



Data, Insight,
Strategy &
Communities

CRU Price Trends Sample Pack

For any enquiries reach out to CRU

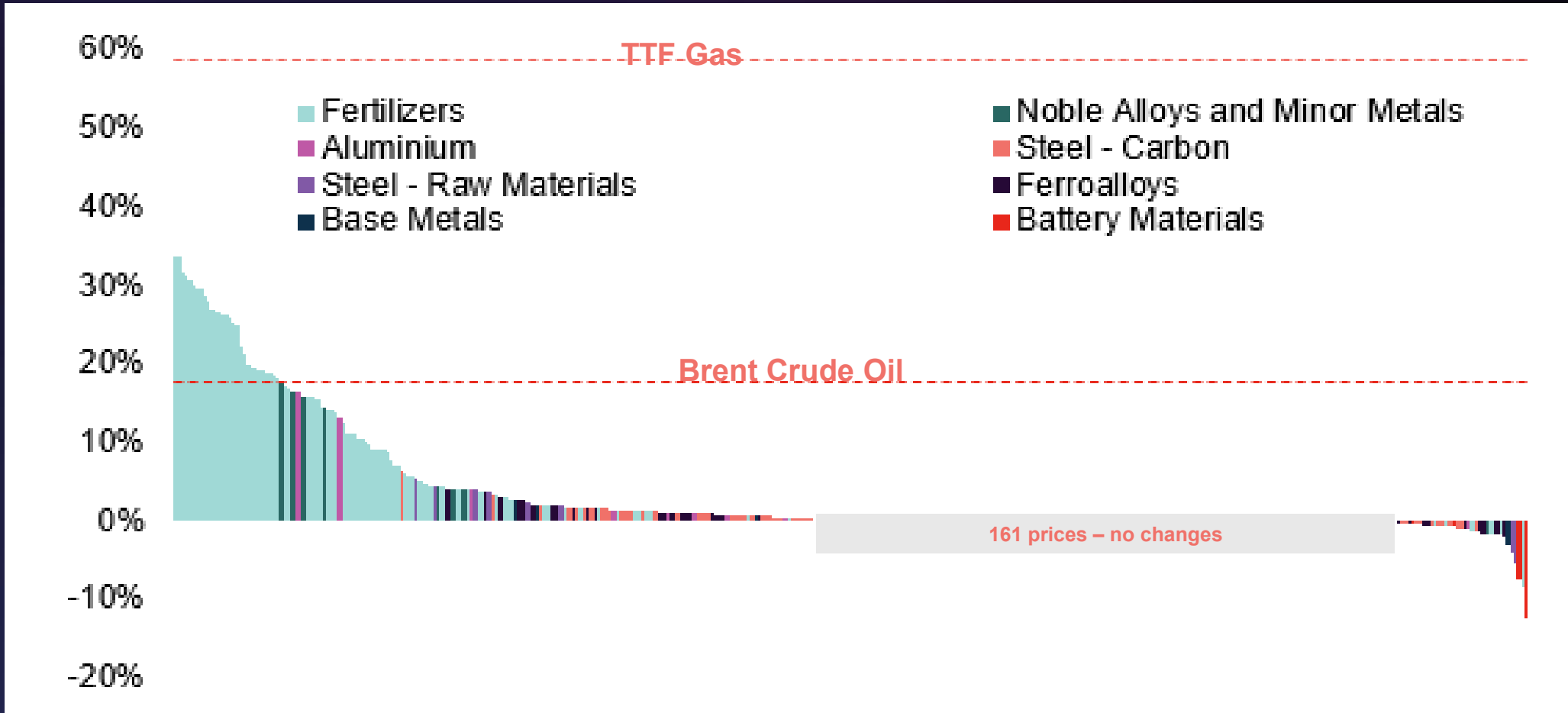
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CRU. Independent *expert* intelligence



Week-on-week CRU commodity price changes, %

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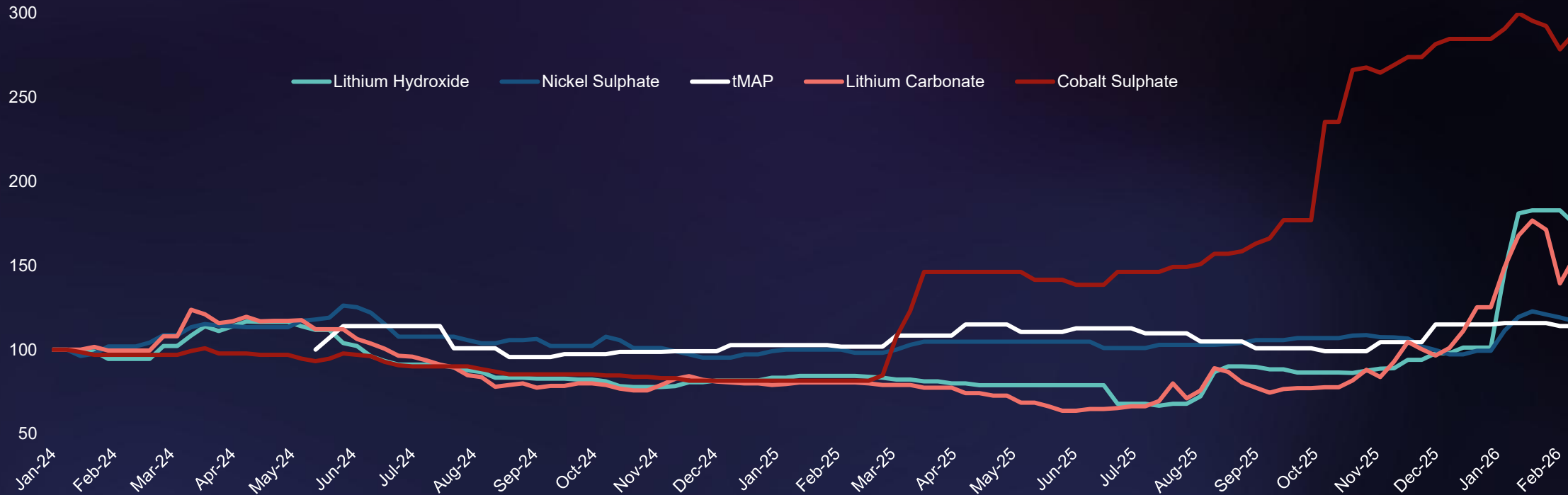
DATA: CRU, ICE. NOTE: Data includes 372 weekly prices published by CRU. Brent Crude and TTF gas price compares closing price of Mar 5th to Feb 27th.



Cobalt and lithium prices on the rise

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Battery raw materials price index, Jan 2024 = 100



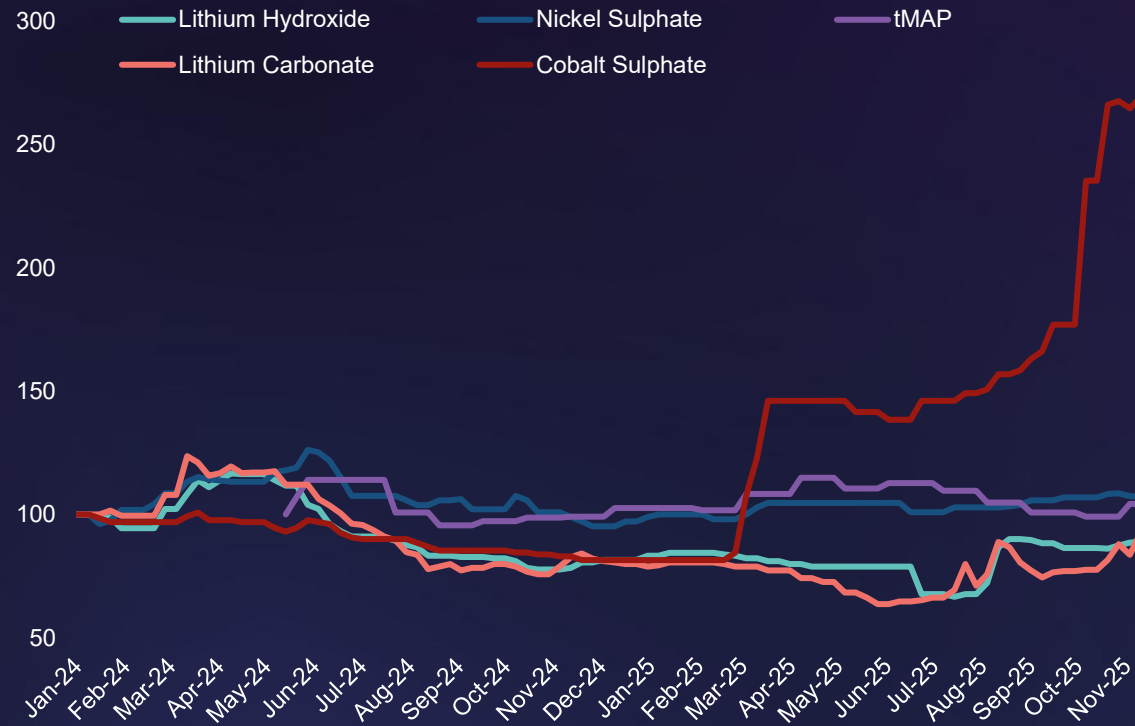
DATA: CRU



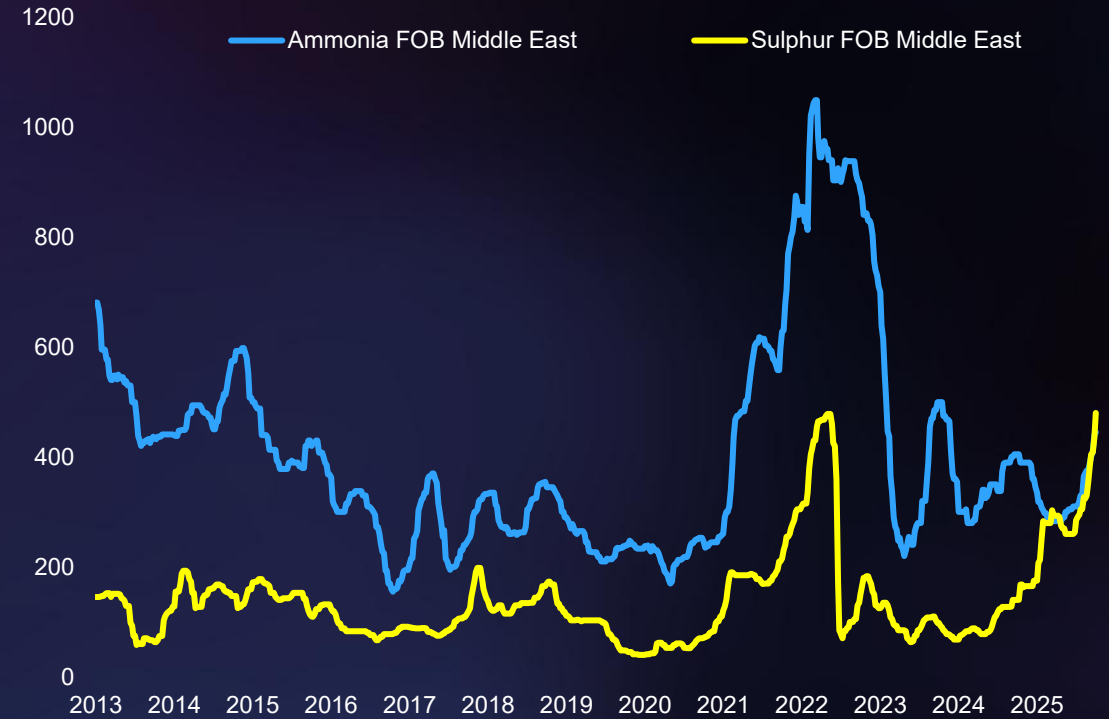
Raw materials breakout

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Battery raw materials price index, Jan 2024 = 100



Fertilizer raw materials prices, Jan 2024 = 100



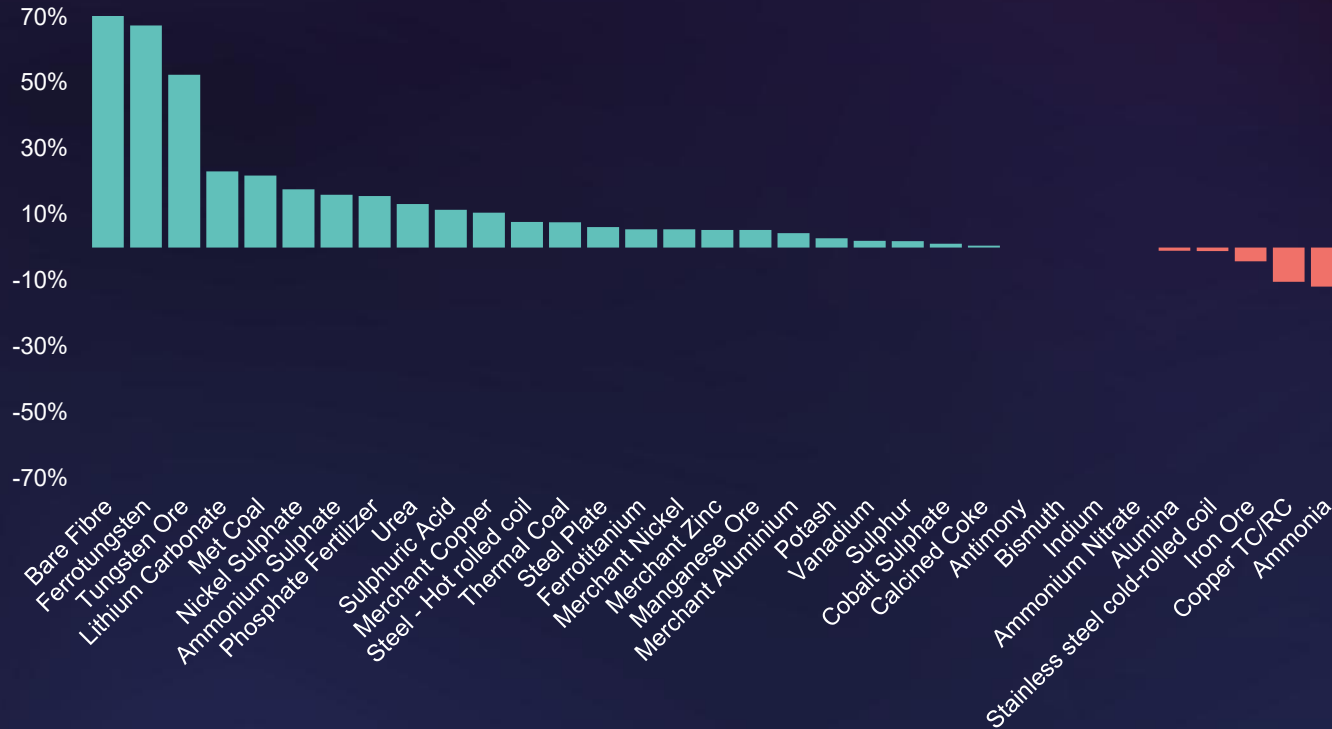
DATA: CRU



Hot commodities – A breakout start to 2026

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CRU Commodity price performance - year to date



DATA: CRU. Price change compares last 2025 price to Feb 13 2026 price.

Tungsten prices, USD /t

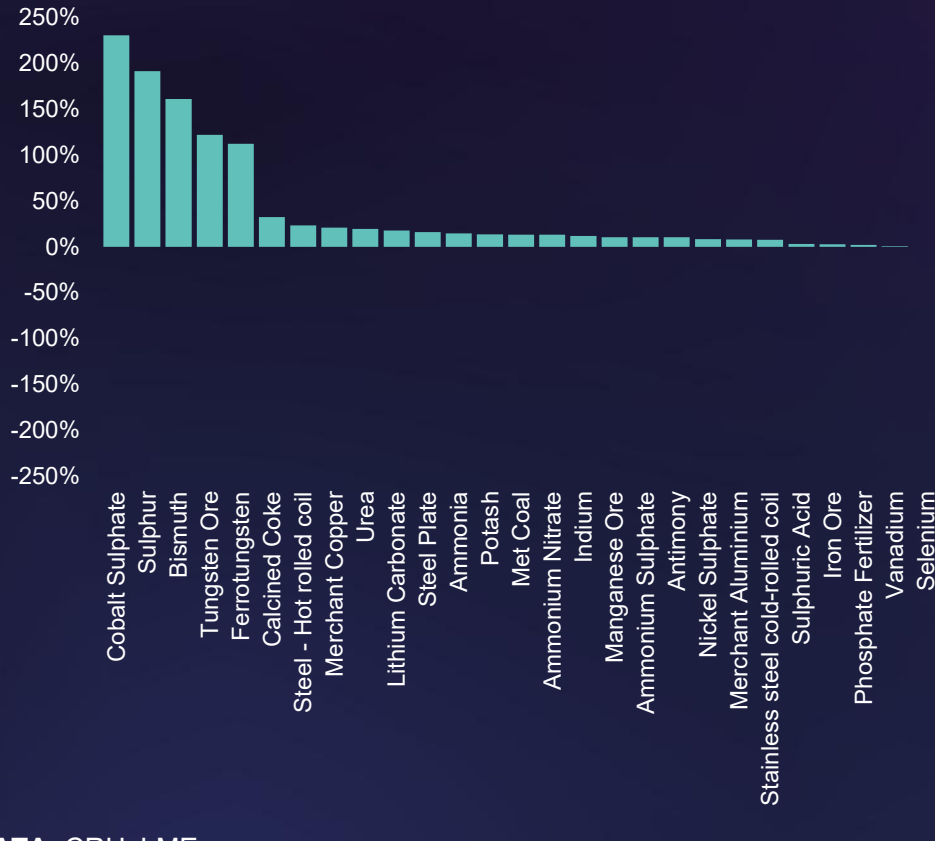




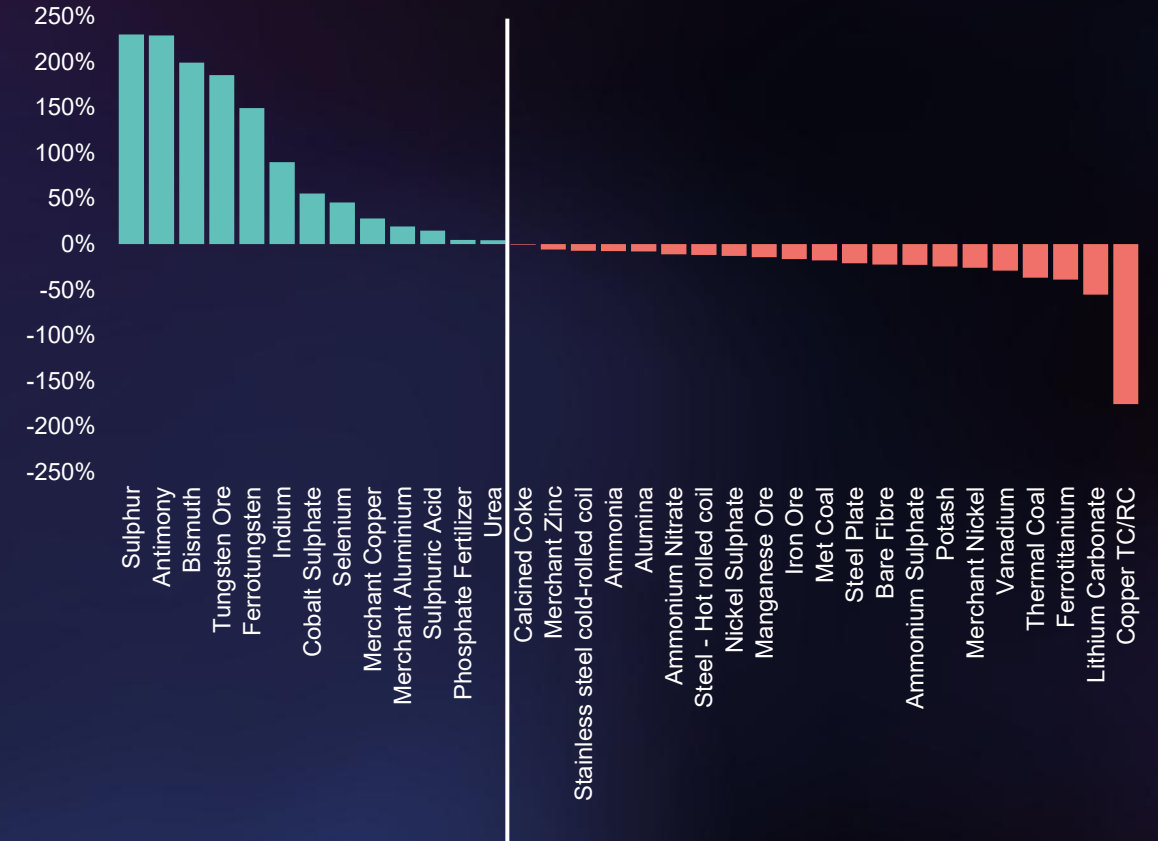
CRU Commodity Price Performance

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CRU Commodity price performance, change year-to-date



CRU Commodity price performance – current price against previous five year average



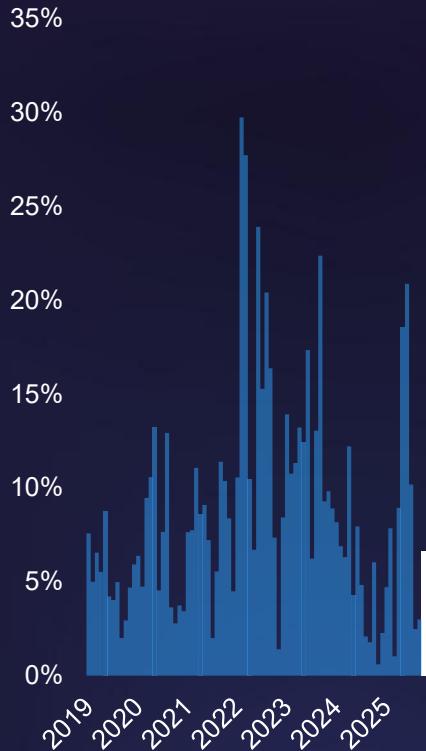
DATA: CRU, LME



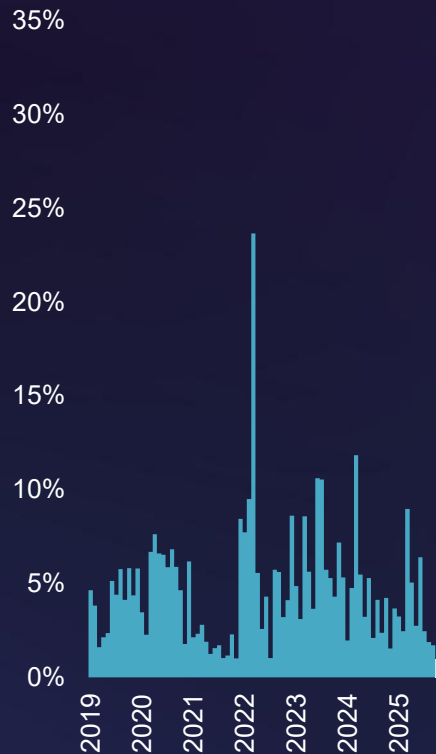
CRU Commodity Volatility

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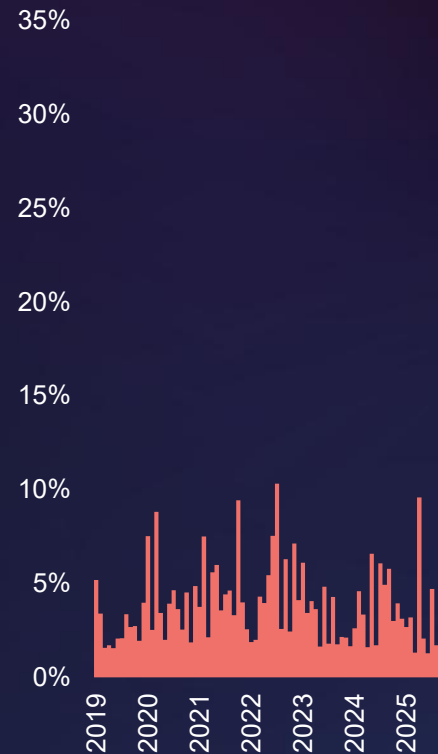
Monthly **urea** volatility (US FOB NOLA)



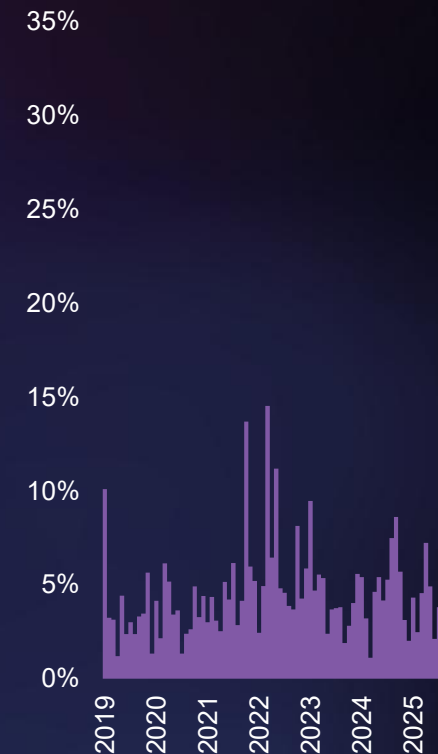
Monthly **steel** volatility (US HRC)



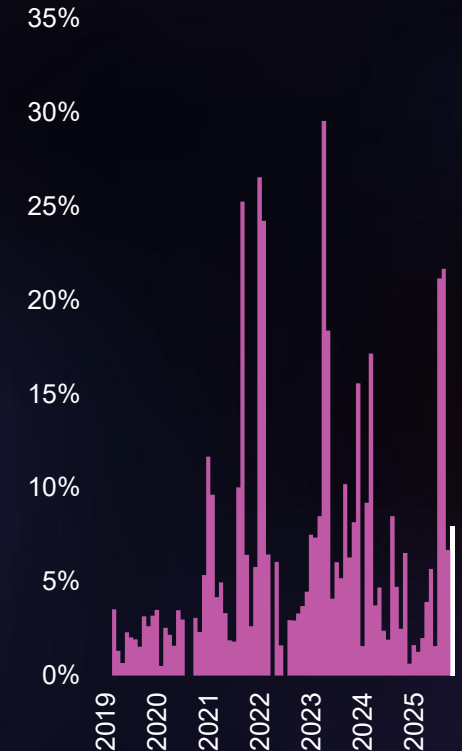
Monthly **copper** volatility (LME 3M)



Monthly **aluminium** volatility (LME 3M)



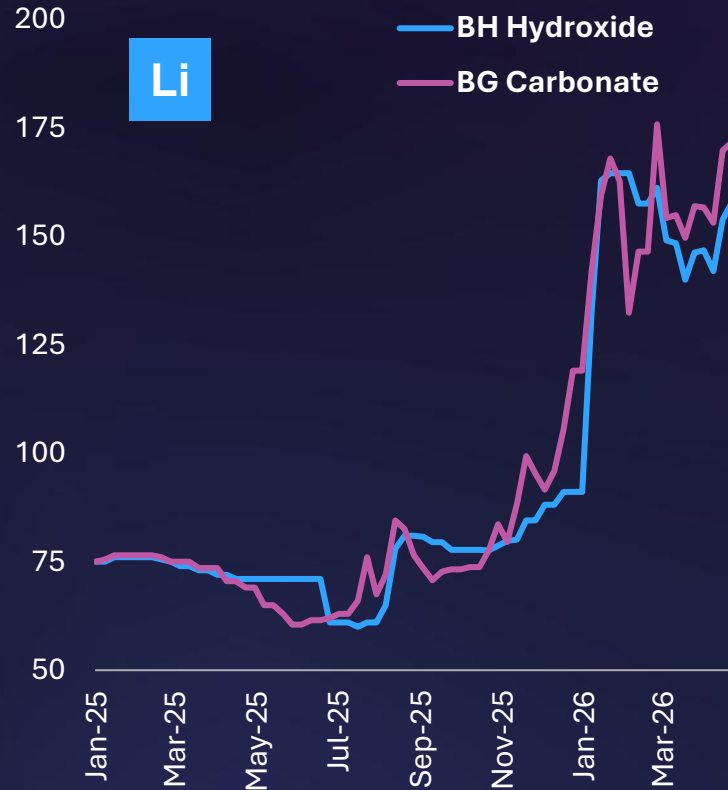
Monthly **lithium** volatility (CRU lithium carbonate)



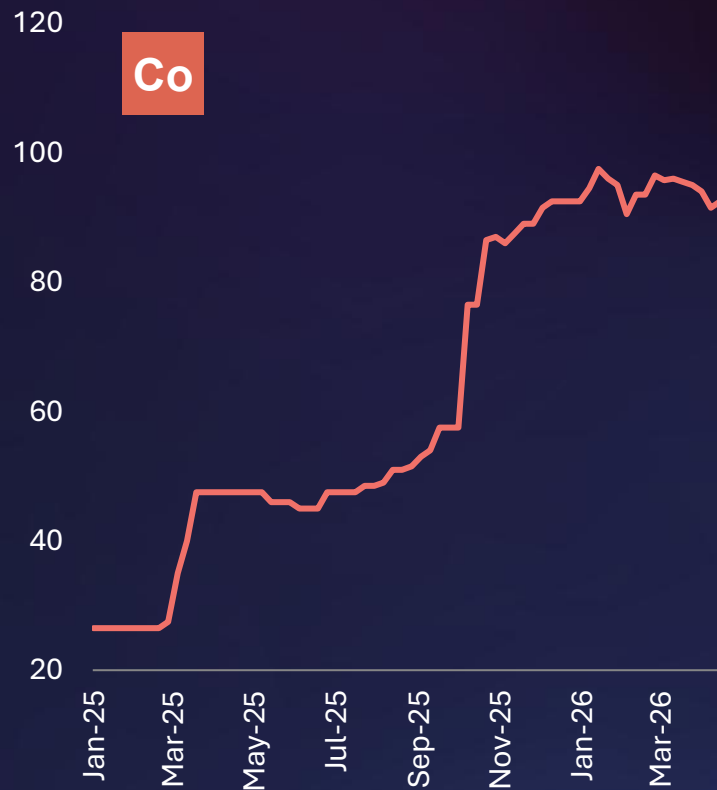
DATA: CRU, LME

Monthly volatility calculated using weekly average prices. White bar represents October 2025

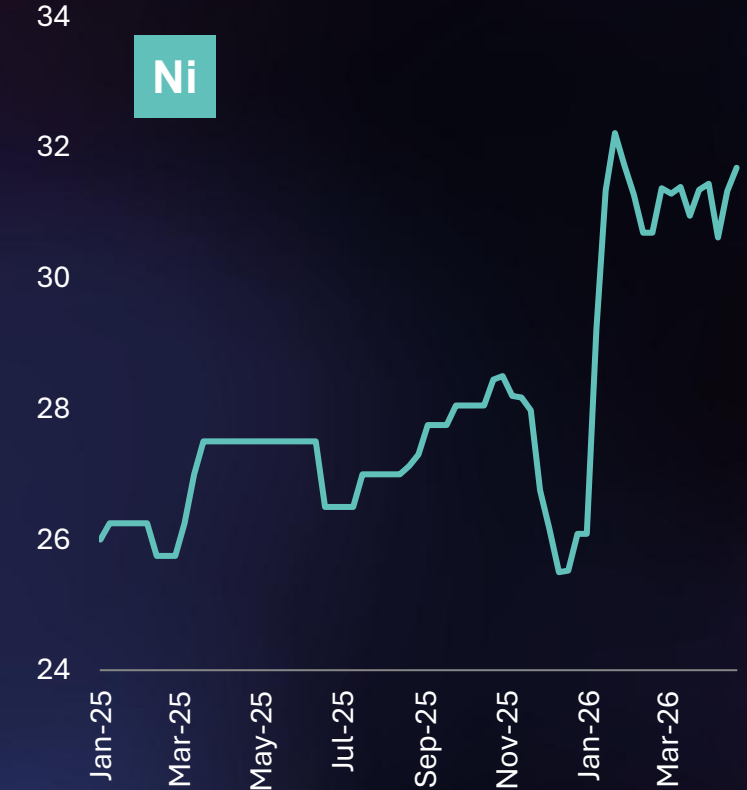
Lithium chemical prices, DAP China, '000 RMB/t



Cobalt sulphate price, DAP China, '000 RMB/t



Nickel sulphate price, DAP China, '000 RMB/t





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CRU Costs Trends Sample Pack

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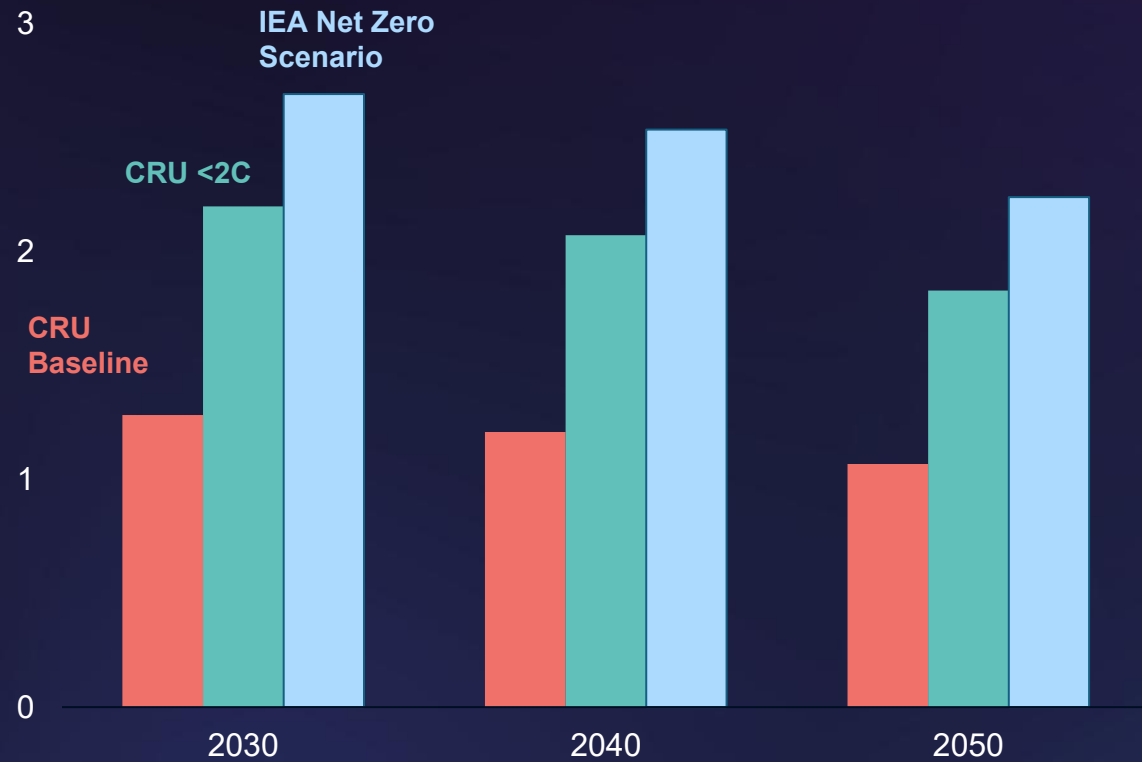


Commodity value chains increasingly shaped by the energy transition

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Changing energy systems: A huge opportunity

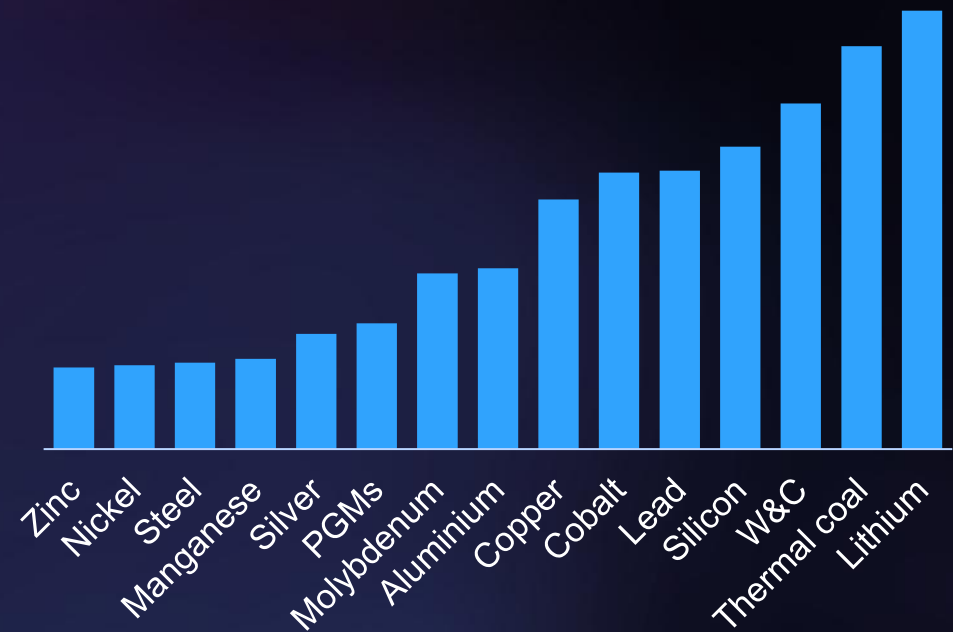
Additional investment in energy system, \$2022 tn per year



DATA: CRU, IEA

The energy transition is rewriting key end-use markets

Global demand from auto and energy sectors*, %



Note: All auto powertrain types included. Energy sector includes renewable energy, BESS, fossil energy (e.g., oil and gas upstream and downstream) and all grids.



Mining



Refining



Components



Battery cells



End use



Recycling

The CRU Battery Value Chain Service **offers complete coverage across the entire battery supply chain.**

It connects demand, production, technology, costs, pricing, competitiveness, supply agreements, policy, and strategy.

How it helps:

It provides the answers needed to navigate this complex value chain. It focuses on key issues providing context, significance, and impacts.

What you get:

- Quarterly written report (Outlook)
- Quarterly data pack (Outlook)
- Monthly market report (Monitor)
- Weekly price assessments
- Continuous news commentary
- Presentations & webinars
- Access to analysts



Market outlook

- Demand, supply, price, cost and technology outlooks for every stage of the value chain
- Technology roadmaps for manufacturers and their impacts
- Scenario and risk analysis



Corporate strategy & policy

- Corporate strategic positioning, cost-competitiveness, supply chain investments, and risk mitigation approaches
- Policy impacts and risk analysis
- Strategic insights and company roadmaps



Market developments

- Major industry developments – and their real context and impact
- Narration of industry megatrends and why they matter



Production analysis

- Full database of production facilities, adjusted for risk
- Regional consumption, production, inventory, and trade flow analysis



Supply-chain mapping

- Database of 'who supplies whom', their commercial terms, feedstock/production source and where the feedstock is used



Cost modelling, price assessments & forecasts

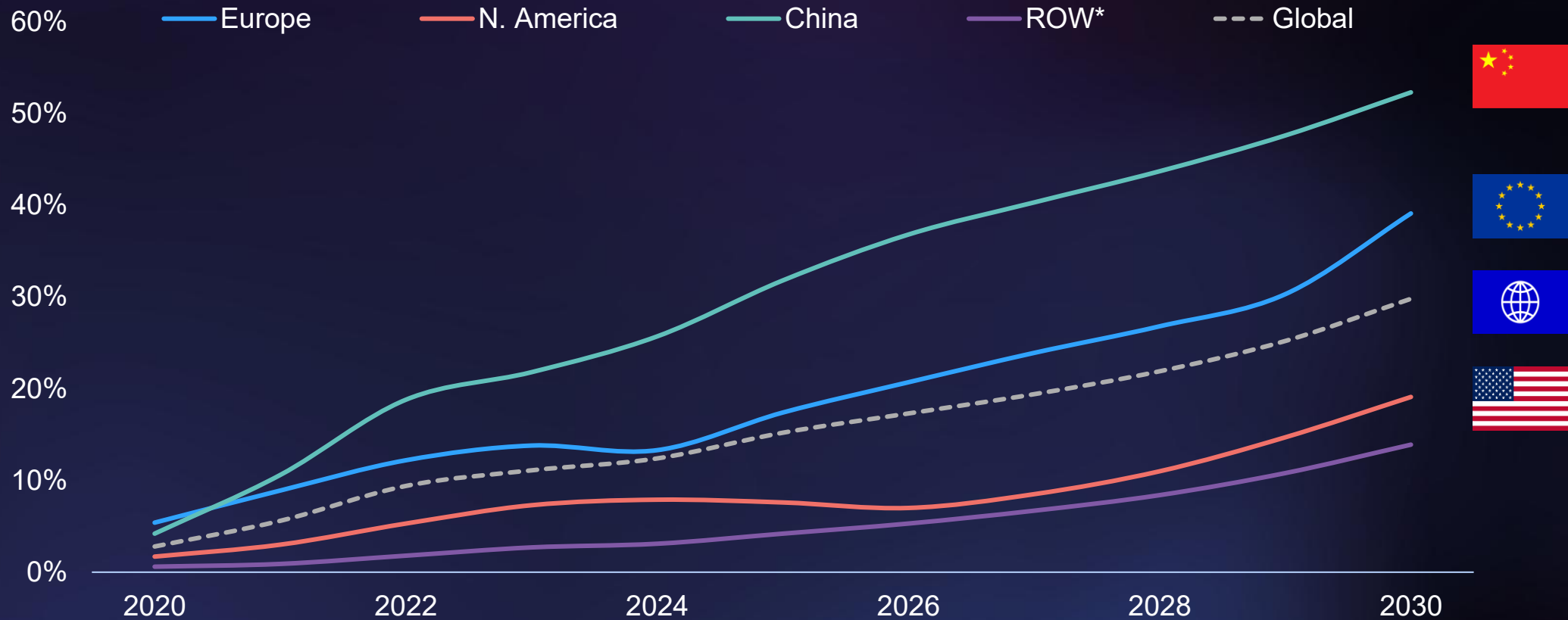
- Weekly price assessments for raw materials
- Five-year price and market balance forecasts
- Manufacturing cost and margin trends along the supply chain



Despite bumps, BEV sales will continue to trend upwards

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BEV sales share by region, %



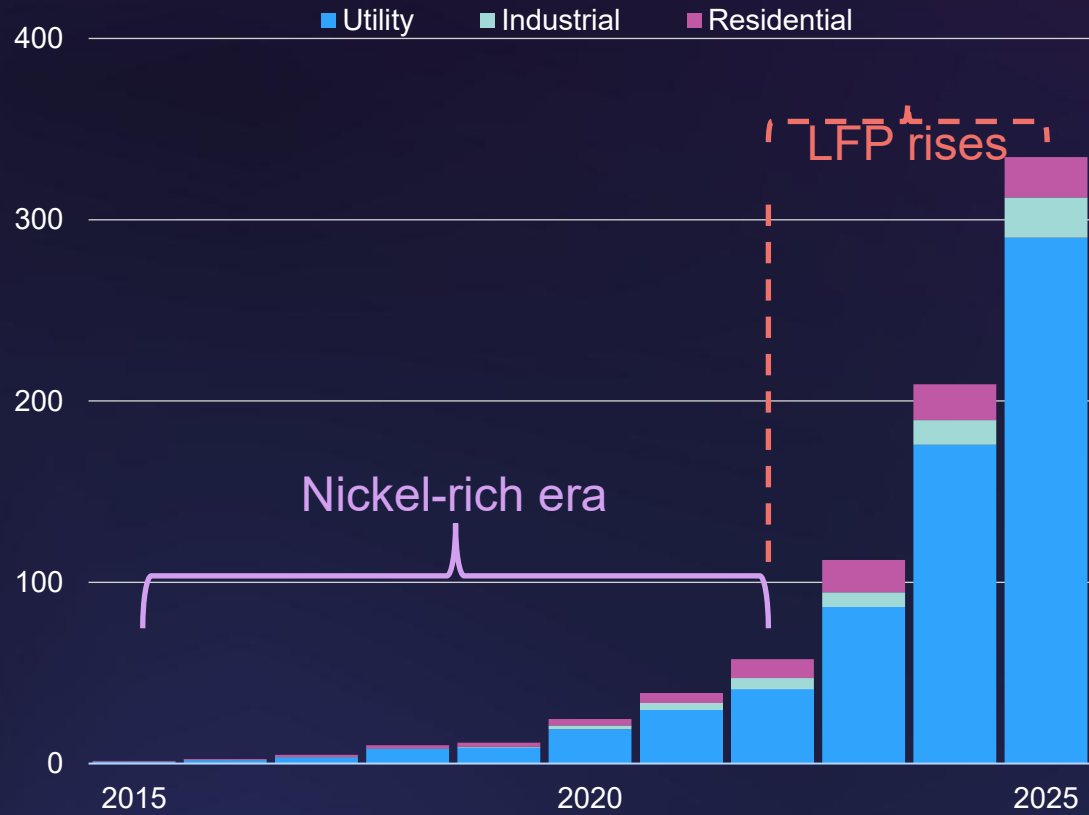
DATA: CRU, IEA



LFP BESS reaches its performance improvement era

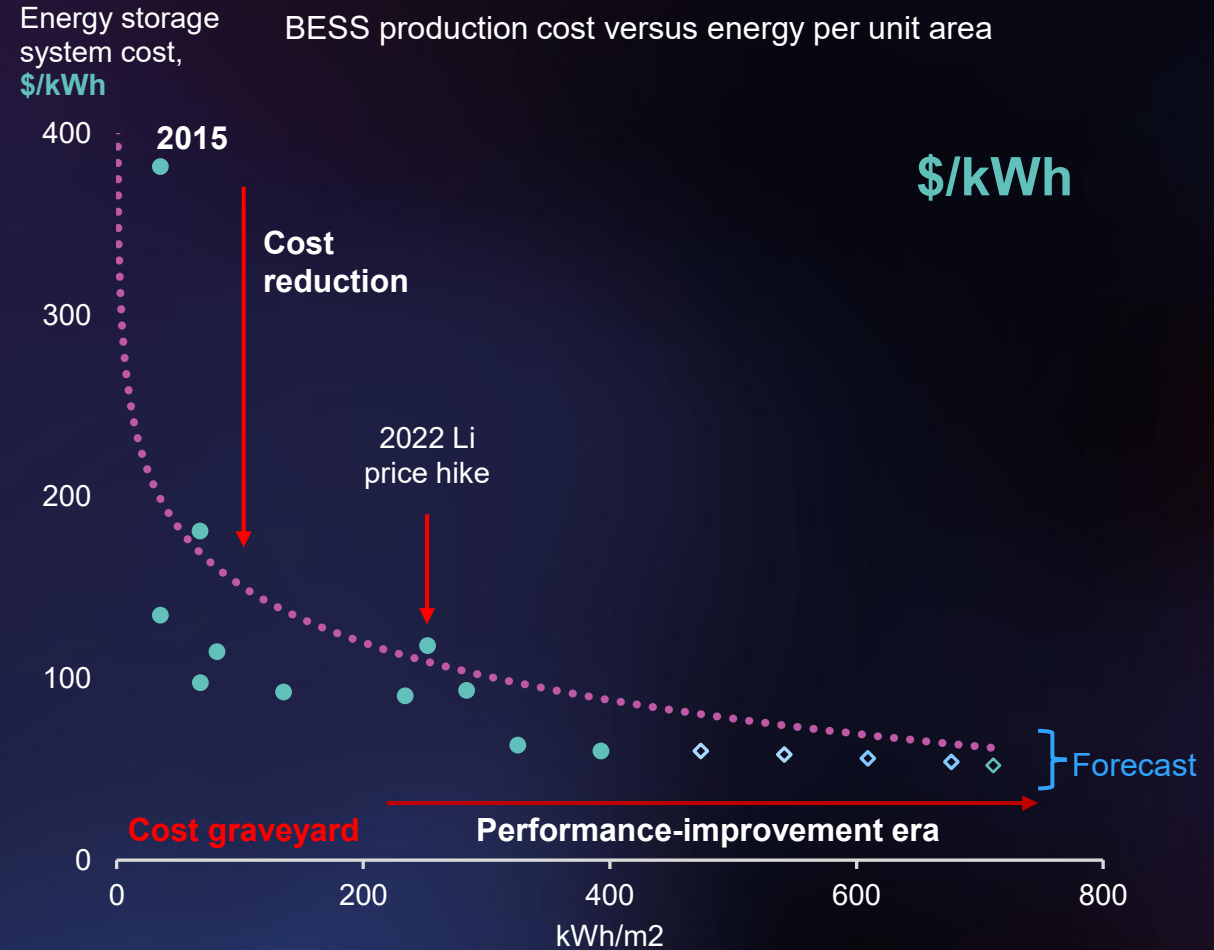
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Annual Global BESS installations, 2015 to 2025, GWh



DATA: CRU Energy Storage Service

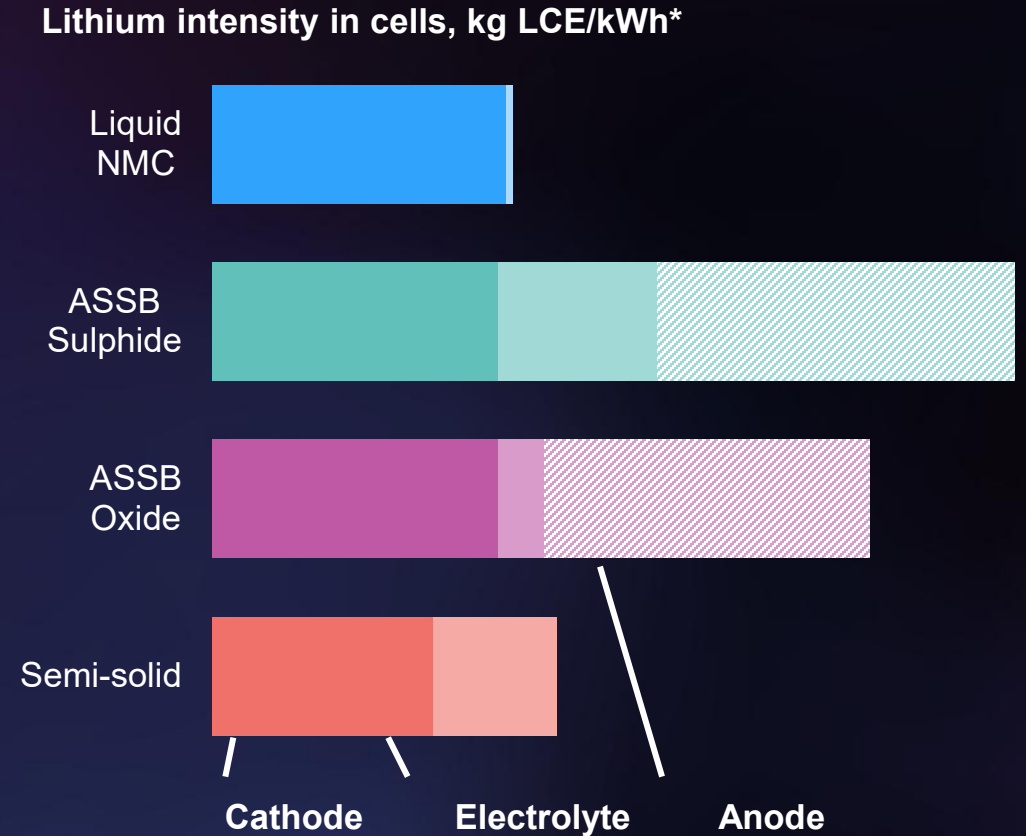
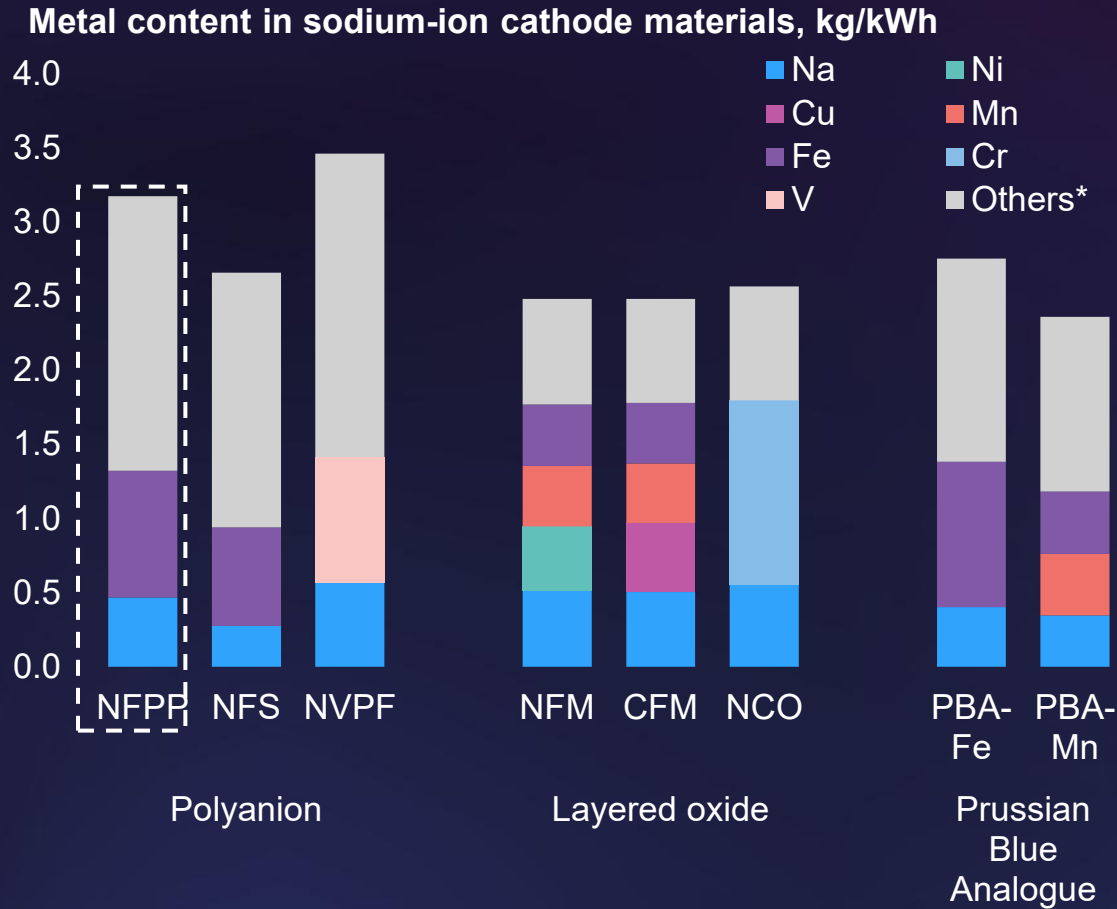
Lithium battery energy storage - costs





Solid-state tech could triple lithium's intensity-of-use

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DATA: CRU Battery Technology & Cost Service