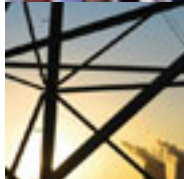


**platts**  
100 YEARS

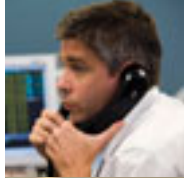


# New Frontier Webinar

September 25, 2009

Joe Innace, US managing editor,  
*Platts Steel Markets Daily*

**platts**  
100 YEARS



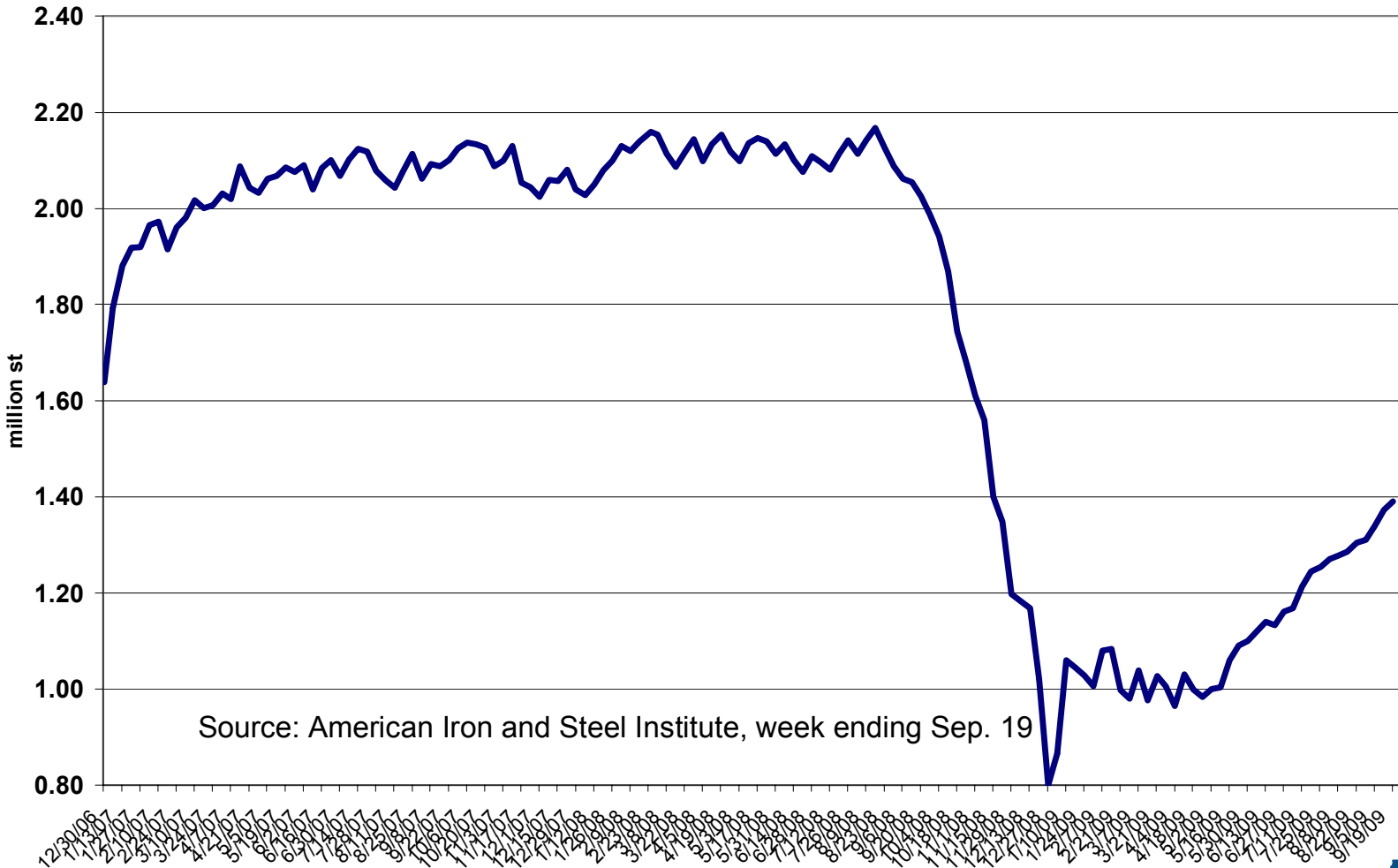
## Contact information:

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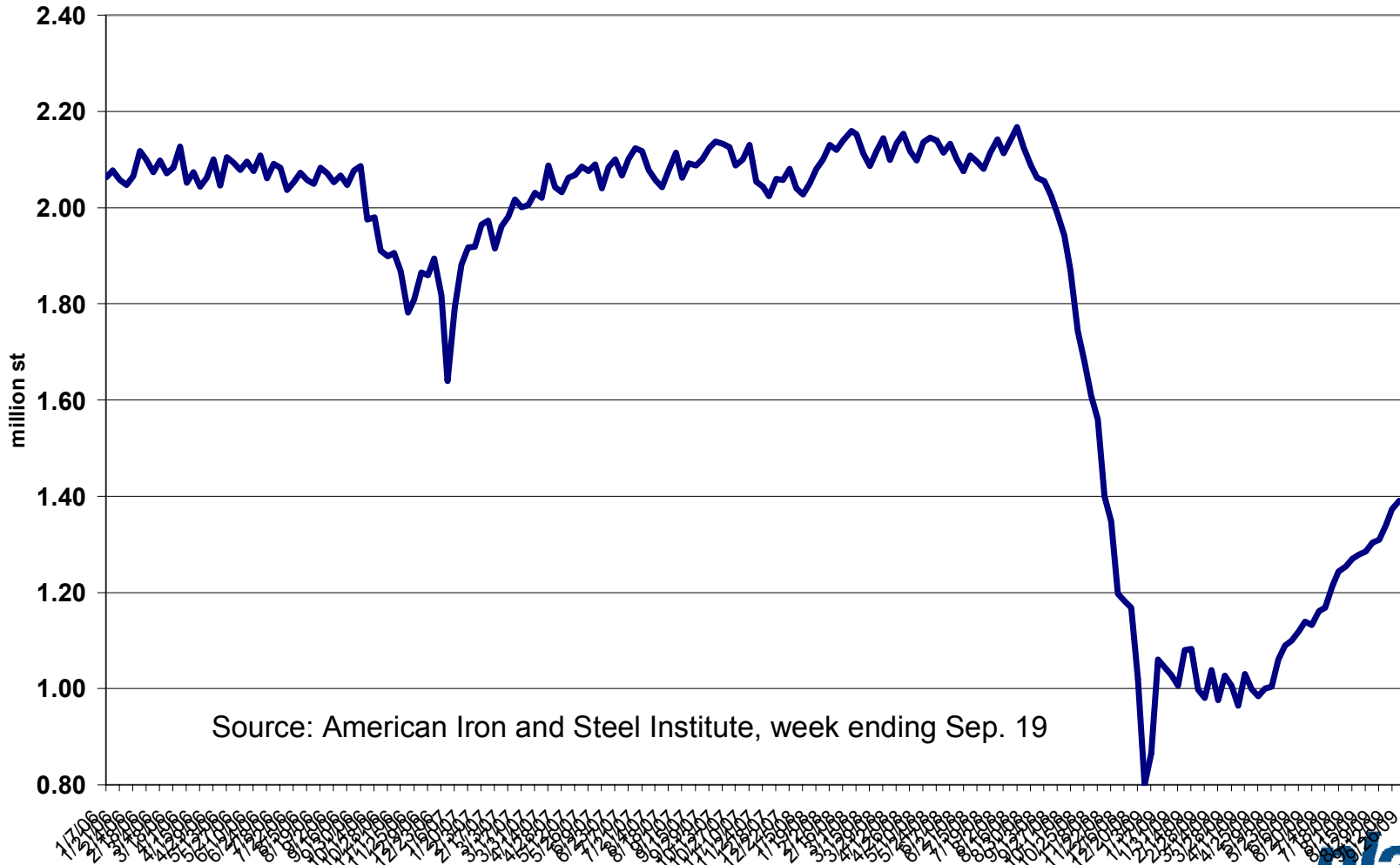
**Anthony Poole**, managing editor, Metals Week  
+1 212 904-2992; [anthony\\_poole@platts.com](mailto:anthony_poole@platts.com)

# US weekly steel output: What's normal now?



Source: American Iron and Steel Institute, week ending Sep. 19

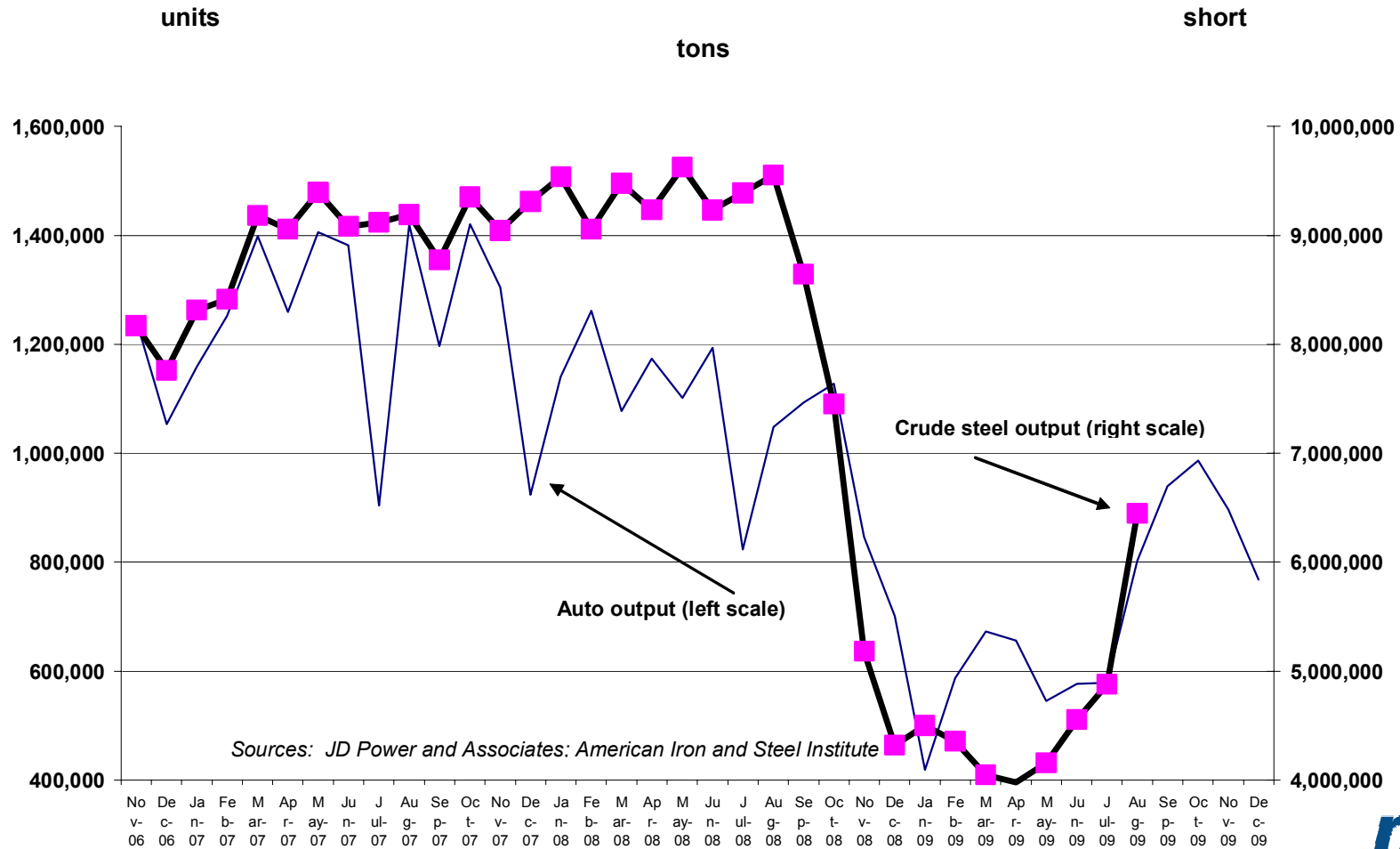
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Source: American Iron and Steel Institute, week ending Sep. 19

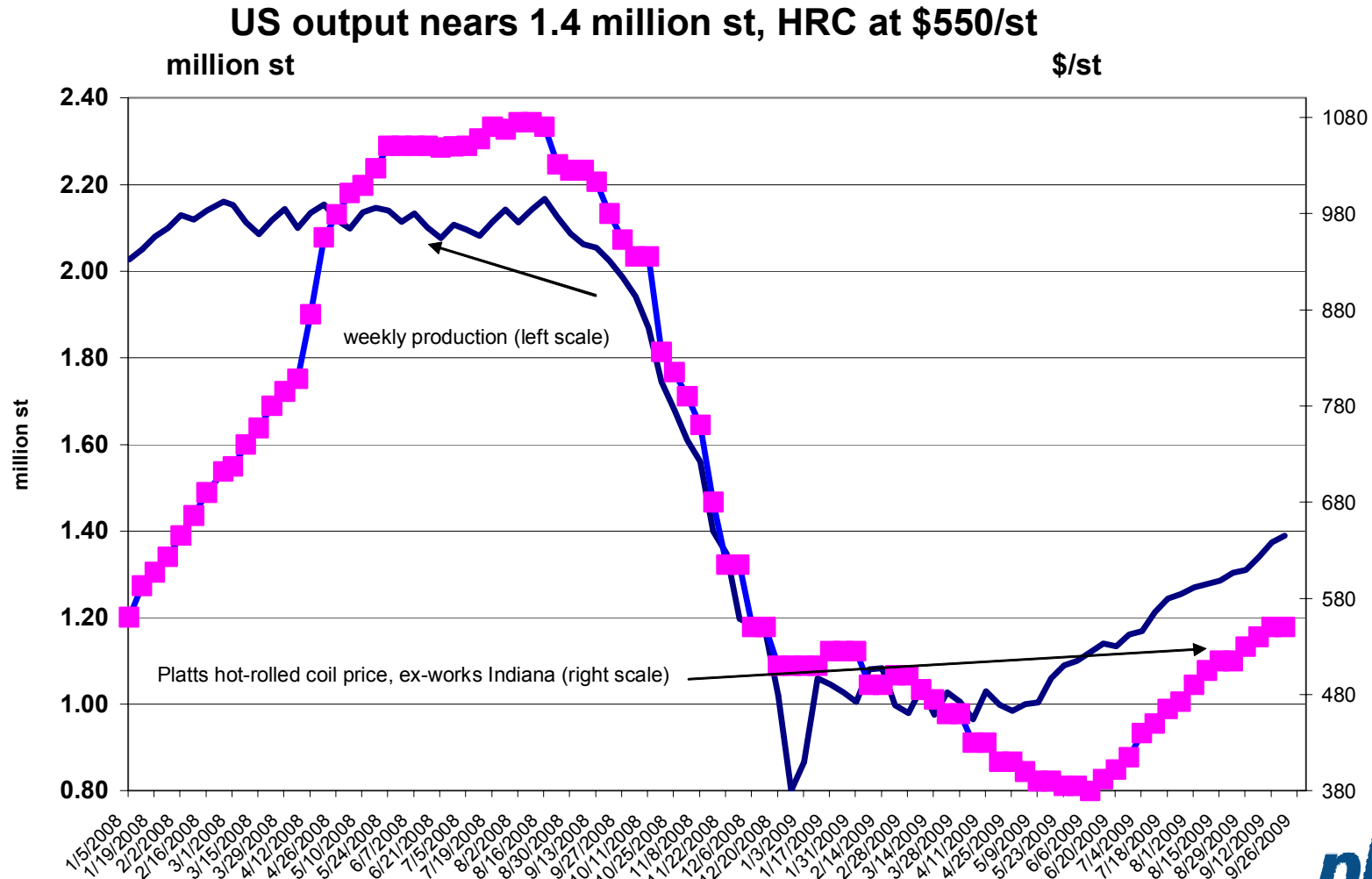
# Steel and cars: A new equilibrium?

North American light vehicle production vs. US raw steel output



Sources: JD Power and Associates; American Iron and Steel Institute

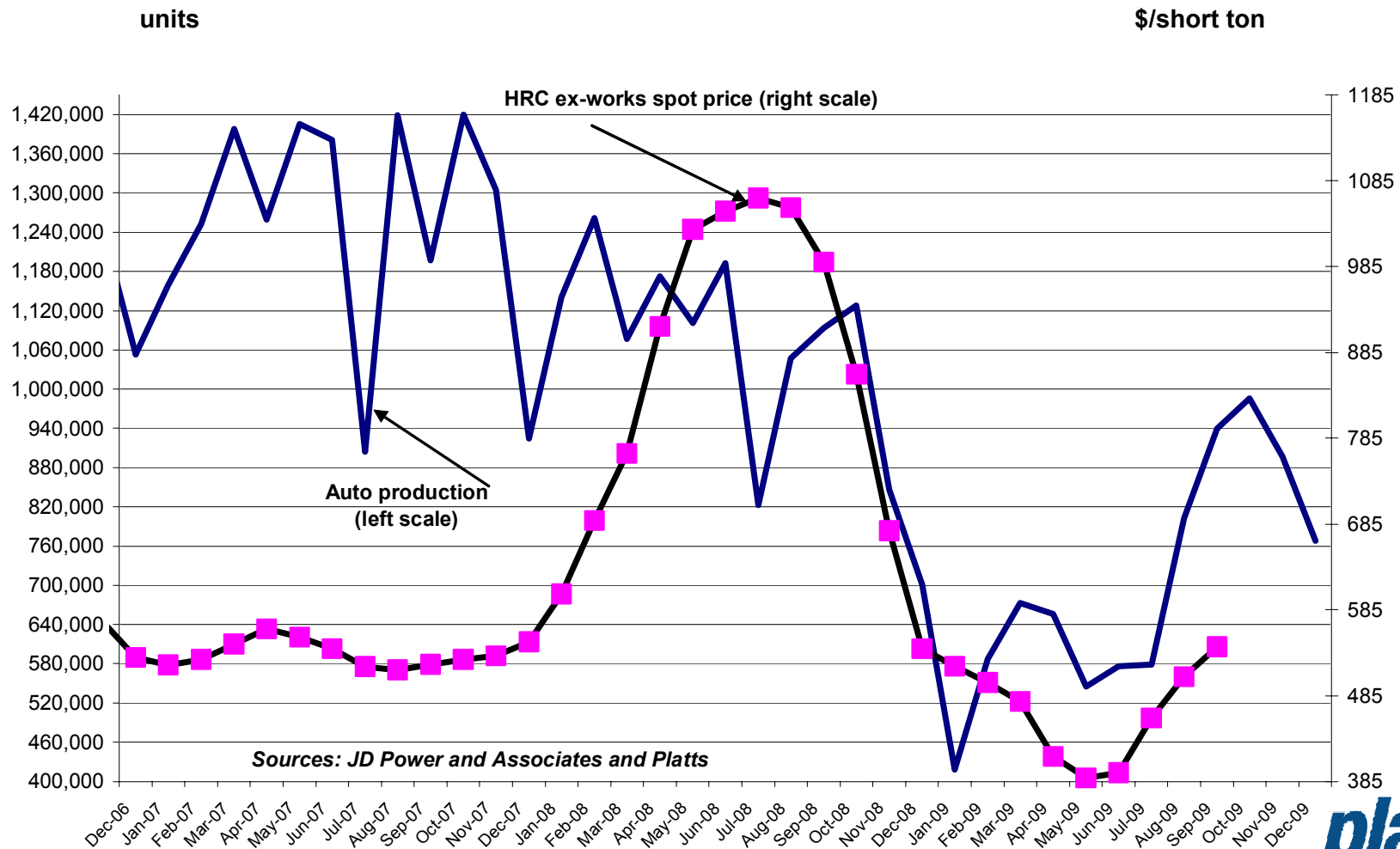
# US steelmaking output approaches 1.4 million short tons



Sources: American Iron and Steel Institute (Sep. 19) and Platts

# Auto production and steel price...how solid a relationship?

## Light vehicle production and US hot-rolled coil steel price

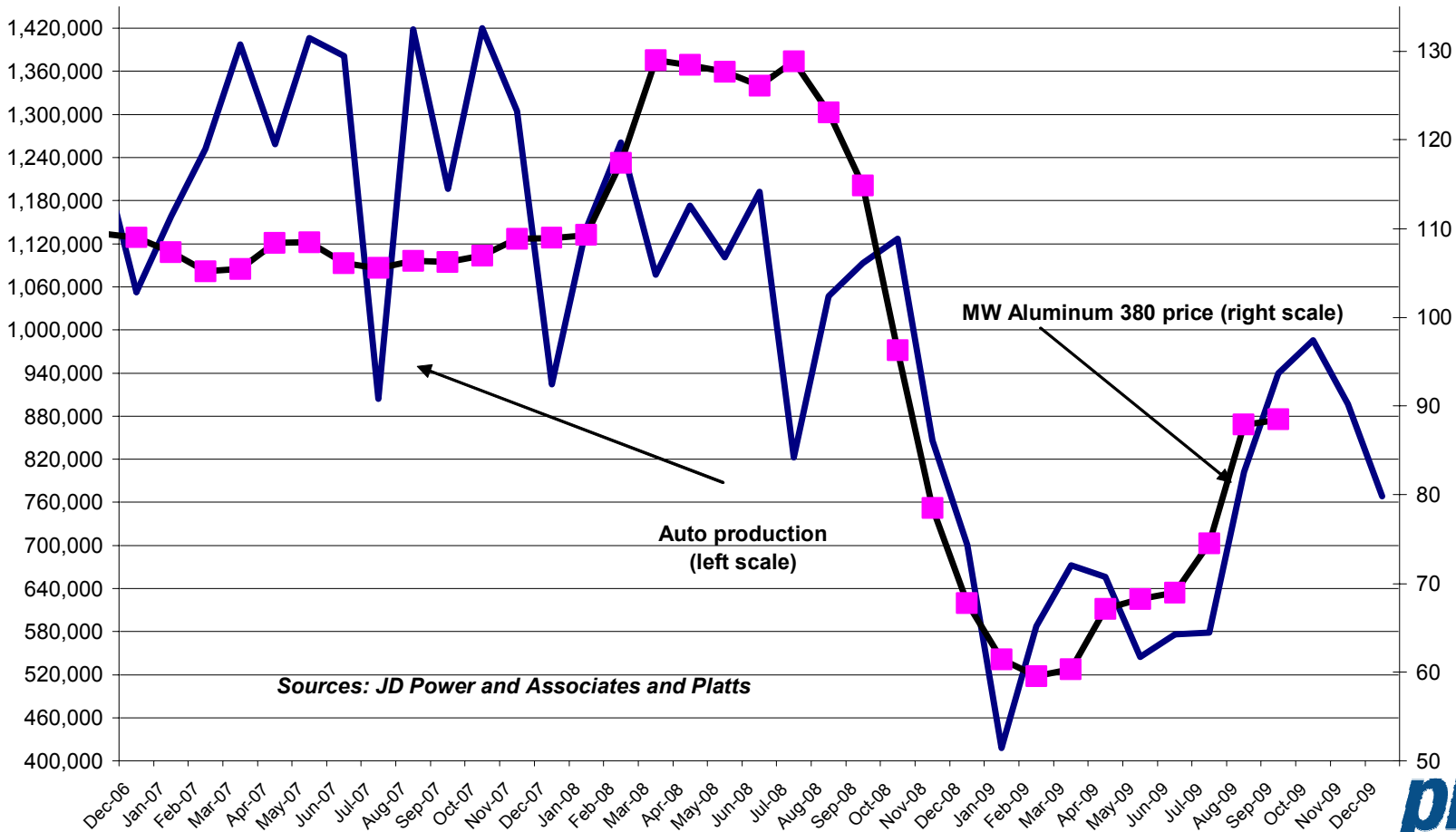


# Auto production and aluminum pricing...closer still?

Light vehicle production and US Midwest aluminum 380 price

units

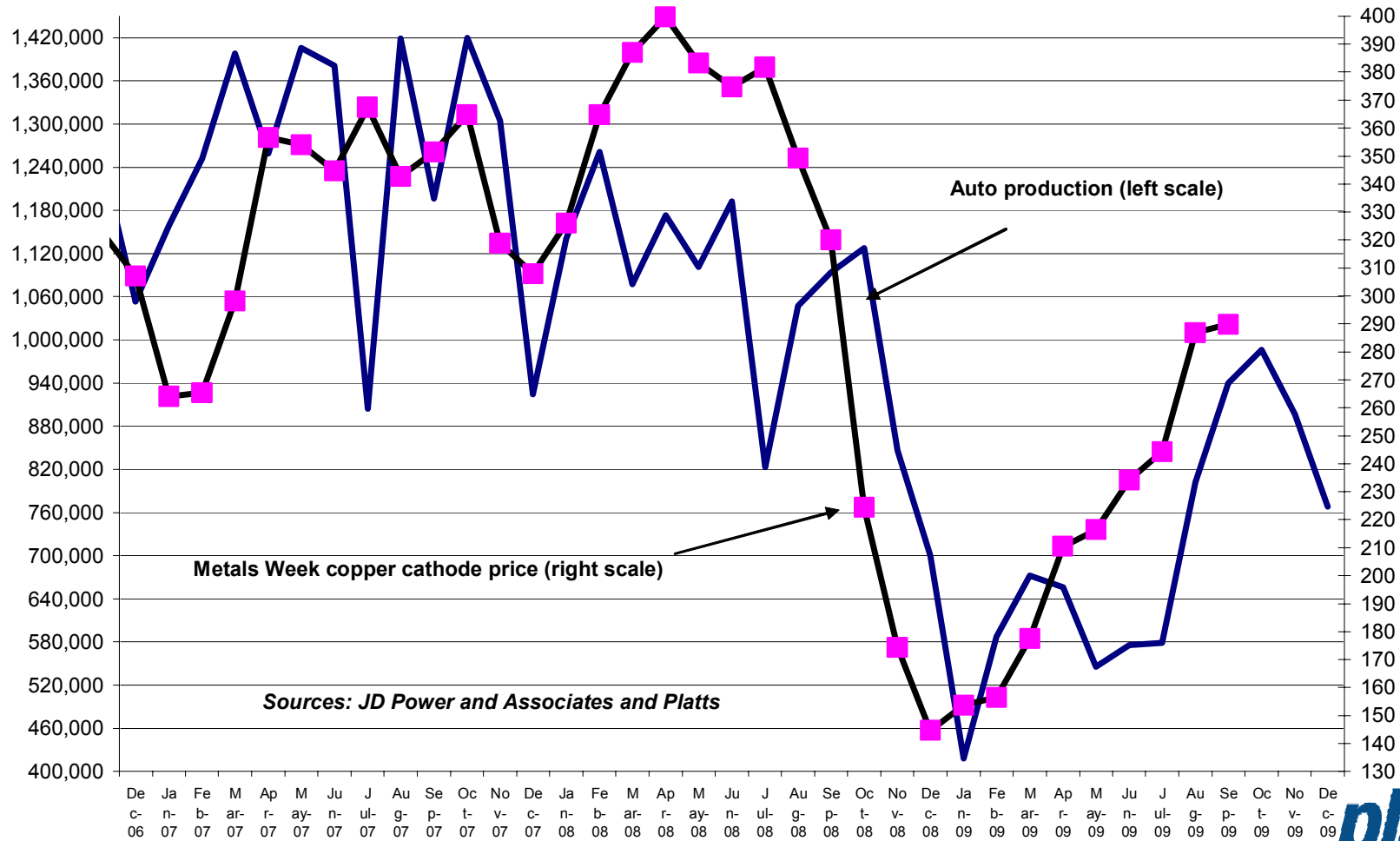
cents/lb



Sources: JD Power and Associates and Platts

# Auto production and copper pricing...almost e-harmony?

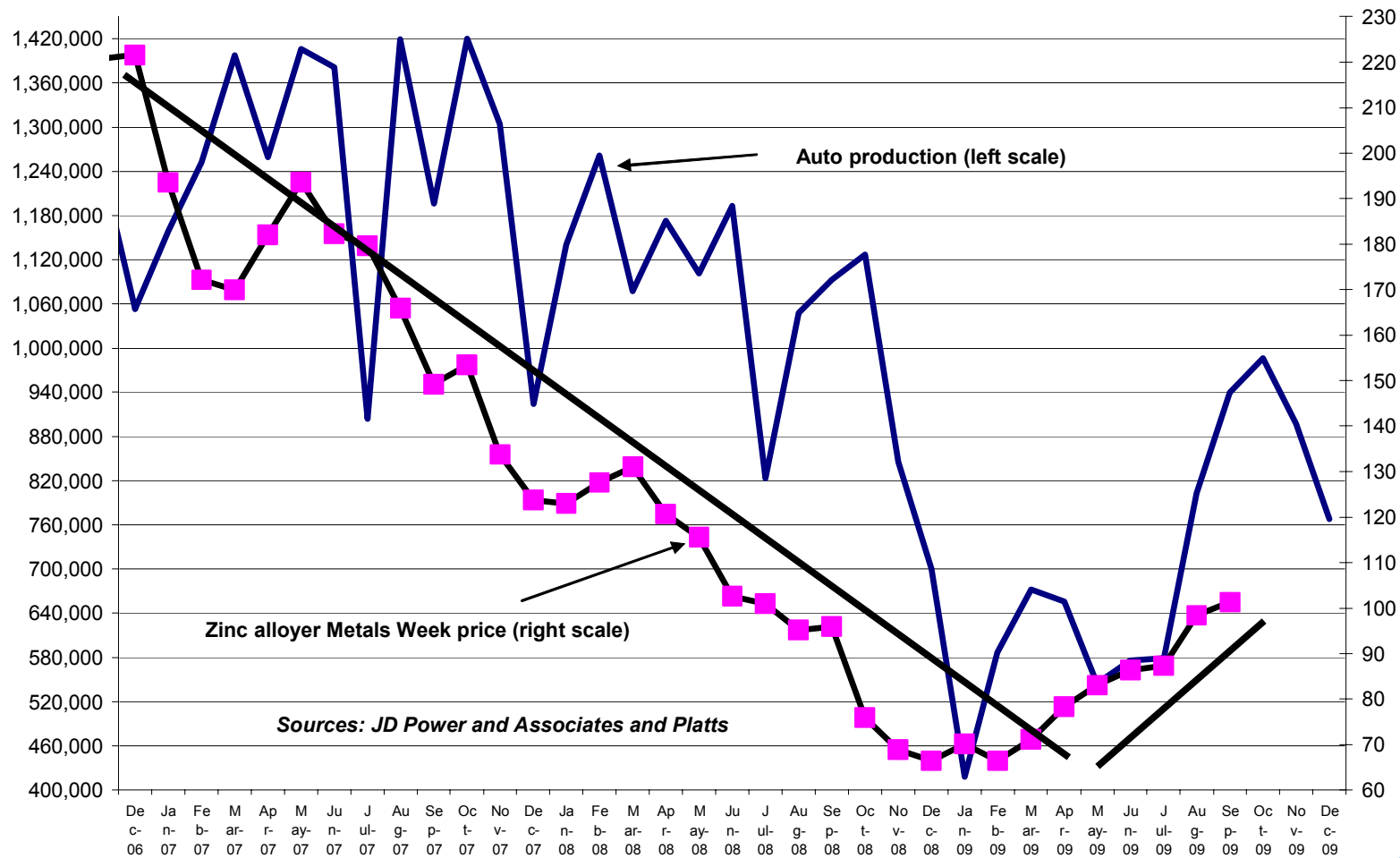
**N. America light vehicle production and copper cathode price**



Sources: JD Power and Associates and Platts

# Auto production and zinc...parallel lives

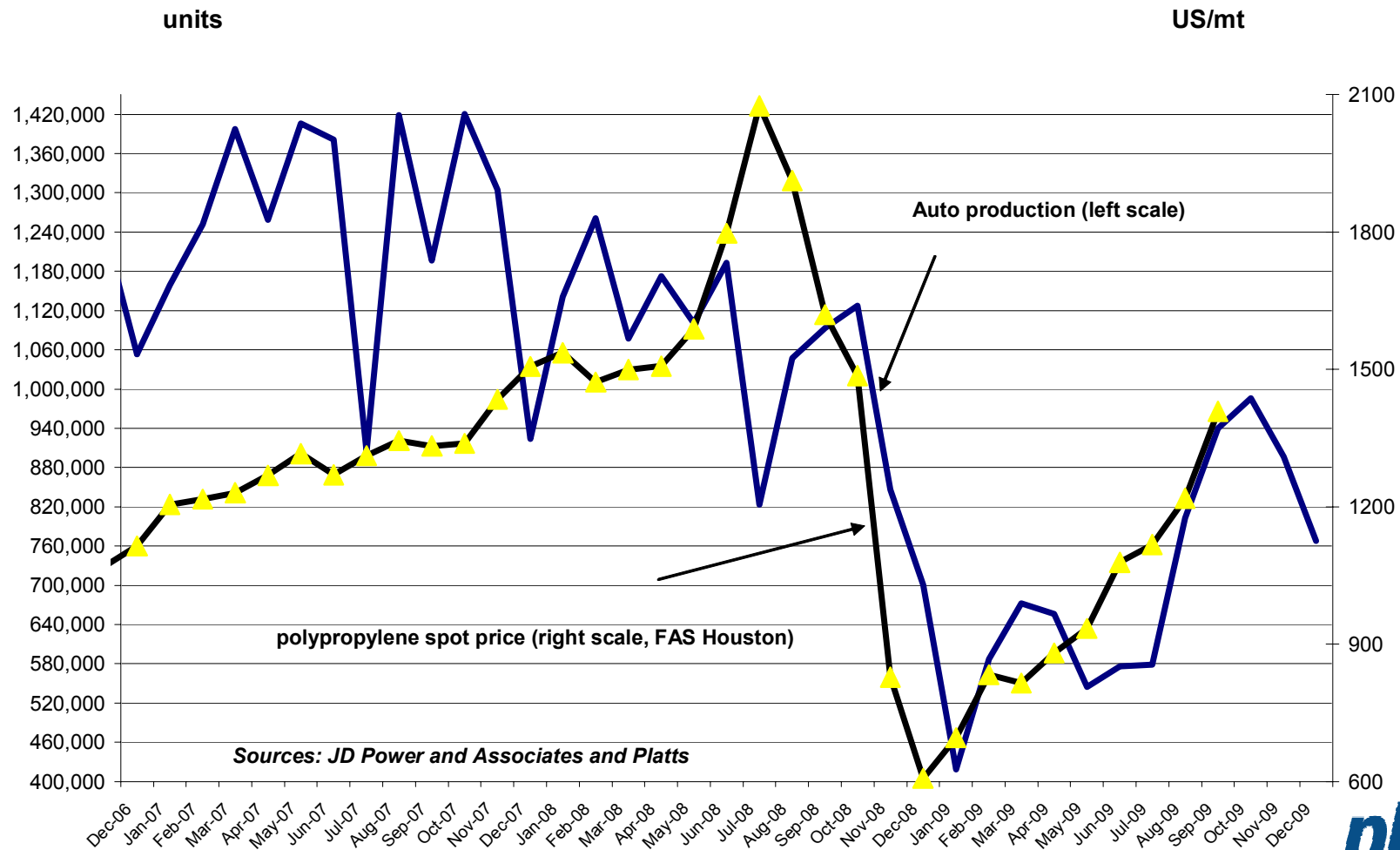
N. America light vehicle production and zinc alloyer No.3 price



Sources: JD Power and Associates and Platts

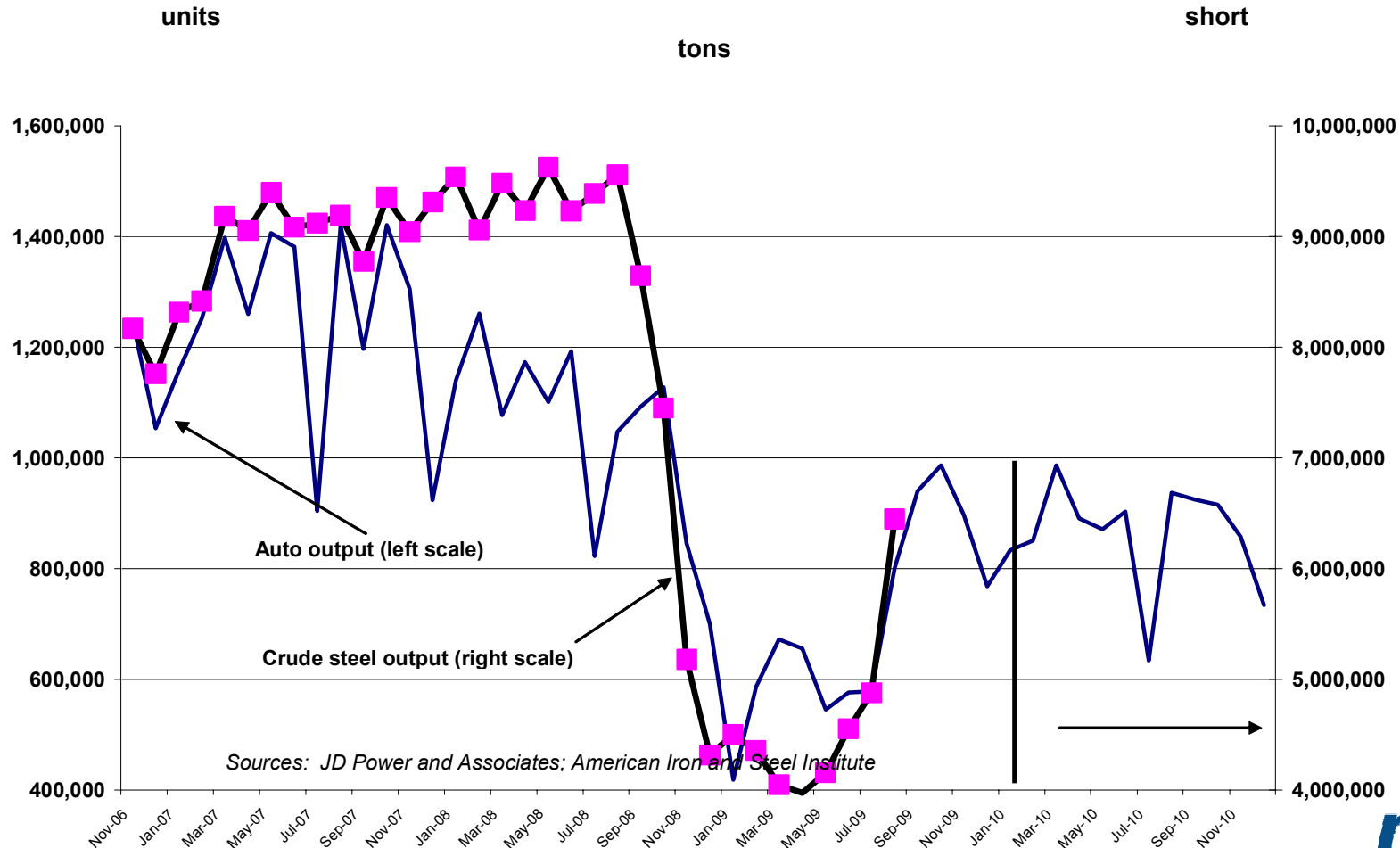
# Auto production and polypropylene pricing

## Monthly light vehicle production and polypropylene spot price



# How about an auto production-based outlook?

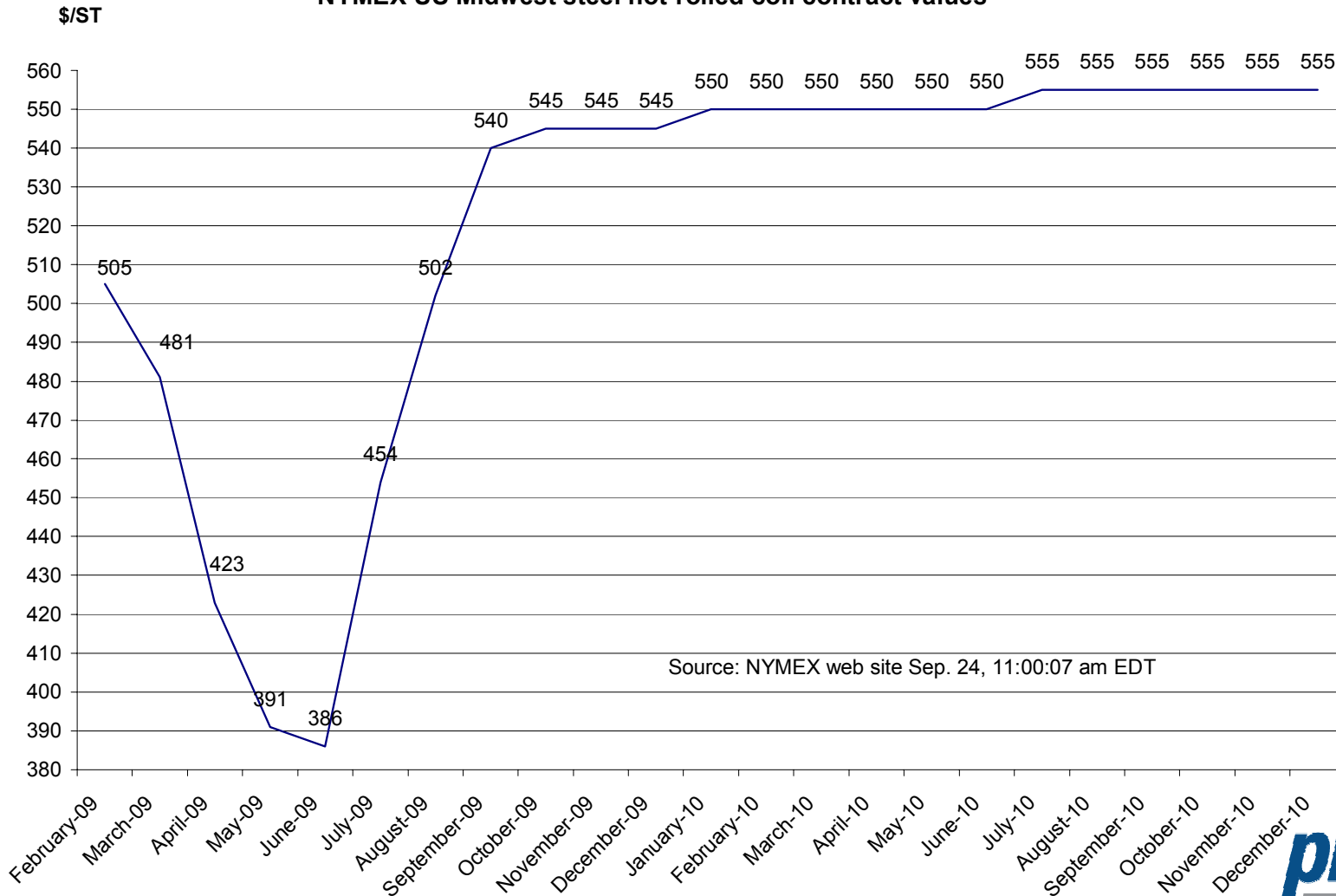
## North American light vehicle production vs. US raw steel output



Sources: JD Power and Associates; American Iron and Steel Institute

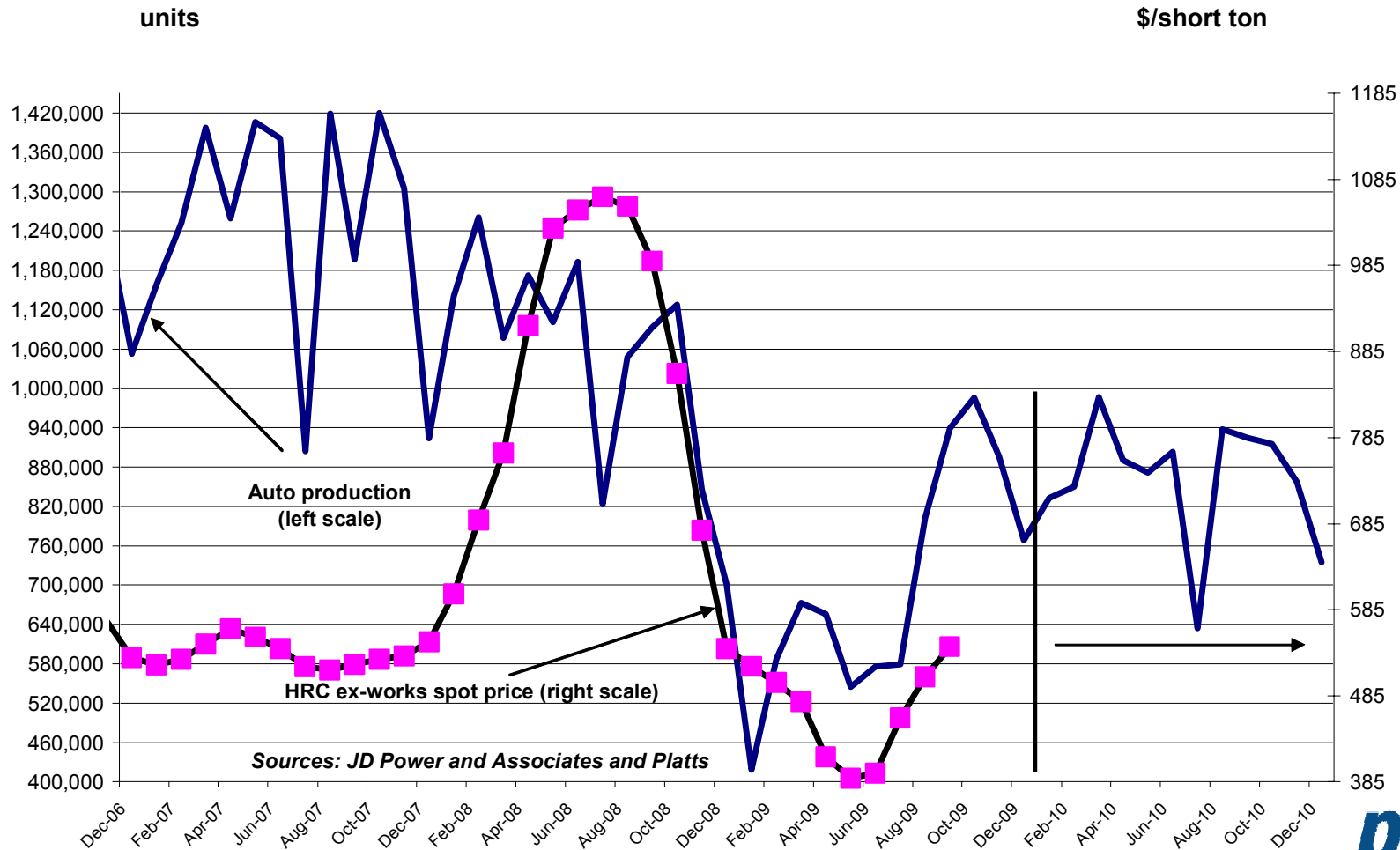
# CME Group/NYMEX forward steel futures...flat-lining 2010

NYMEX US Midwest steel hot-rolled coil contract values



# Auto production-based outlook and steel pricing...

## Light vehicle production and US hot-rolled coil steel price





Thank you!

Joe Innace, 212-904-3484

