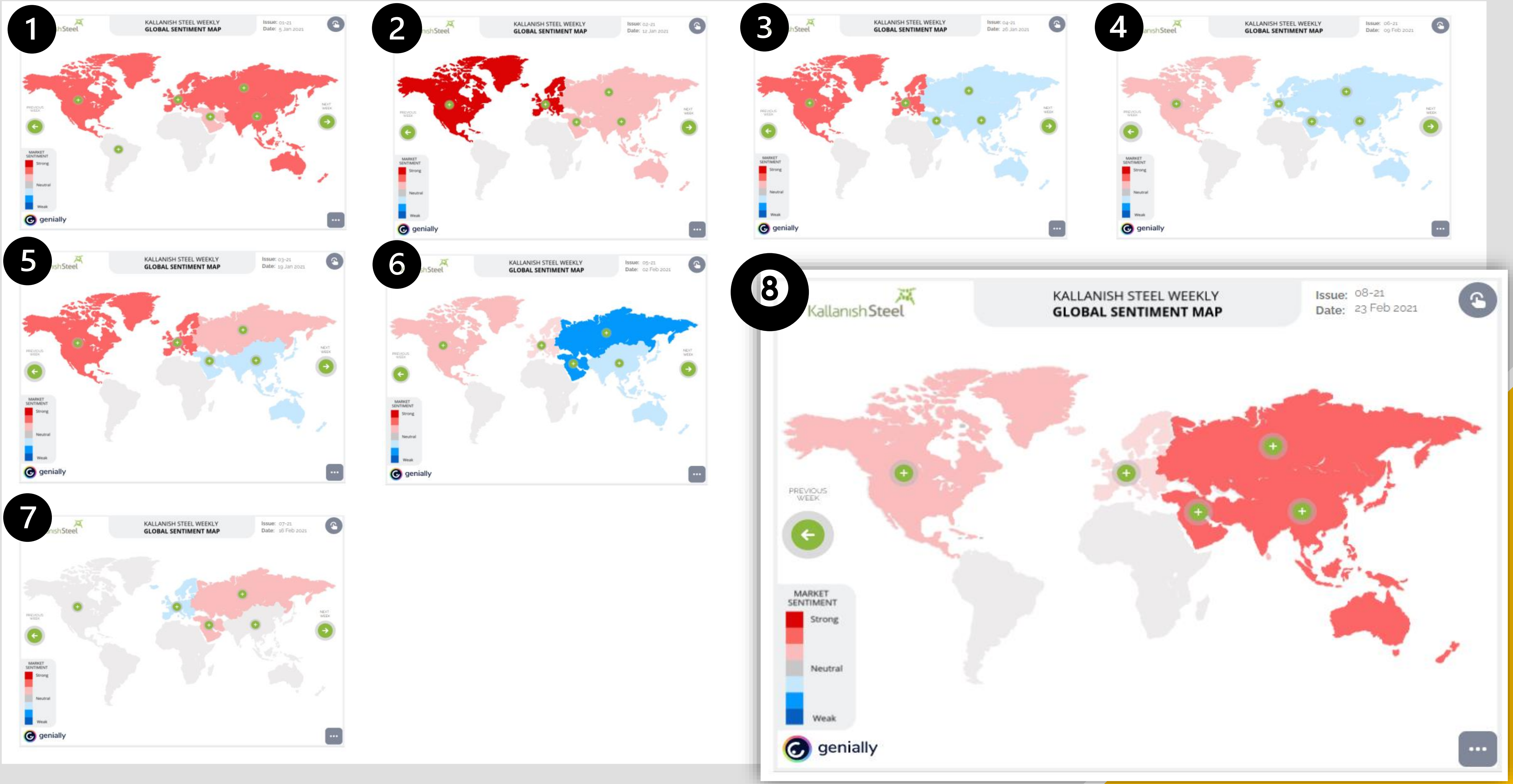
Fitch Ratings has revised up its 2021 iron ore price assumption significantly due to tight market supply that is expected to continue in the next couple of years.

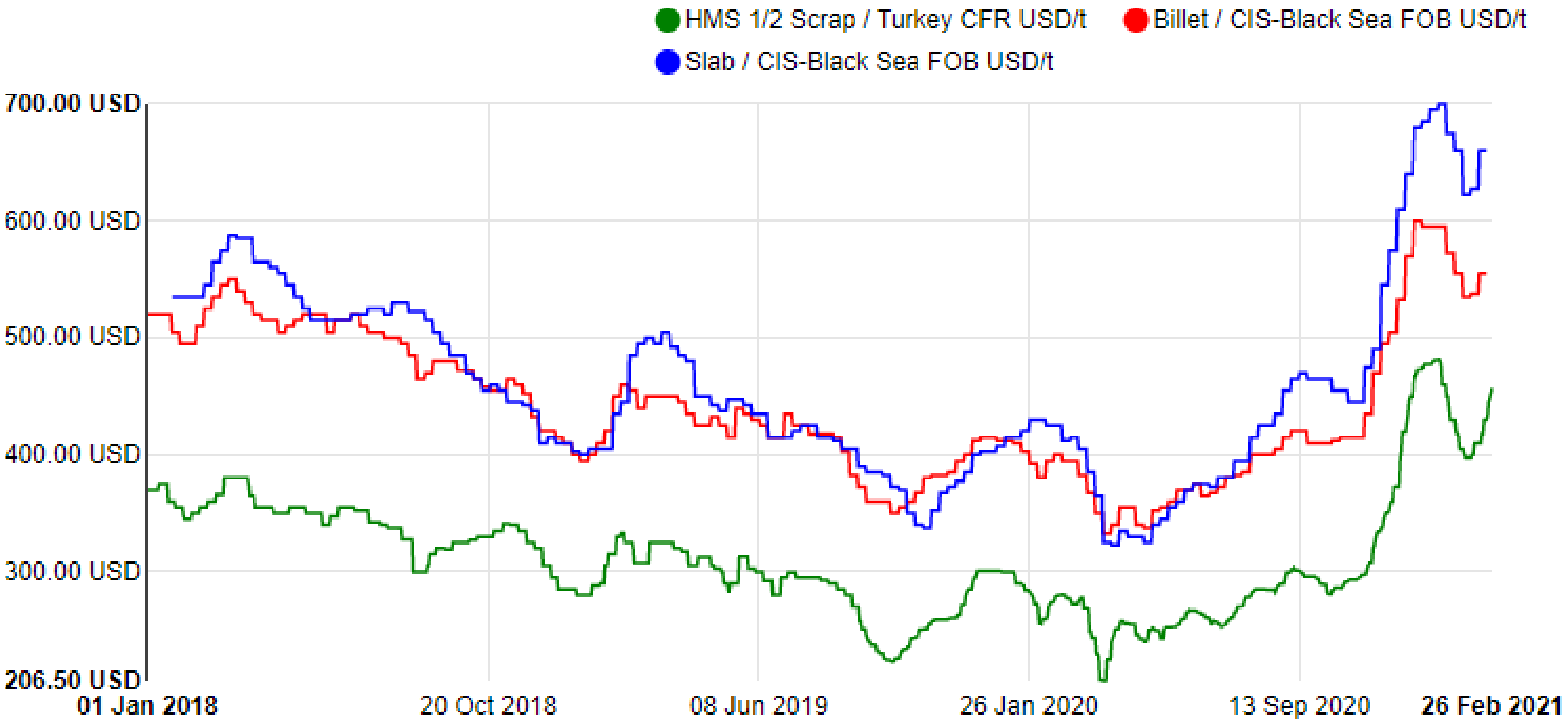
Iron ore in 2021 is now seen averaging at **$125/tonne cfr China for 62% Fe fines**, versus the previous assumption of $75/t and the actual 2020 value of $108/t.

“Vale has cut its production guidance for 2021, resulting in no supply response to growing demand, with all large-scale iron ore producers operating at almost full capacity,” Fitch tells. “Inventories are running low, while we expect additional demand linked to US and European economic stimulus packages.”

Fitch assumption for hard coking coal prices has been revised up **$5/t to $135/t fob Australia** in 2021. This is versus the actual 2020 price of $123/t. The improvement is due to robust demand from the steel sector, supported by recovering steel production in India, Japan, South Korea and Europe.


Annual crude steel production (in million tonnes)
2000
1500
1000
500
0
Mt
2013
2014
2015
2016
2017
2018
2019
2020
World
Rest of World
China
worldsteel.org


1
KALLANISH STEEL WEEKLY
GLOBAL SENTIMENT MAP
Issue: 01-21
Date: 5 Jan 2021
2
KALLANISH STEEL WEEKLY
GLOBAL SENTIMENT MAP
Issue: 02-21
Date: 12 Jan 2021
3
KALLANISH STEEL WEEKLY
GLOBAL SENTIMENT MAP
Issue: 04-21
Date: 26 Jan 2021
4
KALLANISH STEEL WEEKLY
GLOBAL SENTIMENT MAP
Issue: 06-21
Date: 09 Feb 2021
5
KALLANISH STEEL WEEKLY
GLOBAL SENTIMENT MAP
Issue: 03-21
Date: 19 Jan 2021
6
KALLANISH STEEL WEEKLY
GLOBAL SENTIMENT MAP
Issue: 05-21
Date: 02 Feb 2021
7
KALLANISH STEEL WEEKLY
GLOBAL SENTIMENT MAP
Issue: 07-21
Date: 16 Feb 2021
8
KallanishSteel
KALLANISH STEEL WEEKLY
GLOBAL SENTIMENT MAP
Issue: 08-21
Date: 23 Feb 2021
PREVIOUS WEEK
MARKET SENTIMENT
Strong
Neutral
Weak
genially


HMS 1/2 Scrap / Turkey CFR USD/t
Billet / CIS-Black Sea FOB USD/t
Slab / CIS-Black Sea FOB USD/t
700.00 USD
600.00 USD
500.00 USD
400.00 USD
300.00 USD
206.50 USD
01 Jan 2018
20 Oct 2018
08 Jun 2019
26 Jan 2020
13 Sep 2020
26 Feb 2021

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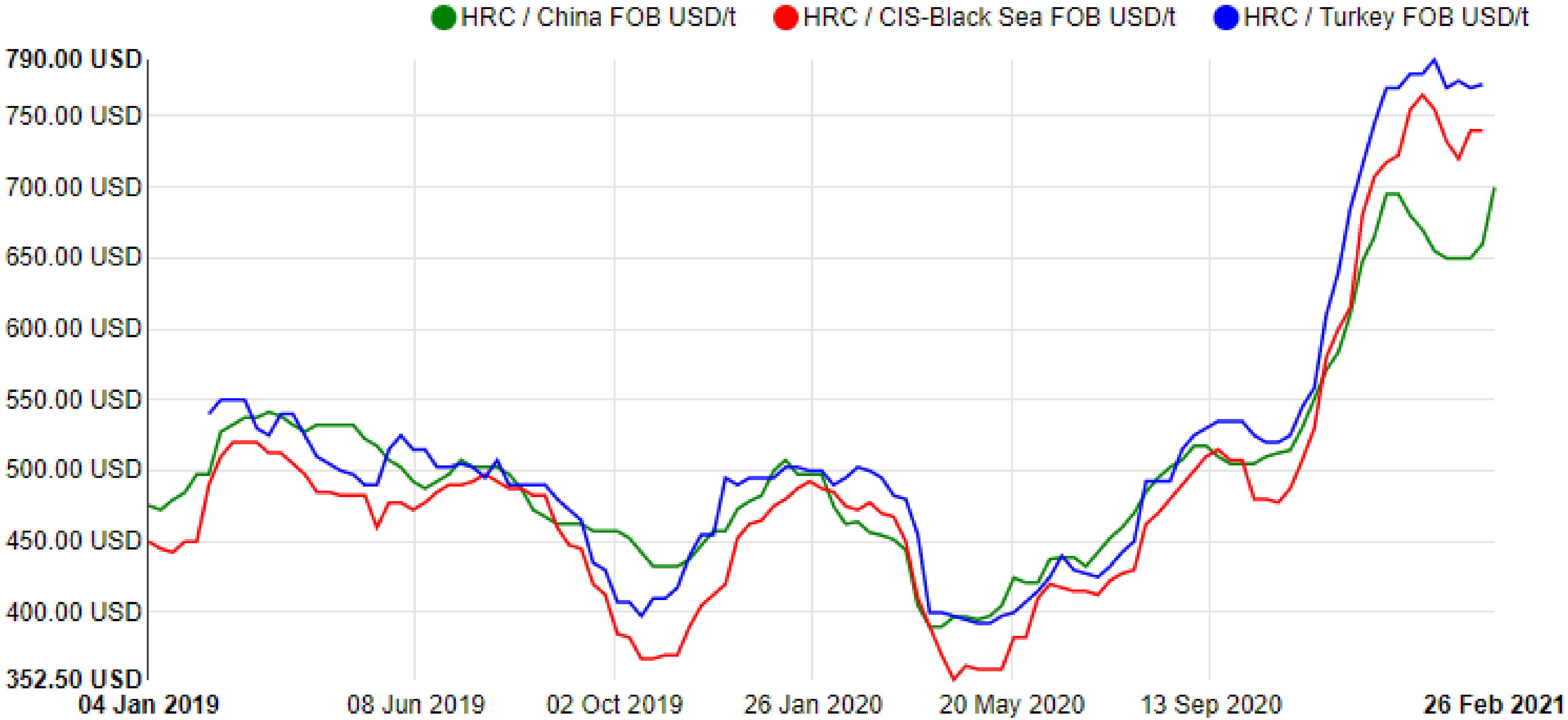

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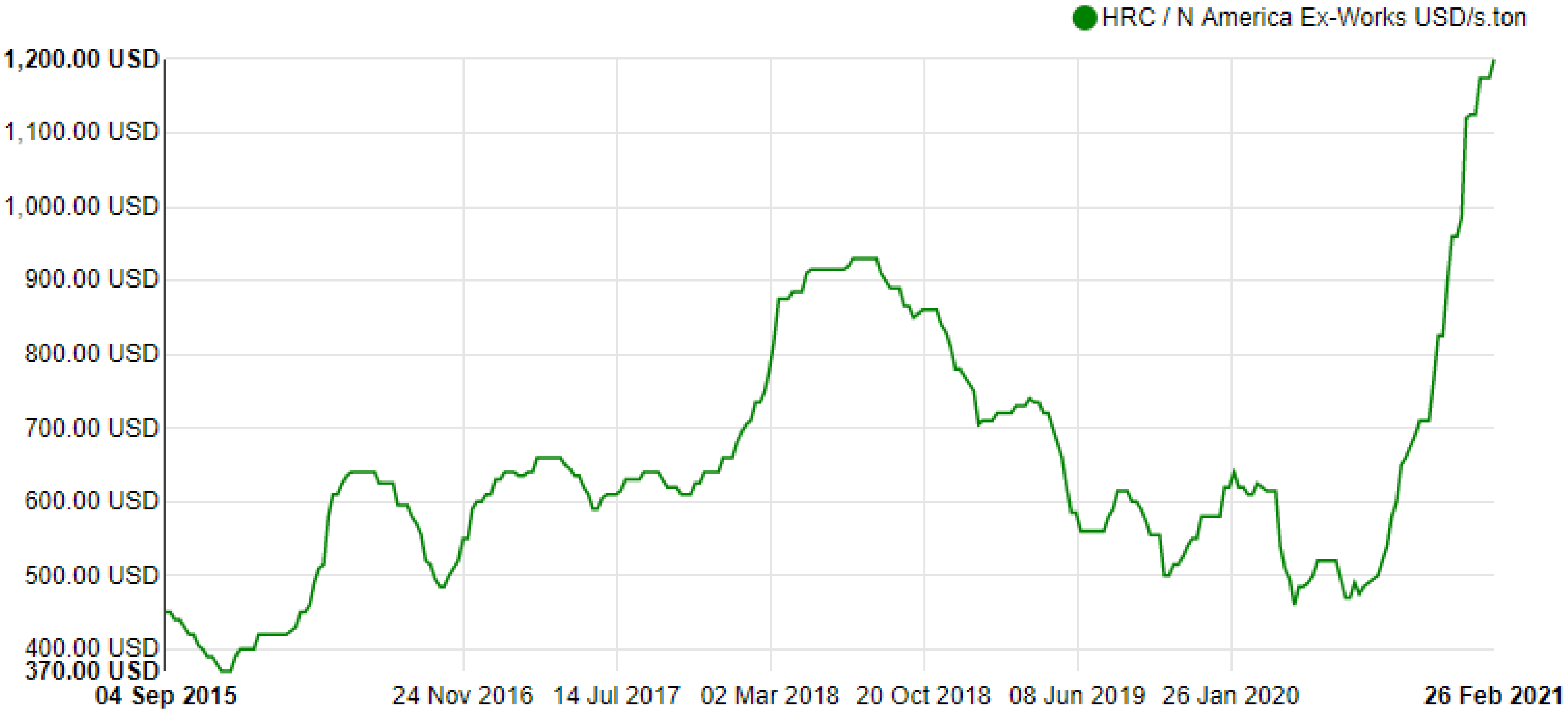
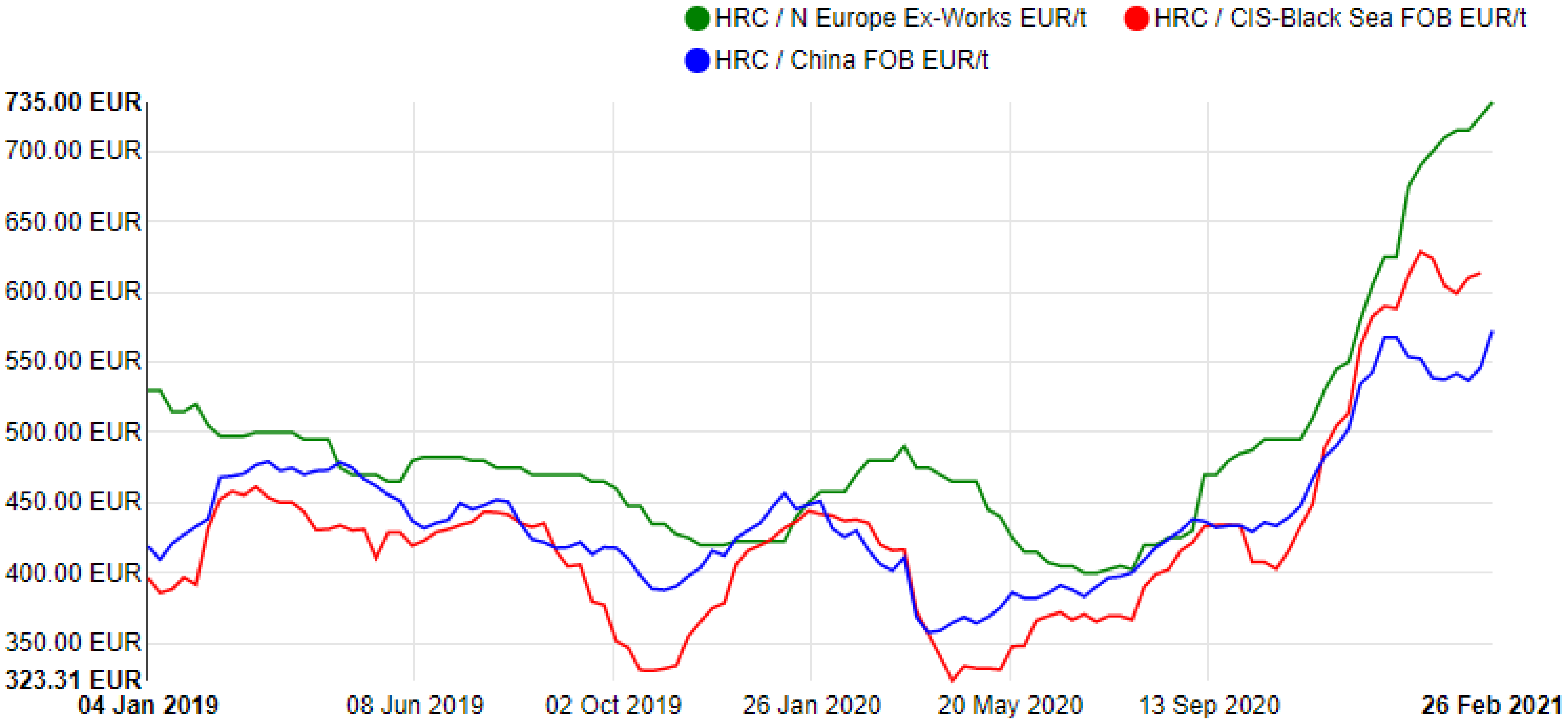



HRC / N Europe Ex-Works EUR/t
HRC / CIS-Black Sea FOB EUR/t
HRC / China FOB EUR/t
735.00 EUR
700.00 EUR
650.00 EUR
600.00 EUR
550.00 EUR
500.00 EUR
450.00 EUR
400.00 EUR
350.00 EUR
323.31 EUR
04 Jan 2019
08 Jun 2019
02 Oct 2019
26 Jan 2020
20 May 2020
13 Sep 2020
26 Feb 2021

Winter triggers force majeure in Germany

Thyssenkrupp warns customers of continued bottlenecks

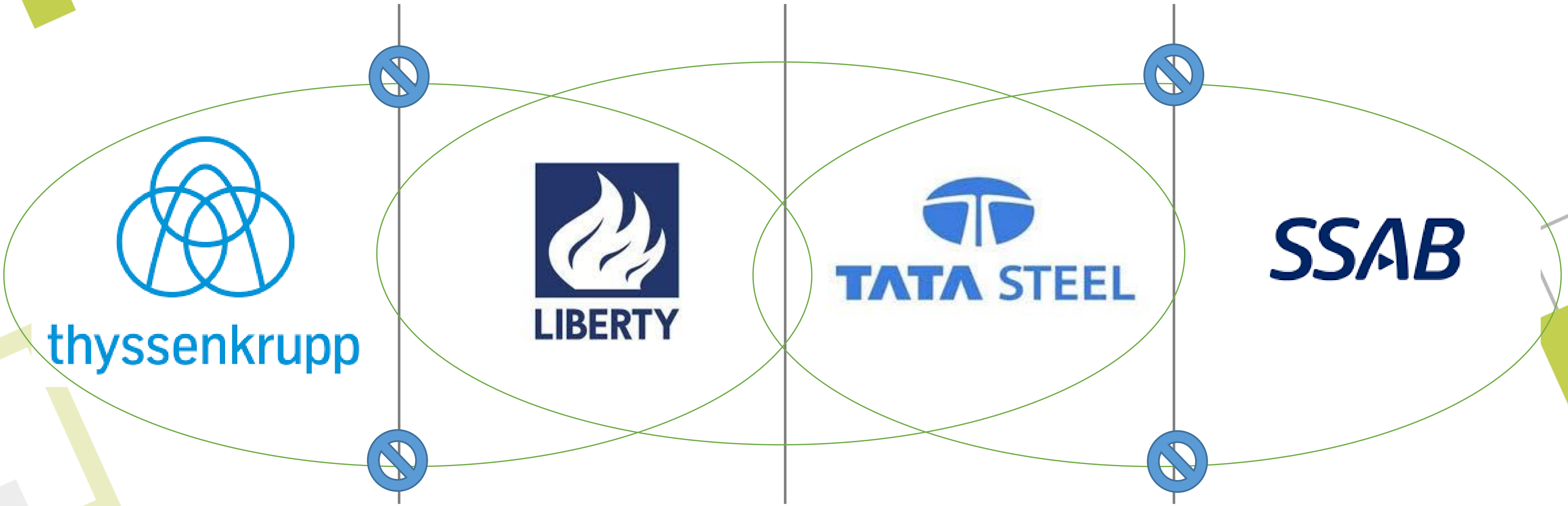
NLMK La Louviere stops strip mill for revamp

ArcelorMittal Gent eyes end-February blast furnace restart

EUROMETAL DECEMBER STOCKS

EU SSC 91 days | -23 days y-o-y

PROXIMITY DISTRIBUTORS 96 days | -21 days y-o-y


thyssenkrupp
LIBERTY
TATA STEEL
SSAB

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Grazie

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