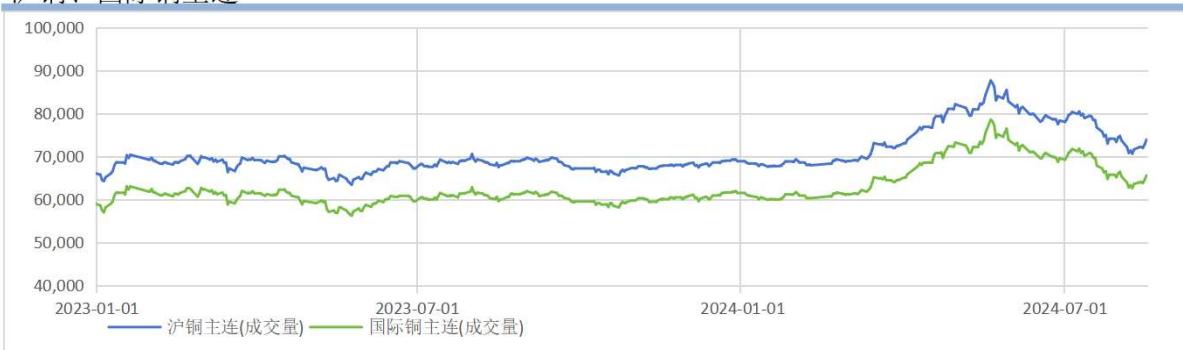




电解铜每日市场观察

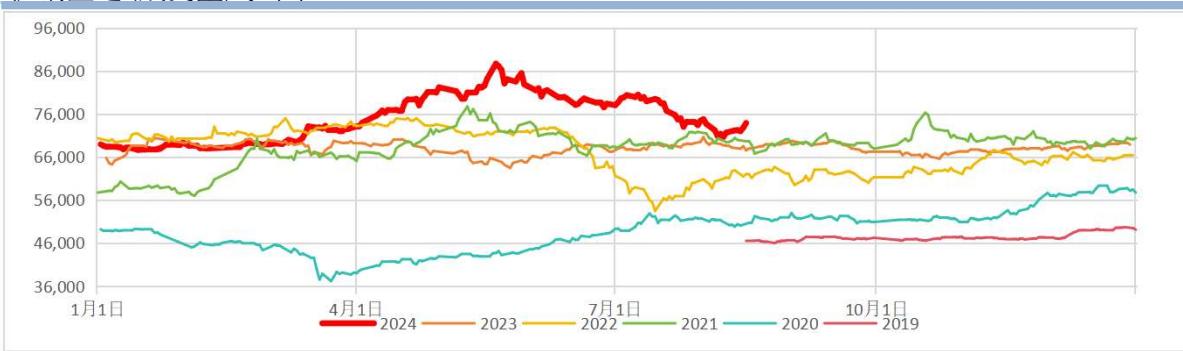
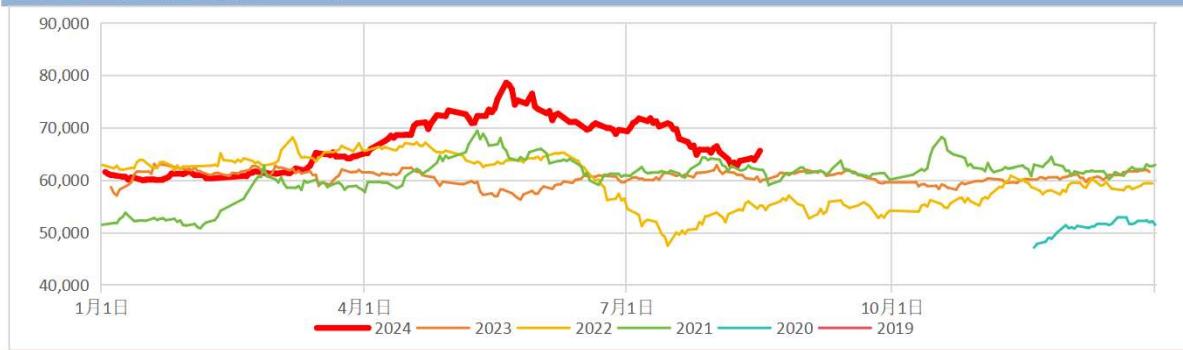
撰写: 曹有明
 审核: 林振龙
 从业资格证号: F3038998
 交易咨询资格证号: Z0018476
 2024年8月16日
 交易咨询资格证号: Z0013162
 复核: 刘书语
 从业资格证号: F03107583

数据类别	指标	单位	8月16日	8月15日	8月9日	较上日		较上周	
						绝对值	百分比	绝对值	百分比
铜期货	沪铜主连(成交量)	元/吨	73930	72830	71670	1100.00	1.53%	2260.00	3.15%
	国际铜主连(成交量)	元/吨	73978	72905	71827	1073.00	1.49%	2151.00	2.99%
	LME铜(3个月)	美元/吨	9104	9104	8922	0	0	182.00	2.04%
	COMEX铜	美分/磅	414	414	398	0	0	15.80	3.97%
铜月差	沪铜主连-沪铜次主连	元/吨	-50	-90	-130	40.00	30.77%	80.00	61.54%
	国际铜主连-国际铜次主连	元/吨	-60	-90	-120	30.00	25.00%	60.00	50.00%
铜跨境基差	沪铜主连-国际铜主连	元/吨	8340	8190	8030	150.00	1.87%	310.00	3.86%
	沪铜主连-LME铜(3个月)	元/吨	8869	7828	7923	1040.82	13.14%	945.97	11.94%
	沪铜主连-COMEX铜	元/吨	8672	7632	8915	1040.65	11.67%	-242.48	-2.72%
	LME铜(3个月)-COMEX铜	美元/吨	-28	-28	139	0	0	-166.33	-119.84%
铜现货及升贴水	平均价:1#电解铜	元/吨	73620	72270	71630	1350.00	1.88%	1990.00	2.78%
	平均价:1#电解铜-沪铜主连	元/吨	-60	-90	-120	30.00	25.00%	60.00	50.00%
	平均价:洋山铜溢价(仓单)	元/吨	53	53	63	0	0	-10.00	-15.87%
	平均价:洋山铜溢价(提单)	元/吨	60	60	67	0	0	-7.00	-10.45%
铜加工费	铜精矿:现货:粗炼费(TC)	美元/干吨	6.80	6.80	6.80	0	0	0	0
	铜精矿:现货:精炼费(RC)	美分/磅	0.68	0.68	0.68	0	0	0	0
铜相关比价	沪铜主连/沪金主连	-	130.22	128.45	127.82	1.77	1.38%	2.40	1.87%
	沪铜主连/原油主连	-	129.32	128.24	127.66	1.07	0.84%	1.65	1.29%
	沪铜主连/沪深300	-	22.10	21.79	21.51	0.30	1.42%	0.59	2.72%
铜矿有关	进口数量:当月同比	%	9.62	9.62	9.62	0	0	0	0
	进口数量:累计同比	%	4.50	4.50	4.50	0	0	0	0
	铜精矿:港口库存:合计	万吨	60.50	60.50	60.50	0	0	0	0
海关总署进口数据	精炼铜:进口数量:当月值	万吨	28.5898	28.5898	28.5898	0	0	0	0
	精炼铜:进口数量:累计值	万吨	180.1011	180.1011	180.1011	0	0	0	0
国家统计局产量	精炼铜当月值	万吨	112.80	112.80	112.80	0	0	0	0
	精炼铜累计值	万吨	667.20	667.20	667.20	0	0	0	0
上海有色产量数据	社会库存:铜:总计	元/吨	38.55	38.55	42.60	0	0	-4.05	-9.51%
	电解铜:产量:当月值	元/吨	102.82	102.82	102.82	0	0	0	0
	电解铜:产量:累计值	元/吨	694.65	694.65	694.65	0	0	0	0
	电解铜:产量:预测值	元/吨	101.66	101.66	101.66	0	0	0	0
铜下游产量数据 (iFind)	铜板带:产量:总计:当月值	万吨	20.97	20.97	20.97	0	0	0	0
	铜棒:产量:总计:当月值	万吨	10.1970	10.1970	10.1970	0	0	0	0
	精铜杆:产量:总计:当月值	万吨	80.10	80.10	80.10	0	0	0	0
期货库存	仓单数量:铜:总计	吨	166879	171993	188842	-5114.00	-2.71%	-21963.00	-11.63%
	仓单数量:铜(BC):总计	吨	21194	21696	19281	-502.00	-2.60%	1913.00	9.92%
	LME:库存:铜	吨	309050	307450	296400	1600.00	0.54%	12650.00	4.27%
	库存:COMEX:铜:合计	短吨	24423	24423	22728	0	0	1695.00	7.46%

沪铜、国际铜主连


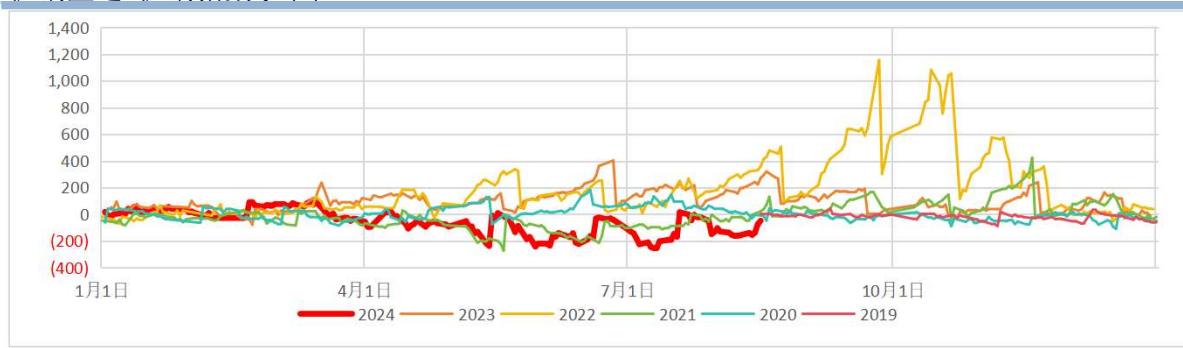
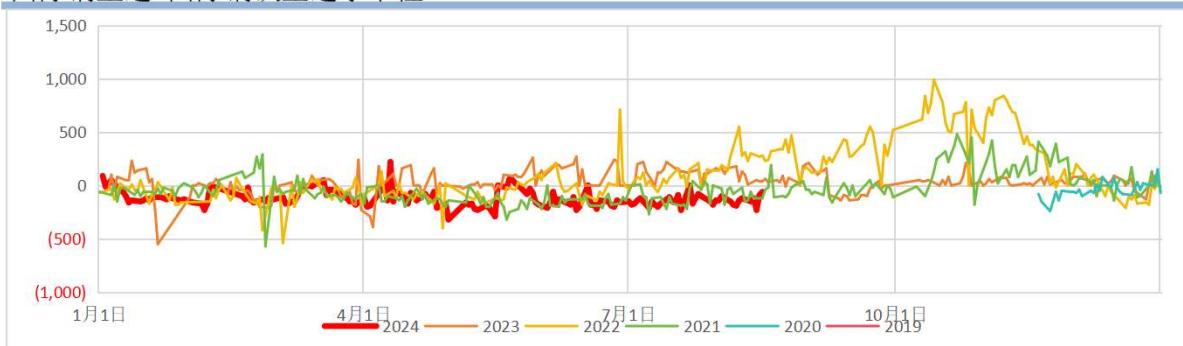
数据来源: iFind

期货结算价:LME铜(3个月):电子盘、期货收盘价(活跃):COMEX铜

沪铜主连(成交量)季节性

国际铜主连(成交量)季节性


沪铜主连-沪铜次主连

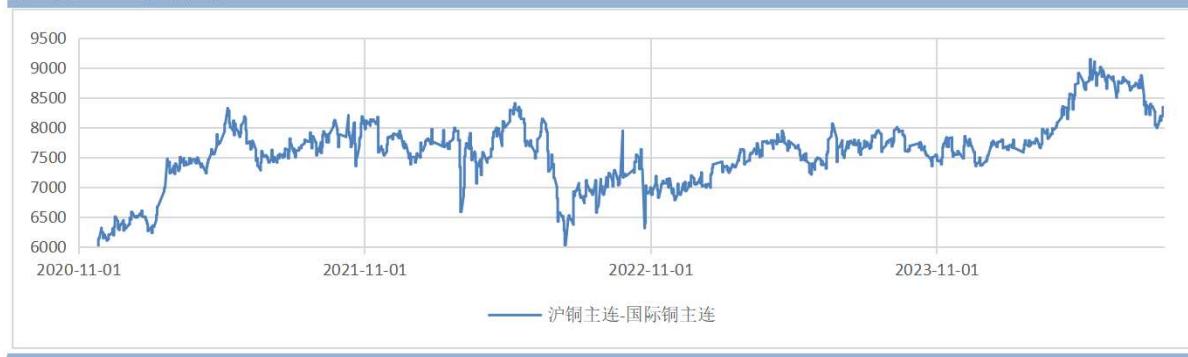
沪铜主连-沪铜次主连季节性

沪铜主连-沪铜指数季节性

国际铜主连-国际铜次主连季节性


国际铜主连(成交量)-国际铜指数季节性



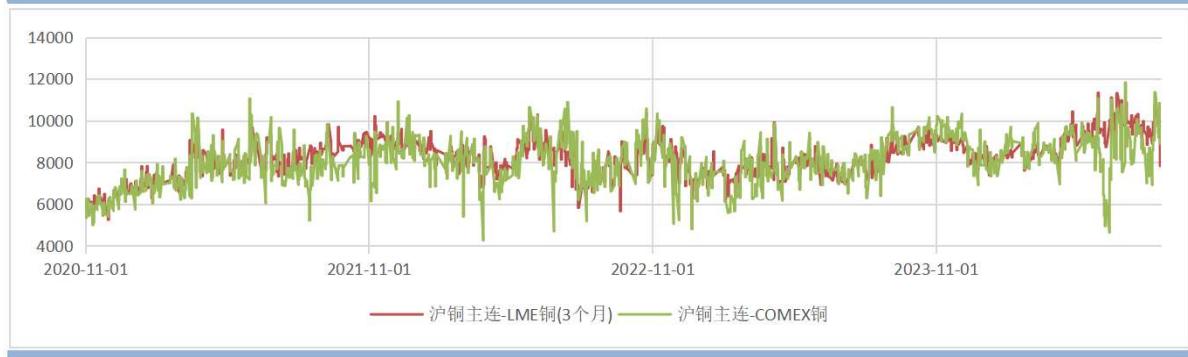
沪铜主连-国际铜主连



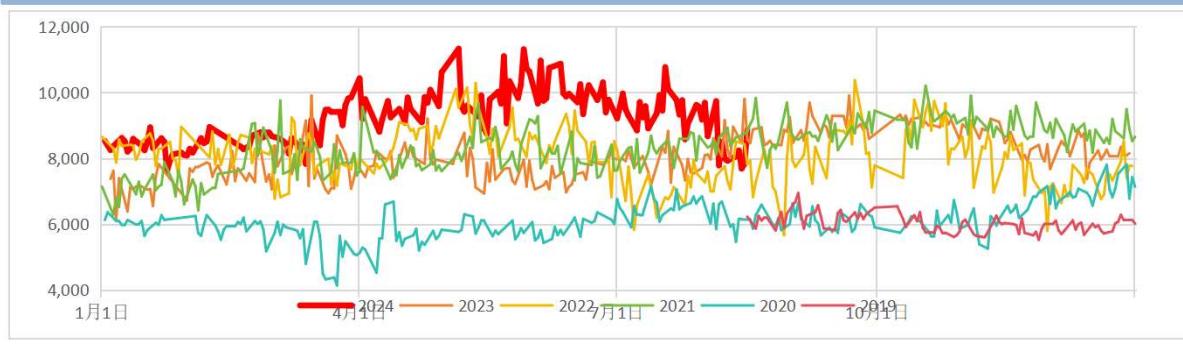
沪铜主连-国际铜主连季节性



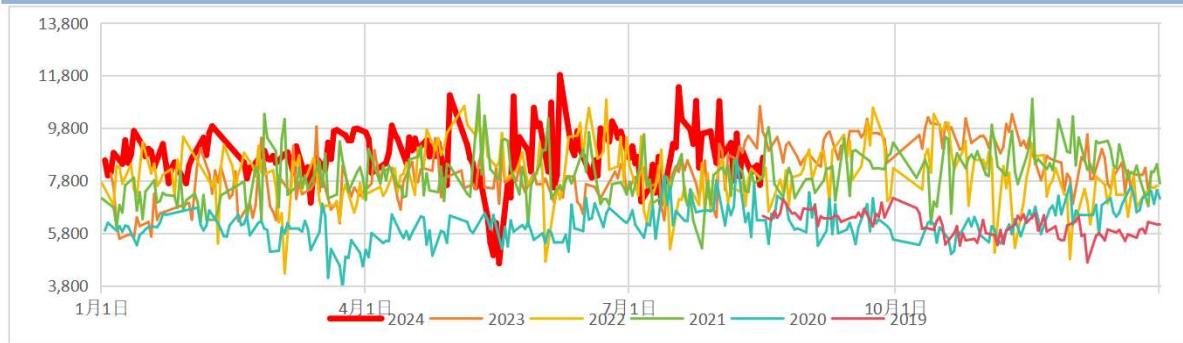
沪铜主连-LME铜(3个月)、沪铜主连-COMEX铜



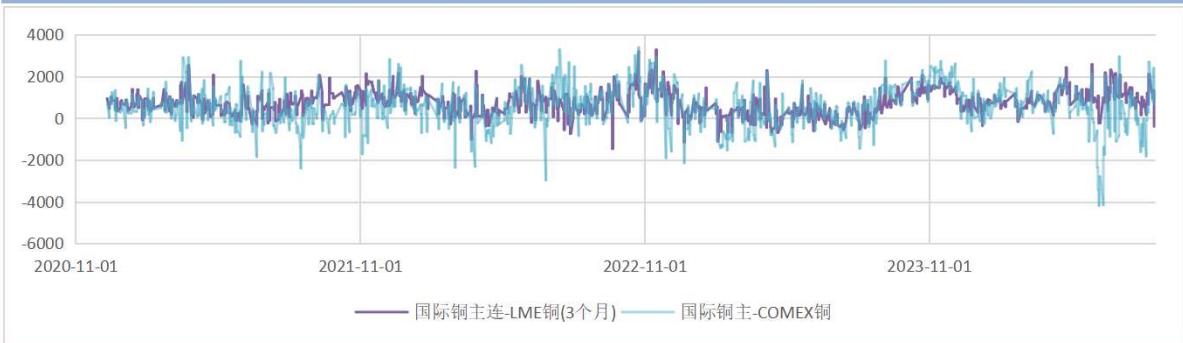
沪铜主连-LME铜(3个月)季节性



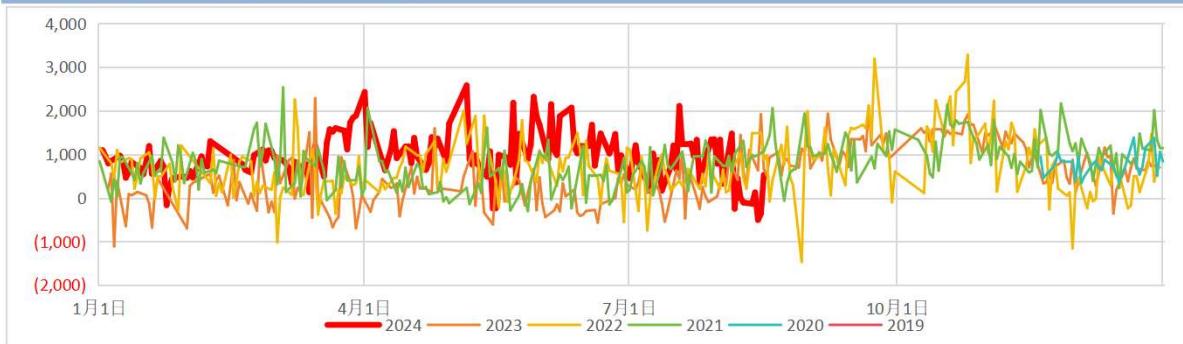
沪铜主连-COMEX铜季节性



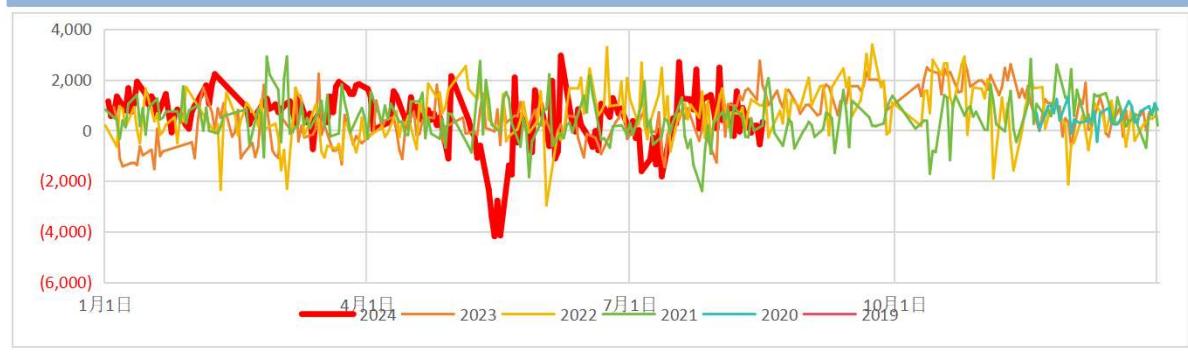
国际铜主连-LME铜(3个月)、国际铜主-COMEX铜



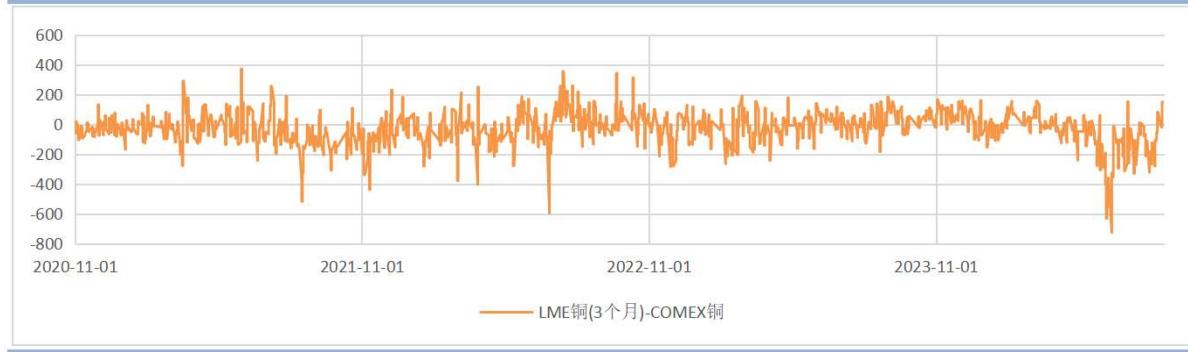
国际铜主连-LME铜(3个月)季节性



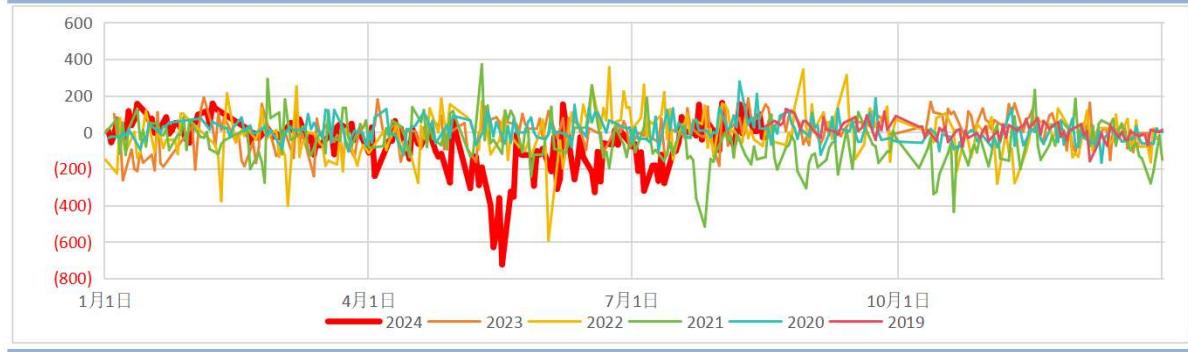
国际铜主-COMEX铜季节性



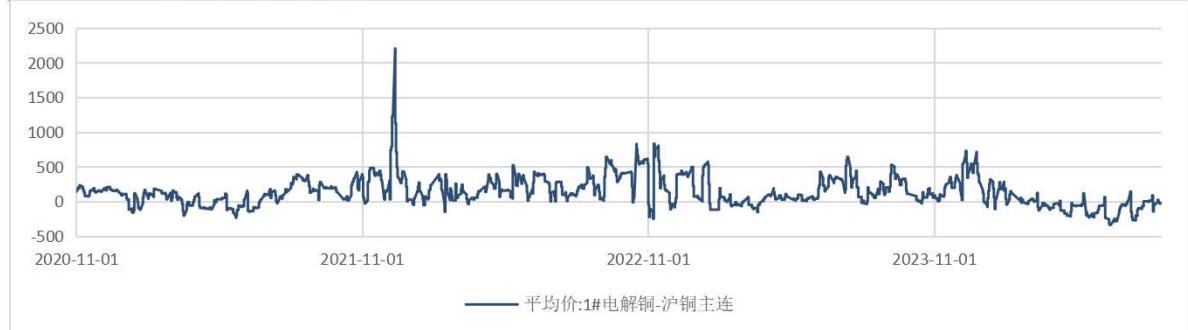
LME铜(3个月)-COMEX铜



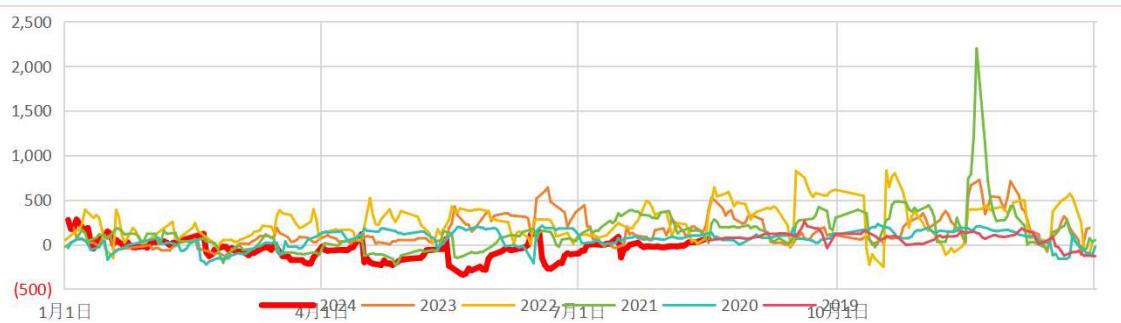
LME铜(3个月)-COMEX铜季节性



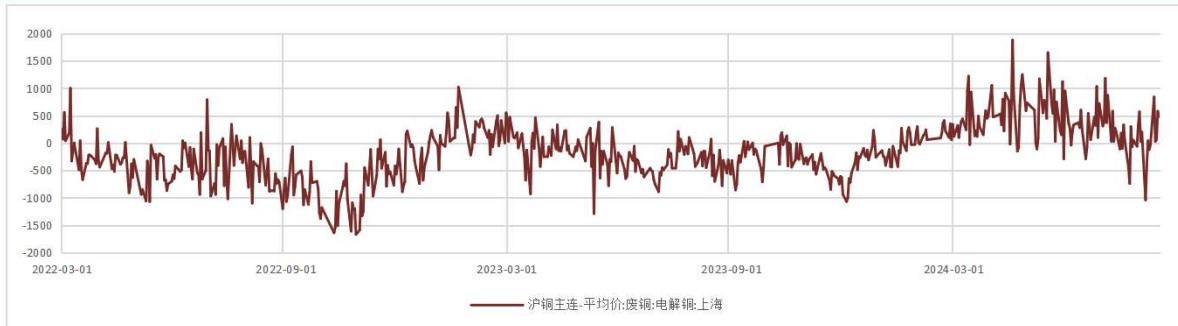
平均价:1#电解铜-沪铜主连



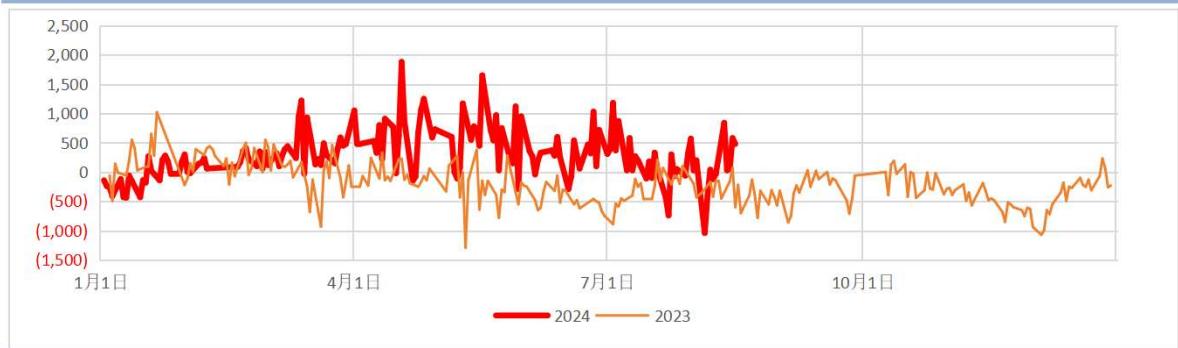
平均价:1#电解铜-沪铜主连季节性



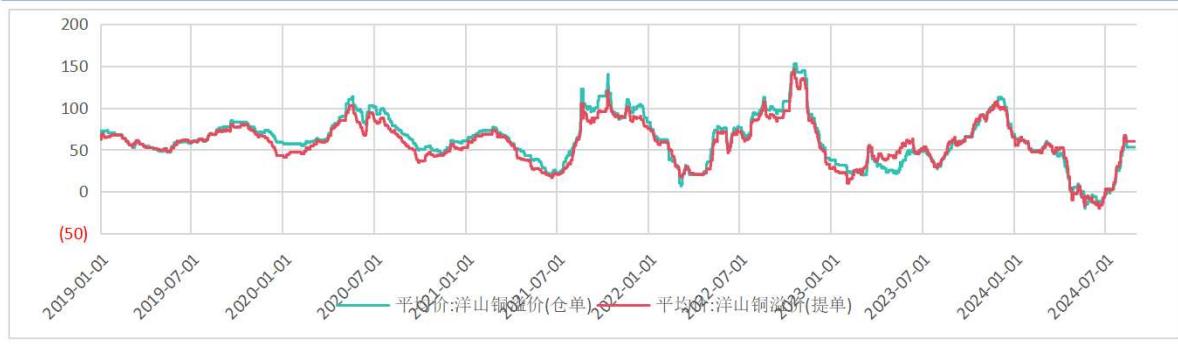
沪铜主连-平均价:废铜:电解铜:上海



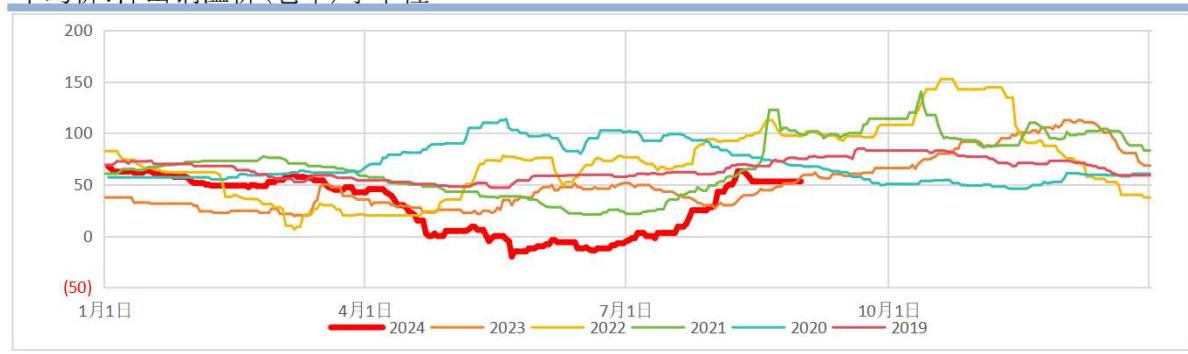
沪铜主连-平均价:废铜:电解铜:上海季节性



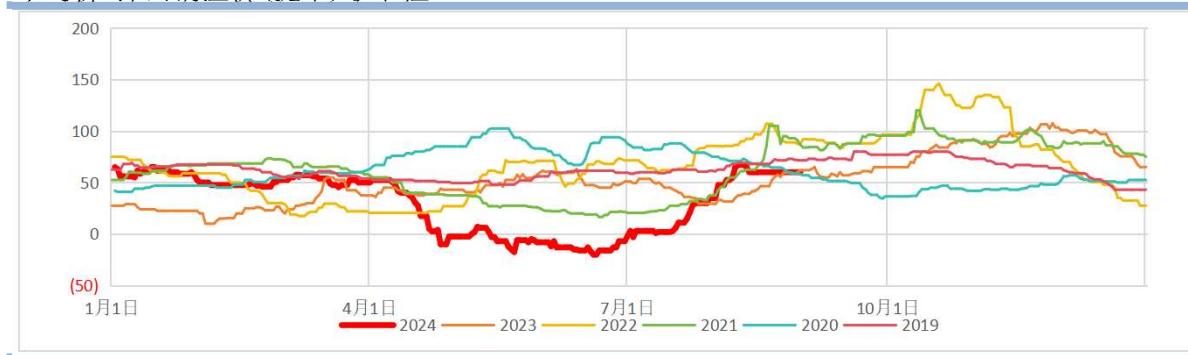
平均价:洋山铜溢价(仓单)、平均价:洋山铜溢价(提单)



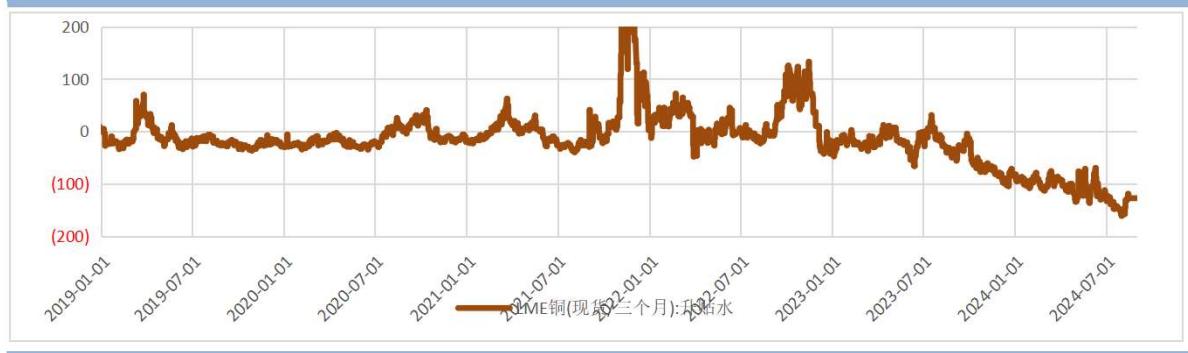
平均价:洋山铜溢价(仓单)季节性



平均价:洋山铜溢价(提单)季节性



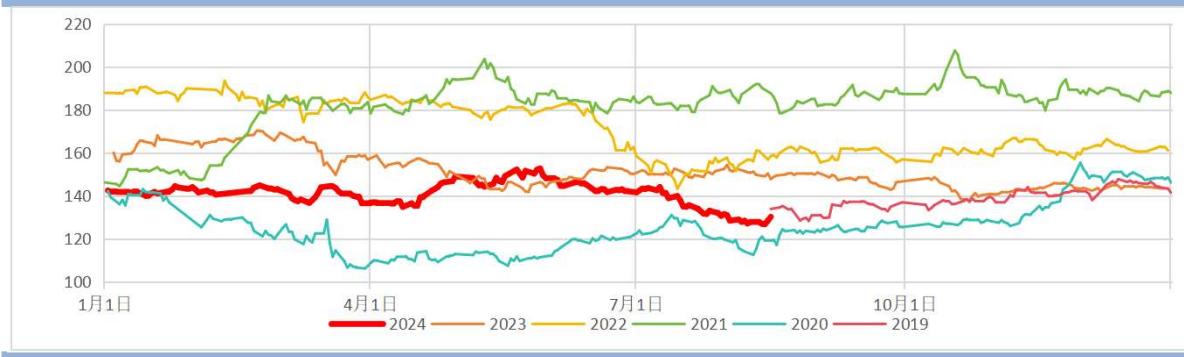
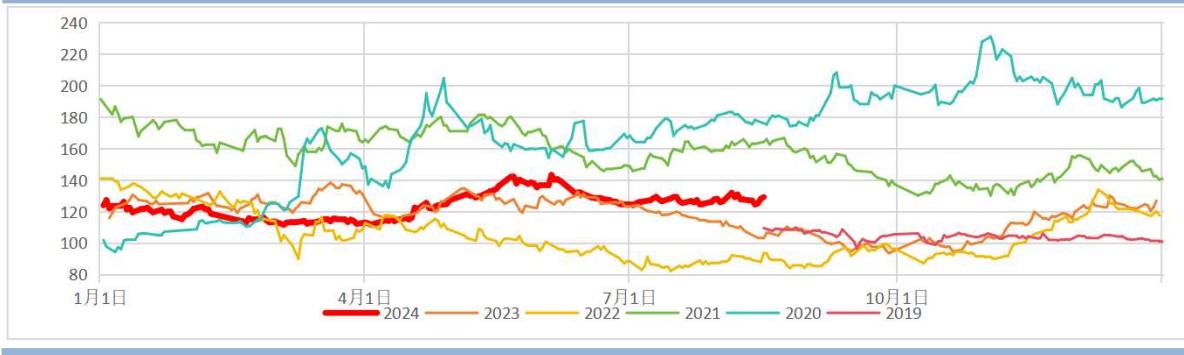
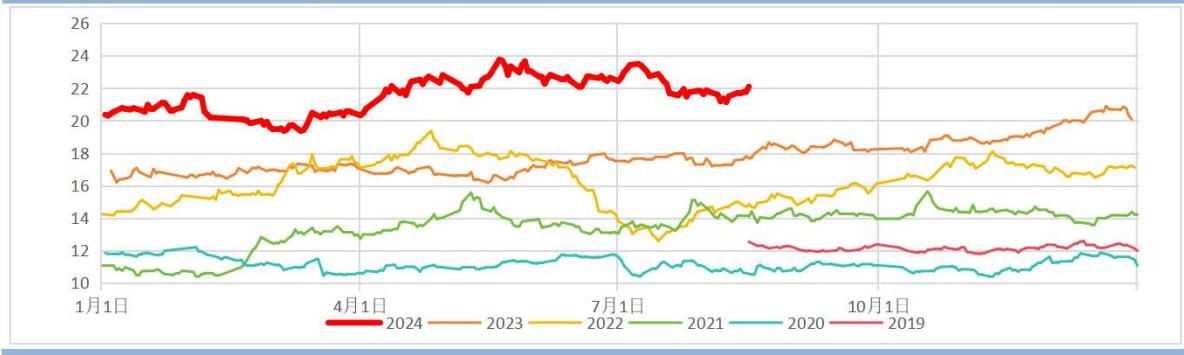
LME铜(现货/三个月):升贴水



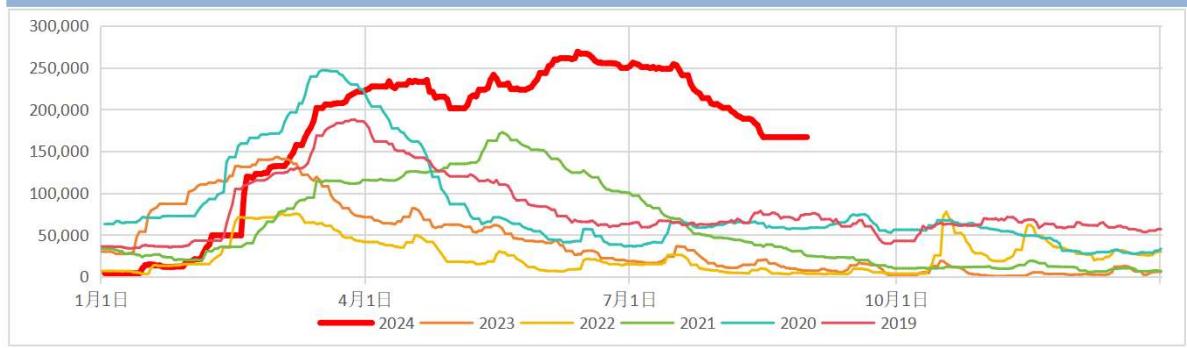
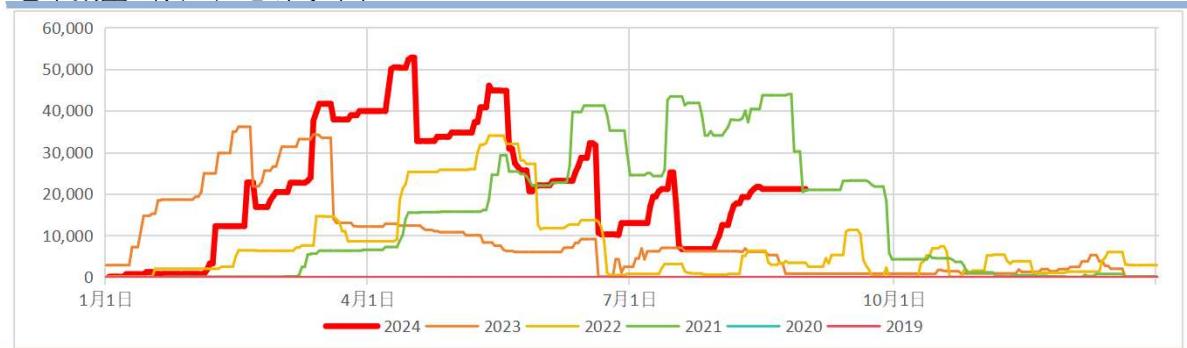
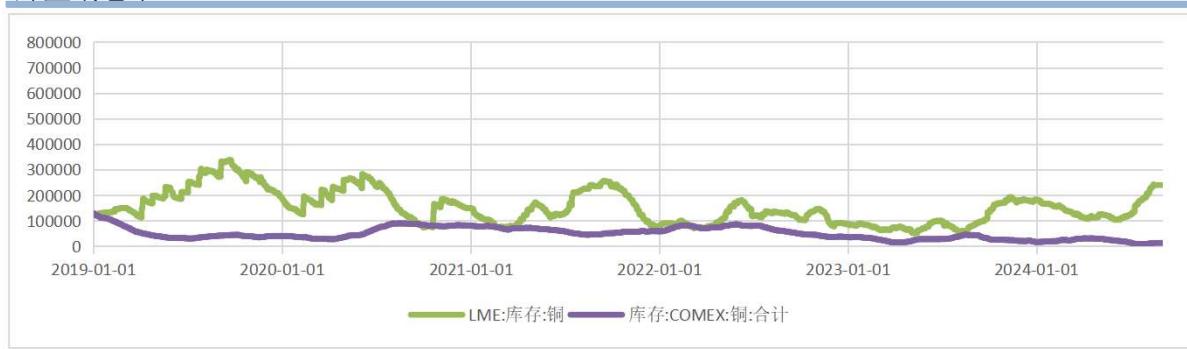
LME铜(现货/三个月):升贴水季节性

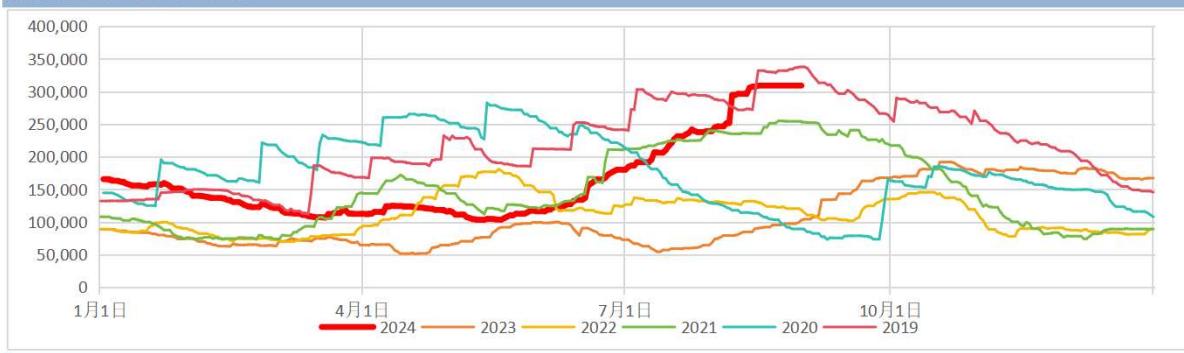
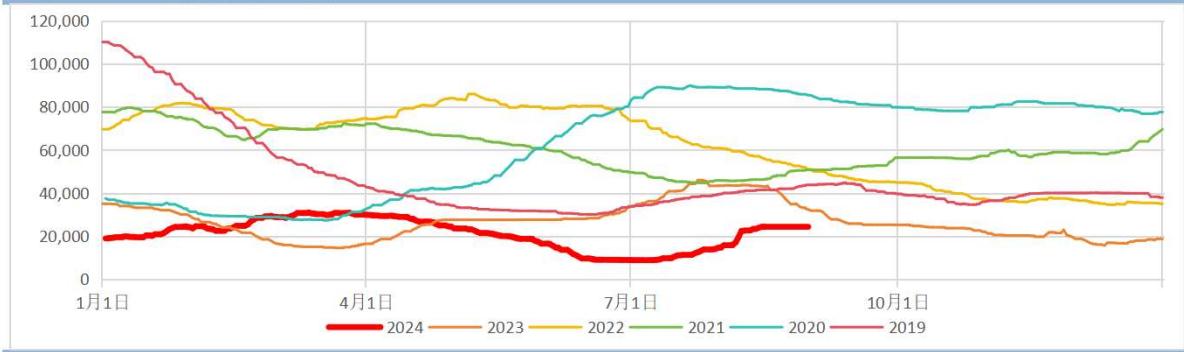
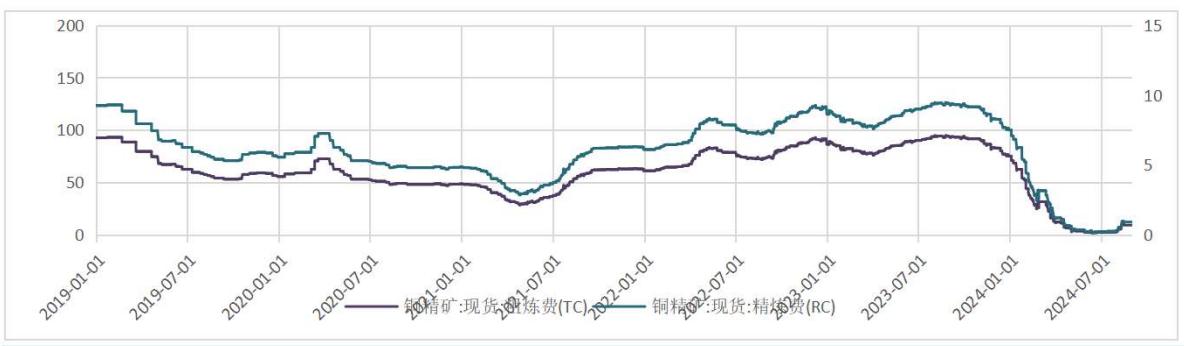
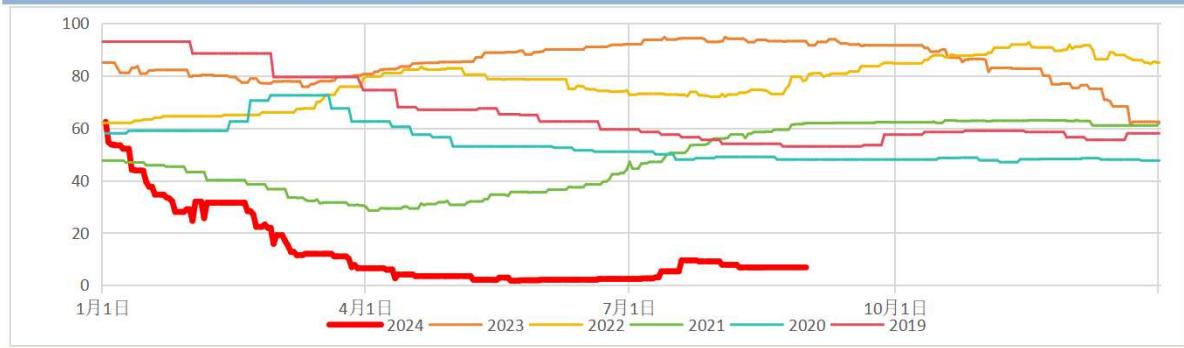


铜有关比价

沪铜主连/沪金主连季节性

沪铜主连/原油主连季节性

沪铜主连/沪深300季节性


国内铜仓单

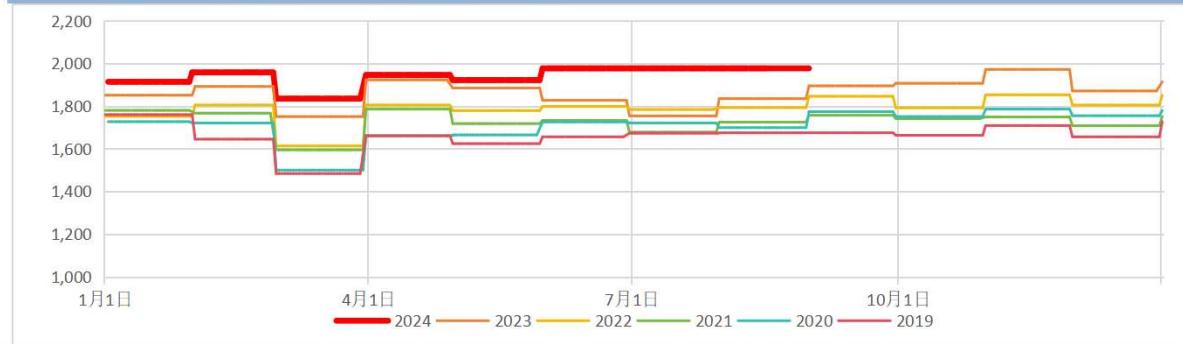
仓单数量:铜:总计季节性

仓单数量:铜(BC):总计季节性

外盘铜仓单


LME:库存:铜季节性

库存:COMEX:铜:合计季节性

铜精矿:现货:粗炼费 (TC)、铜精矿:现货:精炼费 (RC)

铜精矿:现货:粗炼费 (TC) 季节性


铜精矿:现货:精炼费(RC)季节性

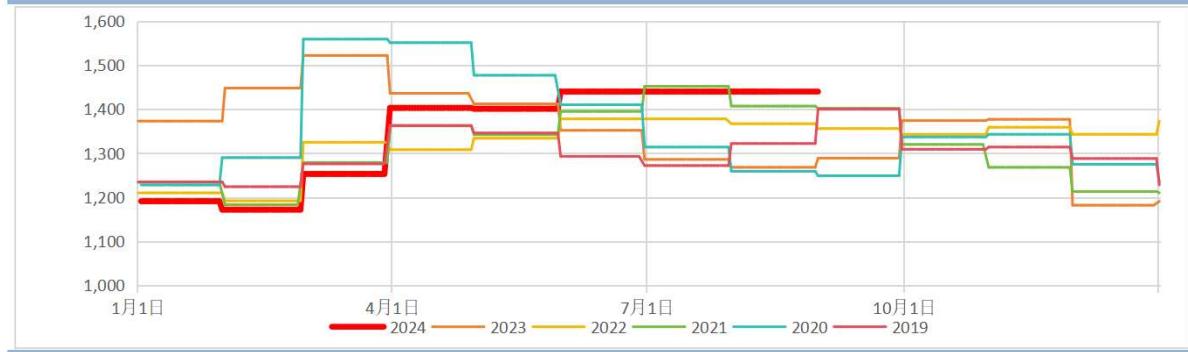
ICSG精铜供需平衡

ICSG精铜供需平衡

ICSG:精铜(原生):全球:产量:当月值季节性


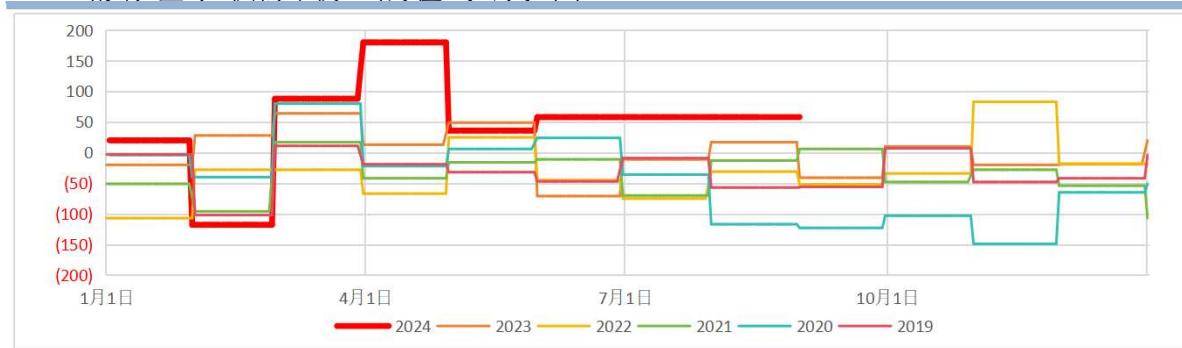
ICSG:精铜(再生):全球:产量:当月值季节性

ICSG:精铜(原生+再生):全球:产量:当月值季节性

ICSG:精铜:期末库存:当月值季节性

ICSG:精铜:库存变化:当月值季节性


ICSG精铜供需平衡

ICSG:精铜:全球:供需平衡:当月值季节性

ICSG:精铜:全球:供需平衡:当月值:季调季节性

ICSG铜精矿

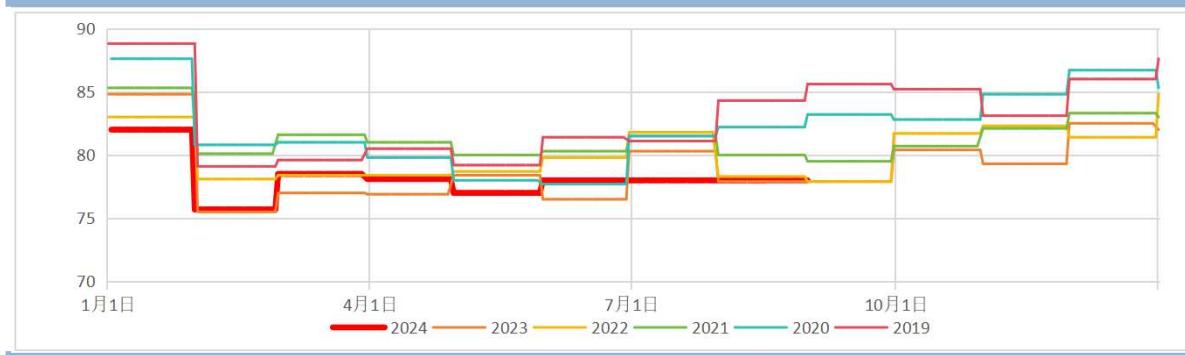

ICSG精铜



ICSG:铜精矿:全球:产能:当月值季节性



ICSG:铜精矿:全球:产能利用率:当月值季节性

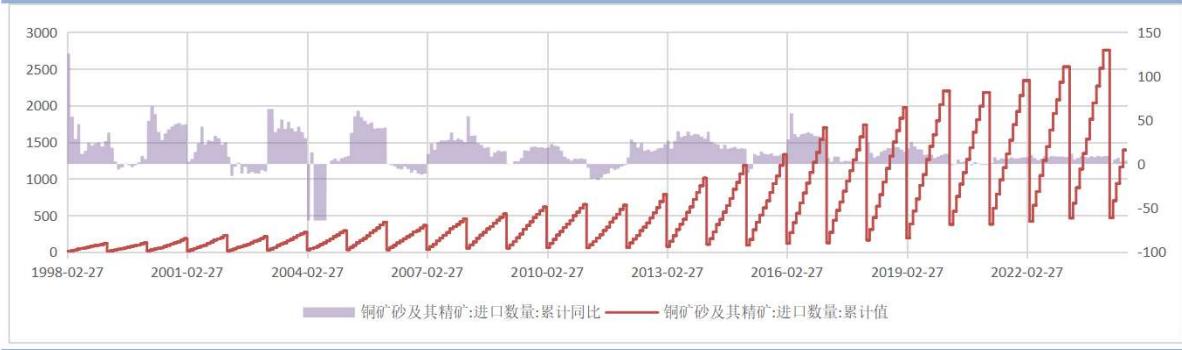
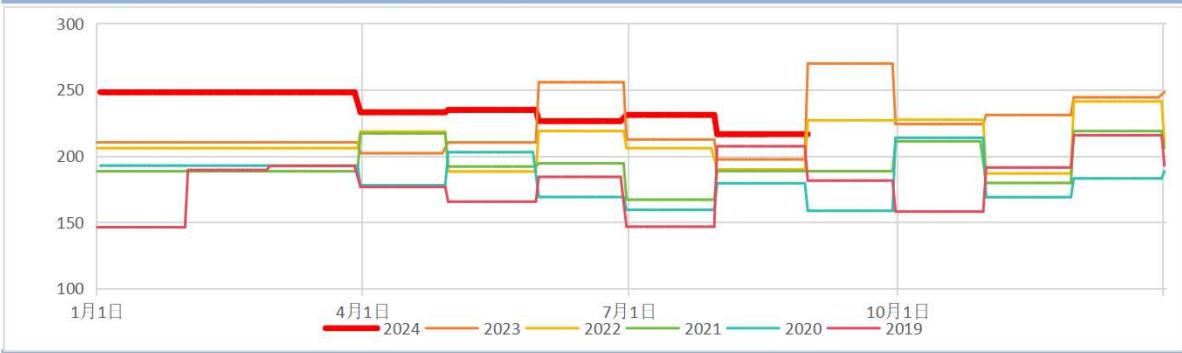


ICSG:精铜:全球:产能:当月值季节性

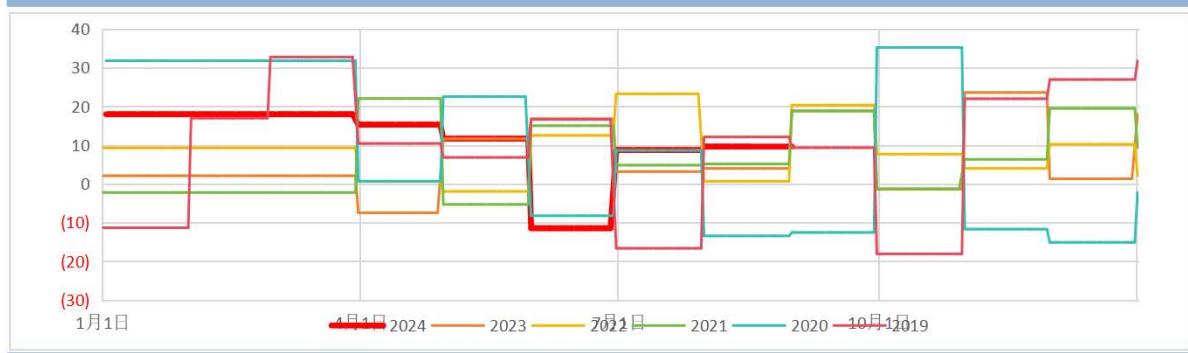


ICSG:精铜:全球:产能利用率:当月值季节性

国内铜矿进口

国内铜矿进口

铜矿砂及其精矿:进口数量:当月值季节性


铜矿砂及其精矿:进口数量:当月同比季节性



铜矿砂及其精矿:进口数量:累计值季节性

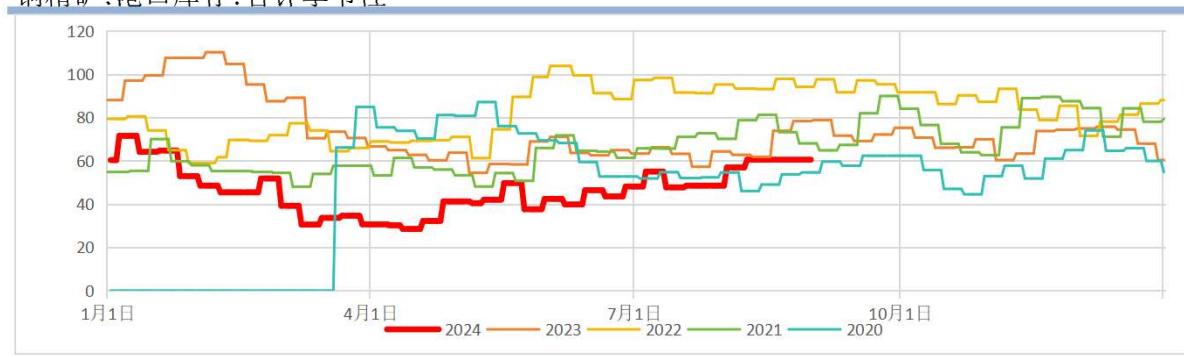


铜矿砂及其精矿:进口数量:累计同比季节性

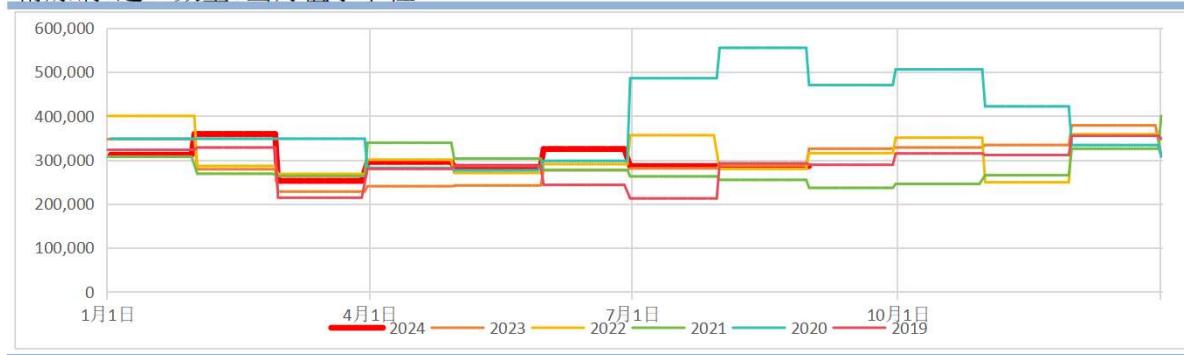


铜精矿:港口库存:合计

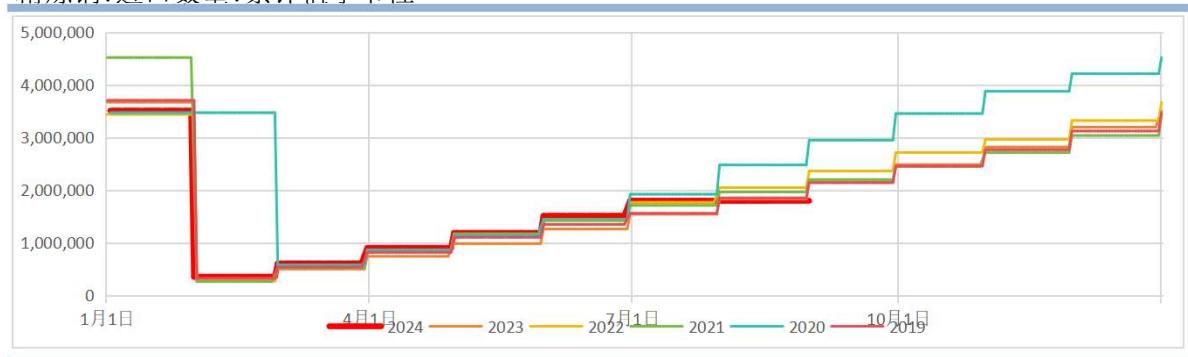


铜精矿:港口库存:合计季节性

海关总署国内精铜进口

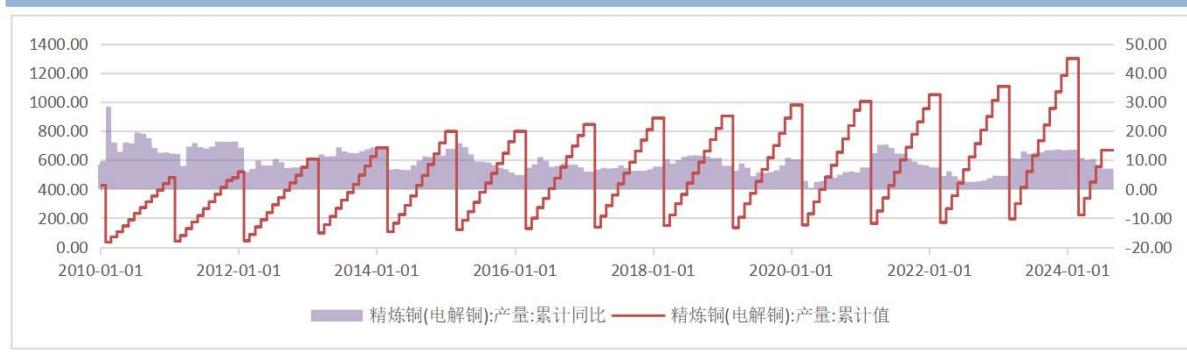
海关总署国内精铜进口

精炼铜:进口数量:当月值季节性


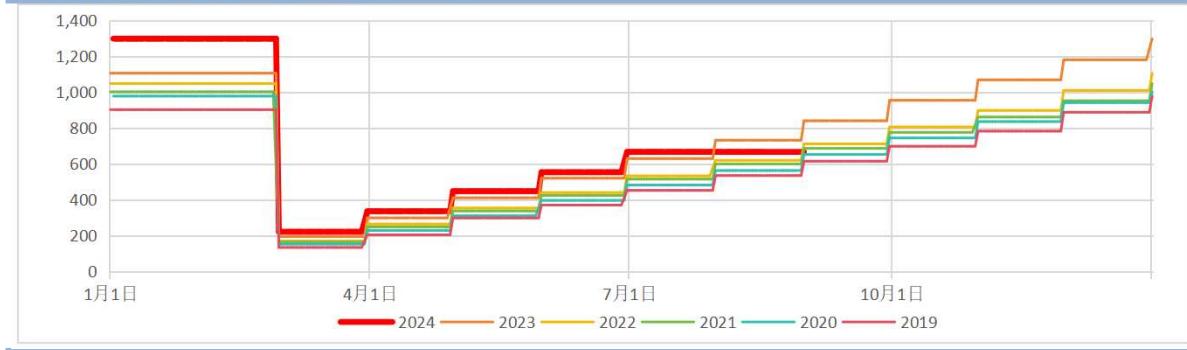
精炼铜:进口数量:当月同比季节性

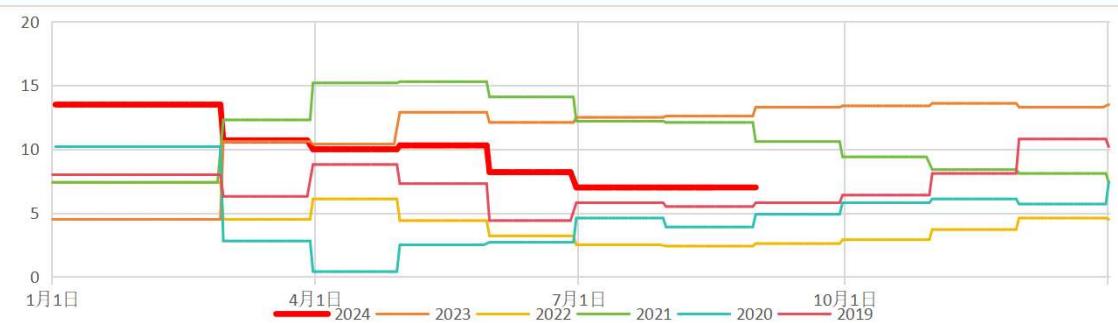
精炼铜:进口数量:累计值季节性

精炼铜:进口数量:累计同比季节性

国家统计局精铜产量

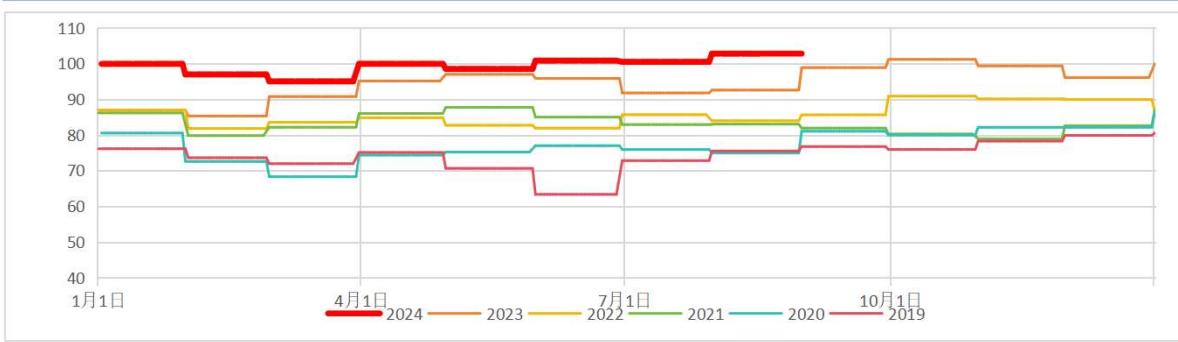

国家统计局精铜产量

精炼铜(电解铜):产量:当月值季节性

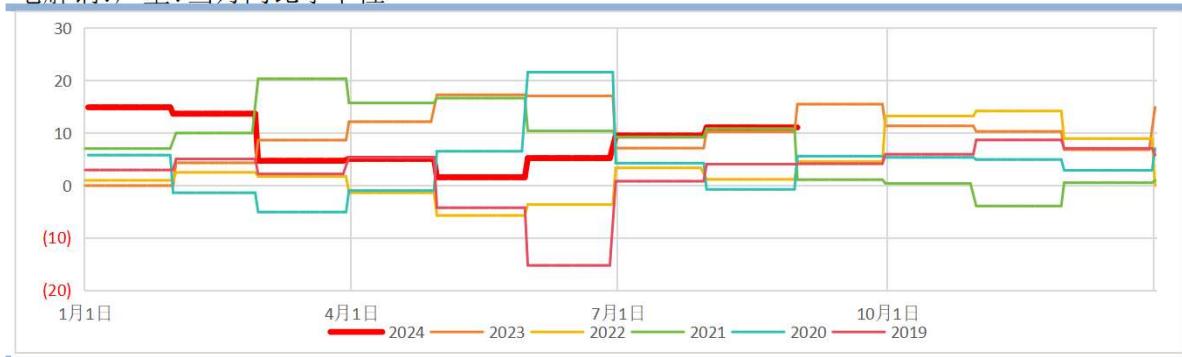
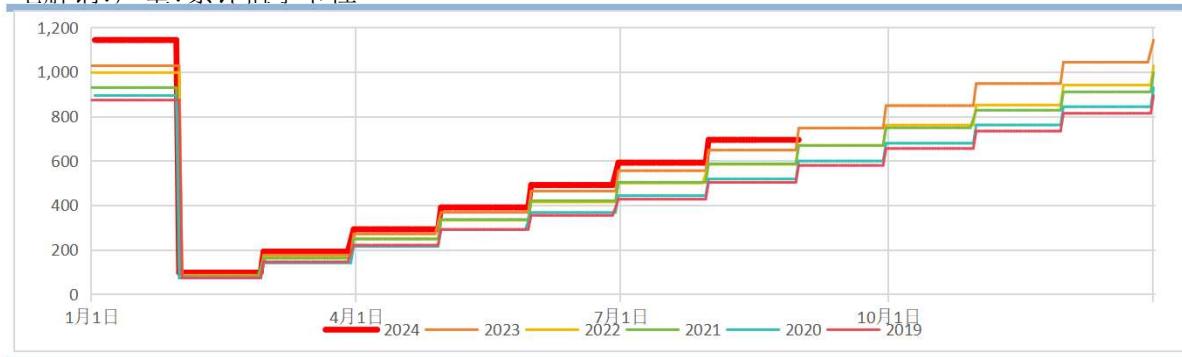
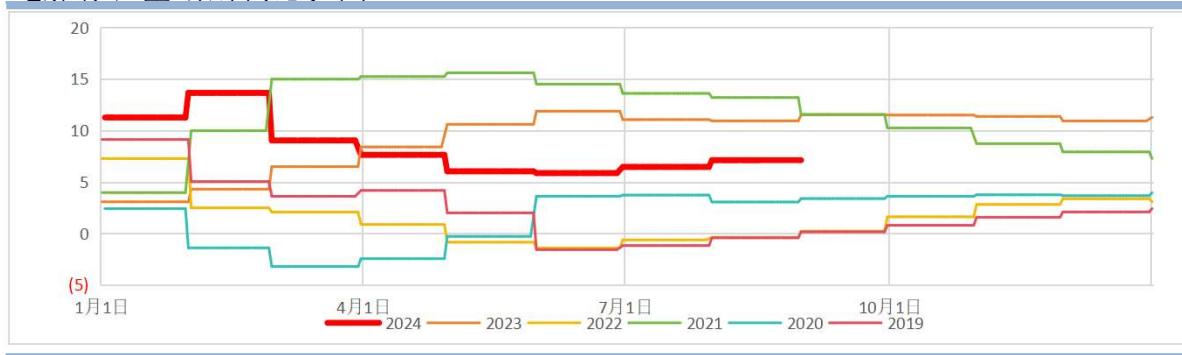
精炼铜(电解铜):产量:当月同比季节性

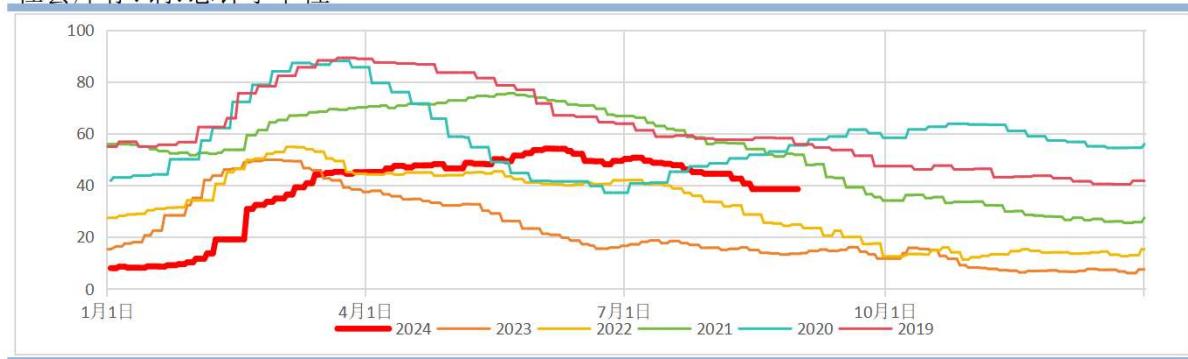
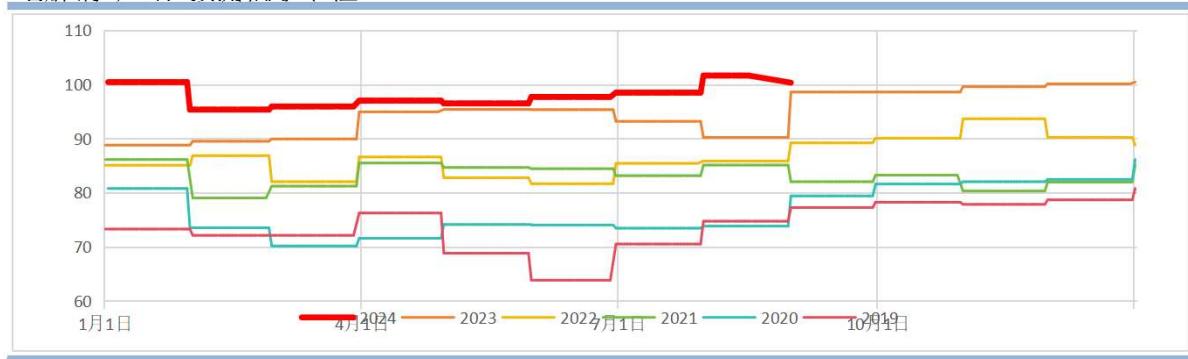
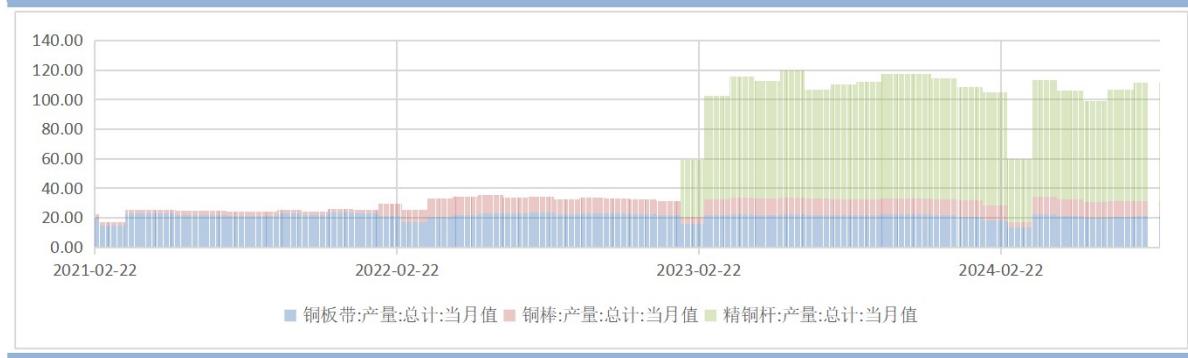
精炼铜(电解铜):产量:累计值季节性


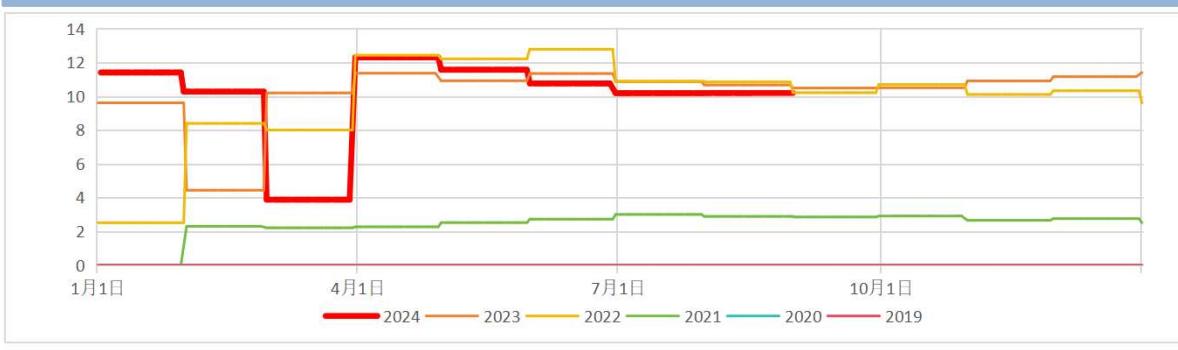
精炼铜(电解铜):产量:累计同比季节性

上海有色精铜供需

上海有色精铜供需

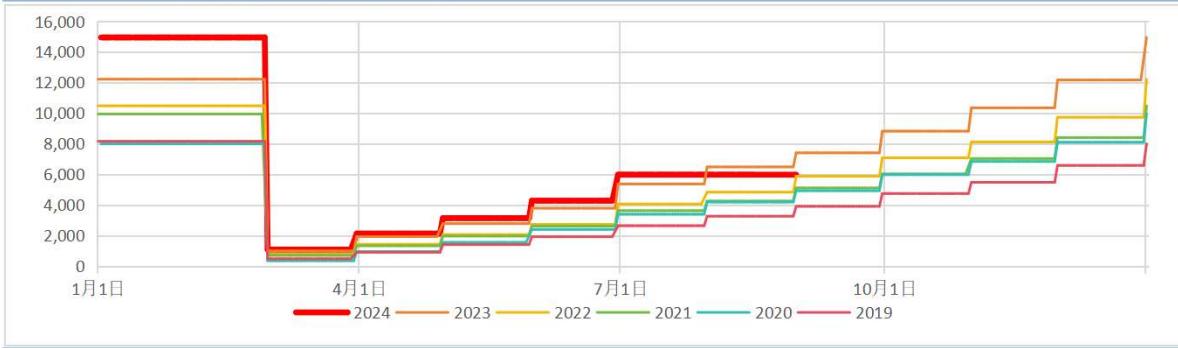
电解铜:产量:当月值季节性


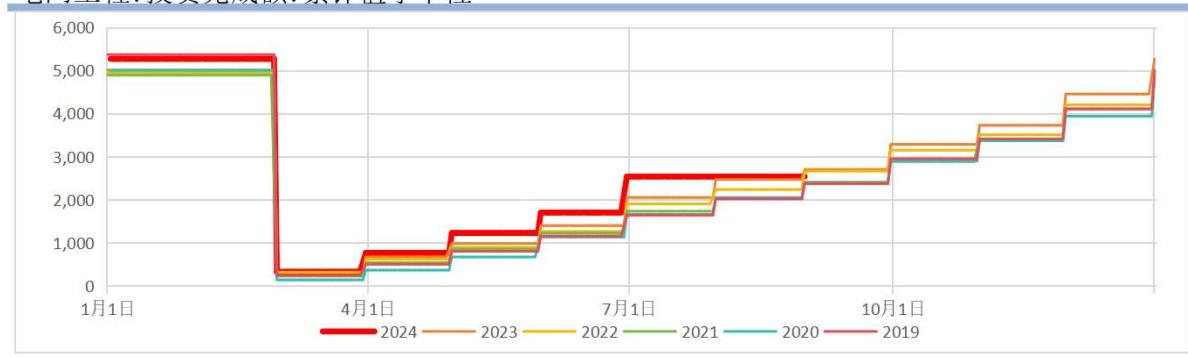
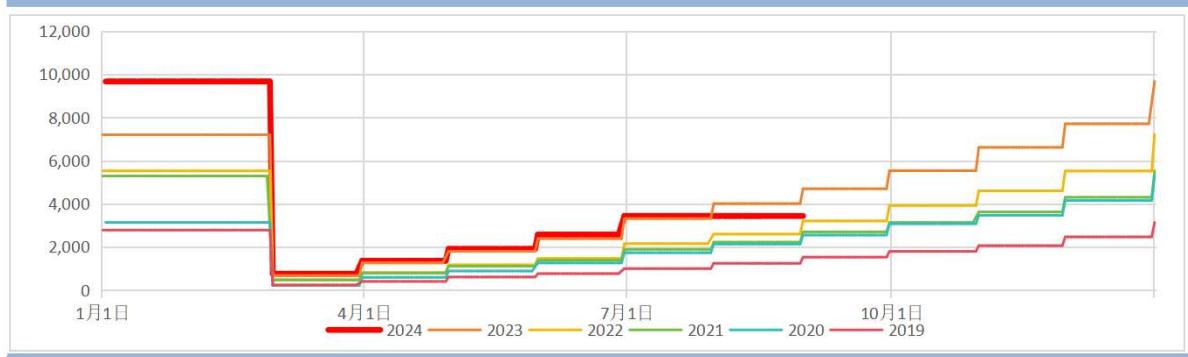
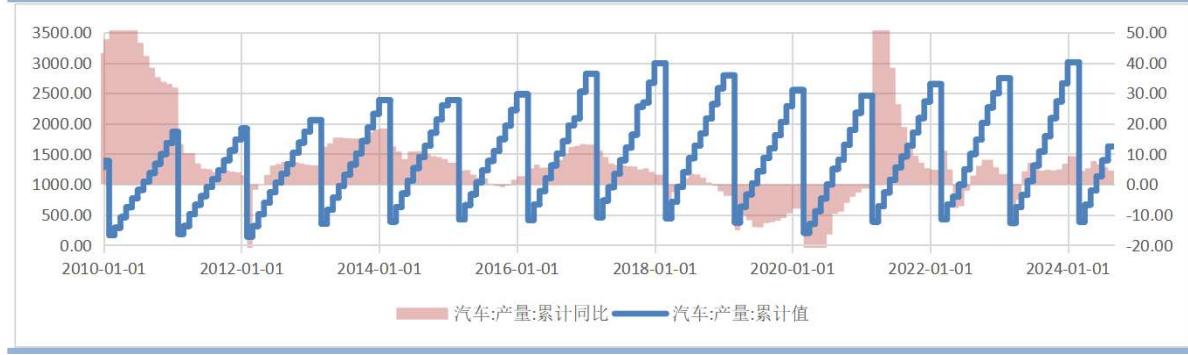
电解铜: 产量: 当月同比季节性

电解铜: 产量: 累计值季节性

电解铜: 产量: 累计同比季节性

上海有色精铜供需

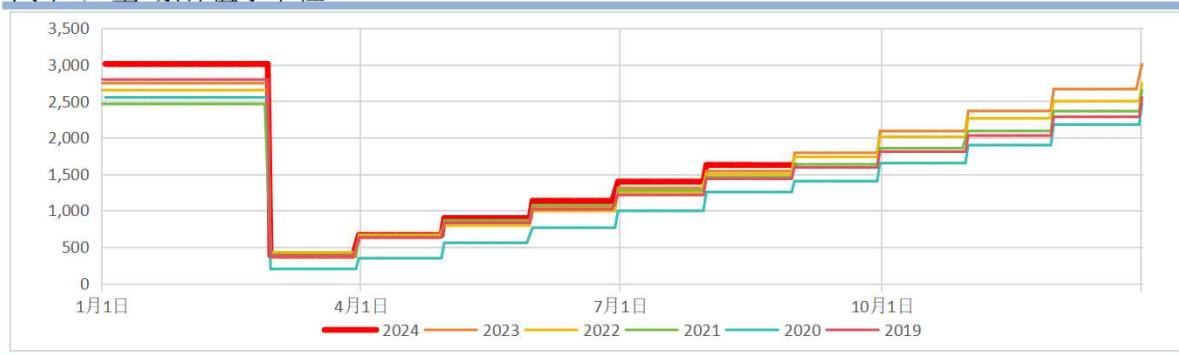

社会库存:铜:总计季节性

电解铜:产量:预测值季节性

铜下游产量

铜板带:产量:总计:当月值季节性

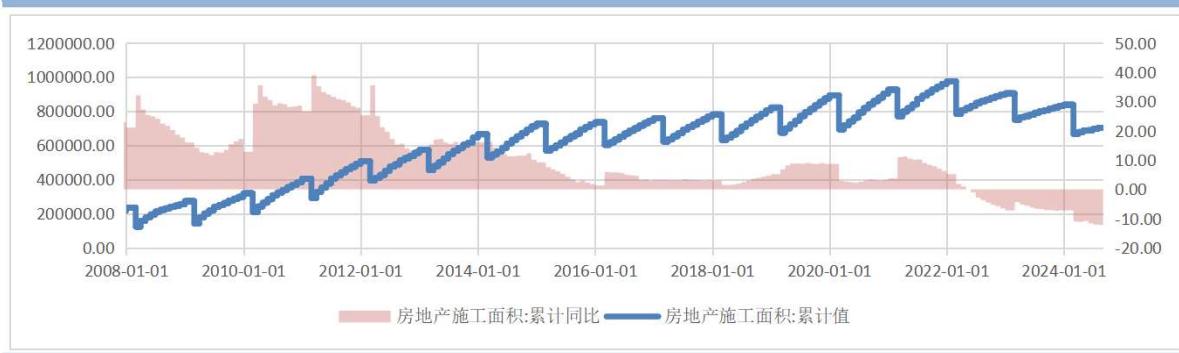
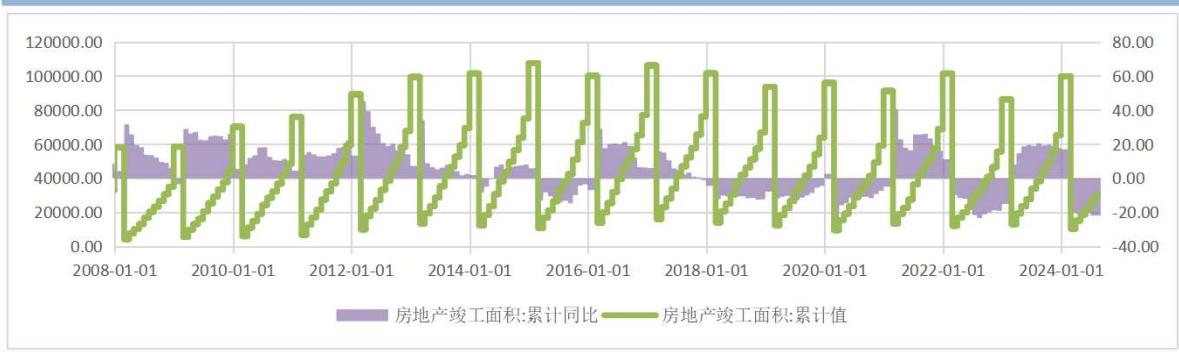

铜棒:产量:总计:当月值季节性

精铜杆:产量:总计:当月值季节性

铜下游应用行业：电力、电网、电源

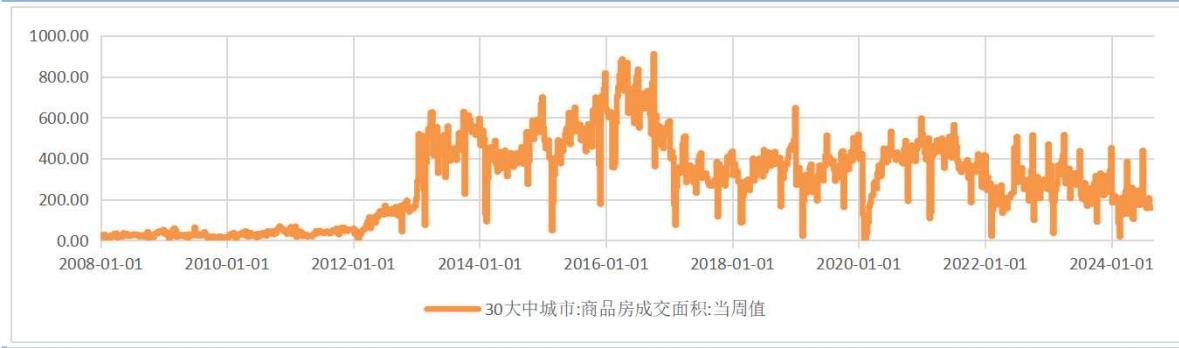
电力工程:投资完成额:累计值季节性


电网工程:投资完成额:累计值季节性

电源工程:投资完成额:累计值季节性

铜下游行业: 汽车

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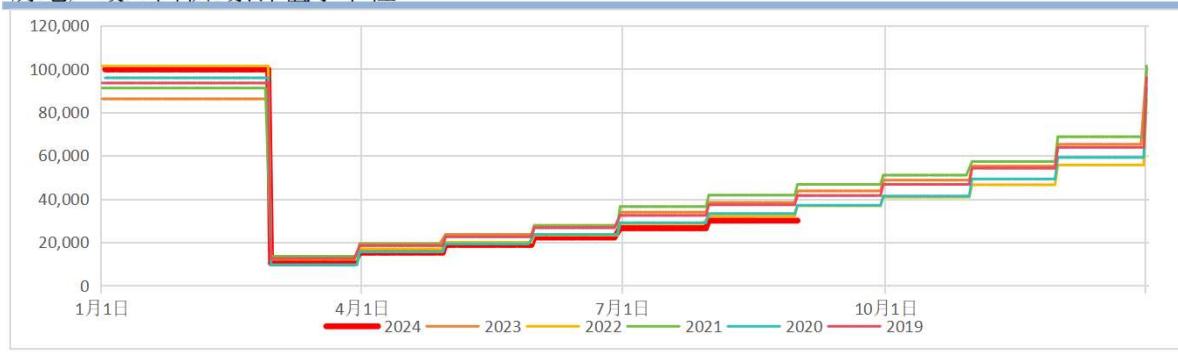
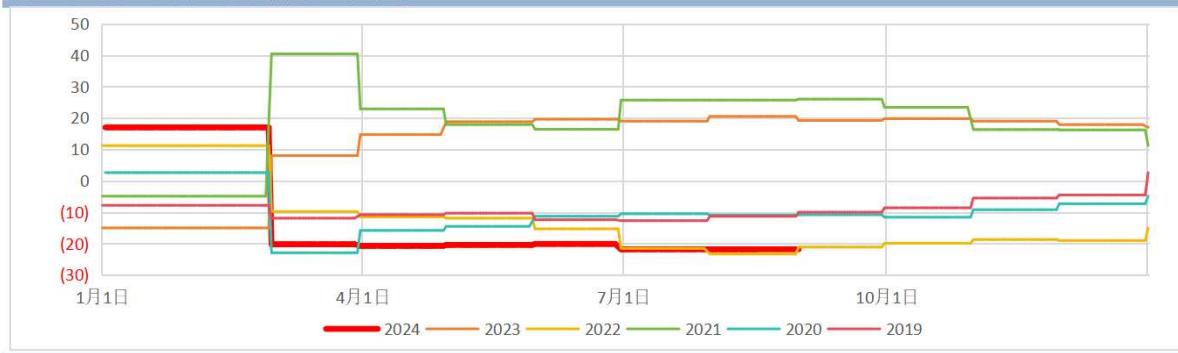

汽车:产量:累计值季节性

新能源汽车:产量:累计值季节性

铜下游行业: 房地产

铜下游行业: 房地产


铜下游行业：房地产

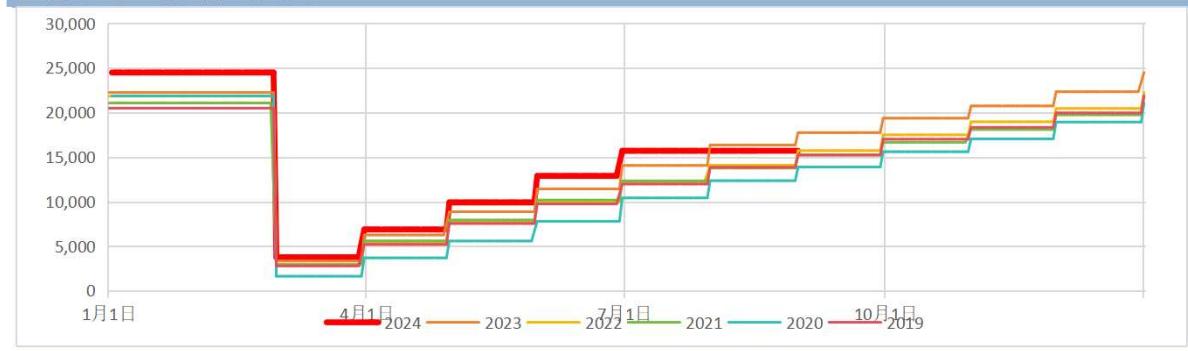
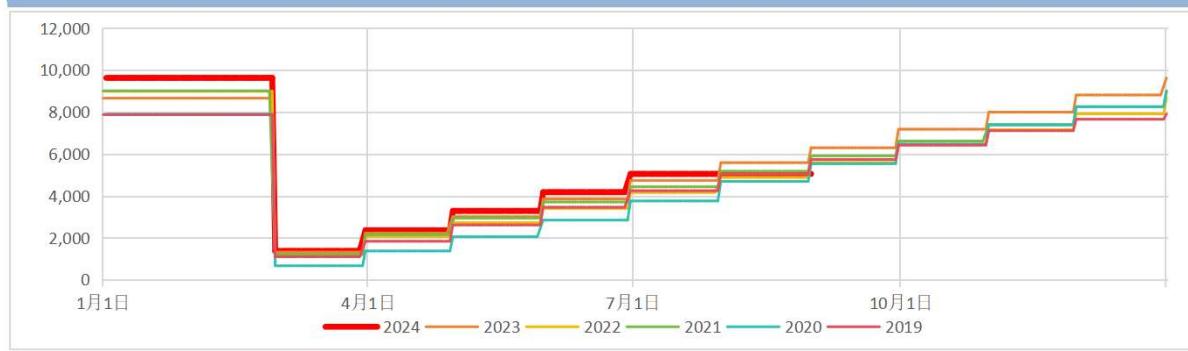
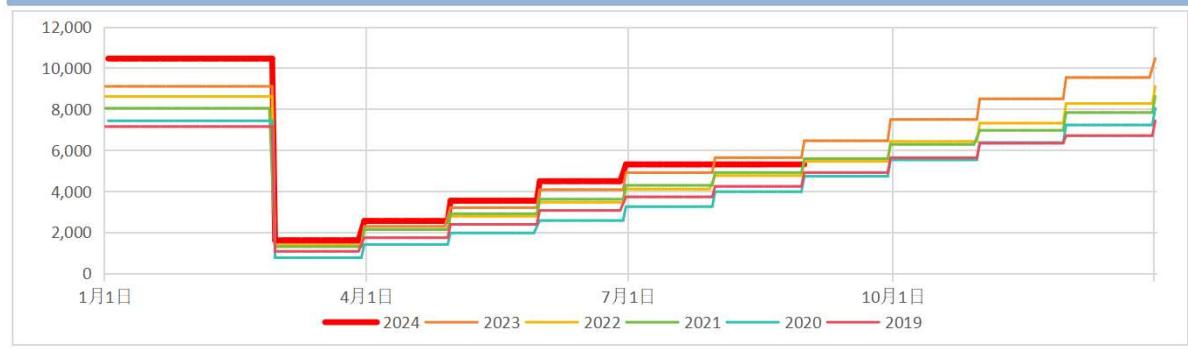
铜下游行业：房地产

房地产施工面积:累计值季节性

房地产施工面积:累计同比季节性

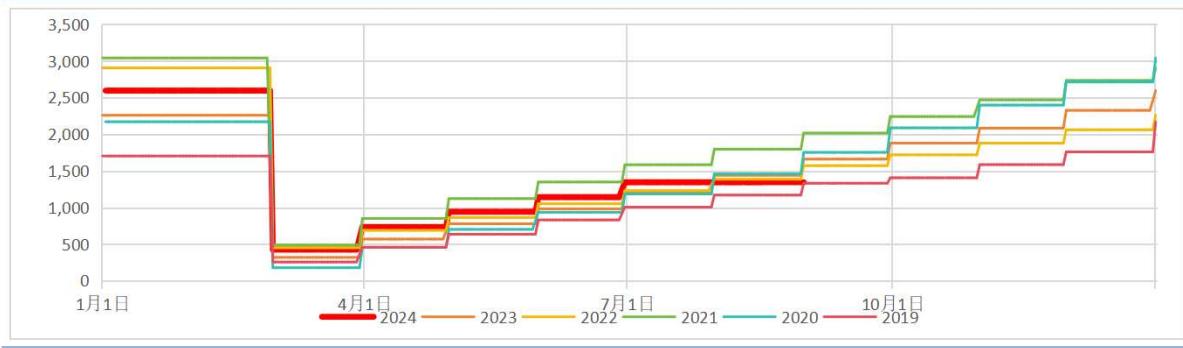

房地产竣工面积: 累计值季节性

房地产竣工面积: 累计同比季节性

房地产新开工施工面积: 累计同比季节性

30大中城市: 商品房成交面积: 当周值季节性


铜下游行业：白电

空调:产量:累计值季节性

家用冰箱:产量:累计值季节性

家用洗衣机:产量:累计值季节性


冷柜:产量:累计值季节性



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