A New Age for Steel Metallics: A Global Market Outlook to 2020

- Obsolete Scrap
- Prompt Industrial Scrap
- Home (Revert) Scrap
- Pig Iron
- DRI/HBI

Also featuring coverage on:
- Iron Ore

- Which markets are best-positioned to take advantage of changes in global supply and demand dynamics?
- When will China be self-sufficient in ferrous scrap?
- What is the outlook for raw material pricing out to 2020?
What will be the relative supply and demand positions of revert (home), prompt and obsolete scrap?

Who will be the losers and winners out to 2020?

When will China be self-sufficient in ferrous scrap and what will this mean going forward for future global scrap prices?

The most comprehensive, data intensive and insightful study on steel raw materials ever published by Metal Bulletin Research providing coverage for Iron Ore, Scrap, DRI/HBI and Pig Iron for the top 40 major markets.

Industry leaders need to understand the supply, demand and pricing dynamics for iron ore, DRI/HBI, pig iron and scrap to stay ahead of the curve, to be in the know and to best compete in ever challenging economic environments.

Metal Bulletin Research have published an in-depth study, A New Age for Steel Metallics: A Global Market Outlook to 2020 for Obsolete Scrap, Prompt Industrial Scrap, Home (Revert) Scrap, Pig Iron, DRI/HBI and Iron Ore which provides detailed and authoritative analysis of past trends and forecasts to 2020 for the complete supply chain of the world steel metallics industry for all the key products and sectors.

This 600 page study has been designed specifically to be rigorous, reliable and credible to best enable the C-Suite to make long term and actionable strategic decisions at both a local and global level:

- Where will tomorrow’s iron units for steel-making come from?
- What are the future demand and pricing trends for prompt industrial and obsolete scrap for suppliers and buyers alike?
- Is the steel and steel raw material industry poised for sustained profitability, or is there a turning point in the current super-cycle led by overcapacity in raw materials?
- What will be the role of China in influencing the global metallics market out to 2020?
The most sophisticated global study on Steel Metallics offering expert analysis, forecasting and independent guidance:

**Crude Steel Production and Raw Materials Demand Analysis**
- Global production by process route
- Regional costs and comparative advantage analysis in steelmaking affecting location and choice of process route
- The impact of climate change and emissions control on future steelmaking
- GDP per capita steel consumption trends and forecasts by country
- Steel consumption forecasts by market
- Steel and raw material price forecasts by major market

**The Ferrous Scrap Market**
- How far beyond will global scrap generation increase from 624m tonnes as of 2010?
- Types of scrap collection and distribution
- Scrap generation rates by top 40 markets, split by obsolete, home (revert) and prompt industrial grades
- Trends in scrap trade
- Coverage of flexible methods of shipping scrap, including containers
- Self-sufficiency ratios analysis: who has scrap and who needs it out to 2020?

**The DRI/HBI Market**
- Will DRI/HBI fulfil its potential as a steel metallic by 2020?
- Can merchant DRI/HBI effectively compete with merchant pig iron produced in low cost markets with excess capacity?
- Supply and demand analysis of production, consumption and trade and price trends by country
- Technical and cost developments

**The Merchant Pig Iron Market**
- The growth of merchant pig iron vs DRI/HBI
- Supply and demand analysis of production, consumption and trade and price trends by country
- Technical and cost developments
- The role of internationally traded pig iron in the global metallic market

**The Iron Ore Market**
- Will China continue to consume over 50% of the global market for iron ore out to 2020?
- How are prices determined and what are future contract/spot trends?
- Trends in supplying countries out to 2020
- Concentration and market dominance
- The politics of the iron ore business and the future role of China
- Key price and margin analysis

**Relative Cost of Different Steelmaking Routes**
- Cost modelling utilising differing assumptions on process routes
- Relating analysis to actual regional differences in steelmaking costs
- The impact of technology
- Impact on future costs, given possible and likely changes in raw material, energy and transport costs

**Forecast Supply and Demand Balances out to 2020**
- Production, trade and consumption by top 40 countries and by steel metallic product
- The demand and price dynamics for steel raw materials out to 2020
- Comparisons of raw material prices and finished steel products
- Self-sufficiency ratios for top 40 countries

**Over 40 key countries covered in this study including:**
- Australia, Brazil, China, India, Turkey, Ukraine, USA, Venezuela
- Over 90 more markets available on request
A Global Market Outlook to 2020 for Obsolete Scrap, Prompt Industrial Scrap, Home (Revert) Scrap, Pig Iron, DRI/HBI and Iron Ore

- Provides supply and demand statistics and analysis by top 40 markets (1985-2011) by steel metallic product with forecasts for the next eight years;
- Details production, imports, exports and apparent consumption by top 40 countries for each steel metallic product;
- Assesses the future role of DRI/HBI in the global metallic market out to 2020;
- Assesses the role of internationally traded pig iron in the global metallics market;
- Provides iron ore supply demand balance by country 1985-2011;
- Gives steel pricing forecasts for the next eight years; includes a detailed breakdown of scrap generation by country:
  - Prompt Industrial Scrap
  - Obsolete Scrap
  - Home (Revert) Scrap
  - Assesses the future role of China and how it will influence the global metallics market out to 2020;
  - Detailed SWOT analysis and profiling by top 40 markets:
    - Country dashboard – high level understanding for each country by each steel metallic
    - Country specific metrics (production, imports, exports, apparent consumption) including iron ore, scrap (split by obsolete, prompt industrial, home), DRI/HBI and pig iron
  - Details scrap dependency (1985-2011) by county, and eight year dependency forecast;
  - Provides scrap apparent consumption by country and how that has changed in the last 25 years and how it will change for the next eight years;
  - Assesses how trends in steelmaking impact the global metallic market balance;
  - Analyses the winners and potential losers in the global quest to secure metallics in the next eight years.

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Why is this study unique?

- Open and rigorous study into metallics supply/demand and pricing with an eight year forecast;
- Unprecedented data coverage of scrap generation rates by country and by major type;
- Independent study based on reliable and exhaustive database by market and product (1985 – 2020);
- Vast industry expertise and knowledge from Metal Bulletin Research consultants;
- Addresses the key issues that keep the C-suite up at night;
- Invaluable for making long term strategic decisions and short term tactical moves;
- Credible forecasting methodology using sophisticated Vector Autoregression with Exogenous Variables – known as the VARX model;
- After sales support and access to analysts.

Biographies of authors

**Brian Levich** – Head of Research
In the past 10 years Brian has covered the global steel and raw material sectors in detail. He has written numerous major reports and has done extensive consultancy and market research work for a number of major steel producers and consumers as well as for financial institutions. He holds an MA with Distinction in Economics.

**Russell Egge** – Principal Consultant
Russell has 18 years of experience as a strategic consultant for the global metals and iron ore mining industry. Russell has worked at Arthur D. Little, Accenture and Deloitte. He has significant experience in helping metals and mining clients identify, quantify, prioritize and capture value creation opportunities. Russell has a degree in Materials and Metallurgical Engineering from the University of Michigan (Ann Arbor Michigan) and a Masters Science in International Management from Rensselaer Polytechnic Institute (Hartford Connecticut).

**Craig Alexander** – Econometrics Consultant
Craig has worked for both McKinsey & Company and Accenture. At McKinsey he worked on general strategic issues with a large public utility, several beverage companies and a major natural resources firm. At Accenture he undertook strategic projects with two major steel firms and an international iron ore mining client. Craig studied economics at the University of Cambridge, where he took a First Class degree. He subsequently undertook postgraduate study at MIT in econometrics and public finance.
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• The Indian Steel Industry: Market Projections & Company Strategies out to 2015
• Trading Iron Ore: A full feasibility study for a new derivatives contract
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