

Markets Report

In the news this week:

ASEAN steel demand seen recovering in 2022-23

ASEAN steel demand is expected to rise in the coming two years as construction activity in the region recovers, according to worldsteel economic studies director Han Nae Hee. She said ASEAN is more insulated from the current global economic situation compared to other regions.

Pakistan to impose 10% tax on steel industry

Pakistan announced on 24 June it will impose a 10% "super tax" on large-scale industries, including the steel industry, in a bid to consolidate revenue and control inflation. The new tax will be imposed from the next fiscal year beginning 1 July 2022.

Malaysian steel demand to rise: MISIF

The Malaysian Iron and Steel Industry Federation president Lim Hong Thye says he foresees Malaysia's ASC will rise to 7.8 million tonnes in 2022 and 8.5mt in 2023. The increase will be supported by foreign investment in the electrical and electronics, paper mills and logistics sectors, which is expected to spur construction activity.

Krakatau Steel lifts production, targets automotive steel

PT Krakatau Steel Tbk (KRAS) plans to expand production capacity and start the supply of automotive steel. It will focus on increasing capacity in order to achieve the target of 10m t/y of steelmaking for the Cilegon steel cluster by 2030.

Malaysia's vehicle sales fall on-month in May

Malaysia's total vehicle sales slipped 11.76% from April to 49,603 units in May due to the shortage of chips and components and logistics disruptions. The Malaysian Automotive Association expects sales in June to be better than May, underpinned by impetus from a sales tax exemption for consumers to buy passenger vehicles and an aggressive push for sales by car companies.

Lingyuan Steel, Angang plan reorganisation

Lingyuan Iron & Steel Group in northeastern China's Liaoning province announced on 22 June that it plans to restructure with Anshan Iron & Steel Group (Angang). After acquiring Lingyuan Steel, Angang would be close to achieving this capacity target of 70m t/y, with 69m t/y of steelmaking capacity.

Vale partners InvestPerak to attract investment

Vale and Malaysia's InvestPerak have jointly organised a visit by five South American ambassadors to the Teluk Rubiah Maritime Terminal (TRMT). Vale invests \$1.4 billion in TRMT and the distribution hub in Manjung is designed to handle 30m t/y of iron ore.

Japan's steel consumption weakens in April

Japan Iron & Steel Federation (JISF) data shows grand total consumption stood at 5.32mt in April, down 5.1% from March and 2.4% on-year. Of that, exports rose 2.4% on-year to 2.11mt but domestic consumption was down 4.8% at 3.13mt, including intra-traded volumes among reporting companies.

Posco plans EAF for carbon reduction

Posco is discussing feasibility plans for two 2.5m t/y continuously-feeding and preheating EAFs with international steel equipment suppliers such as Danieli, Tenova, SMS, Primetals. The EAF to be installed at the Gwangyang plant will be introduced in 2025, and the other at Pohang will be completed in 2027.

Flats

Page 2

Longs

Page 3

Semis

Page 4

Raw Materials

Page 5

Publishing Days

The Kallanish South East Asian Steel Markets report is published in sections to enable us to deliver our readers the most up to date and timely information.

Mondays: Markets Report
Wednesdays: Production Report

Country trade data is published as soon as it becomes available.

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Markets Report: Flats

Key Market Indicators

Indicator	Value	Change
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Markets Report: Longs

MARKET SUMMARY

Price of Longs (USD/MT)	↑ 10%	↑ 15%	↑ 20%
Price of Rebar (USD/MT)	↑ 12%	↑ 18%	↑ 22%

The market for long steel products in South East Asia has shown a steady upward trend over the past few months. This is primarily due to increased demand from the construction sector, particularly in the Philippines and Indonesia. The price of long steel has risen by approximately 10% over the last quarter, with rebar prices showing a similar but slightly higher increase.



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Markets Report: Semis

Summary of market trends and key indicators for the Semis market in South East Asia.

Indicator	Value	Change
Price Index	100.00	+0.50
Volume Index	100.00	+0.20
Inventory Index	100.00	+0.10
Production Index	100.00	+0.30

Market analysis text block 1.

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Market analysis text block 3.

Market analysis text block 4.

Market analysis text block 5.

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Markets Report: Raw Materials

Key highlights from the report, including market trends and regional performance. This section provides a summary of the raw materials market in South East Asia, covering various commodities and their price movements.

Commodity	Unit	Current Price	Change	High	Low
Iron Ore	USD/MT	115	↓	120	110
Alumina	USD/MT	2200	↓	2300	2100
Coal	USD/MT	180	↓	190	170
Steel Scrap	USD/MT	120	↓	130	110

Market analysis and commentary on the raw materials sector. This section discusses the factors influencing prices, such as supply and demand dynamics, and provides insights into the regional market's outlook.



Additional market insights and regional updates. This section provides further details on the raw materials market, including regional supply and demand trends and their impact on prices.

Regional market performance and outlook. This section focuses on the specific market conditions in South East Asia, highlighting regional supply and demand trends and their impact on raw materials prices.

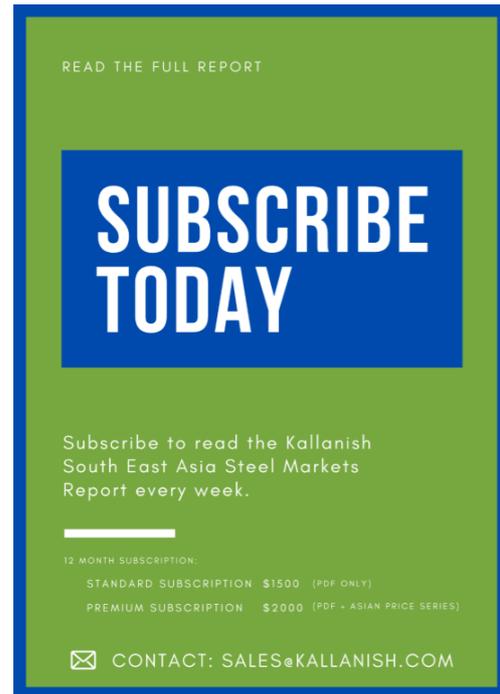
Global market trends and their impact on the region. This section discusses the broader global market context, including international trade and supply chain issues, and how these factors influence the raw materials market in South East Asia.

About Kallanish

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Markets Report: Raw Materials Continued from previous page

▶ The markets report continues from the previous page, providing detailed analysis of raw materials prices and trends in the South East Asian region. The report covers various commodities such as iron ore, coal, and steel, and discusses the impact of global market conditions on the local industry. It also includes forecasts and recommendations for stakeholders in the sector.



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