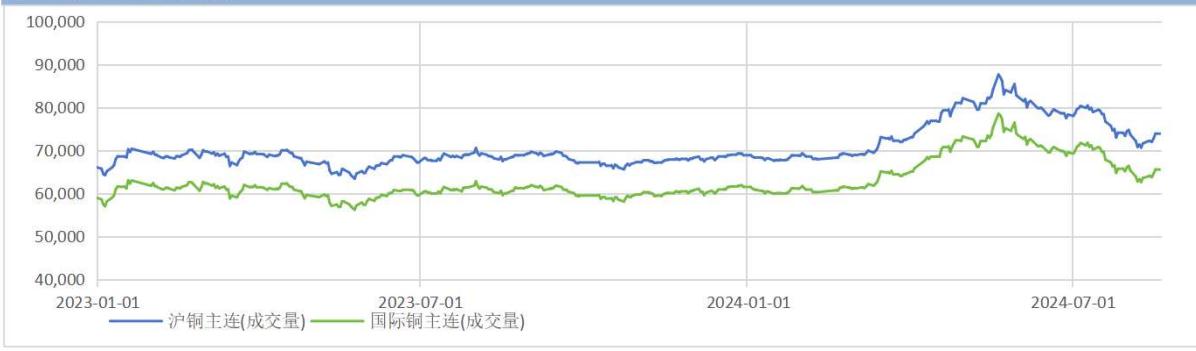




电解铜每日市场观察

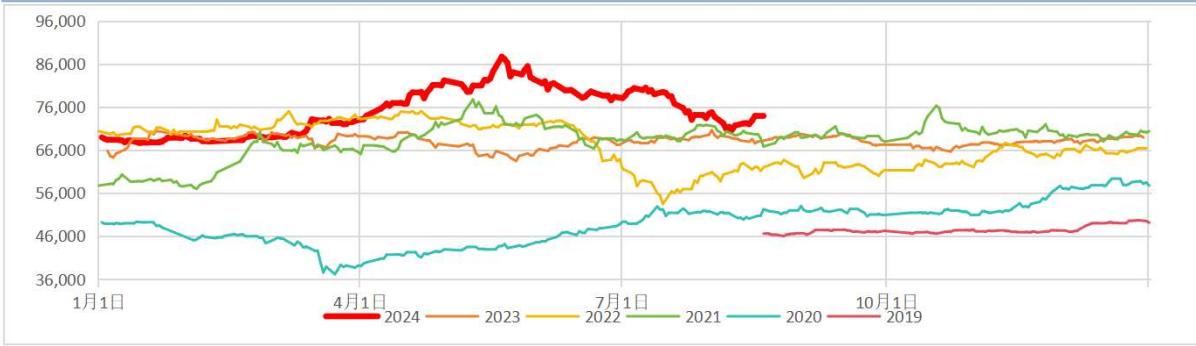
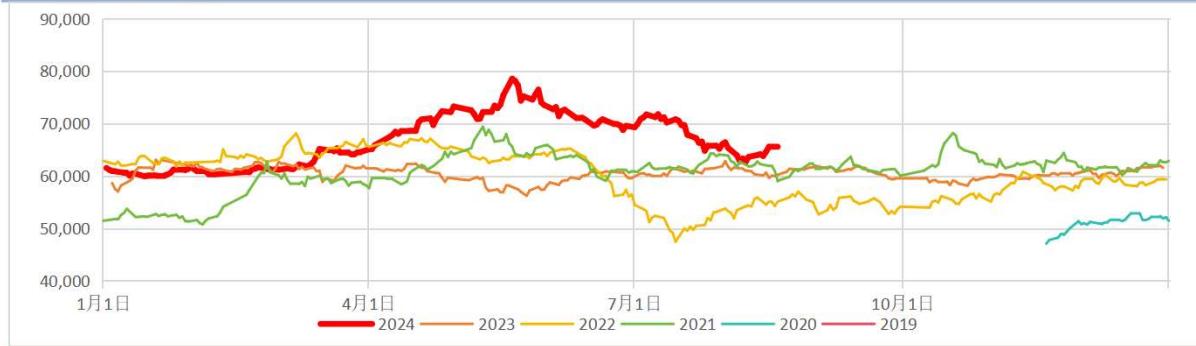
撰写: 曹有明 审核: 林振龙
 从业资格证号: F3038998 交易咨询资格证号: Z0018476 2024年8月19日
 交易咨询资格证号: Z0013162 复核: 刘书语
 从业资格证号: F03107583

数据类别	指标	单位	8月19日	8月16日	8月12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	73900	73930	72190	-30.00	-0.04%	1710.00	2.37%
	国际铜主连(成交量)	元/吨	73925	73978	72330	-53.00	-0.07%	1595.00	2.21%
	LME铜(3个月)	美元/吨	9052	9052	8975	0	0	77.00	0.86%
	COMEX铜	美分/磅	415	415	407	0	0	8.20	2.02%
铜月差	沪铜主连-沪铜次主连	元/吨	-40	-50	-90	10.00	11.11%	50.00	55.56%
	国际铜主连-国际铜次主连	元/吨	-100	-60	-150	-40.00	-26.67%	50.00	33.33%
铜跨境基差	沪铜主连-国际铜主连	元/吨	8340	8340	8190	0	0	150.00	1.83%
	沪铜主连-LME铜(3个月)	元/吨	9255	9241	8056	14.35	0.18%	1198.70	14.88%
	沪铜主连-COMEX铜	元/吨	8553	8538	8096	14.84	0.18%	457.54	5.65%
	LME铜(3个月)-COMEX铜	美元/吨	-98	-98	6	0	0	-103.78	-1885.68%
铜现货及升贴水	平均价:1#电解铜	元/吨	74035	73620	71355	415.00	0.58%	2680.00	3.76%
	平均价:1#电解铜-沪铜主连	元/吨	-100	-60	-150	-40.00	-26.67%	50.00	33.33%
	平均价:洋山铜溢价(仓单)	元/吨	53	53	60	0	0	-7.00	-11.67%
	平均价:洋山铜溢价(提单)	元/吨	58	60	65	-2.00	-3.08%	-7.00	-10.77%
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	-	128.81	130.22	127.70	-1.41	-1.10%	1.11	0.87%
	沪铜主连/原油主连	-	132.08	129.32	127.07	2.77	2.18%	5.01	3.94%
	沪铜主连/沪深300	-	22.01	22.10	21.71	-0.08	-0.38%	0.31	1.42%
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	63.80	63.80	60.50	0	0	3.30	5.45%
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	110.30	110.30	110.30	0	0	0	0
	精炼铜累计值	万吨	777.10	777.10	777.10	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	40.64	0	0	-2.09	-5.14%
	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	158731	166879	187708	-8148.00	-4.34%	-28977.00	-15.44%
	仓单数量:铜(BC):总计	吨	21194	21194	20491	0	0	703.00	3.43%
	LME:库存:铜	吨	308075	309050	296125	-975.00	-0.33%	11950.00	4.04%
	库存:COMEX:铜:合计	短吨	25089	25089	23445	0	0	1644.00	7.01%

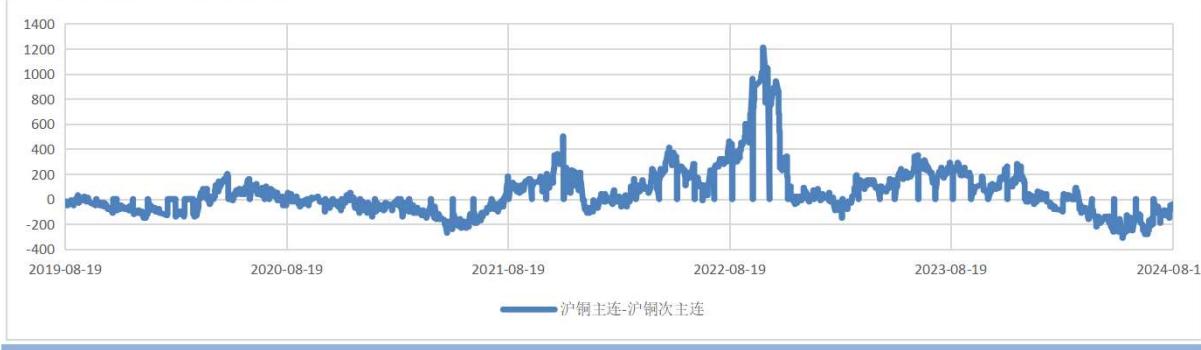
沪铜、国际铜主连


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



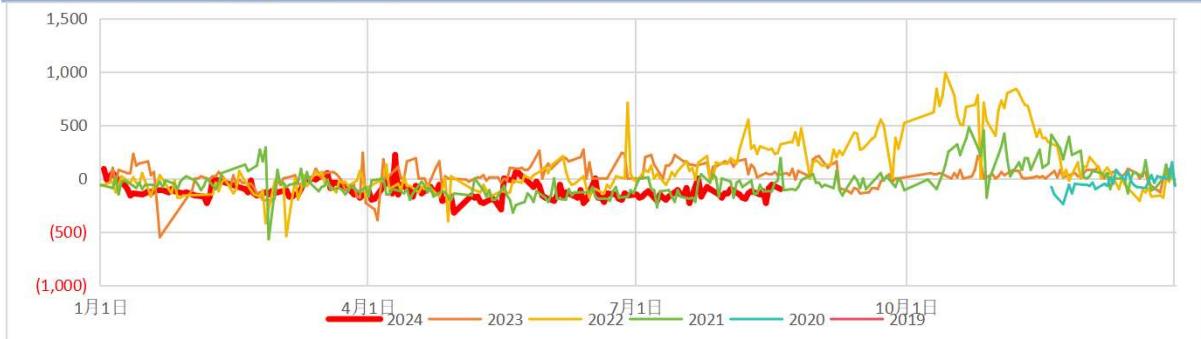
沪铜主连-沪铜次主连季节性



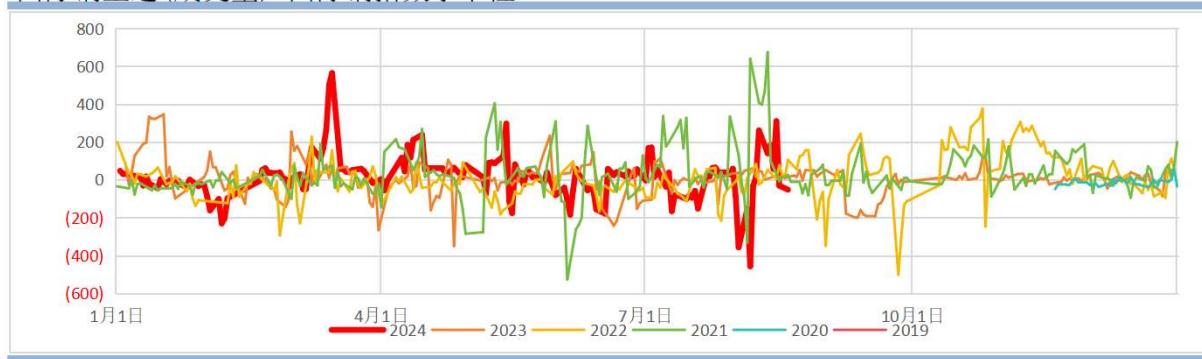
沪铜主连-沪铜指数季节性



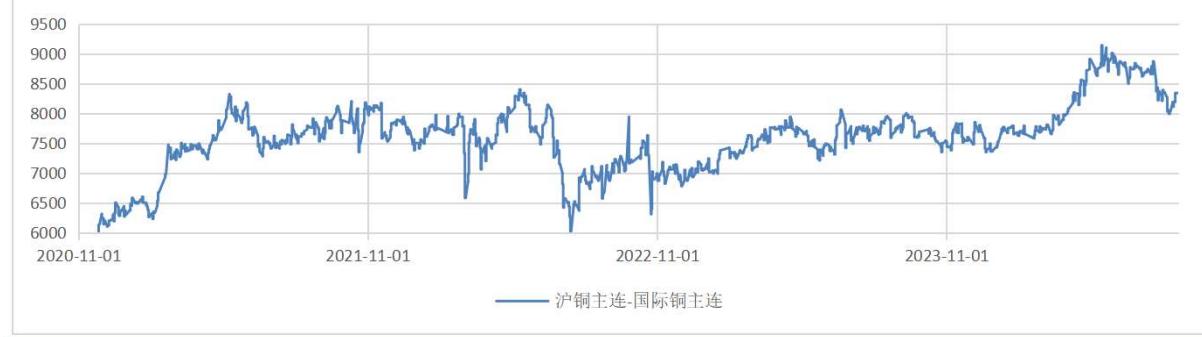
国际铜主连-国际铜次主连季节性



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



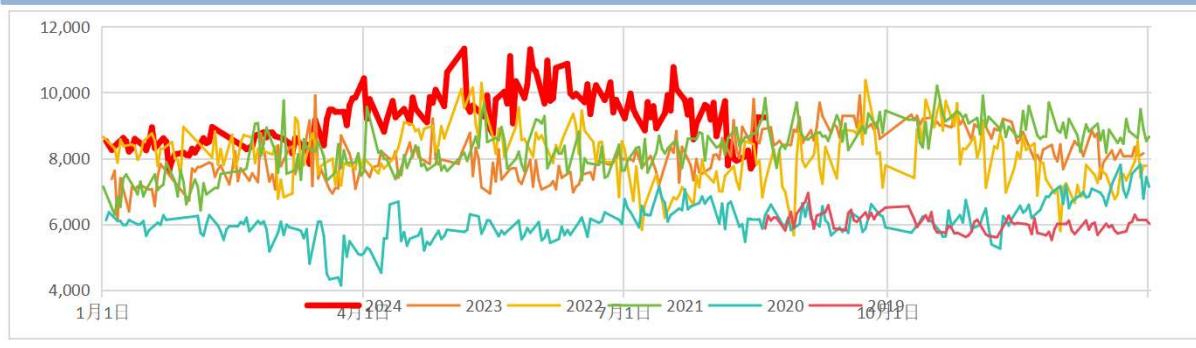
沪铜主连-国际铜主连季节性



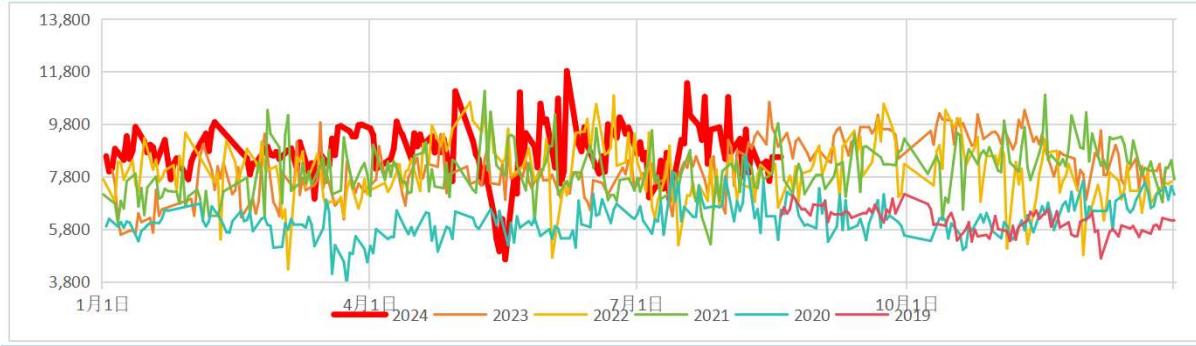
沪铜主连-LME铜(3个月)、沪铜主连-COMEX铜



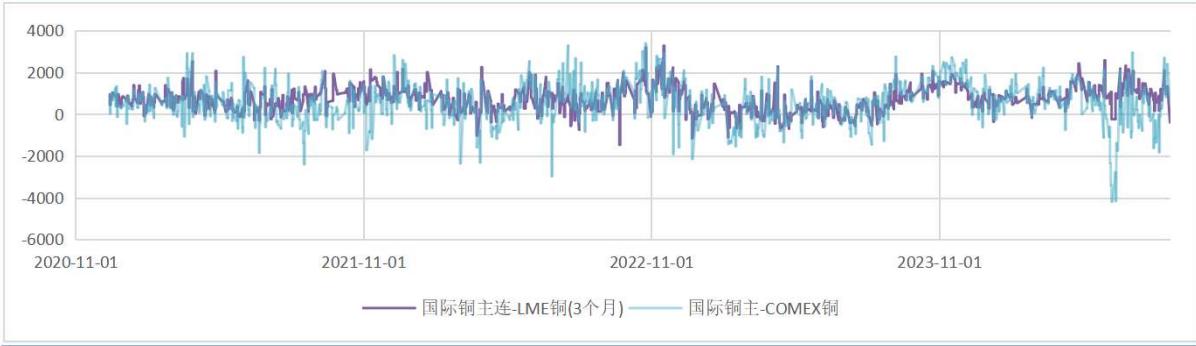
沪铜主连-LME铜(3个月)季节性



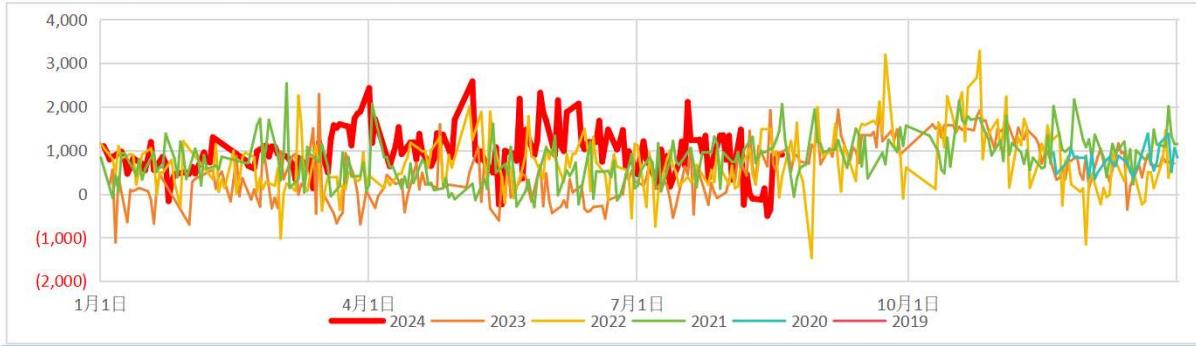
沪铜主连-COMEX铜季节性



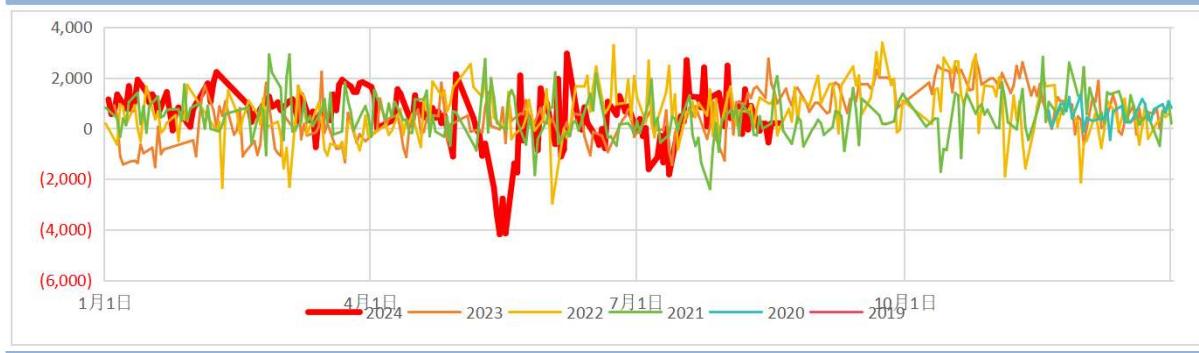
国际铜主连-LME铜(3个月)、国际铜主-COMEX铜



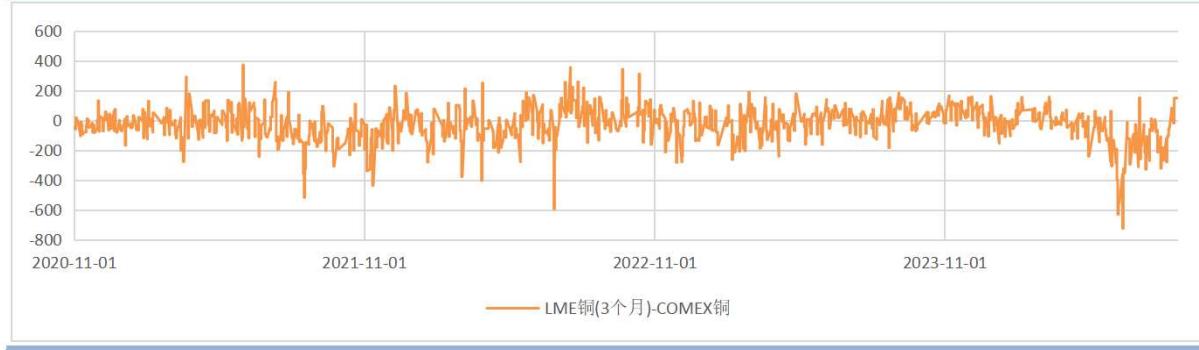
国际铜主连-LME铜(3个月)季节性



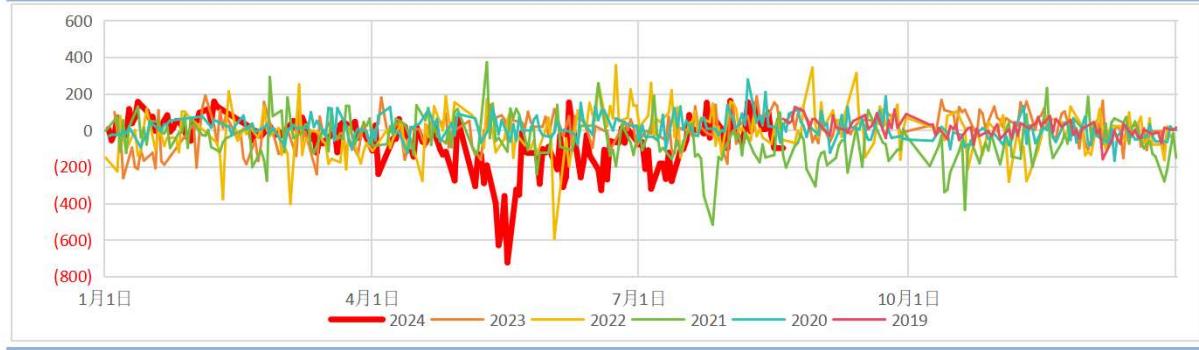
国际铜主-COMEX铜季节性



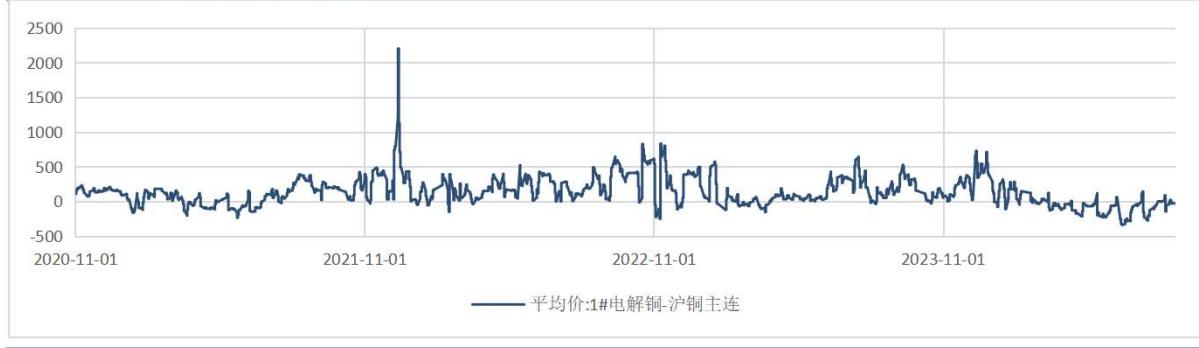
LME铜(3个月)-COMEX铜



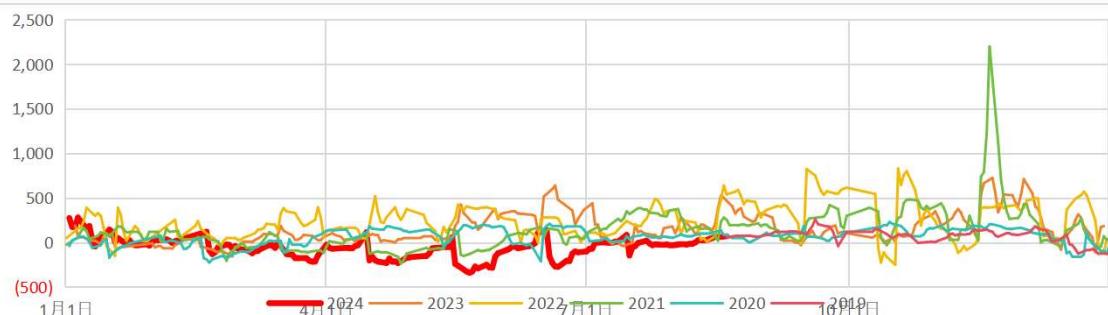
LME铜(3个月)-COMEX铜季节性



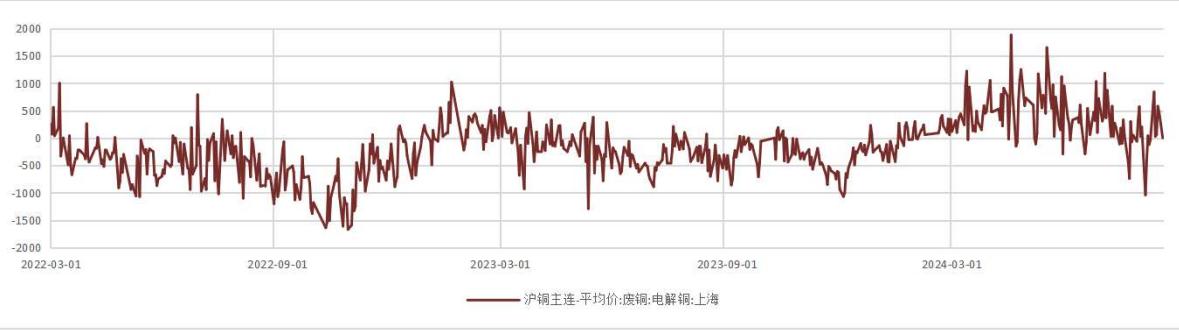
平均价:1#电解铜-沪铜主连



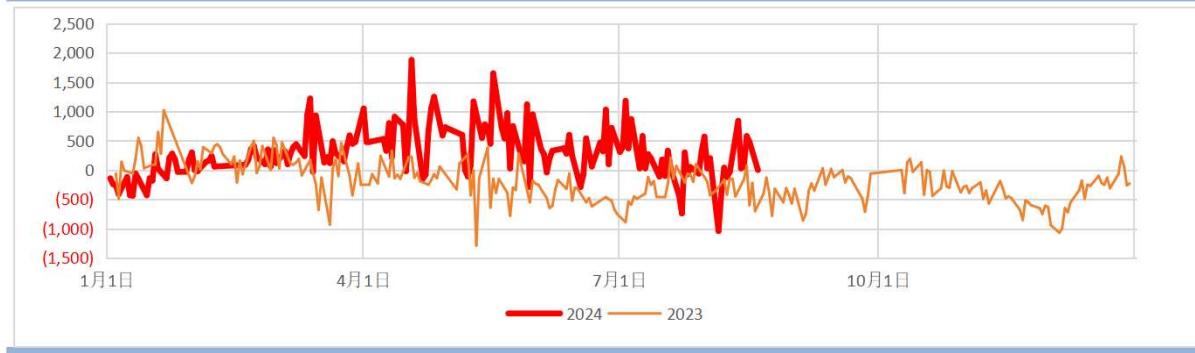
平均价:1#电解铜-沪铜主连季节性



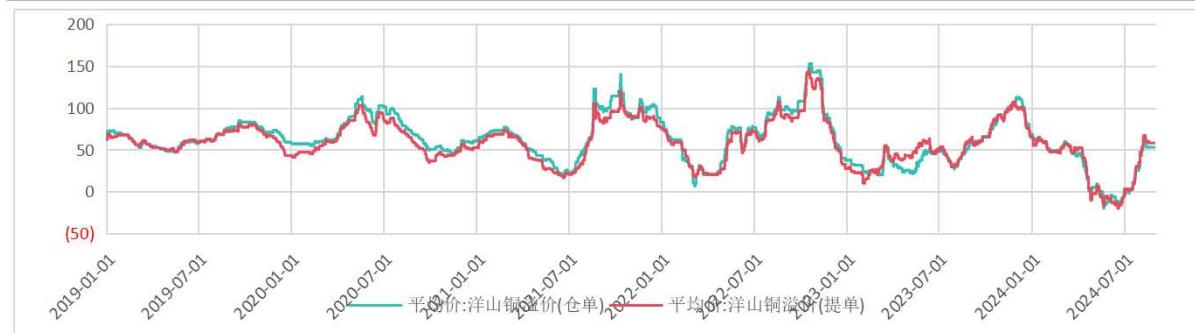
沪铜主连-平均价:废铜:电解铜:上海



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)



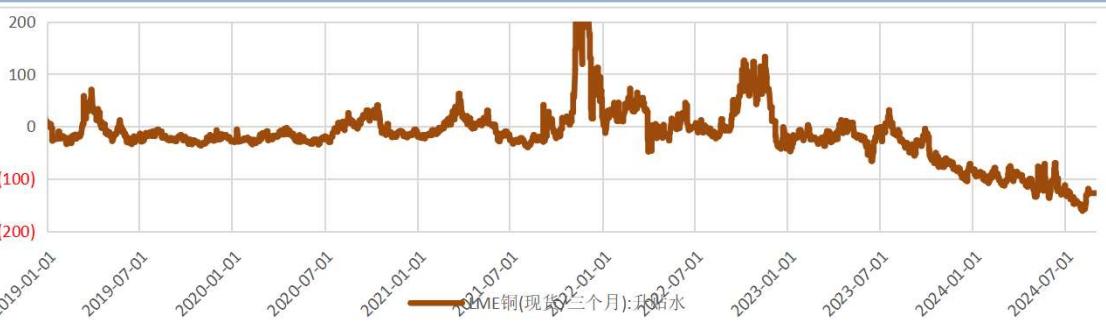
平均价:洋山铜溢价(仓单)季节性



平均价:洋山铜溢价(提单)季节性



LME铜(现货/三个月):升贴水



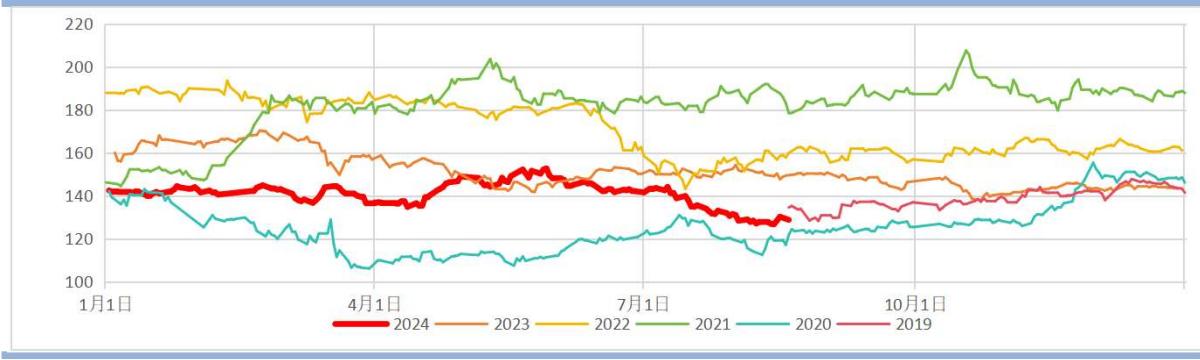
LME铜(现货/三个月):升贴水季节性



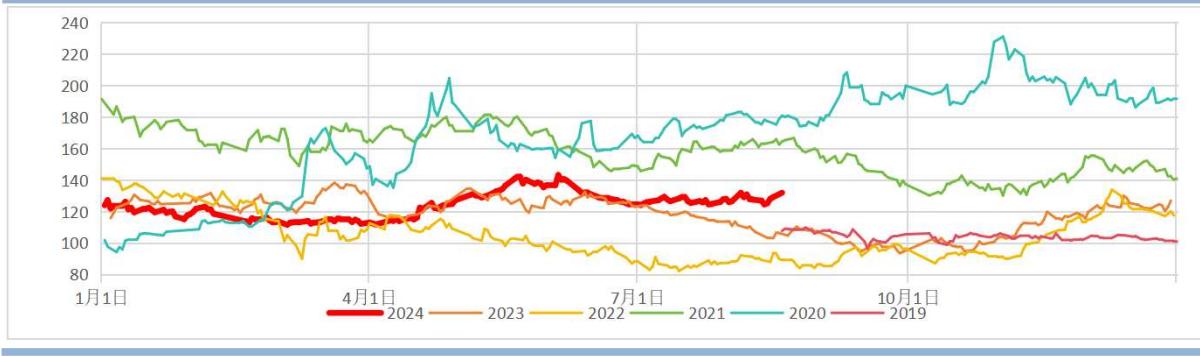
铜有关比价



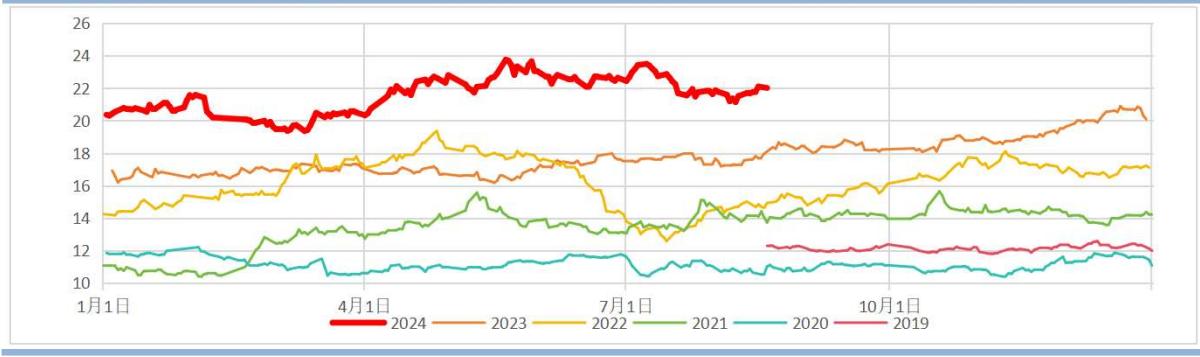
沪铜主连/沪金主连季节性



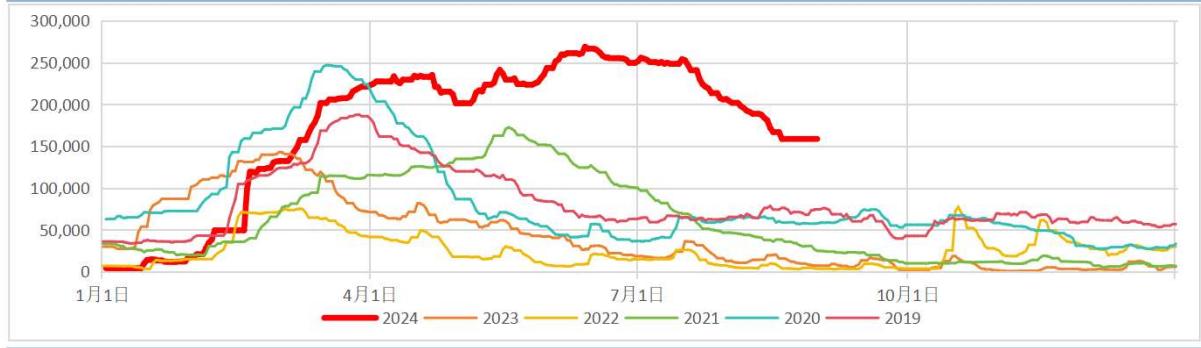
沪铜主连/原油主连季节性

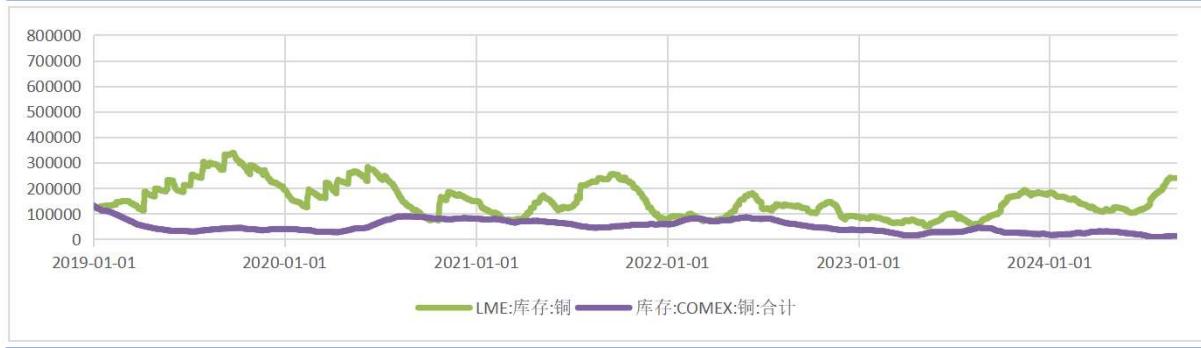


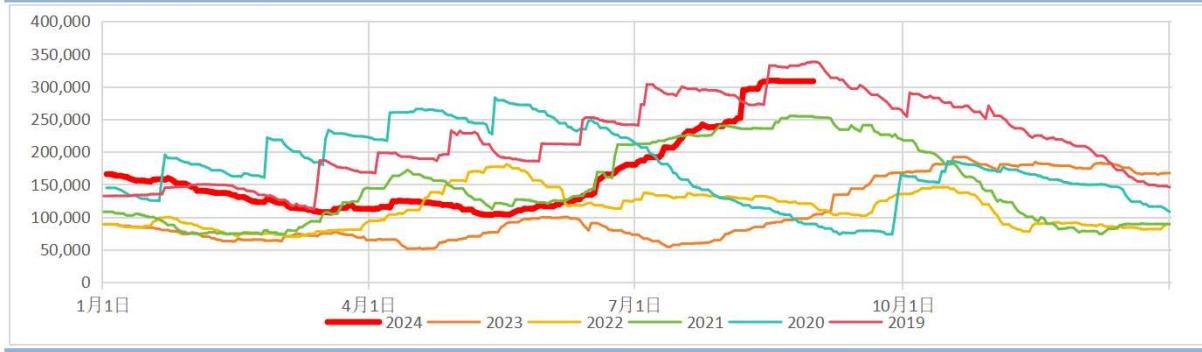
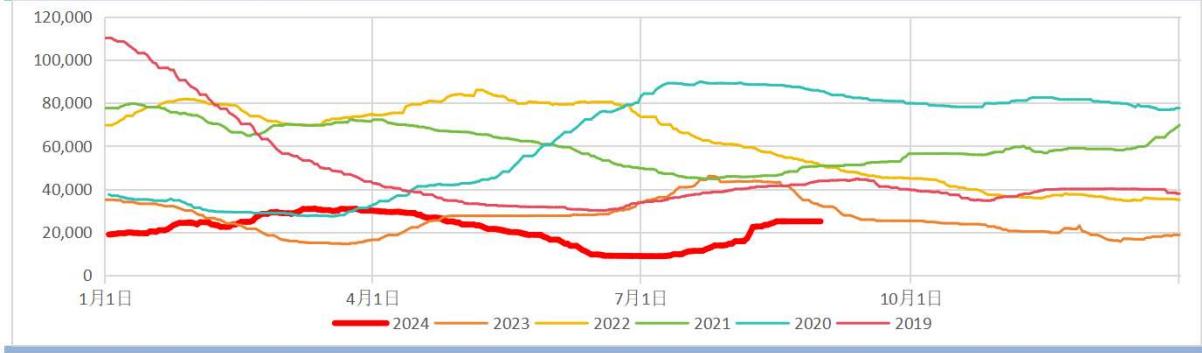
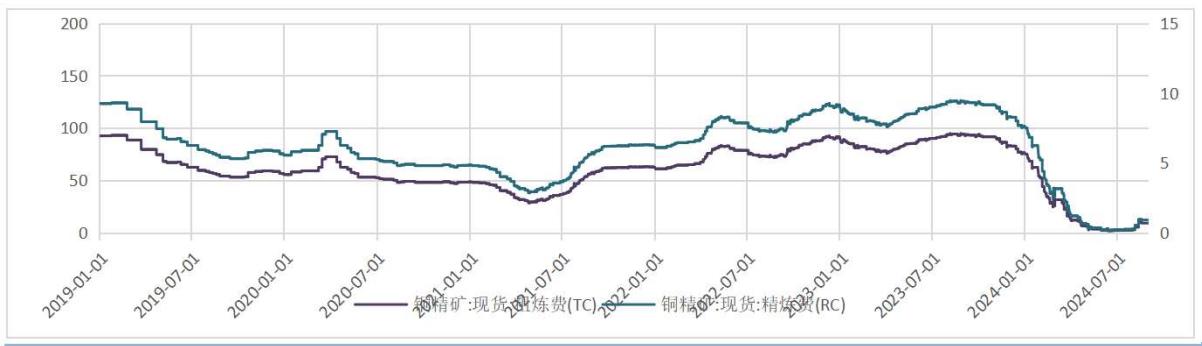
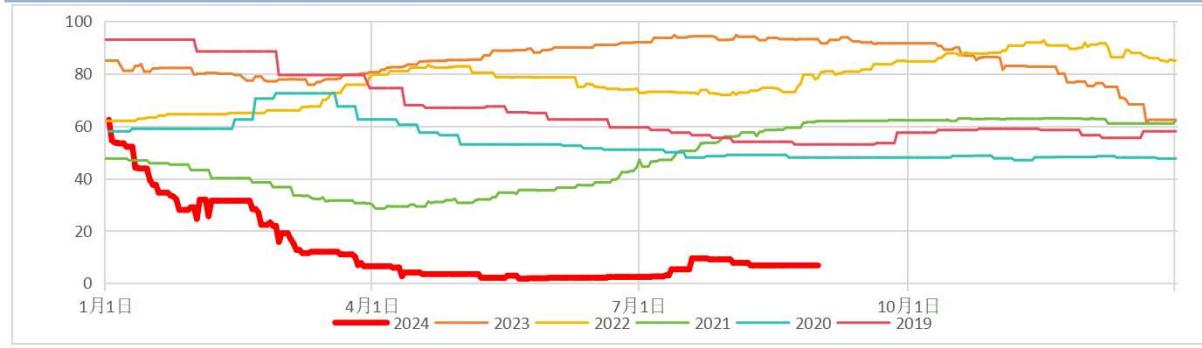
沪铜主连/沪深300季节性



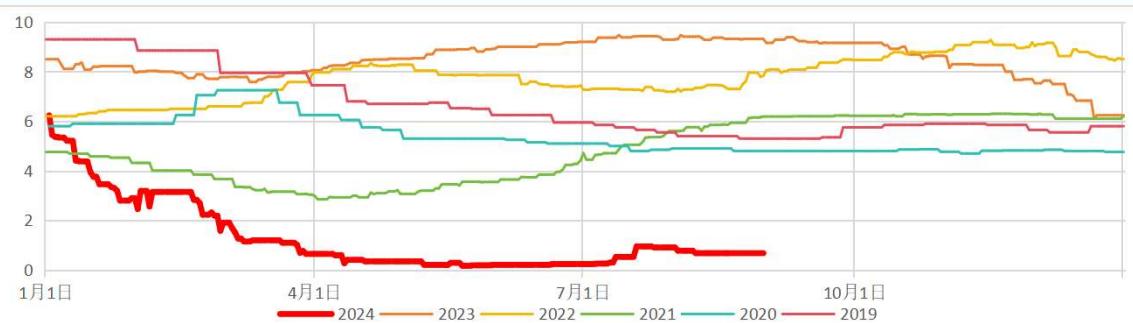
国内铜仓单

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



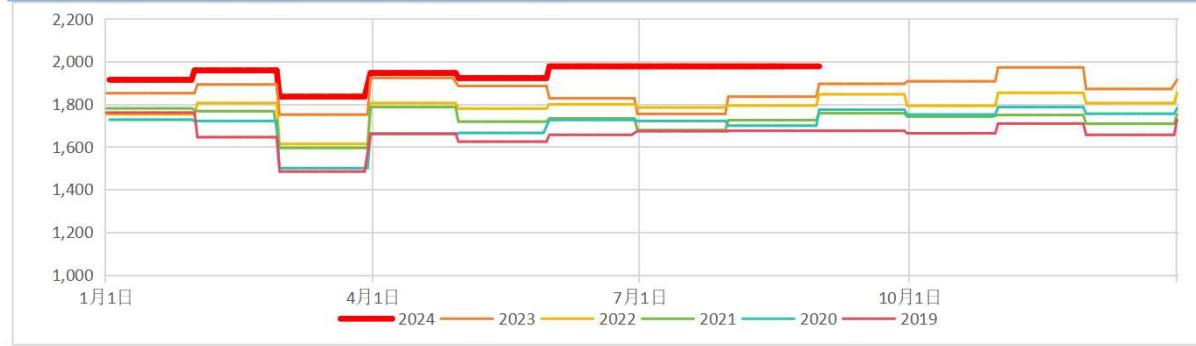
ICSG精铜供需平衡

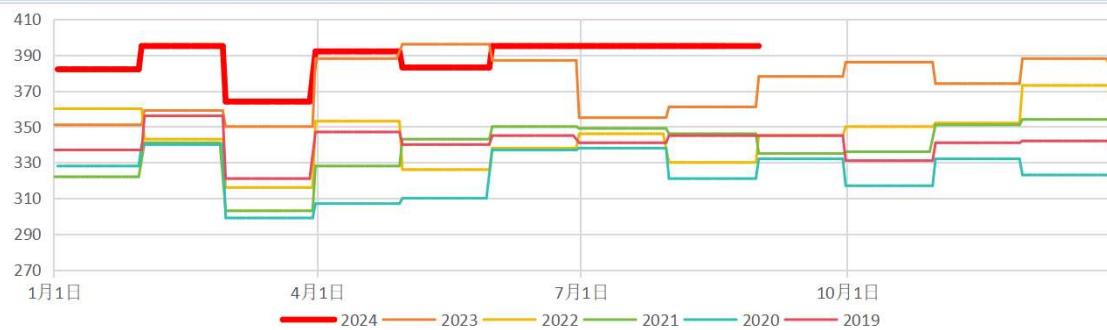
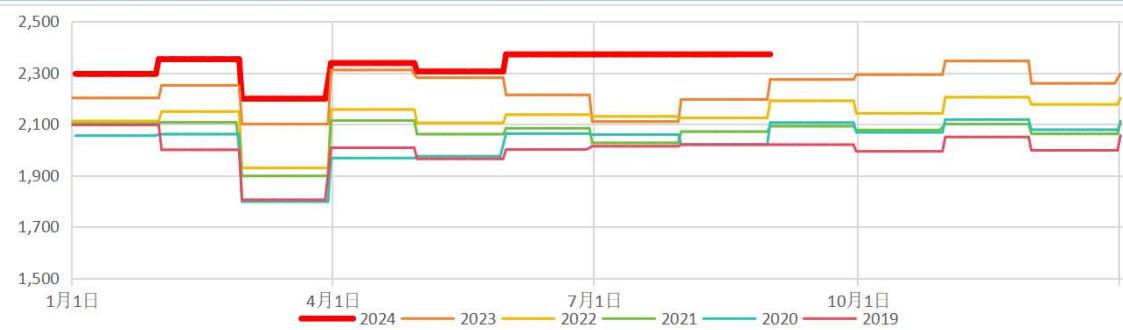
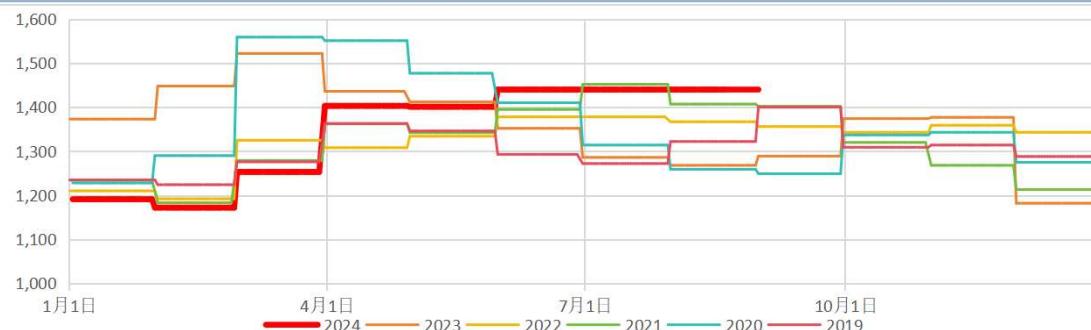
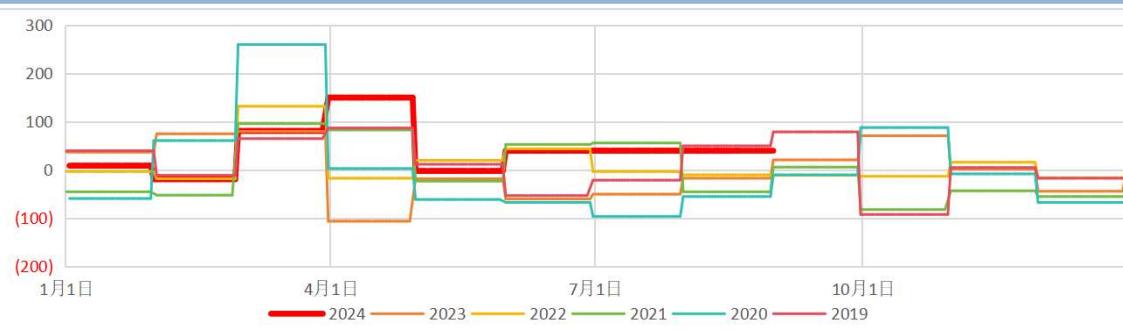


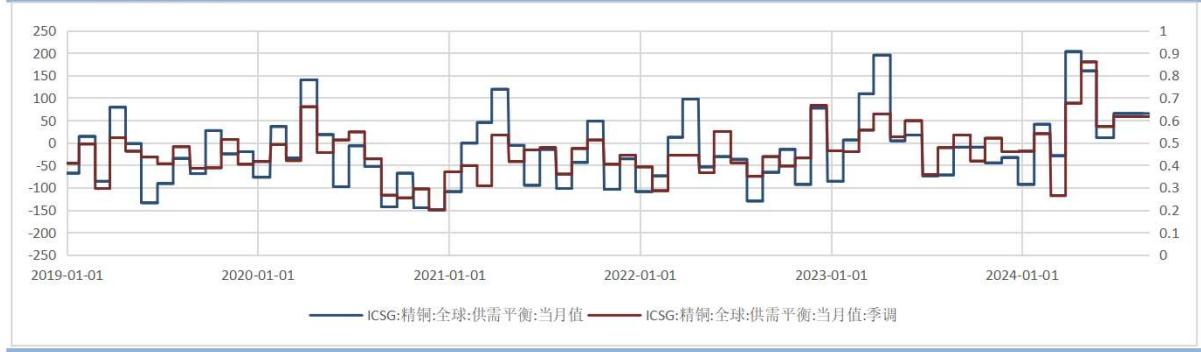
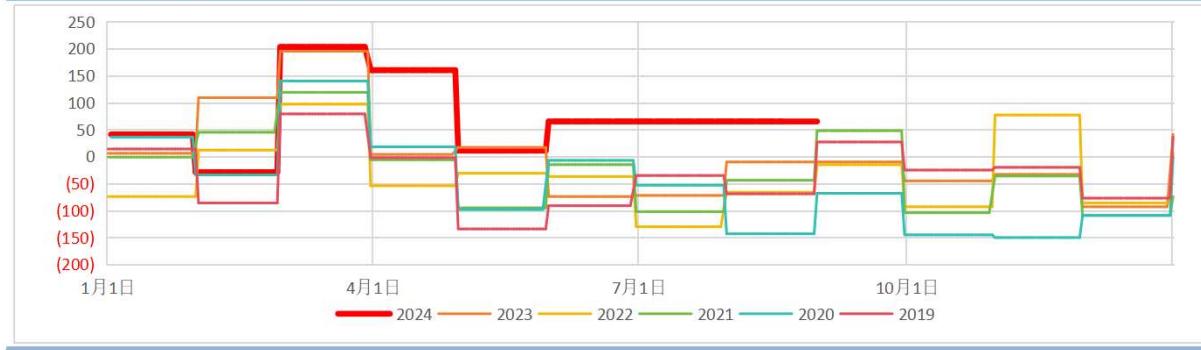
ICSG精铜供需平衡



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


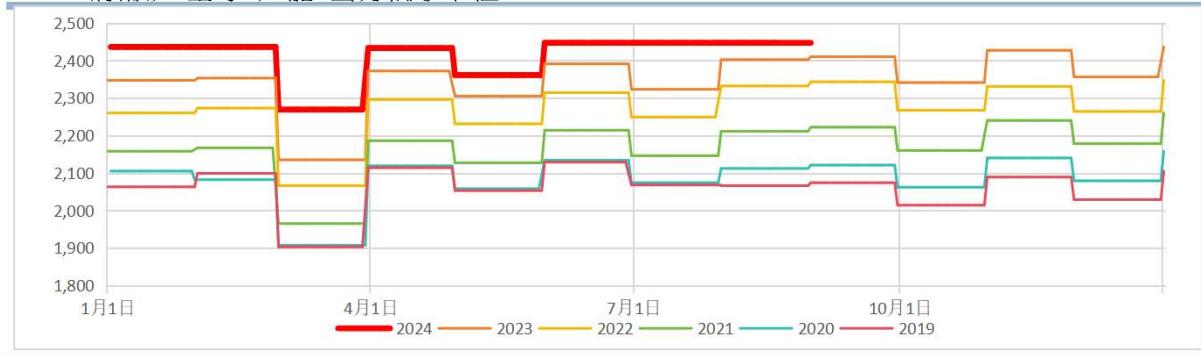
ICSG精铜供需平衡

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

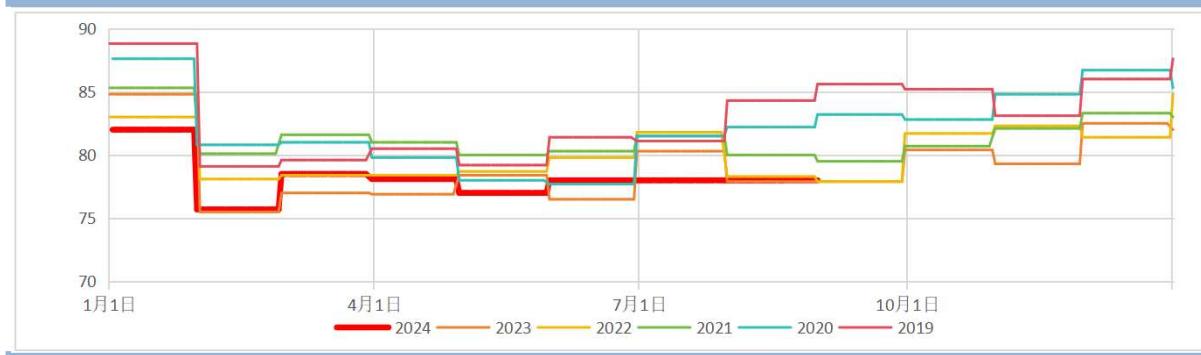

ICSG精铜



ICSG:铜精矿:全球:产能:当月值季节性

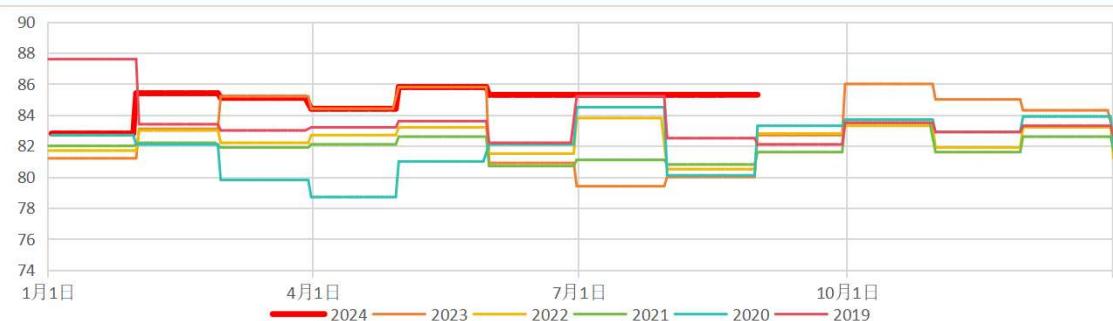


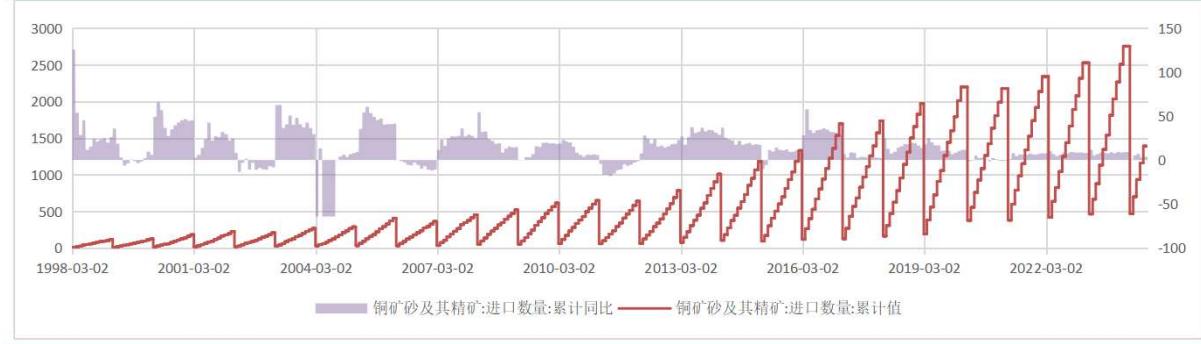
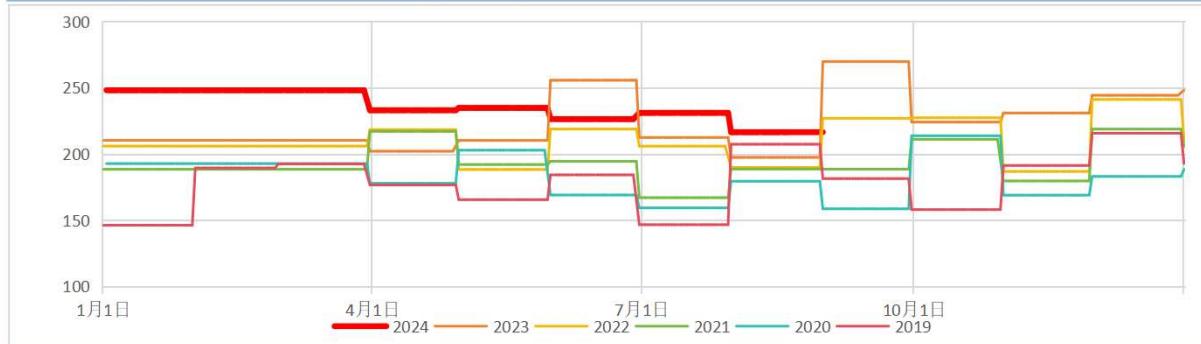
ICSG:铜精矿:全球:产能利用率:当月值季节性



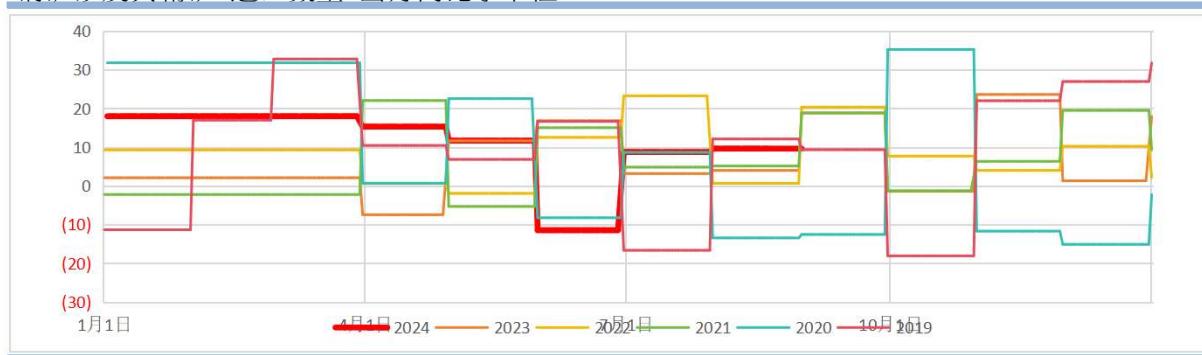
ICSG:精铜:全球:产能:当月值季节性



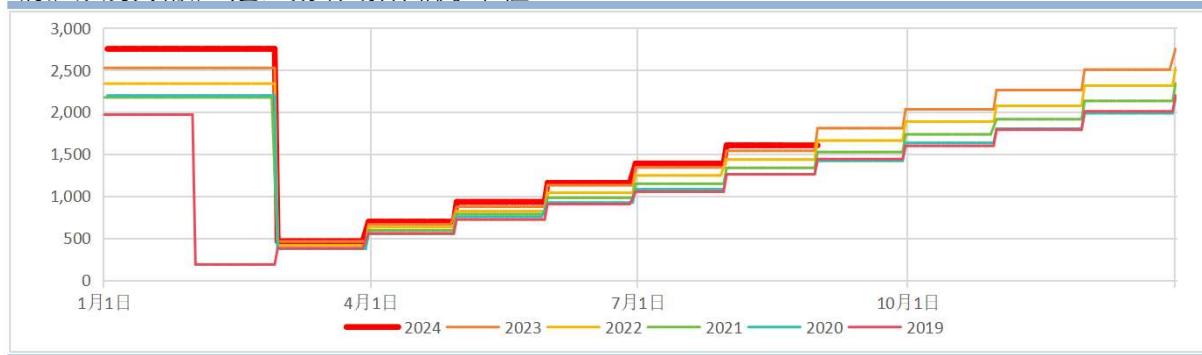
ICSG:精铜:全球:产能利用率:当月值季节性

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


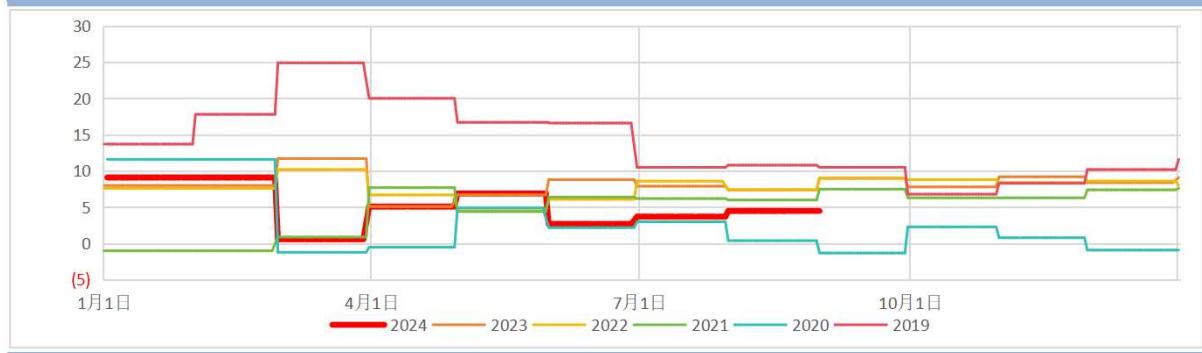
铜矿砂及其精矿:进口数量:当月同比季节性



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



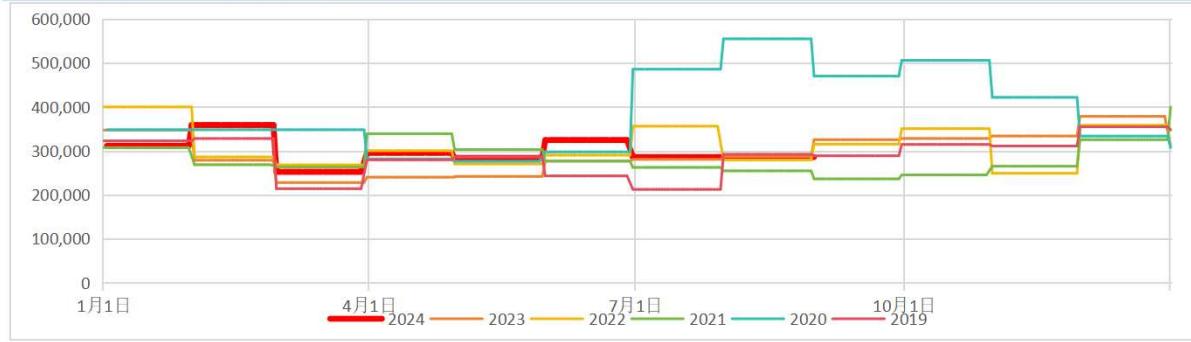
海关总署国内精铜进口



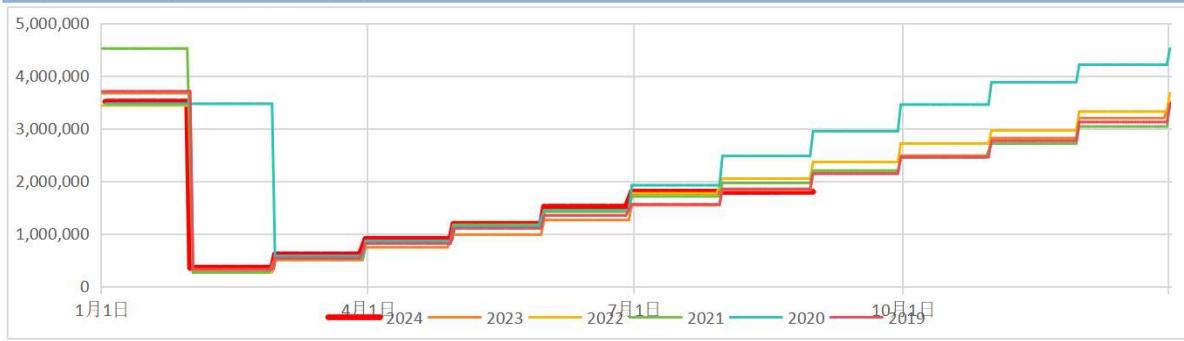
海关总署国内精铜进口



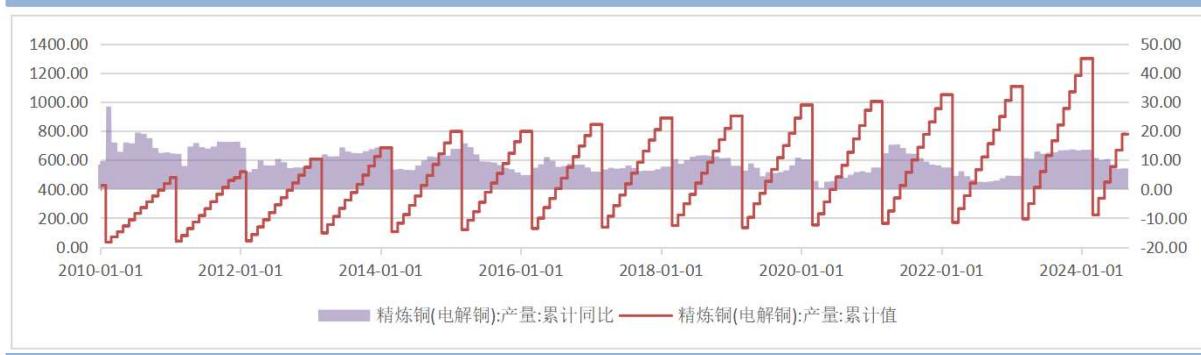
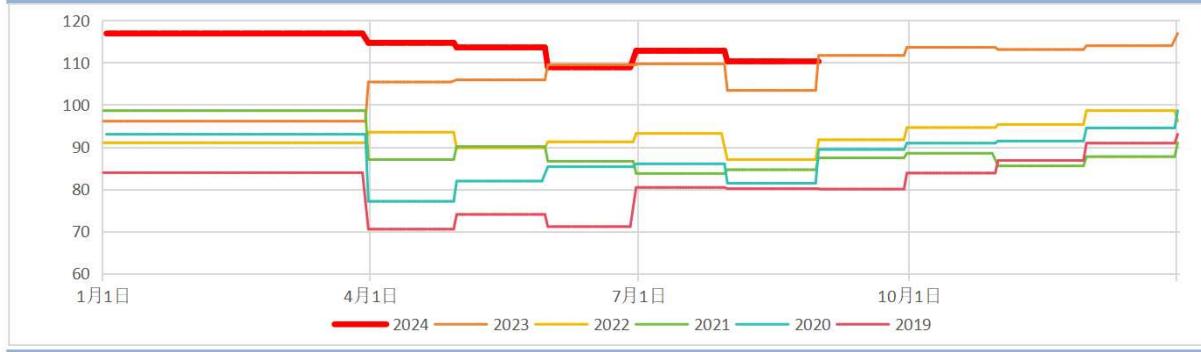
精炼铜:进口数量:当月值季节性

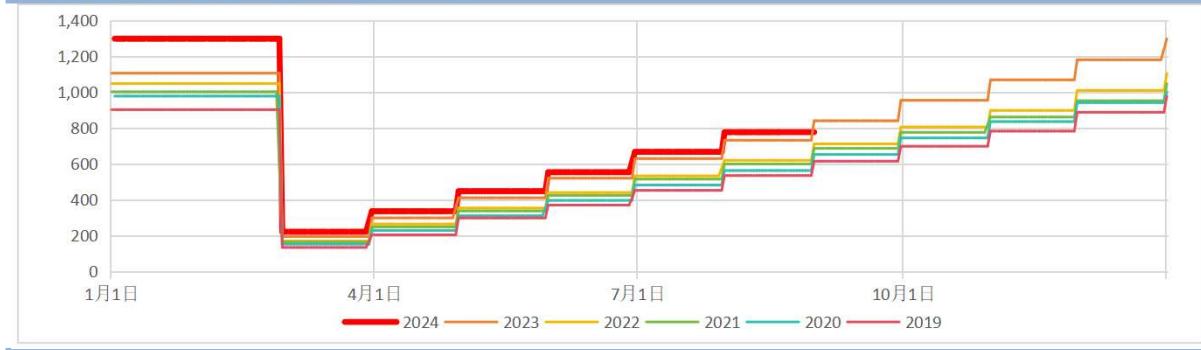


精炼铜:进口数量:当月同比季节性

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



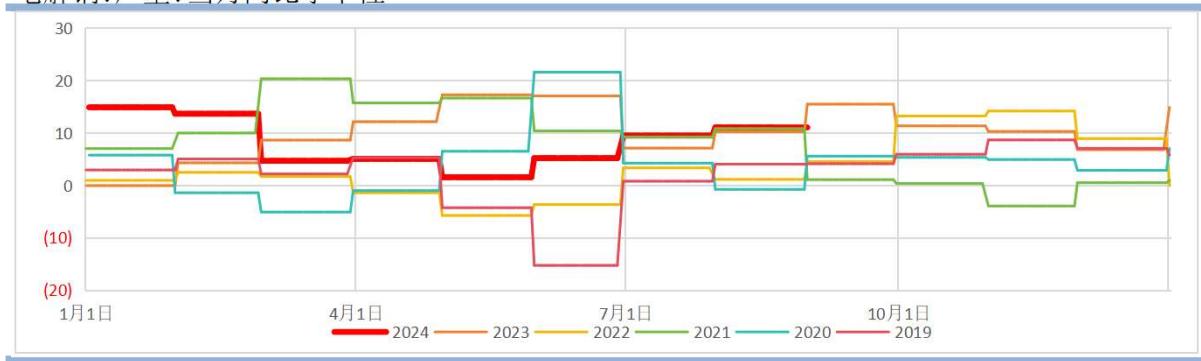
上海有色精铜供需



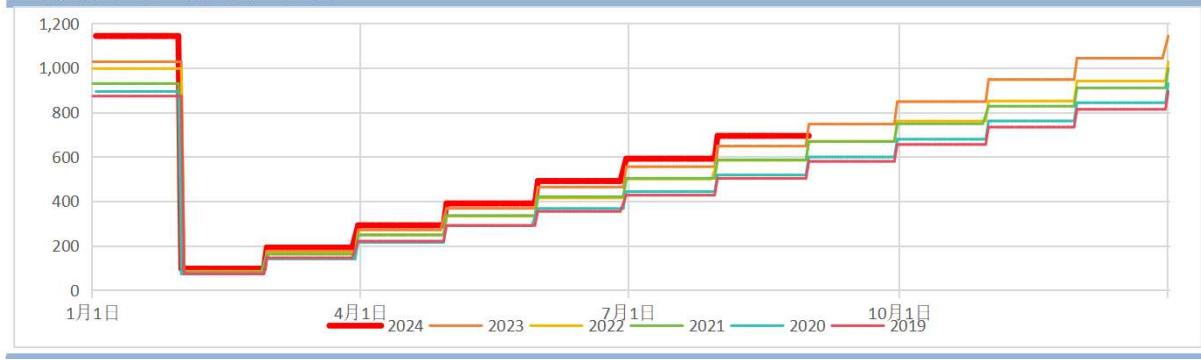
电解铜:产量:当月值季节性



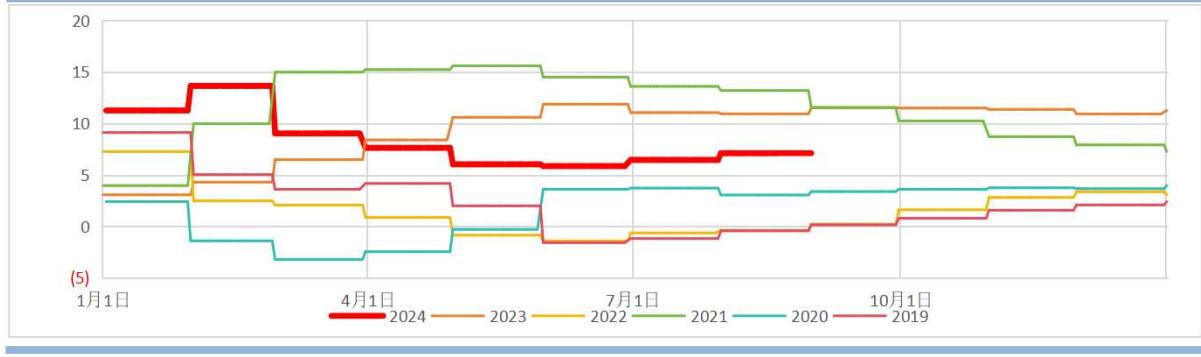
电解铜:产量:当月同比季节性



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



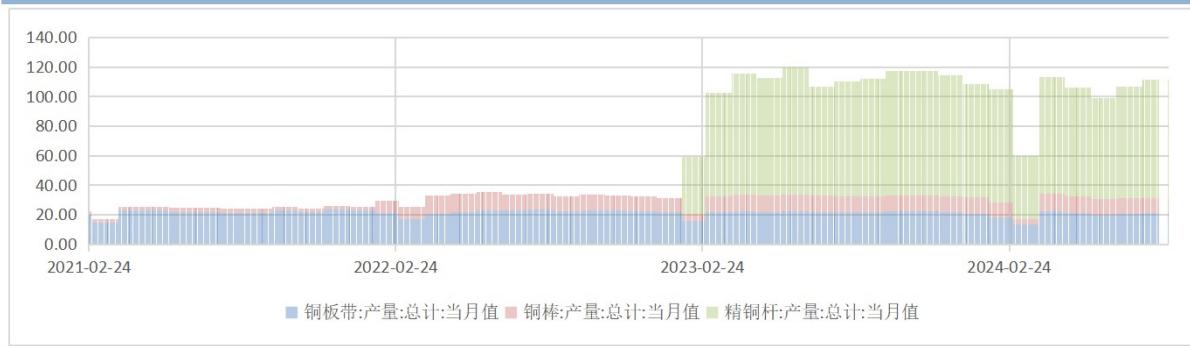
社会库存:铜:总计季节性



电解铜:产量:预测值季节性

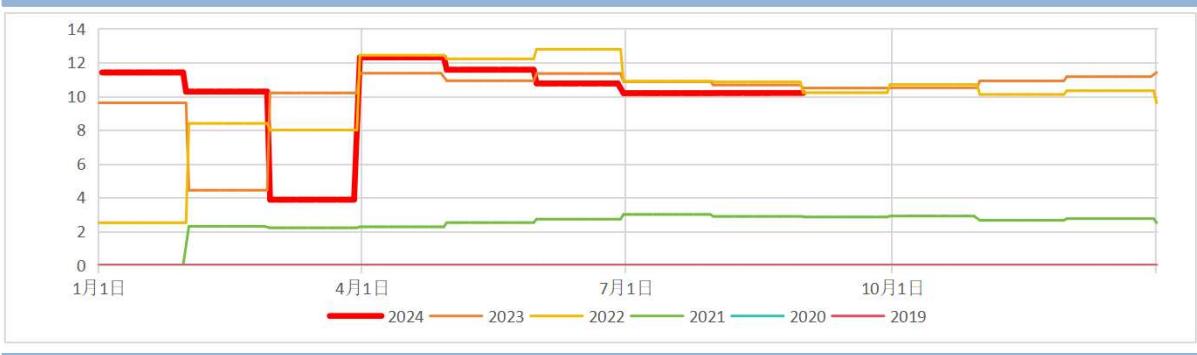


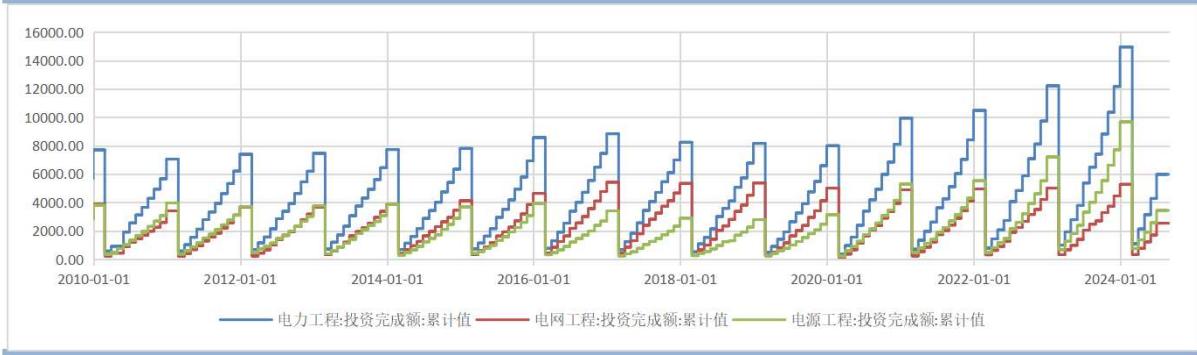
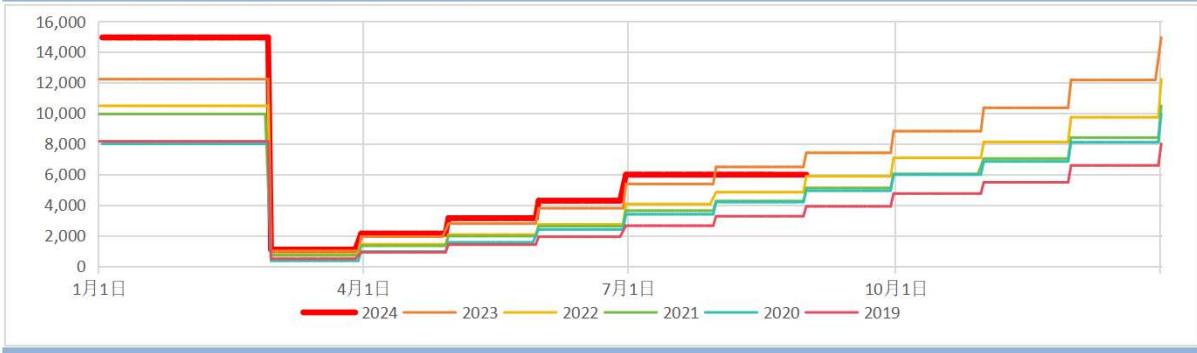
铜下游产量



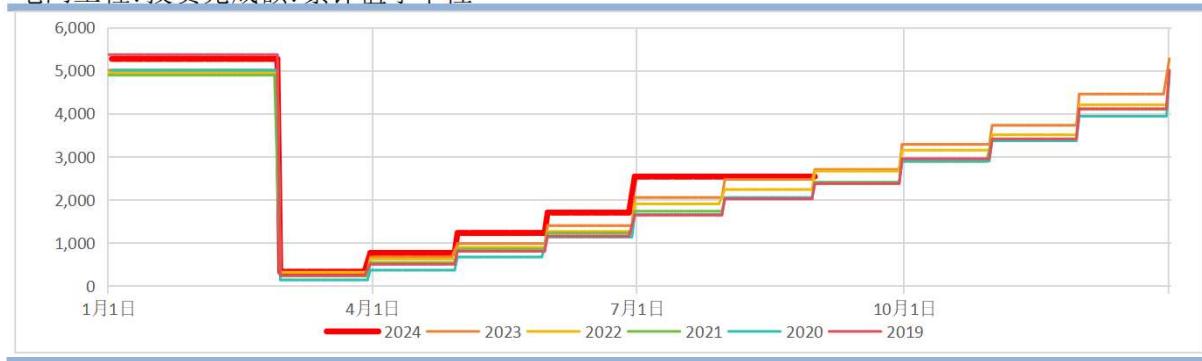
铜板带:产量:总计:当月值季节性



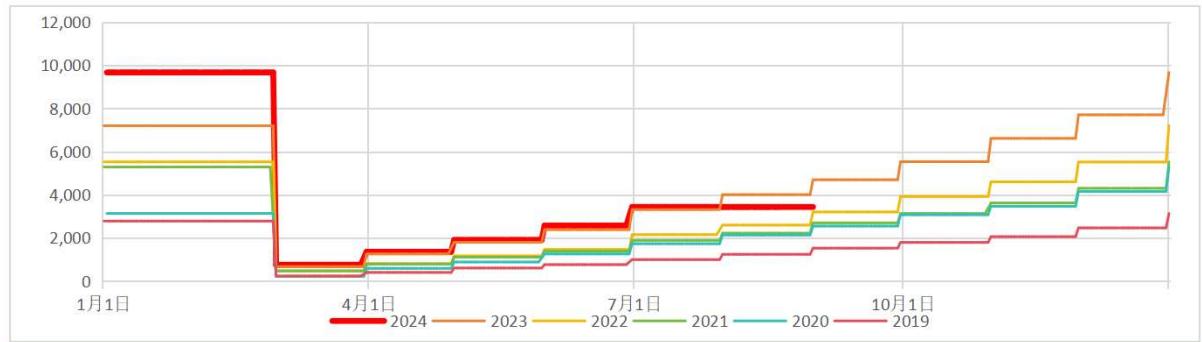
铜棒:产量:总计:当月值季节性

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


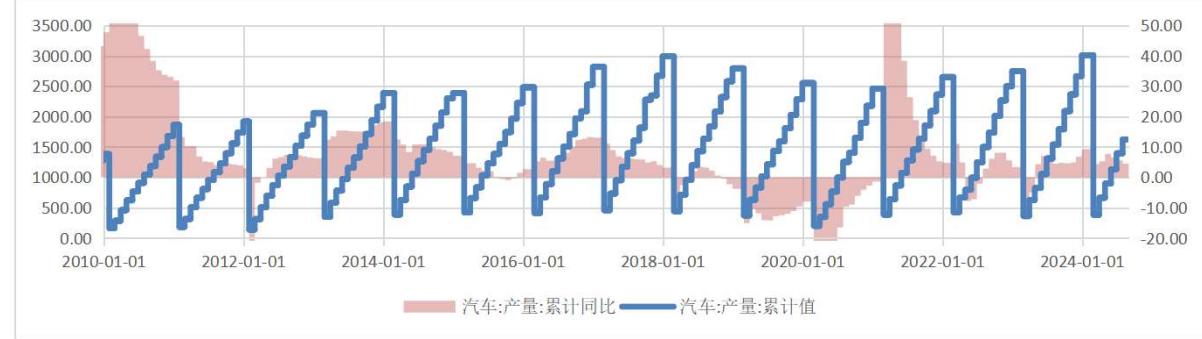
电网工程:投资完成额:累计值季节性



电源工程:投资完成额:累计值季节性

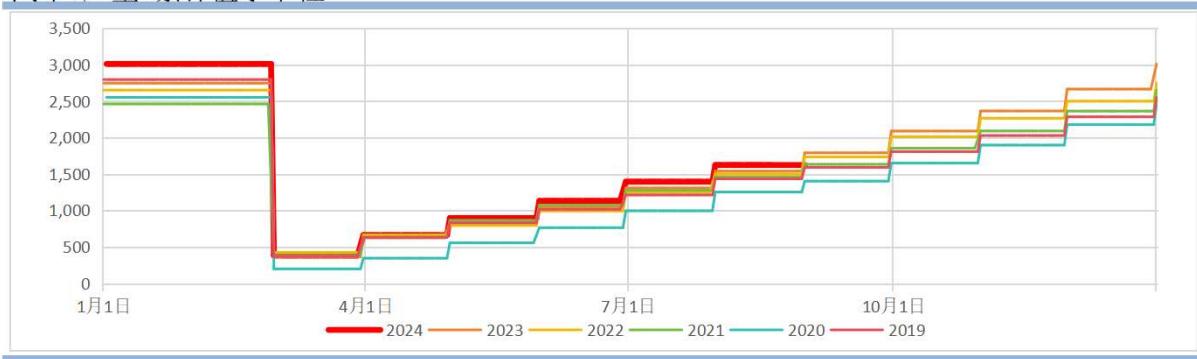
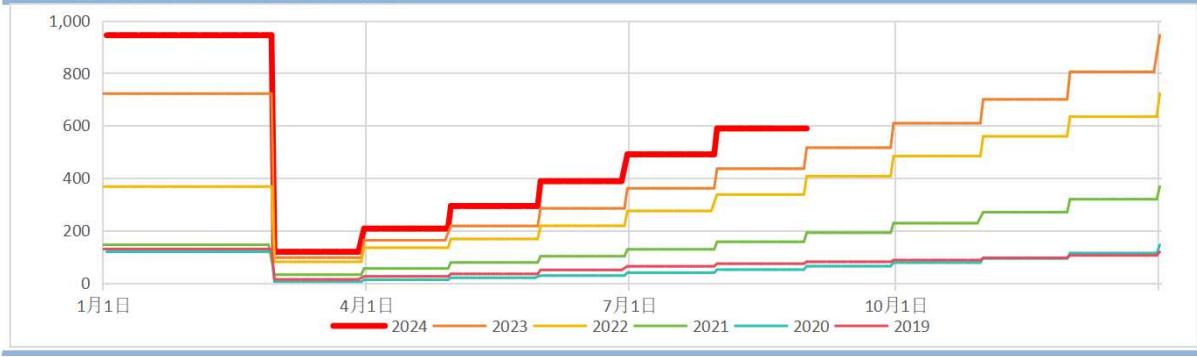
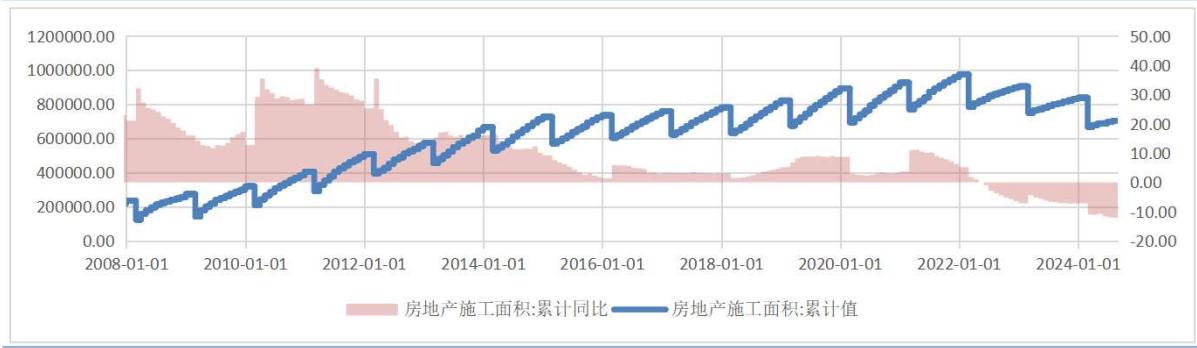
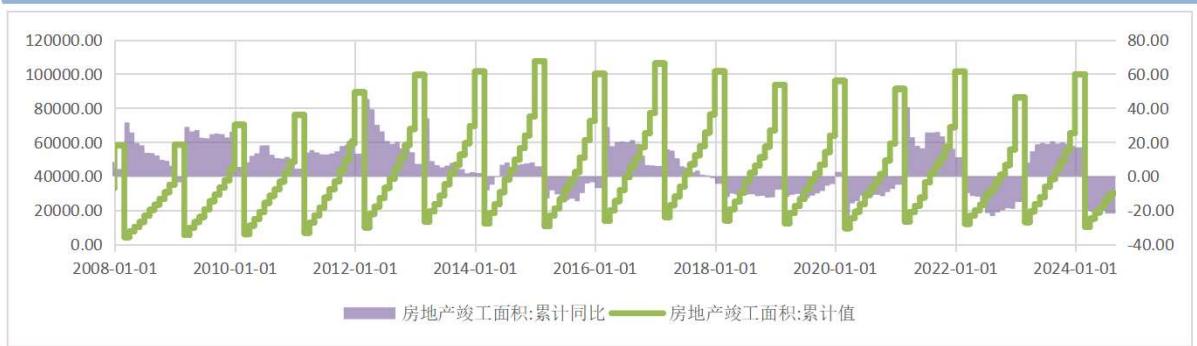


铜下游行业: 汽车



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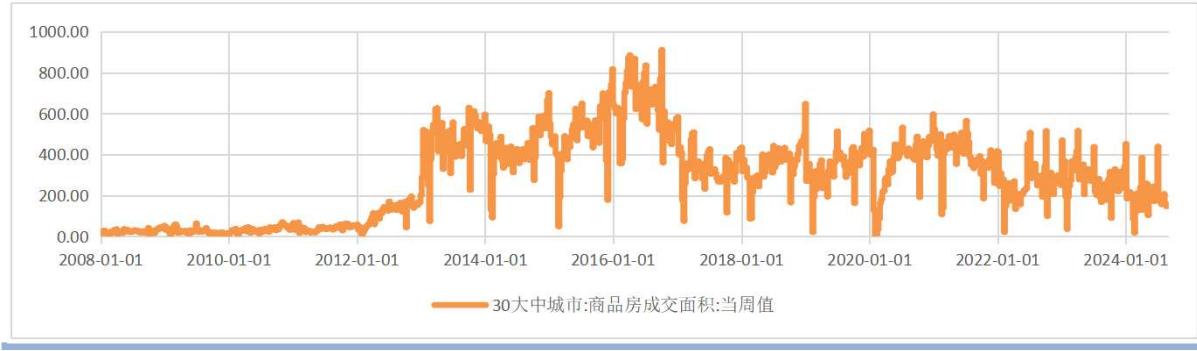


汽车:产量:累计值季节性

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


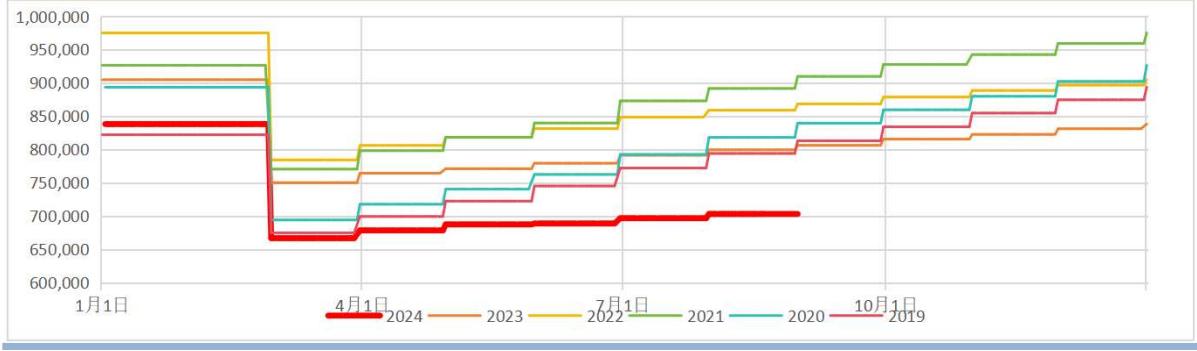
铜下游行业：房地产



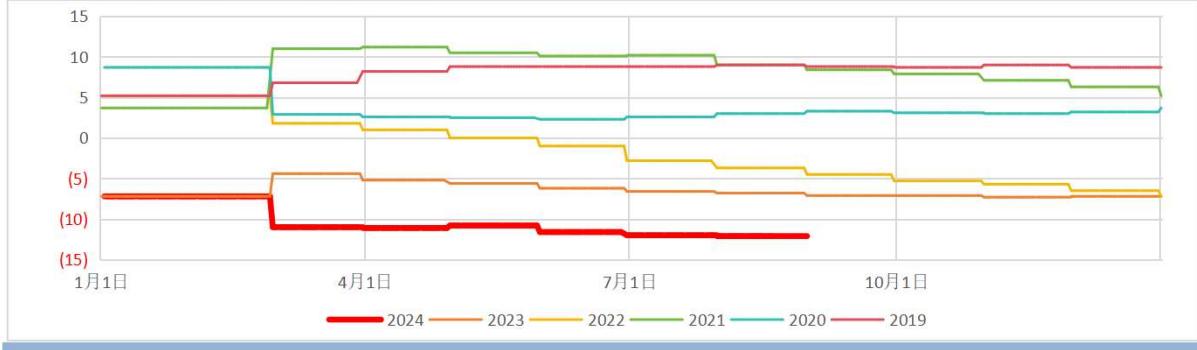
铜下游行业：房地产

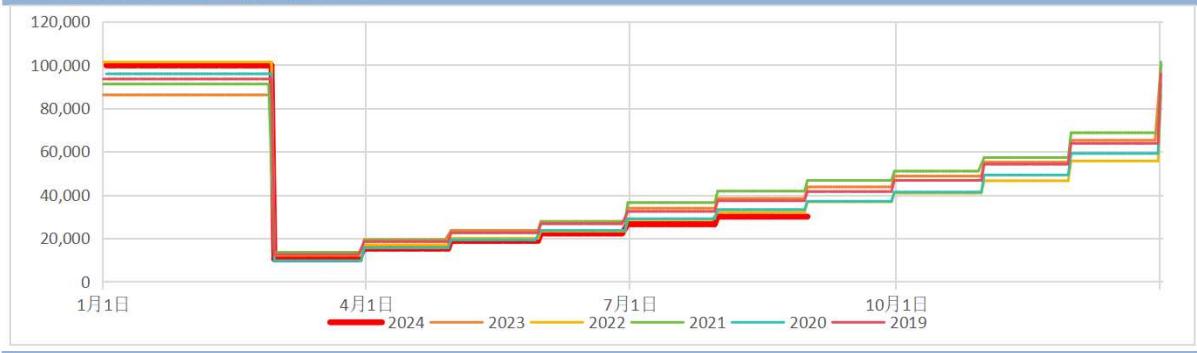
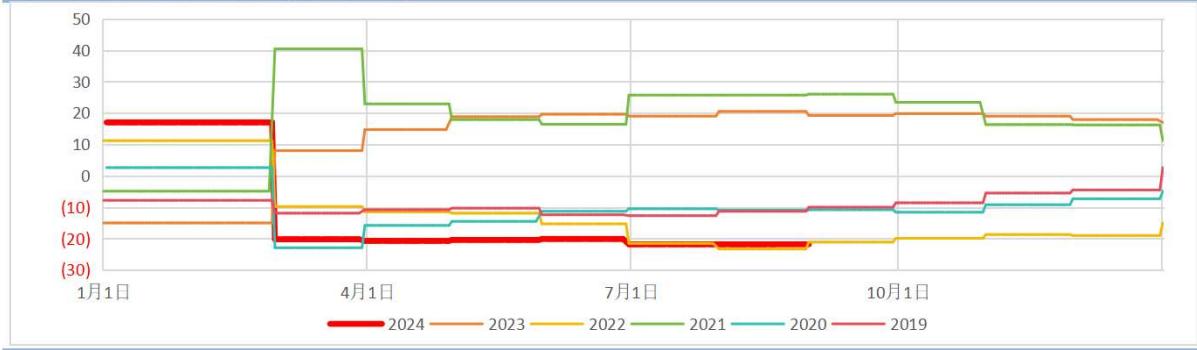
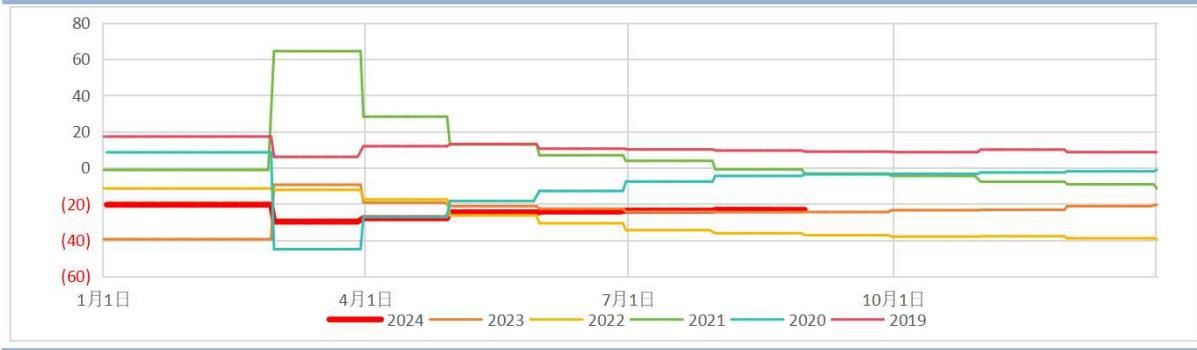


房地产施工面积: 累计值季节性

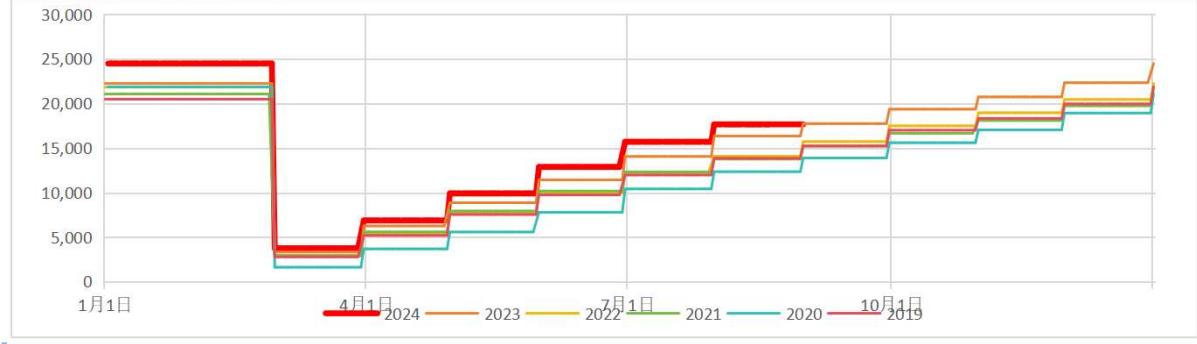


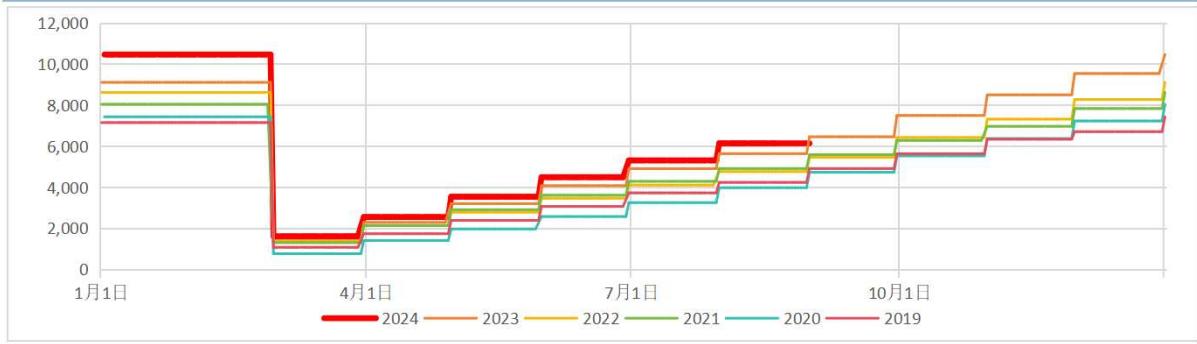
房地产施工面积: 累计同比季节性



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

家用电冰箱: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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