



# 发展中的中国钢铁工业

The developing China steel industry

中国钢铁工业协会

China iron & steel association

9.JUN.2005

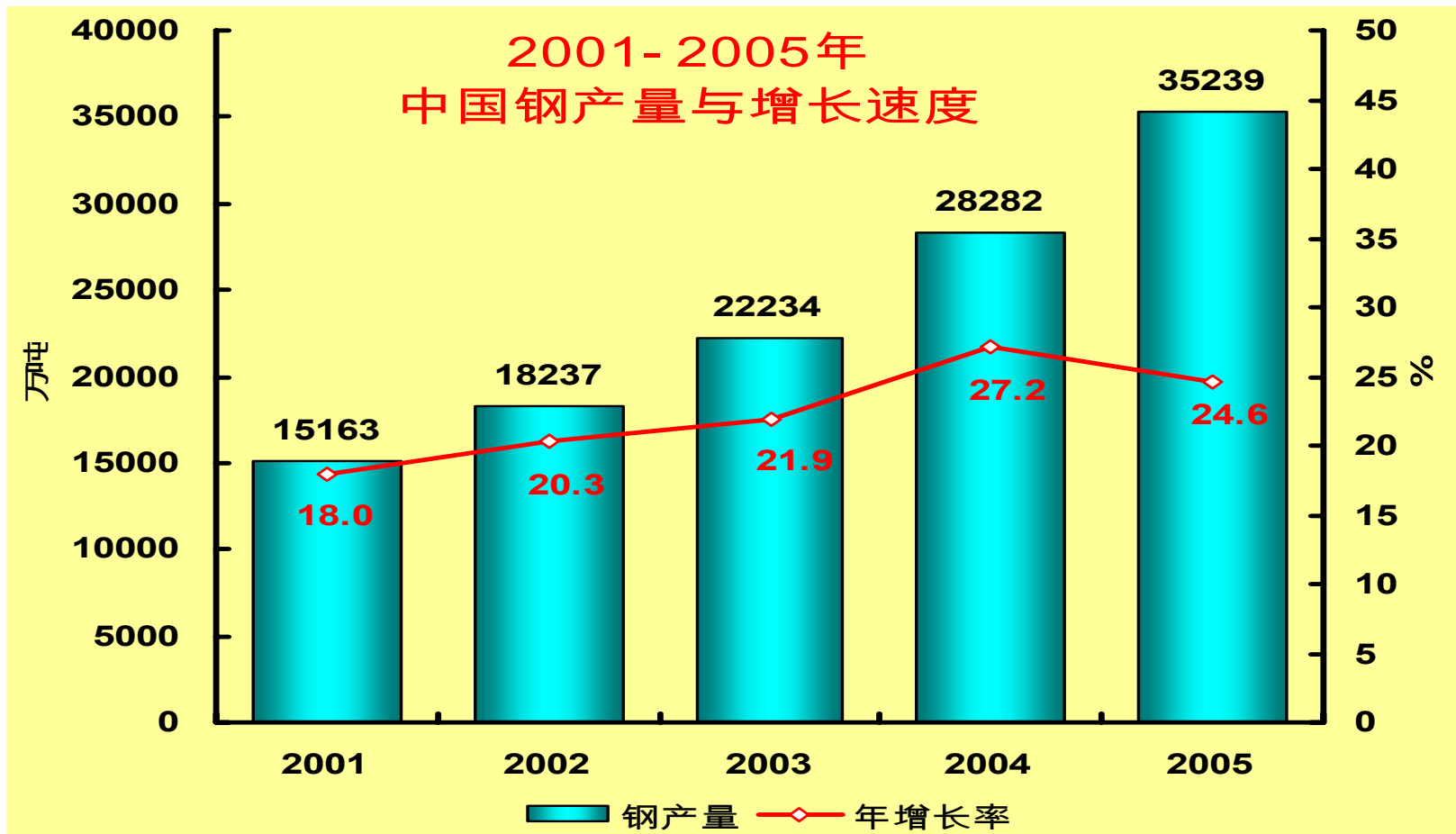
在国内需求强劲的拉动下，中国钢产量由2000年的1.285亿吨上升到2005年的3.523亿吨，用5年时间钢产量增加2.238亿吨。中国钢产量占世界钢产量的比例由2000年的15.2%上升到2005年的31.1%。本世纪初的5年，世界钢产量增加2.848亿吨，其中中国增加量占78.6%。

The strong domestic demand pushed steel production jump high, crude steel production of china increased from 128.5million ton of 2000 to 352.3 million ton of 2005.

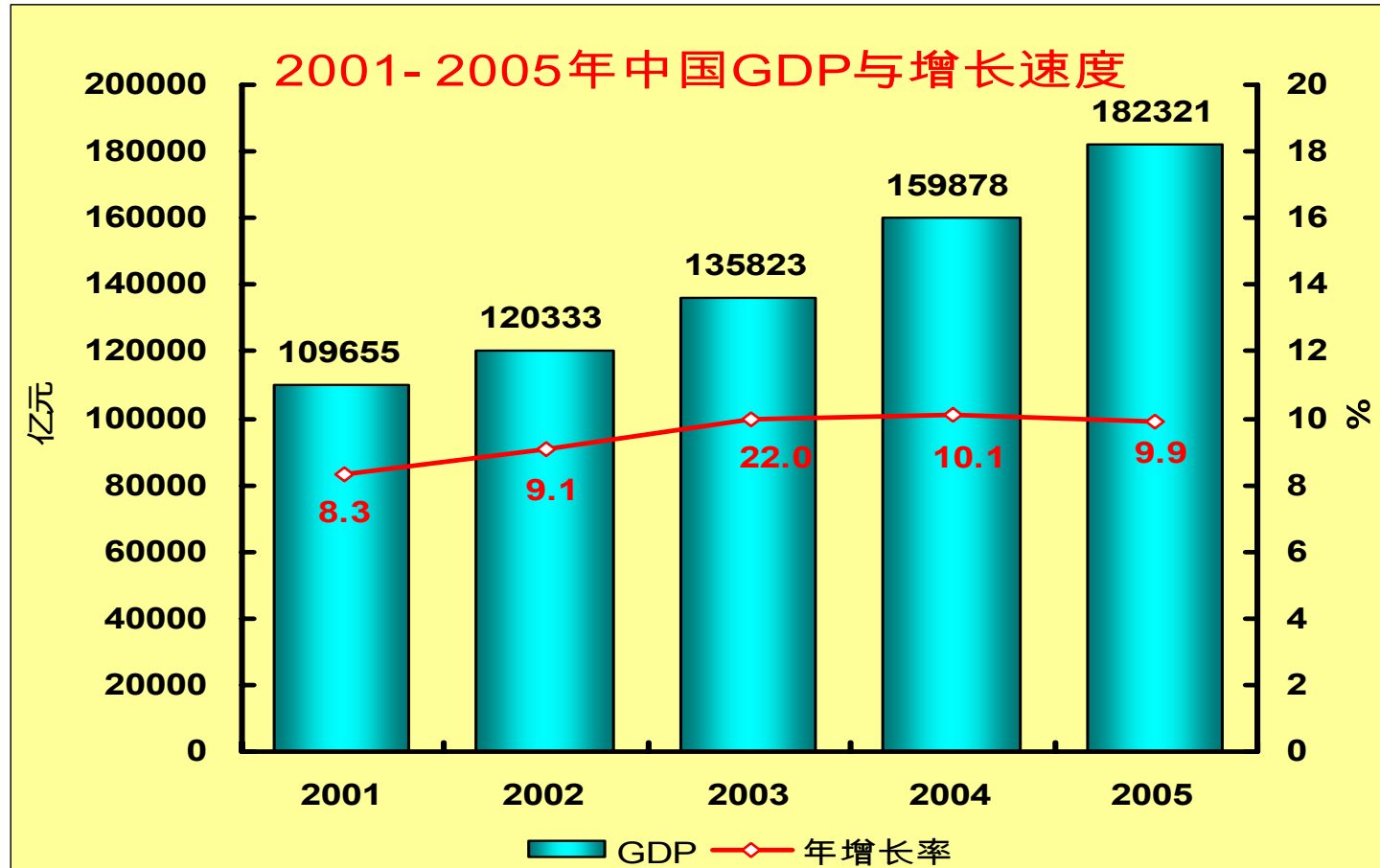
China's share in the world total steel production increased from 15.2% in 2000 to 31.1% in 2005.

In the first five years of the century, the world total steel production increased by 284.8million ton with china contribution 78.6%.

# 2001-2005 China's crude steel production & growth rate

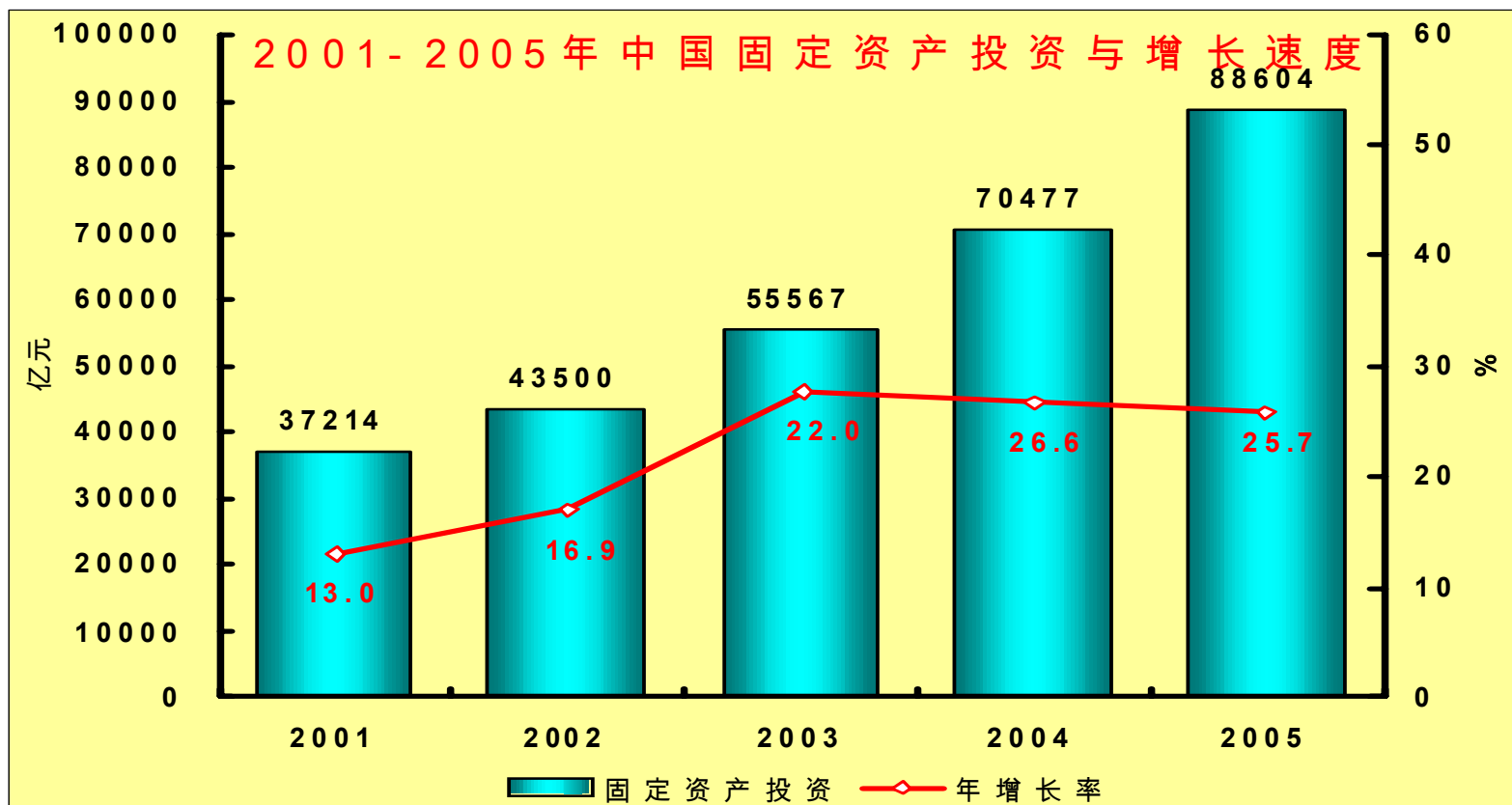


# 2001-2005 China's GDP growth rate



# Investment of Fixed Assets

2001 to 2005



# Rapid Growth of Major Industrial Products (2000 TO 2005)

	unit	2000	2005	increment	Growth rate%
10ferrous minerals	10000ton	784	1635	851	108.5
Cement	10000ton	59714	106000	46286	77.51
Moto vehicle	10000	207	570	363	175.36
In which: Car	10000	60	277	217	361.66
Air condition	10000	1826	6765	4939	270.48
Personal computers	10000	672	8084	7412	1102.97
Steel products	10000ton	13146	39692	26546	201.93

# Apparent steel Consumption & Growth Rate in 2001-2005

	Unit	2001	2002	2003	2004	2005
Apparent steel consumption	10000 ton	16950	21154	27129	33490	40222
Growth rate of A.S.C	%	20.03	24.8	28.24	23.44	20.10
Steel production	10000 ton	15702	19250	24108	31983	39692
Import	10000 ton	1722	2449	3717	2930	2580
export	10000 ton	474	545	696	1423	2052

# 关于中国钢铁产能和产量

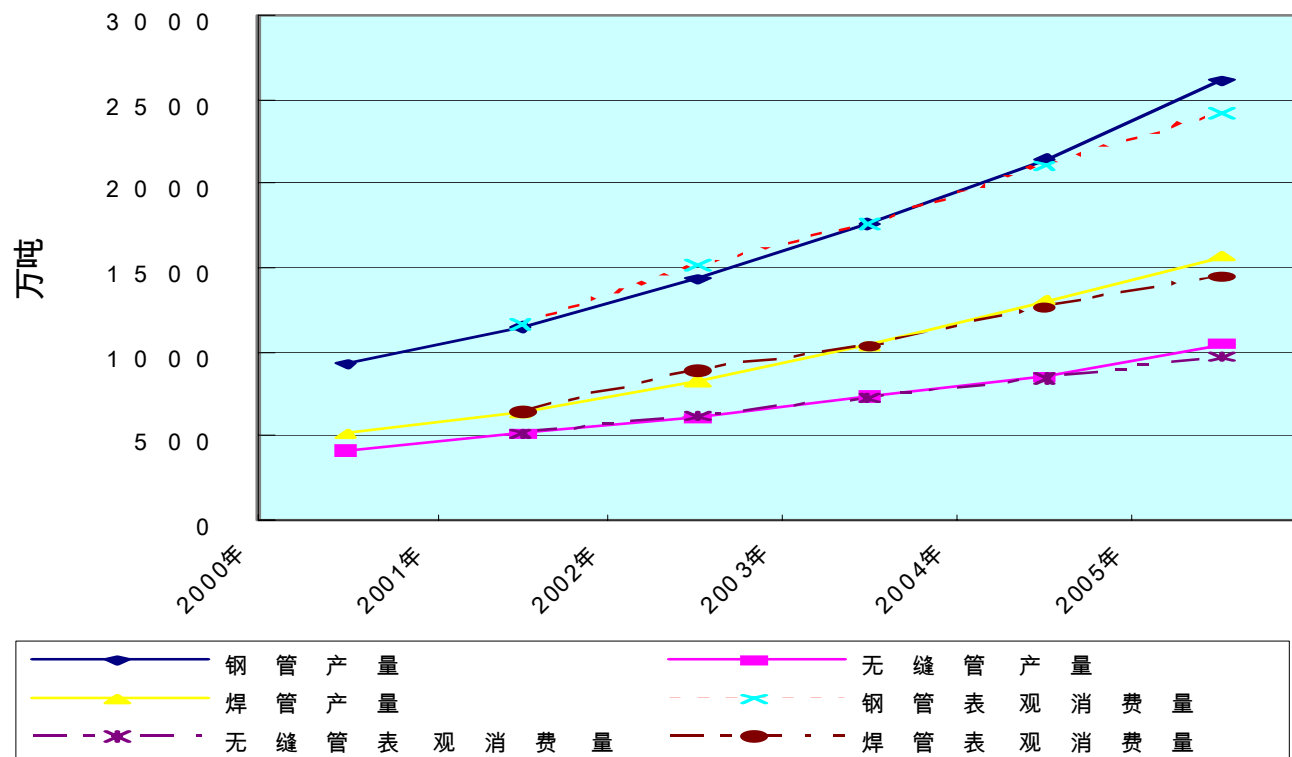
## China Steel Making Capacity & Production

- 到2005年整个钢铁行业的炼钢产能4.14亿吨，炼铁产能3.91亿吨，轧钢产能4.2亿吨。
- The iron making capacity 391million ton per year ,The steel capacity 414million ton per year and The rolling capacity 420million ton per year in 2005
- 2006年我国粗钢产量预计3.84亿吨，同比增长10%左右，国内市场粗钢消费预计增长12-15%，产量与市场需求是基本平衡。China crude steel production forecast 384 million ton in 2006, increased around 10% compare with same period last year, Domestic demand increased 12-15%, China steel production almost balance with domestic steel demand .

# China steel tube production

## 中国钢管生产

### 2001 to 2005



# China steel tube production in 2005

- 钢管产量达到2614万吨,同比增长21.62%，其中无缝钢管产量为1047万吨，同比增长23.5%；焊接钢管产量为1567万吨，同比增长20.5%。钢管同钢材之比仍保持在7.04%，钢管的产量和钢材总量同步发展。国内钢管的表观消费量为2418万吨，较上年度增长14.5%，

# China steel tube import & export in 2005

- 2005年出口钢管304.37万吨，进口钢管108.38万吨。其中无缝钢管出口139.24万吨，进口67.82万吨;焊接钢管出口165.12万吨，进口40.56万吨。

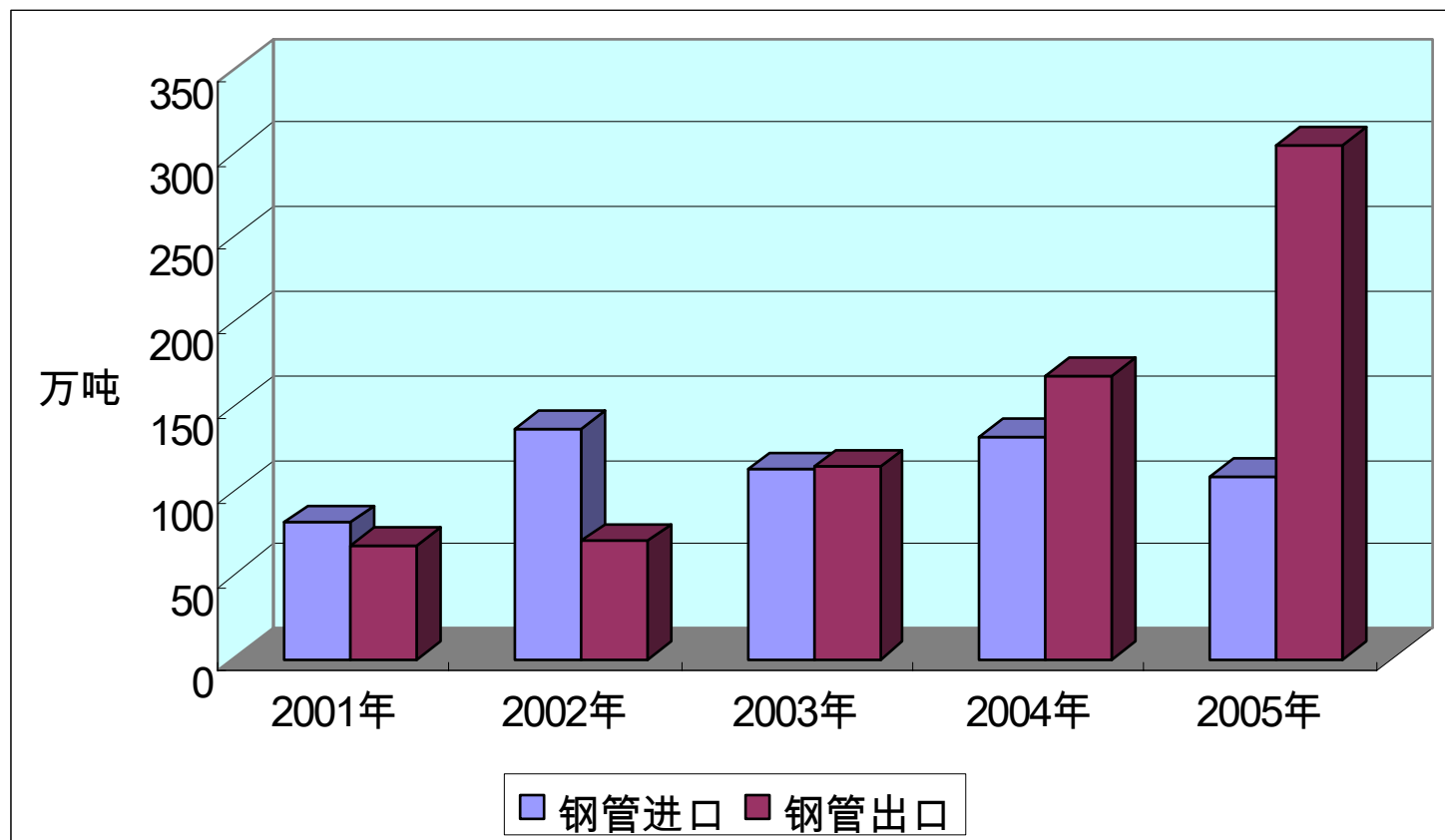
# Major importers & exporters of China steel tube in 2005

- 2005年我国出口钢管的目的国主要是美国、加拿大，其次是韩国和台湾地区。而我国进口无缝管主要来自日本、德国、意大利、阿根廷等。进口焊管主要来自日本、台湾地区和韩国等。

# China trade in steel tube

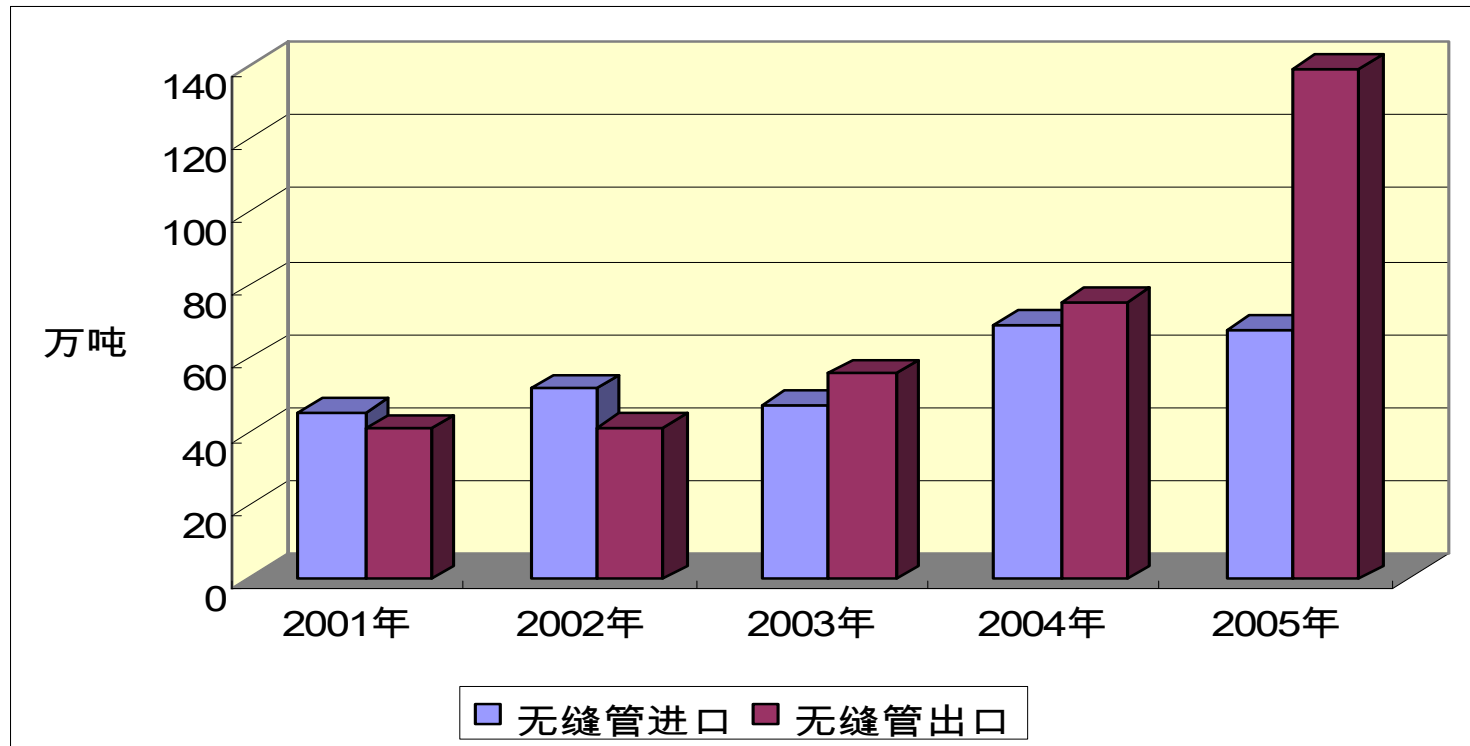
## 中国钢管贸易

2001 to 2005



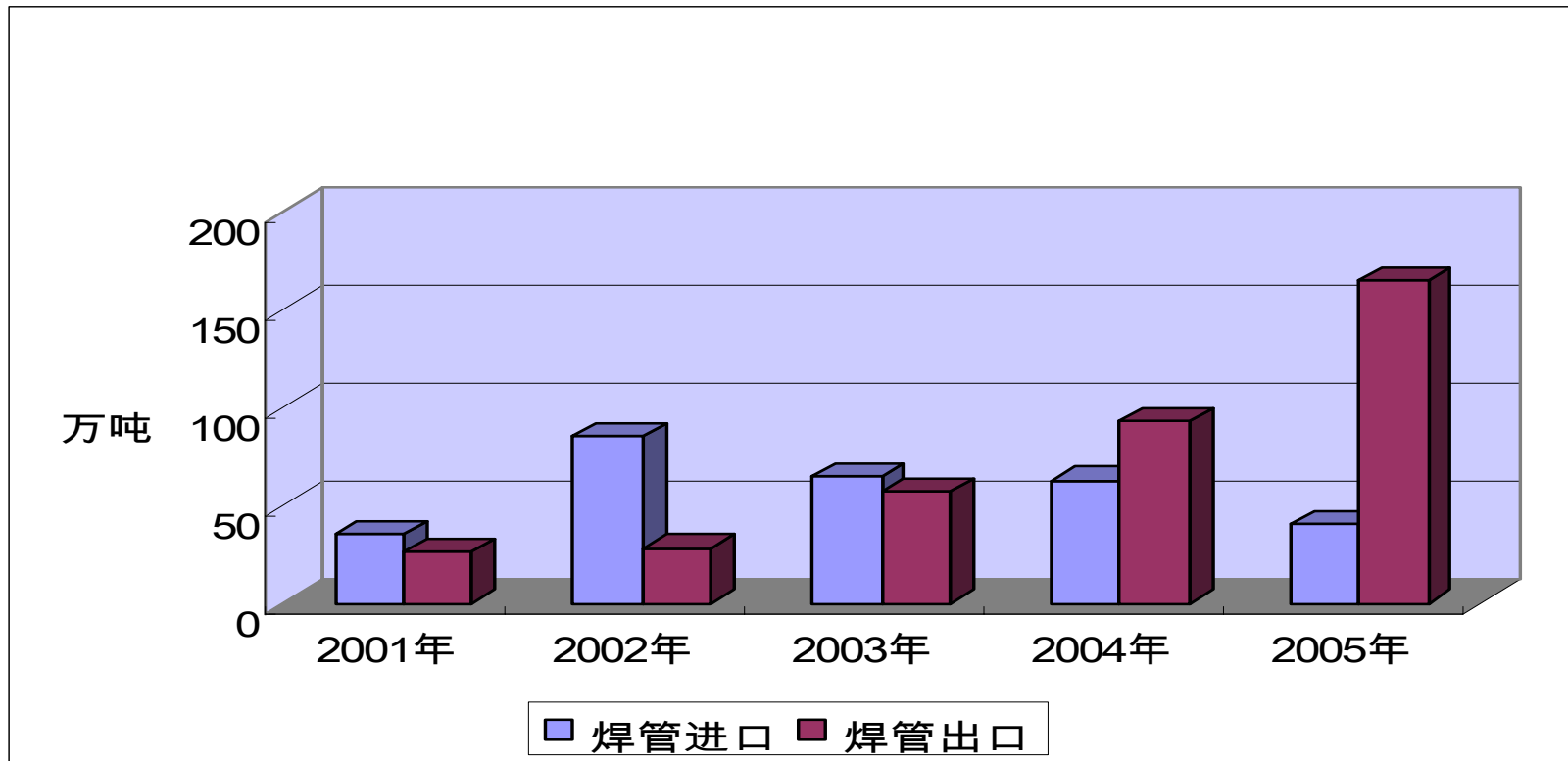
# China trade in seamless tube

2001 - 2005

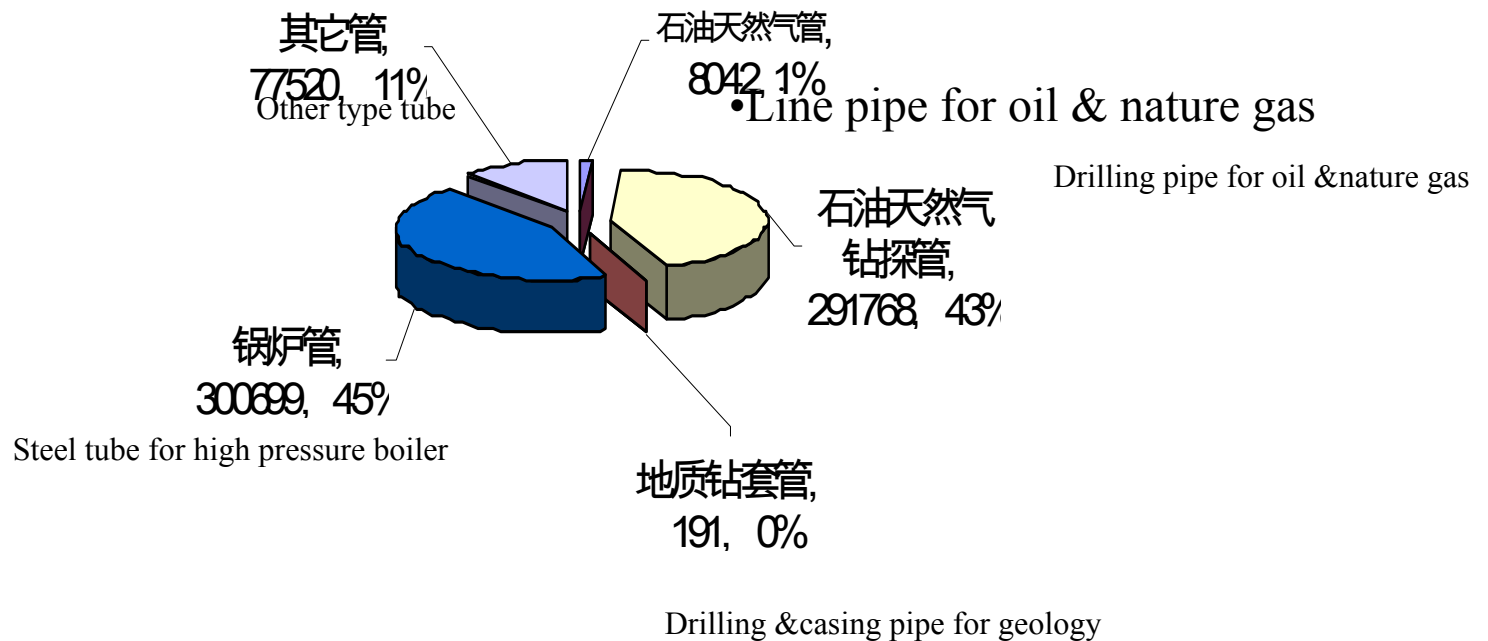


# China trade in weld tube

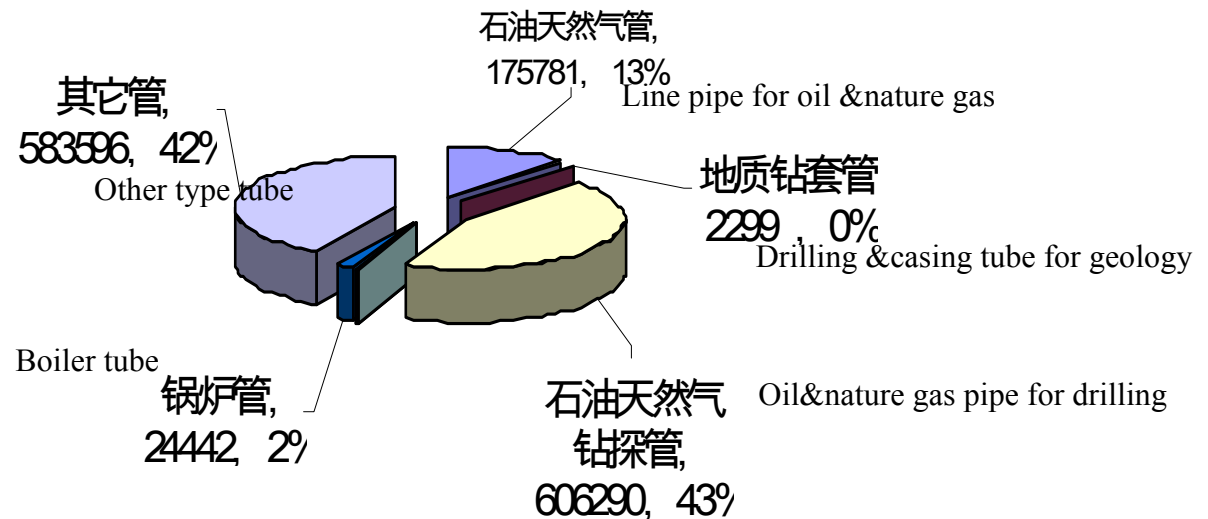
2001 - 2005



# China import seamless tube type IN 2005(0.67million ton)



# China export seamless tube type IN 2005(1.39million ton)



# China steel tube production &trade in 2006

- 2006年钢管产量将达到2870万吨。
- 2006年会员企业将投产轧机4套，新增生产能力90万吨。
- 2006年钢管进出口基本保持2005年的水平，国内钢管的供需基本上保持平衡。

# 2006年主要用钢行业钢材消费预测

Major industrial enterprise 's steel consumption  
& growth rate in 2006

	constru ction	mechan ic	Light industr y	automo bile	coal	shipbui lding	contain er	Oil- chemist ry
2004	17500	4500	2480	1276	1500	359	356	253
2005	20400	5200	2660	1579	1620	440	450	333
2006	23300	5700	2870	1850	1740	600	480	380
Increment 2006	2900	500	210	271	120	160	30	47
Growth rate 2006%	14.2	9.6	7.9	17.2	7.4	36.4	6.7	14.1

# 2006年国内市场粗钢消费 预计增长12-15%

## Domestic steel consumption forecast in 2006

forecast	Investment in fixed assets		Domestic steel consumption		Strength of steel consumption	
	<sup>10</sup> 10yuan	(%)	<sup>10</sup> 10ton	(%)	<sup>10</sup> 10ton/ <sup>10</sup> 10yuan	Compar e with last year %
2005	88604	25.7	33551	14	0.379	-9.3
2006(1)	104500	18.0	37580	12	0.360	-5
2006(2)	106300	20.0	38600	15	0.363	-4.2

# 2006年钢材钢坯进出口

## Steel & bloom import & export trend in 2006

- 预计2006年进口钢材在2300万吨，钢坯135万吨；出口钢材2050万吨，钢坯420万吨；按上述预测，2006年我国钢材、钢坯折合粗钢计算，将保持进口出口总量平衡。

2006年预计粗钢产量3.84亿吨，比上年增长10%左右

Crude steel production 384million ton ,increase 10% compare with last year in 2006

output	2005 Million ton	2006 Million ton	Increment Million ton	Growth rate %
Steel	349	384	0.35	10%
Iron	330	360	0.30	10%
Steel products	371	408	0.37	10%

# 2006年1-4月钢铁生产

## Steel production from January to April in 2006

以销定产,钢的生产增速回落,钢产量同比增长17.98%,比去年同期24.77%,回落了6.79点.

进口钢材同比减少225万吨,下降26.4%,出口钢材同比增加191万吨,增长26.4%.

钢的表观消费增加了1672万吨,同比增长15.89%,低于上年同期.

我国宏观经济呈现加快增长,固定资产投资同比增长27.7%比上年同期高4.9个百分点.钢材市场需求旺盛,超出预期,主要工业品产量增幅加快.钢材价格处于合理回升阶段.

# 2006年1-4月中国钢材进出口

## china steel import & export January to April

- **进口:**

- 钢坯14万吨,同比减少73.4%
- 钢材629万吨,同比减少26.4%

- **出口:**

- 钢坯138万吨,同比减少62.3%
- 钢材917万吨,同比增加26.4%

# 2006年1-4月钢管进出口

## Steel tube import & export from January to April

- **进口:**

- 无缝管24.4万吨,同比增长9.6%
- 焊管8.8万吨,同比减少32.4%
- 铸铁管0.1万吨,同比减少21.7%

- **出口:**

- 无缝管61.7万吨,同比增长58.5%
- 焊管64.2万吨,同比增长23.3%
- 铸铁管17.6万吨,同比增长57.1%

# 积极开展中美钢铁贸易对话

## Actively carry out America-China Steel Trading Talks

中国和美国作为全球最大的钢铁生产大国和消费大国，为发展两国经济，加强和扩大两国在钢铁贸易合作是符合两国经济发展要求，也符合两国企业的要求。我们愿意根据中美国两国市场需要，通过钢铁贸易，推动双方在钢铁行业的交流合作，达到双方优势互补和共赢。

As the world largest steel produces & consumers ,America & China would like to enhance their economic developments by strengthening & expanding bilateral cooperation on steel trade ,which meets not only the demand of both countries' economic development ,but also the requirements of American & Chinese enterprises .I believe both parties would like to promote bilateral cooperation on steel industry, become supplementary to each other & reach a win-win goal by means of steel trade ,according to the demand of American & Chinese market .

中国发展钢铁工业是立足于主要满足国内市场的需求,我们钢材出口仅占生产量很小比例,今后将会保持这种趋势.

China steel development of production、 capacity、 sales etc supply mainly domestic market demand , and China steel export concerned are made up a fractional percentage to steel production , it is clear that the trends have consistently remained in the future。

我们主张通过积极的钢铁对话，进一步交流信息，在加强理解和信任的基础上，进一步扩展两国间、行业间和企业间的合作，不仅在产品贸易上，我们也希望能与美方同行在钢铁技术、企业管理和钢铁物流等多方面的交流与合作。

We 'd like to have a further information exchange by actively carrying out bilateral talks ;to expand cooperation between the nations ,their respective steel industries & their enterprises based on strengthened mutual understanding & trust.the cooperation would cover not only trade of products ,but also steel techniques ,enterprise management ,logistics and so on.

# Thank NASPD & Enterprises

感谢美国钢管销售协会邀请中国钢铁企业访美,感谢美国钢管流通企业多年对中国钢铁企业的大力支持