

Mineral Industry Surveys

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TIN IN JULY 2000

Domestic consumption of primary tin in July was estimated by the U.S. Geological Survey to be slightly lower than that in June and 4% lower than that in July 1999.

The *Platt's Metals Week* average composite price for tin in July was \$3.66 per pound, slightly lower than that in June and 2% higher than that in July 1999.

The U.S. International Trade Commission (ITC) voted 4-2 to impose a 95% anti-dumping duty on most tinplate imports from Japan. The final affirmative injury determination drew a strong negative response from Japanese tin mills because the ITC found injury in a case that had only one domestic tin mill petitioner, Weirton Steel Corp., Weirton, WV. Weirton, the only one of seven major U.S. tinplate producers to file the antidumping petition, claimed that the ITC ruling was crucial for the company's long-term viability. Weirton is the largest U.S. tinplate producer, with a 22% market share. The company derives about 40% of its total revenue from tinplate sales. Weirton also ranks as one of the major U.S. tin consumers. The ITC's 95% duty will apply to imports from Nippon Steel, NKK Corp., Kawasaki Steel, and Toyo Kohan, the major Japanese tinplate exporters. The United States imported about 337,000 metric tons of tinplate from Japan last year, up from an average of about 210,000 tons annually in the prior three years (Metal Bulletin, 2000b).

In Tokyo, it was announced that a new low-pollution, high-efficiency tinplate electrolyte jointly developed by NKK Corp. and Learonal Japan Inc. will be marketed to steelmakers worldwide. The environment-friendly product is a two-in-one electrolyte that enables uniform plating in a wide range of electric current densities and achieves a productivity equal or superior to that of halogen-based electrolytes but generates virtually no fluoride sludge (American Metal Market, 2000).

Argentina's only tinplate producer, Siderar SAIC, has returned to production its only tinning line, following modernization by Techint Technologies (Pittsburgh, PA). The line's speed was increased from 244 meters per minute to 305 meters per minute, with a further upgrade to 365 meters per minute due this year. The line's capacity is now 150,000 tons annually compared to a previous 120,000 tons annually. Siderar's tinning line produces mainly for domestic markets (Metal Bulletin, 2000a).

Japan's tin consumption may decline due to erosion of tinplate markets for beverage cans caused by competition from plastic bottles. Although aluminum sheet is competitive against plastic bottles in Japan, tinplate is not. Aluminum is used primarily in cans for beer and some malt beverages. Some beer distributors have considered using plastic bottles for beer containers, but a shift from cans is not expected. Tinplate, however, is used in soft drink cans, a market that lower-cost plastic bottles have largely captured. Japan's output of steel cans (mostly tinplated) was 196,000 tons in 1999, up 2% from 1998, but down 13% from 1995. Another factor reducing demand for tinplate is the recent imposition of antidumping duties on Japanese tinplate by the ITC. In effect, the duties reduced access to one of Japan's largest export markets (Platt's Metals Week, 2000b).

In South America, two of the continent's tin producers announced plans to expand production. Minsur, Peru's lone tin miner, plans to expand production to about 35,000 tons of tin-in-concentrate during 2000, up from 31,000 tons in 1999. Minsur's Funsur tin smelter production is expected to reach 22,000 tons of tin metal in 2000, compared with 18,000 tons in 1999. In Bolivia, the Vinto tin smelter, now owned by London-based Allied Deals, plans to raise production from its current level of 11,000 tons per year to a level of 15,000 tons per year (Platt's Metals Week, 2000a).

Update

On September 8, 2000, the *Platt's Metals Week* composite price for tin was \$3.73 per pound.

References Cited

- American Metal Market, 2000, US company offering NKK's new tinplate electrolyte: American Metal Market, v. 108, no. 143, July 26, p. 6.
- Metal Bulletin, 2000a, Siderar revamps tinplate line: Metal Bulletin, no. 8498, August 7, p. 20.
- 2000b, Weirton wins final ruling against Japanese tinplate: Metal Bulletin, no. 8498, August 7, p. 20.
- Platt's Metals Week, 2000a, Minsur, Vinto plan increased tin output soon: Platt's Metals Week, v. 71, no. 34, August 21, p. 14.
- 2000b, Plastic reducing Japanese tin consumption: Platt's Metals Week, v. 71, no. 34, August 21, p. 14.

TABLE 1
SALIENT TIN STATISTICS 1/

(Metric tons, unless otherwise noted)

	2000			
	1999 p/	June	July	January- July
Production, secondary e/ 2/	10,800	900	900	6,300
Consumption:				
Primary	42,800	3,560 r/	3,540	24,700
Secondary	12,300	910 r/	858	6,260
Imports for consumption, metal	47,500	4,230	NA	NA
Exports, metal	6,770	351	NA	NA
Stocks at end of period	XX	8,090 r/	8,300	XX
Prices (average cents per pound): 3/				
Metals Week composite 4/	365.98	368.23	366.03	XX
Metals Week New York dealer	254.54	255.17	249.50	XX
London, standard grade, cash	245.00	247.00	242.00	XX
Kuala Lumpur	240.70	241.43	241.63	XX

e/ Estimated. p/ Preliminary. r/ Revised. NA Not available. XX Not applicable.

1/ Data are rounded to no more than three significant digits, except prices.

2/ Includes tin recovered from alloys and tinplate. The detinning of tinplate (coated steel) yields only a small part of the total.

3/ Source: Platt's Metals Week.

4/ The Metals Week composite price is a calculated formula, not a market price, that includes fixed and finance charges, and a risk factor. It is normally substantially higher than other tin prices.

TABLE 2
METALS WEEK COMPOSITE PRICE 1/

(Cents per pound)

Period	High	Low	Average
1999:			
June	368.44	354.81	360.01
July	362.56	356.00	357.87
August	362.04	355.27	358.10
September	372.30	357.68	364.61
October	383.67	363.53	369.61
November	397.54	385.56	391.55
December	403.52	381.53	386.61
Year	403.52	343.72	365.98
2000:			
January	405.27	390.75	397.72
February	391.72	377.25	382.84
March	383.26	364.68	373.01
April	371.49	365.85	368.16
May	369.58	363.91	367.72
June	373.83	362.99	368.23
July	372.25	362.15	366.03

1/ The Metals Week composite price is a calculated formula, not a market price, that includes fixed and finance charges, and a risk factor. It is normally substantially higher than other tin prices.

Source: Platt's Metals Week.

TABLE 3
TINPLATE PRODUCTION AND SHIPMENTS IN THE UNITED STATES 1/

(Metric tons, unless otherwise noted)

Period	Tinplate waste (waste, strips, cobble, etc.) (gross weight)	Tinplate (all forms)			Shipments 2/
		Gross weight	Tin content	Tin per metric ton of plate (kilograms)	
1999 p/	W	1,750,000	9,080	5.2	2,370,000
2000:					
January	W	141,000	718	5.1	184,000
February	W	144,000	785	5.5	175,000
March	W	155,000	810	5.2	203,000
April	W	149,000	736	4.9	170,000
May	W	156,000	816	5.2	219,000
June	W	149,000 r/	795 r/	5.3 r/	203,000
July	W	165,000	780	4.7	182,000

p/ Preliminary. r/ Revised. W Withheld to avoid disclosing company proprietary data.

1/ Data are rounded to no more than three significant digits.

2/ Source: American Iron and Steel Institute monthly publication.

TABLE 4
U.S. TIN IMPORTS FOR CONSUMPTION AND EXPORTS 1/

(Metric tons)

Country or product	1999 p/	2000		
		May	June	January- June
Imports:				
Metal (unwrought tin):				
Bolivia	3,850	200	1,510	4,080
Brazil	4,700	594	502	2,740
Chile	3,980	--	245	1,720
China	13,900	861	260	5,530
Hong Kong	261	20	--	277
Indonesia	7,930	457	519	2,700
Japan	282	--	--	--
Malaysia	944	20	60	104
Peru	11,000	950	920	5,950
Russia	--	--	145	145
Singapore	60	--	--	20
Thailand	20	--	--	--
United Kingdom	60	1	1	210
Other	533	40	72	185
Total	47,500	3,140	4,230	23,700
Other (gross weight):				
Alloys	3,090	235	469	2,090
Bars and rods	872	102	68	468
Foil, tubes, pipes	1	--	--	--
Plates, sheets, strip	122	284	3	408
Waste and scrap	2,730	209	422	1,150
Miscellaneous	2,290	556	1,480	3,000
Total	9,100	1,390	2,440	7,110
Exports (metal)	6,770	460	351	2,870

p/ Preliminary. -- Zero.

1/ Data are rounded to no more than three significant digits; may not add to totals shown.

Source: U.S. Census Bureau.

TABLE 5
CONSUMPTION OF TIN IN THE UNITED STATES, BY FINISHED PRODUCT 1/

(Metric tons of contained tin)

Product	2000							January- July total
	1999 p/	June			July			
		Primary	Secondary	Total	Primary	Secondary	Total	
Alloys (miscellaneous) 2/	W	125 r/	W	125 r/	119	W	119	861
Babbitt	22	26 r/	34	60	46	W	46	249
Bar tin and anodes	244	25	W	25	25	W	25	176
Bronze and brass	3,170	104	126	229	102	114	216	1,700
Chemicals	8,140	682	W	682	682	W	682	4,780
Collapsible tubes and foil	W	W	W	W	W	W	W	W
Solder	14,000	1,060 r/	431	1,490 r/	1,070	398	1,470	10,300
Tinning	508	58	--	58	49	--	49	411
Tinplate 3/	9,080	795 r/	--	795 r/	780	--	780	5,440
Tin powder	W	50	--	50	W	--	W	147
White metal 4/	W	W	--	W	W	--	W	10
Other	6,120	37 r/	19 r/	56 r/	61	46	107	649
Total reported	41,300	2,960 r/	610 r/	3,570 r/	2,940	558	3,500	24,700
Estimated undistributed consumption 5/	13,800	600	300	900	600	300	900	6,300
Grand total	55,100	3,560 r/	910 r/	4,470 r/	3,540	858	4,400	31,000

p/ Preliminary. r/ Revised. W Withheld to avoid disclosing company proprietary data; included with "Other." -- Zero.

1/ Data are rounded to no more than three significant digits; may not add to totals shown.

2/ Includesterne metal.

3/ Includes secondary pig tin and tin components of tinplating chemical solutions.

4/ Includes pewter, britannia metal, and jewelers' metal.

5/ Estimated consumption of plants reporting on an annual basis.