

# Weathering the Storm



Answering all your questions on the  
global tin industry

A market-leading report for tin users,  
producers, explorers, and investors.

# Introduction

The ITA is the main source of global tin industry statistical and market information, based on its networks of member companies and regular, large-scale industry surveys.

Based in the UK, with a representative office in China, ITA has first-hand access to the world's major producing and consuming markets.

Its long history in applications technology provides unique insights into market opportunities and substitution threats.

## Tin Industry Review 2020 and 2021 Executive Summary Update

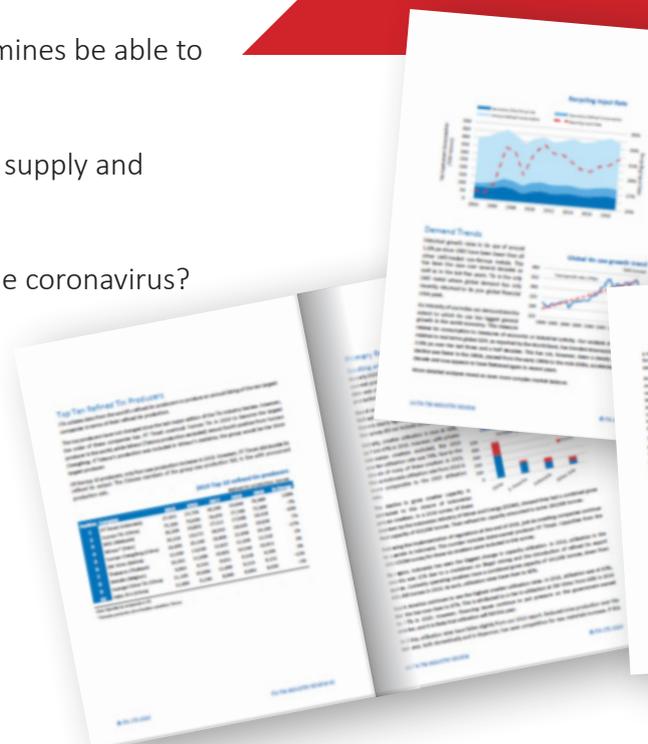
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This is the sixth edition of a series of major studies on the tin outlook published by ITA (previously ITRI) since 2008. The 120-page printed report and electronic PDF file is backed up by data tables in Excel and charts in PDF format. All of the key questions which will determine the outlook for the industry are considered in depth and answered objectively:

- Will miniaturisation of electronics continue to impact tin demand, or is its effect fading?
- Are there new market opportunities for tin outside of traditional uses?
- After a period of under-investment, will new tin mines be able to obtain the financing to get off the ground?
- Will recycling play an increasing role in balancing supply and demand?
- Will the price of tin recover after the shocks of the coronavirus?

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# The Review includes...

## EXECUTIVE SUMMARY

### Weathering the Storm

### Outlook for Tin Usage, Tin Production, Investment, Market Balance, and Price



#### Chapter 1: Outlook for Tin Usage

- Overview
- Demand Trends
- Recent Market Trends
- Technology Threats and Opportunities
- Forecast to 2025 and Beyond

#### Chapter 2: Current and Future Tin Supply

- Overview of Recent Trends
- Top Ten Refined Tin Producers
- Primary Refined Tin Production
- Secondary Refined Tin Production
- Global Mine Production
- China Strives Towards Higher-Quality Development
- African Tin Supply Rebound Continues
- Trends in Tin Mine Production Costs
- Global Tin Resources and Reserves
- The Global Project Pipeline

#### Chapter 3: Market Balance and Price Outlook

- Tin Price History
- The Supply/Demand Position and Stock Levels
- Floor and Equilibrium Prices
- Regional Developments
- Forecast Supply/Demand Position and Prices

#### Appendix I:

- Statistical Data

#### Appendix II:

- Summary of Technology Threats

#### Appendix III:

- Cost Model Definitions and Production Data
- Air Model Definitions and Scores

## Who will benefit from the report?

### Tin users

The report helps inform pricing and hedging decisions, as well as underpinning long-term planning of product development.

### Investors in new mine projects

The report identifies the need for increased investment in sustainable mine supply. Using the ITA Tin Production Cost Model, as well as the new Assessment of Investment Risk Model, we can identify whether new projects are likely to enter the tin market and where they will fit in the future cost distribution. Furthermore, price forecast scenarios can be used to calculate IRRs.

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# Tin Industry Review

(2020 edition and 2021 update)



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