

Russian steel scrap market. Features, trends, forecast

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Abstracts

The report is available in the Russian language. If you would like to order the English version of the report, it will be delivered to you within one business week.

Raw material supply to electric steel producers is a central issue now, as their capacities have soared in recent years and the rise continues. The expected decrease in scrap export duties is one of crucial factors here. Whether there will be enough scrap can be understood only through detailed analysis of the regional market balances that allows for the expected scrap demand and generation dynamics.

In the new research called “Russian steel scrap market. Features, trends, forecast”, Metal Expert Consulting in detail examines ferrous scrap generation, collection, shipments and consumption in Russia. An overview of competition in the regional markets is given, export statistics and Russia’s positions in the global trade are analyzed. Price formation issues are studied, factors affecting price formation and indicators that may be used in price forecasting are determined. The market balance and changes in commodity flows in the period until 2015 are assessed using the optimization model of the Russian scrap market developed by Metal Expert Consulting.

The study results show that in the medium term the Russian market will undergo big changes, which means new opportunities for players.

The research “Russian steel scrap market. Features, trends, forecast” includes 65 pages of analytical data with graphs and tables in a pdf format, as well as an excel supplement that includes detailed statistics (the period between 2008 and 2012).

Preparing the research, Metal Expert Consulting used the following information:

scrap consumption by company;

railway statistics, and its analysis enabled assessment of:

scrap shipments to steel producers, regional supply structure;

scrap collection in Russia's districts;

scrap shipments to certain scrap collectors, structure of their supplies by district;

steel product and pipe consumption by district and sector (source – Metal Expert). The data analysis enabled Metal Expert Consulting to estimate new scrap generation volumes, its structure by sectors and districts, to define the key “scrap generators”. The analysis, as well as estimates of overall scrap collection and new scrap generation volumes, has been the basis for estimates of obsolete scrap collection and its structure by districts;

Russian steel market statistics. The statistics were analysed to assess Russia's scrap reserves (both by district and in the country as a whole), provide basis for scrap collection volumes and make scrap collection forecasts for the medium term;

Russian steelmakers' purchase prices Metal Expert collects every month (data on purchase prices of 14 companies since January 2011) were used to calculate average weighted prices (taking into account scrap shipments to mills), both for the country as a whole and for the Central, Urals and Southern Federal Districts;

data on consumption coefficients in pig iron, crude steel and rolled steel production, allowing assessment of a mill's need for each of the raw materials, assessment of home scrap generation;

prices in the raw material market, collected weekly by Metal Expert.

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