



上海中期期货  
SHZQ FUTURES

# 钢矿市场周度数据盘点

2024年2月20日

上海中期研究所黑色小组制作

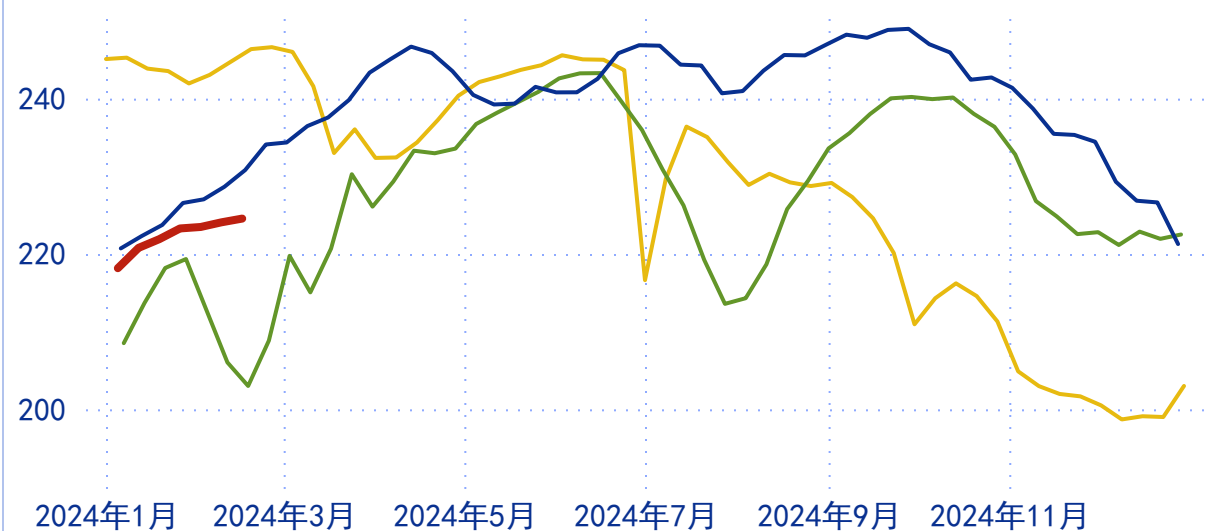
● 黄慧雯，期货从业资格证号：F0256596；投资咨询资格证号：Z0010132

● 李吉龙，期货从业资格证号：F3038265；投资咨询资格证号：Z0014831

# 铁水产量维稳，螺纹产量继续回落

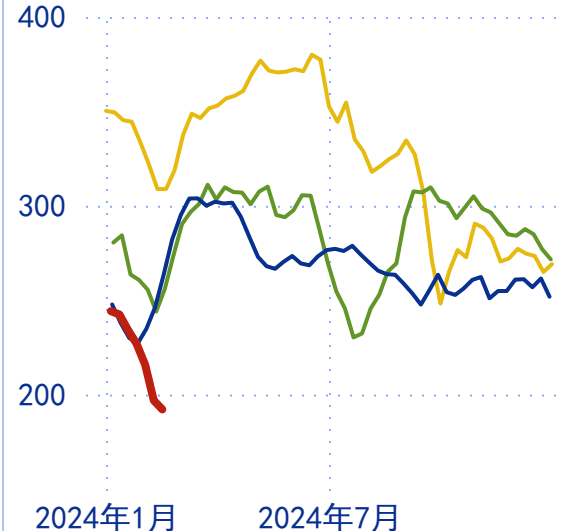
## 247家钢铁企业铁水日均产量(周度, 万吨)

年份 ● 2021 ● 2022 ● 2023 ● 2024



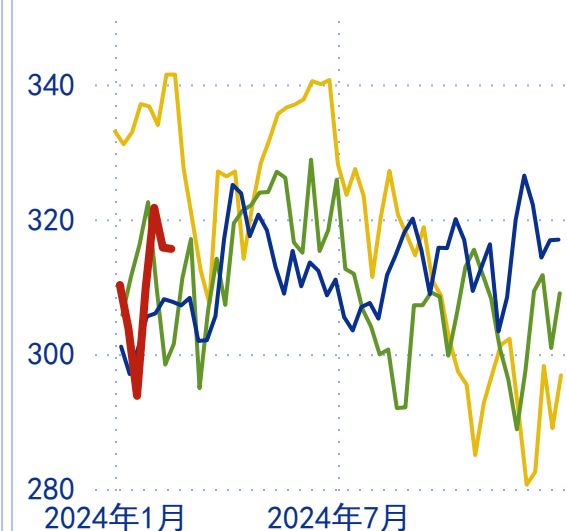
## 螺纹钢钢厂实际产量(周度, 万吨)

年份 ● 2021 ● 2022 ● 2023 ● 2024



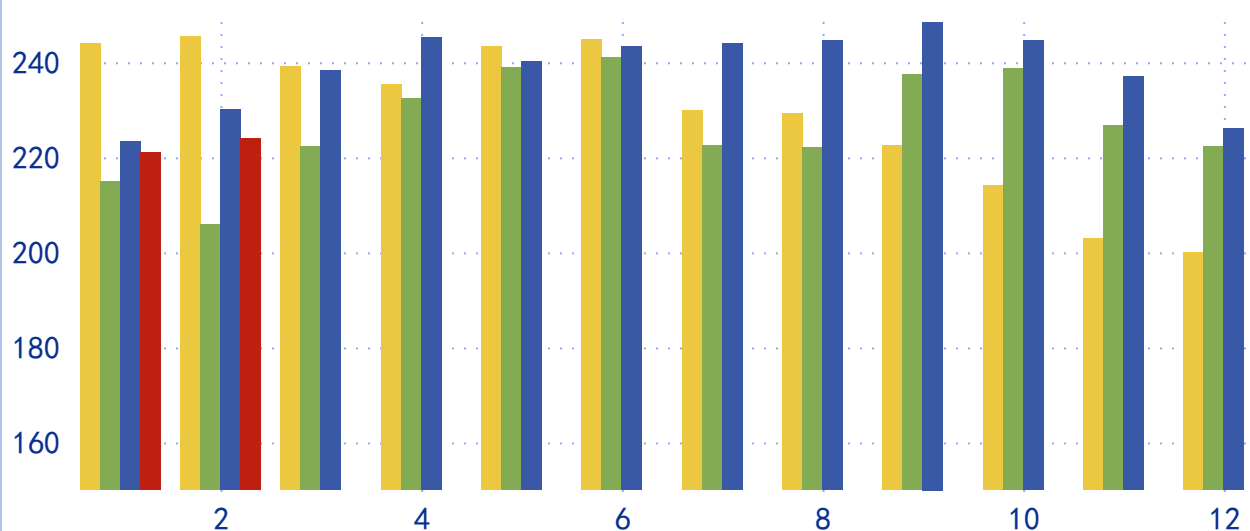
## 热轧板卷钢厂实际产量(周度, 万吨)

年份 ● 2021 ● 2022 ● 2023 ● 2024



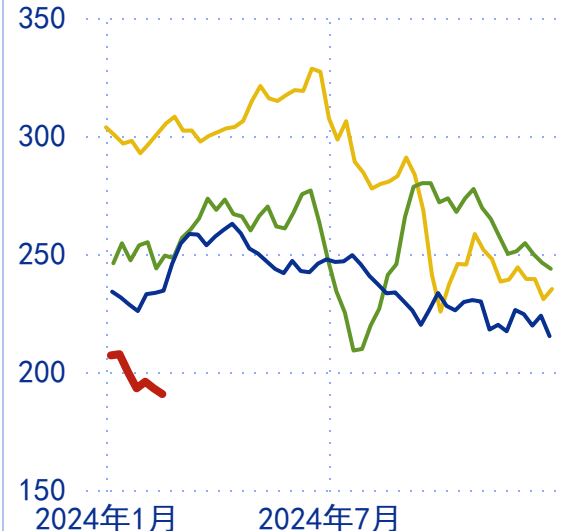
## 247家钢铁企业铁水日均产量(按月平均, 万吨)

年份 ● 2021 ● 2022 ● 2023 ● 2024



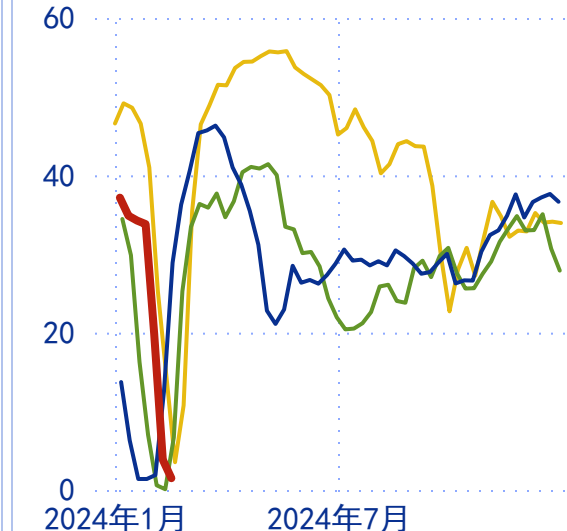
## 长流程钢厂螺纹钢产量(周度, 万吨)

年份 ● 2021 ● 2022 ● 2023 ● 2024



## 短流程钢厂螺纹钢产量(周度, 万吨)

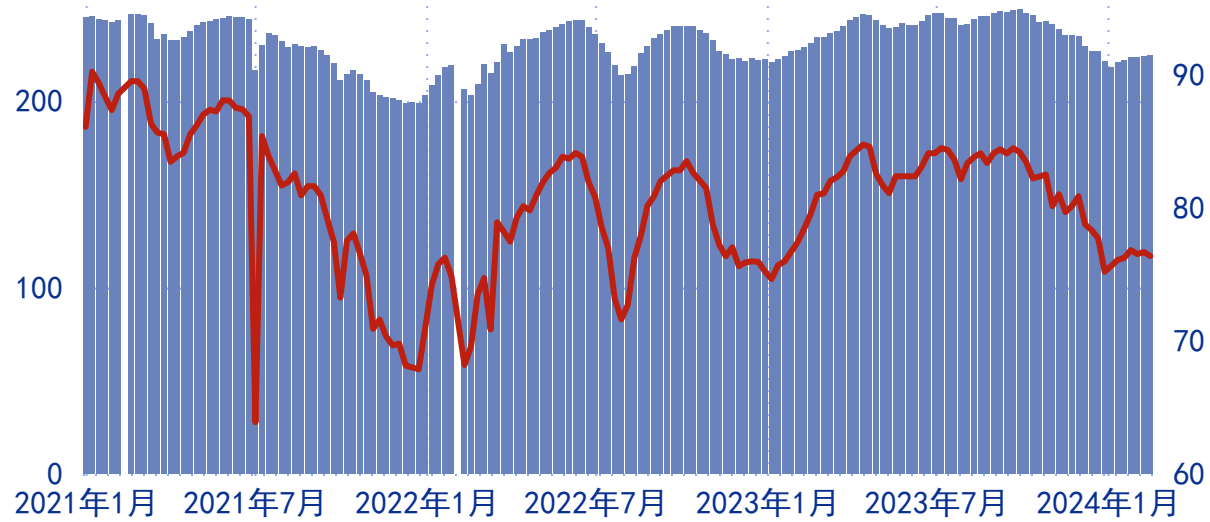
年份 ● 2021 ● 2022 ● 2023 ● 2024



# 螺纹钢开工维持低位，热卷开工维稳

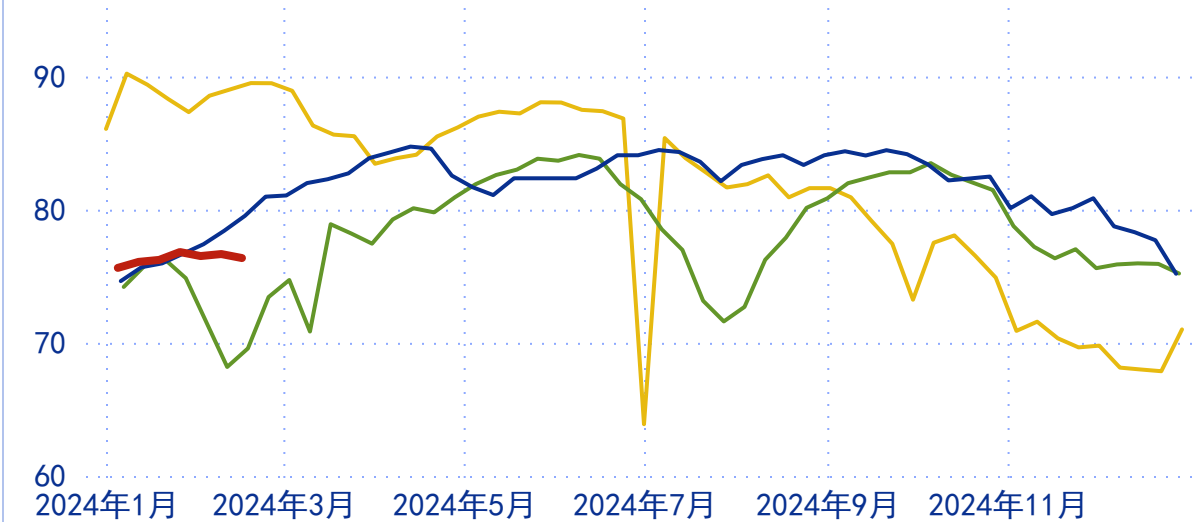
## 247家钢铁企业高炉生产及产量情况

● 日均铁水产量(左轴, 万吨) ● 开工率(右轴, %)



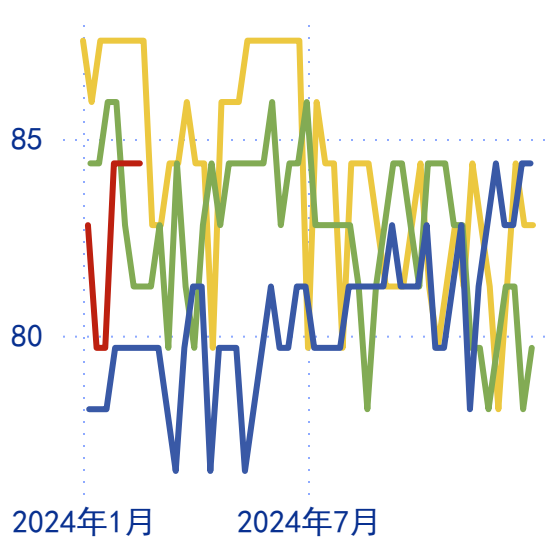
## 247家钢铁企业高炉开工率(阳历%)

年份 ● 2021 ● 2022 ● 2023 ● 2024



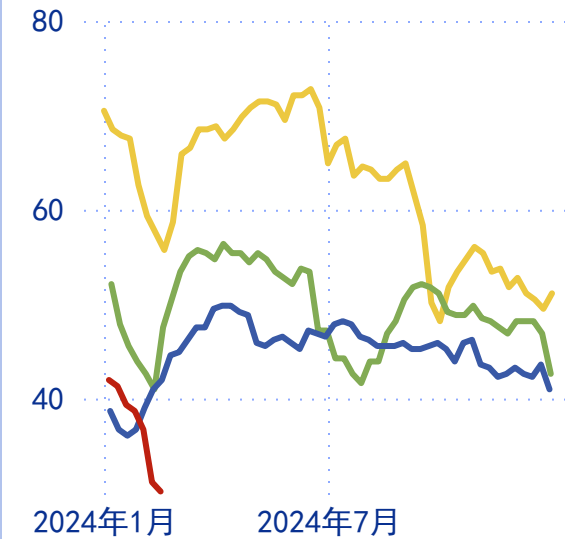
## 钢铁企业热轧板卷开工率(%)

年份 ● 2021 ● 2022 ● 2023 ● 2024



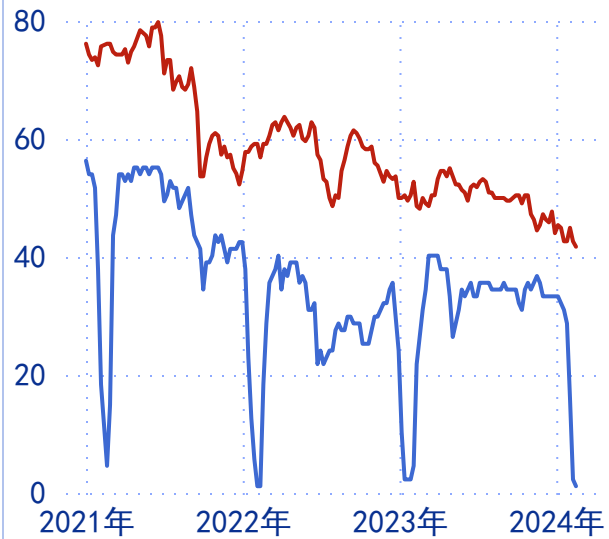
## 建材钢厂螺纹钢开工率(%)

年份 ● 2021 ● 2022 ● 2023 ● 2024



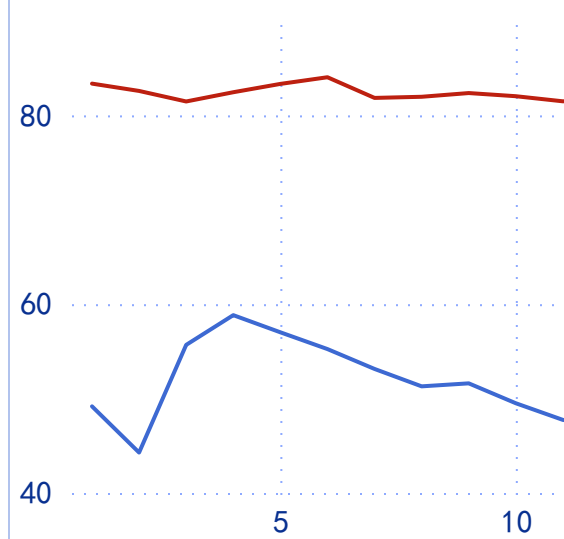
## 建材钢厂螺纹钢开工率(按工艺, %)

● 长流程 ● 短流程

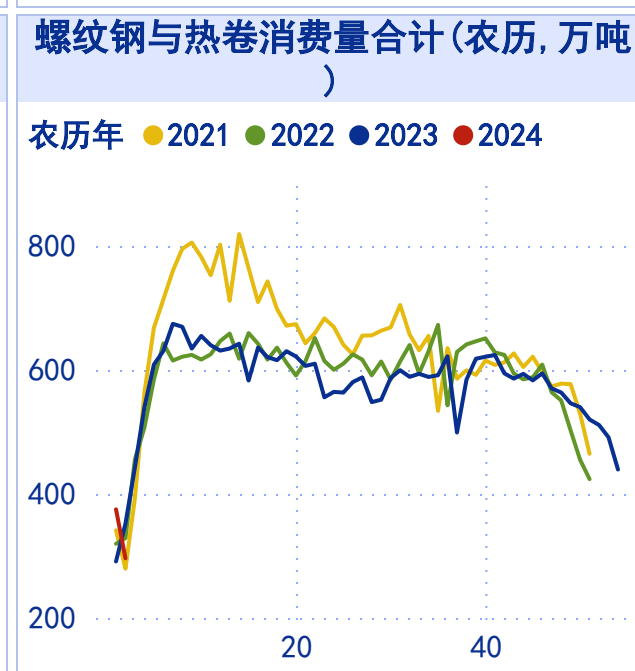
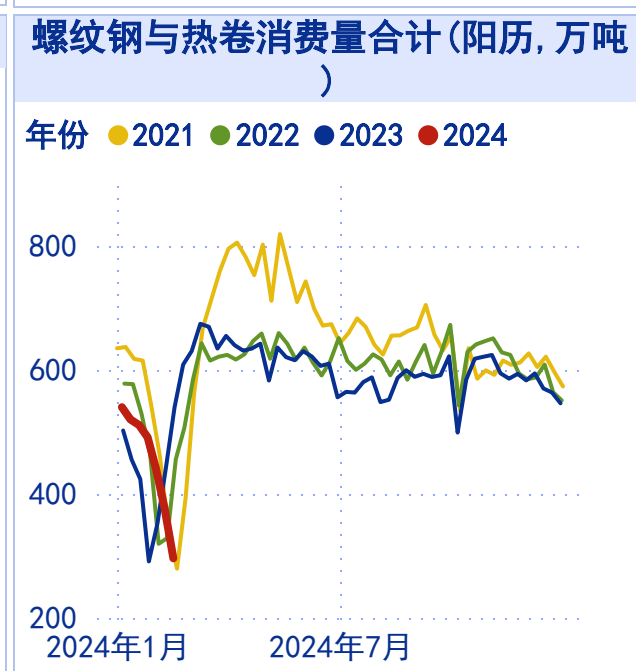
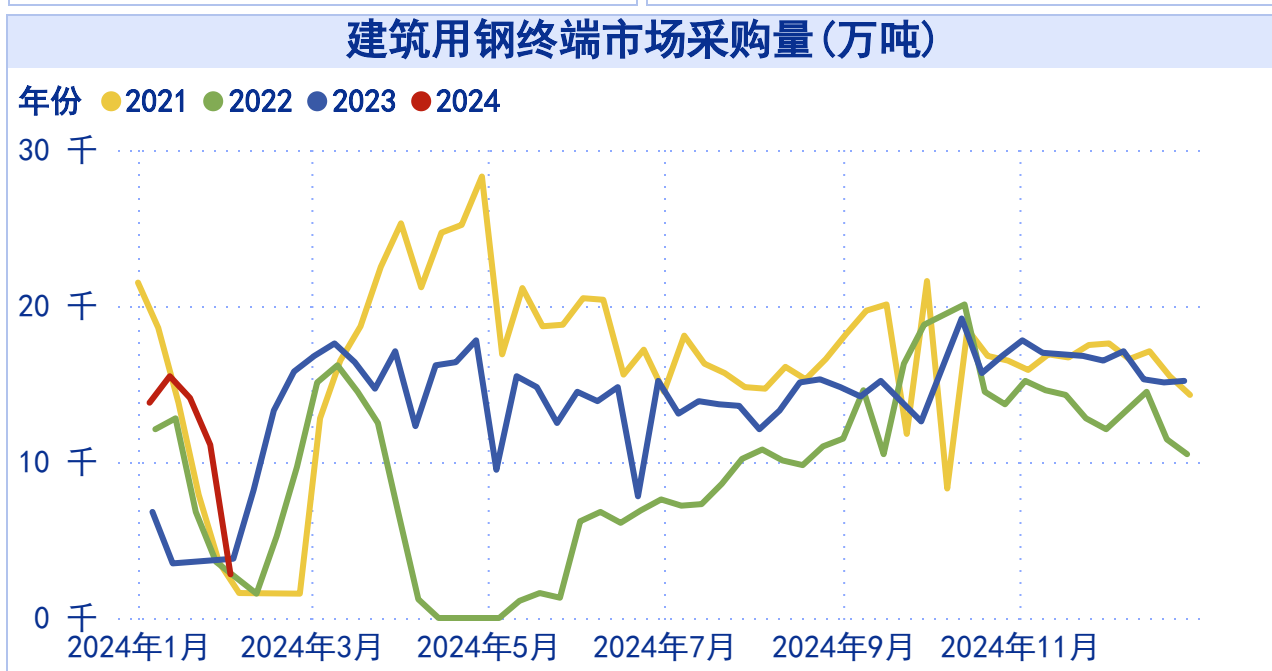
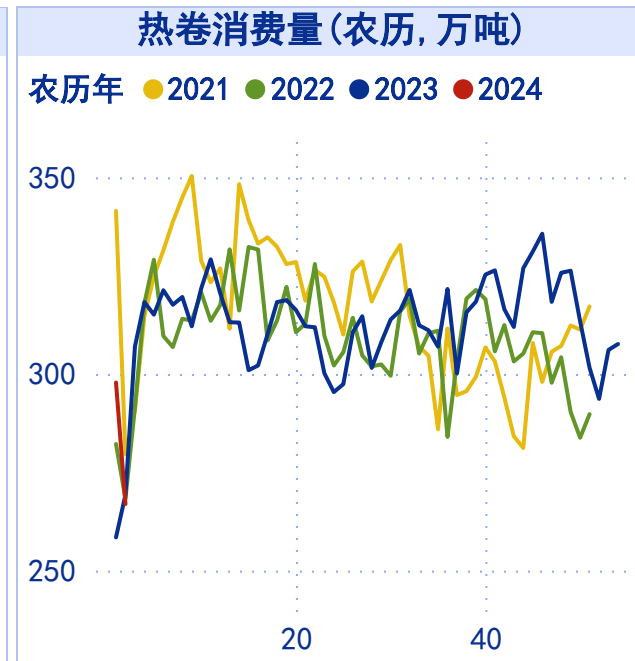
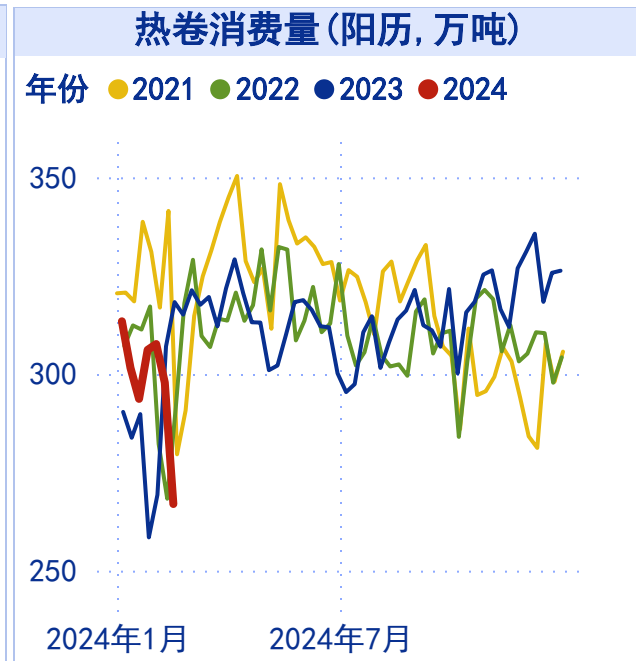
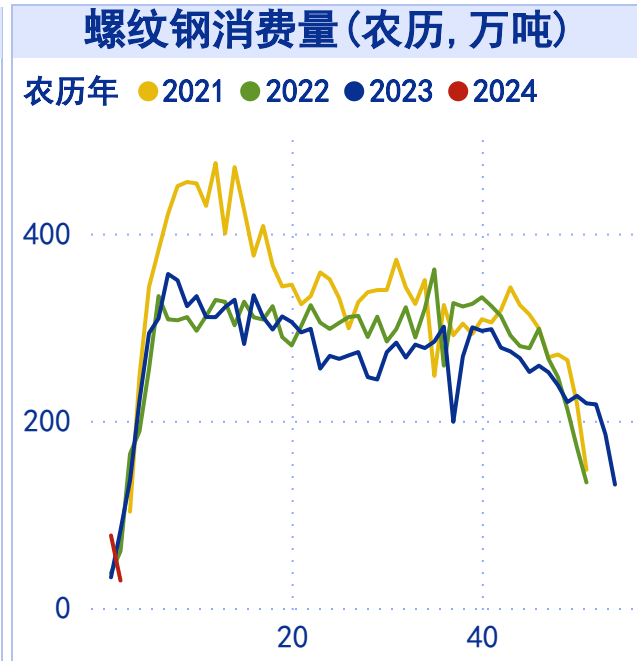
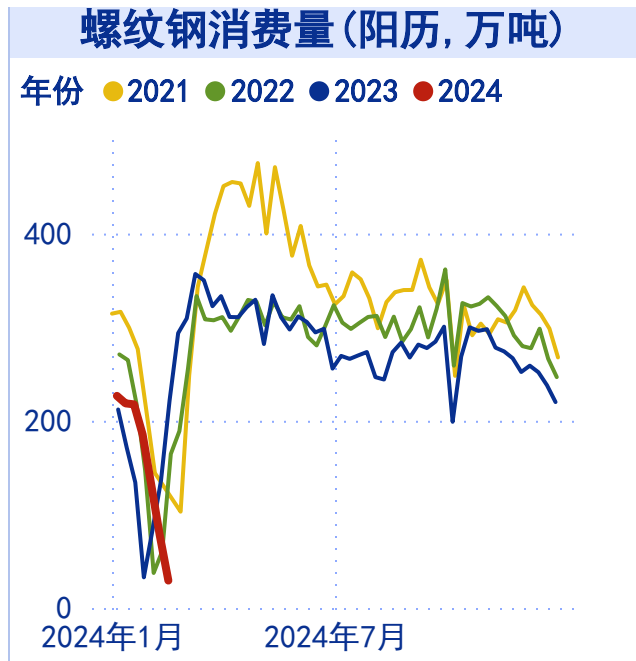


## 螺纹钢与热卷开工率对比(月均, %)

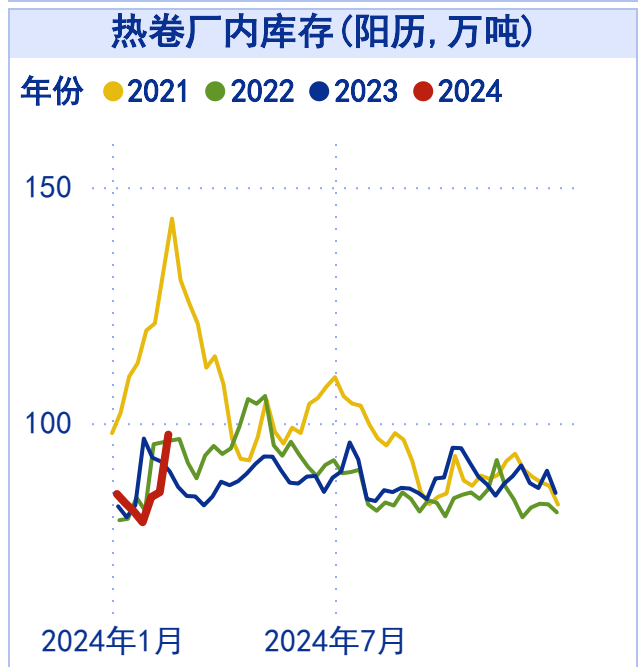
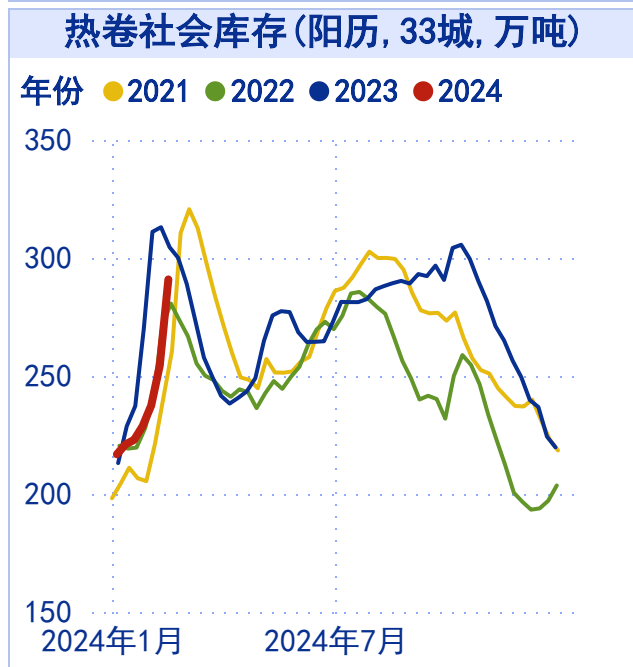
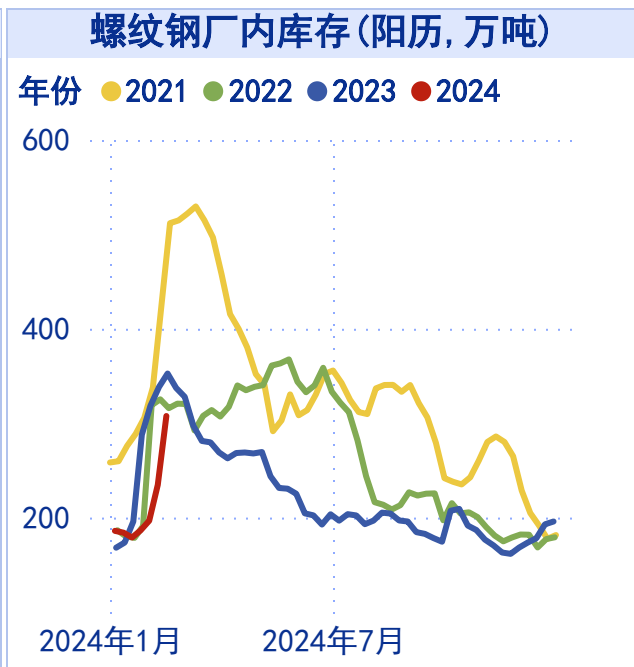
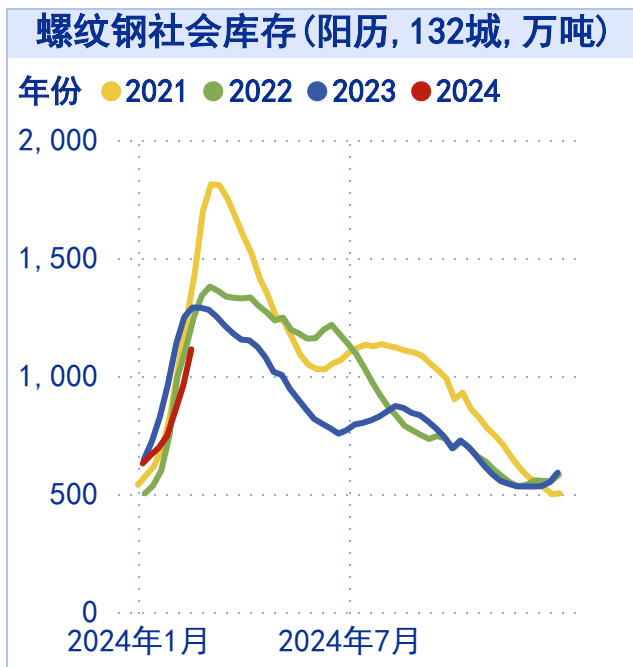
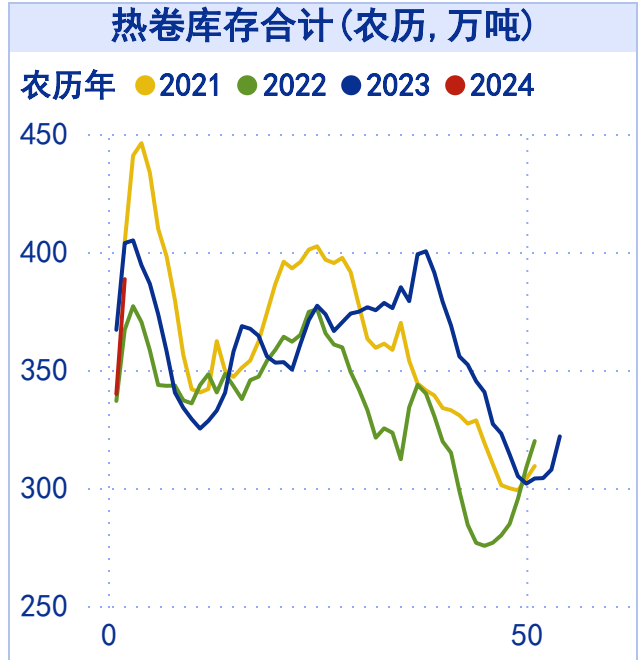
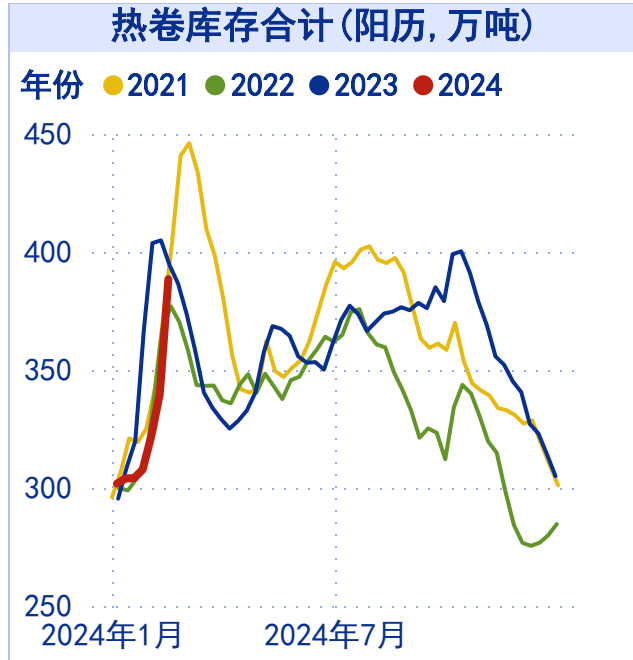
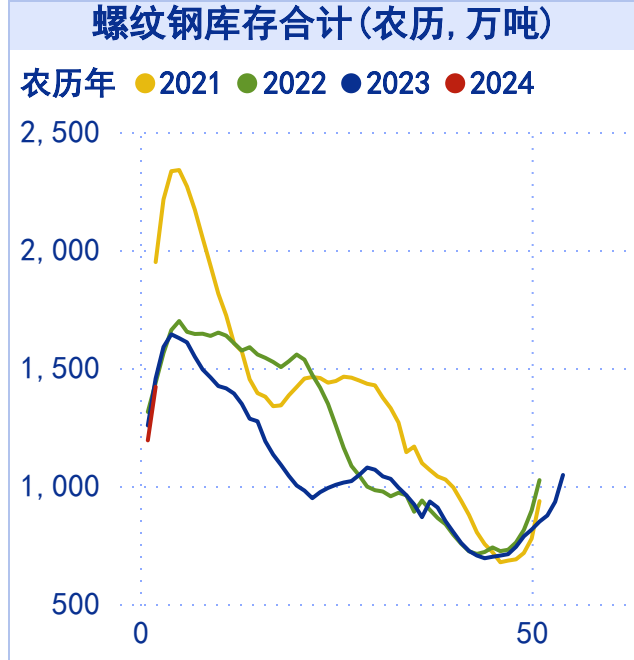
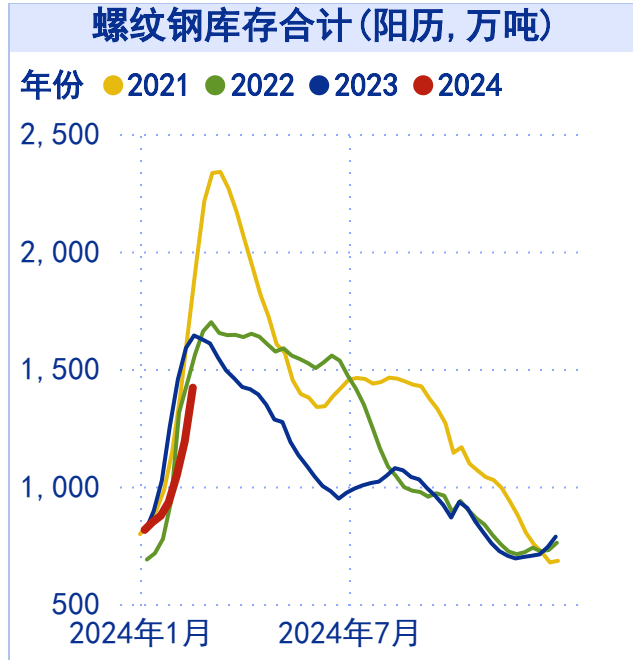
● 热轧板卷 ● 螺纹钢



# 螺纹钢表观消费延续季节性弱势，热卷表现有所回落

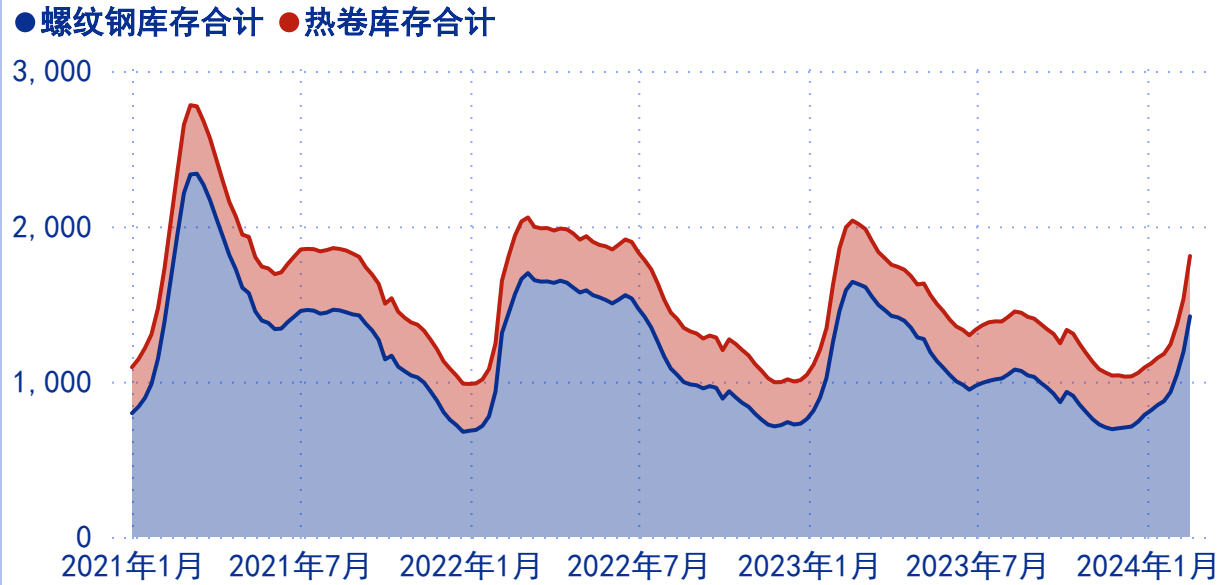


# 节间累库进程加快

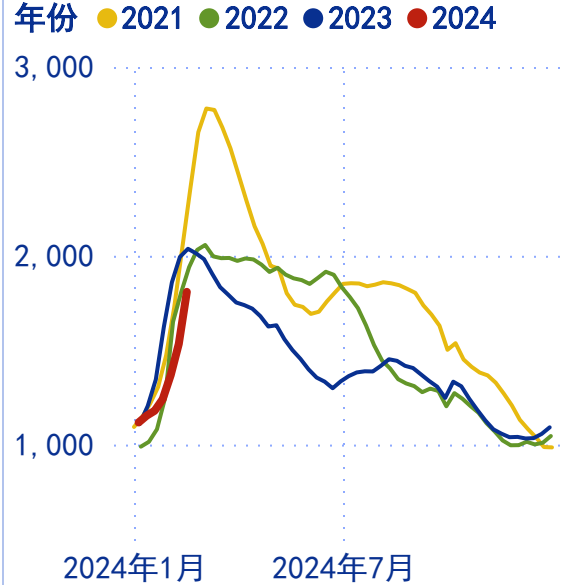


# 节间累库进程加快

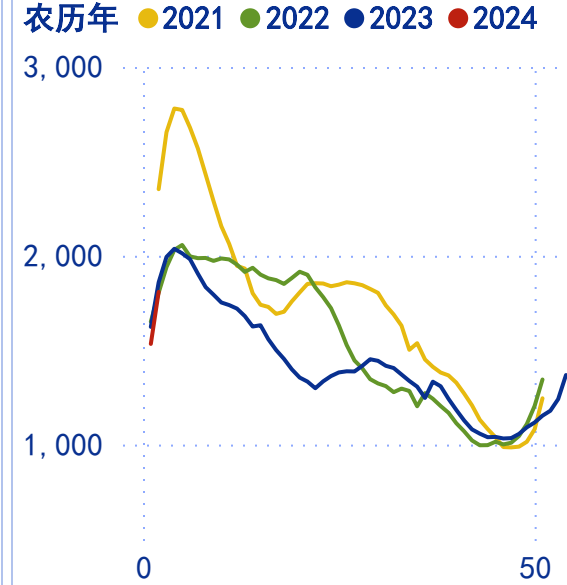
## 螺纹钢与热卷库存合计(阳历, 万吨)



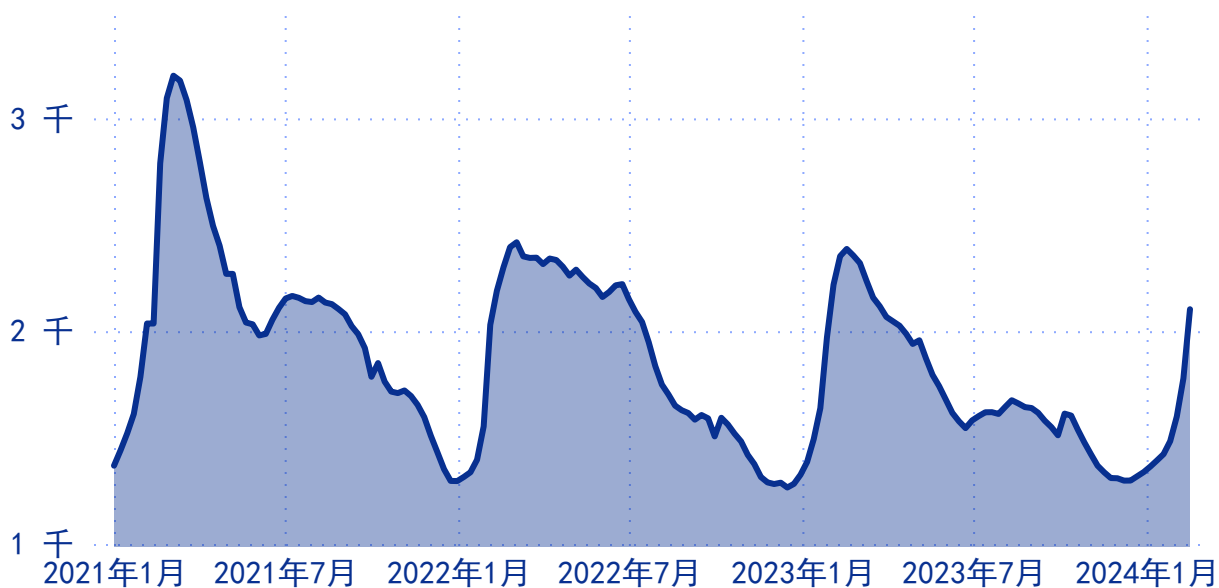
## 螺纹钢与热卷库存合计(阳历, 万吨)



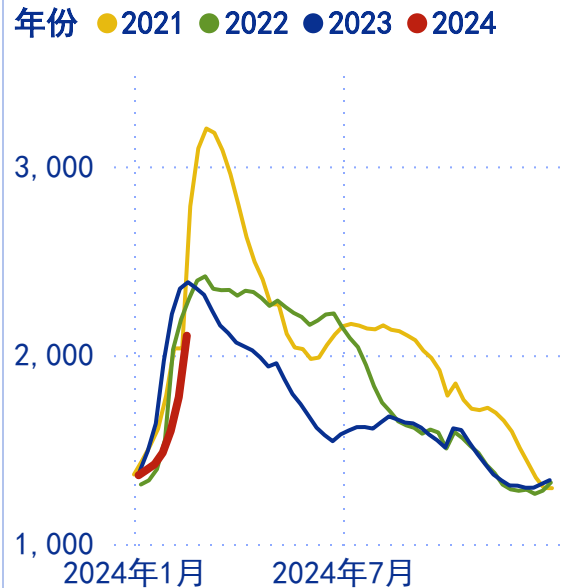
## 螺纹钢与热卷库存合计(农历, 万吨)



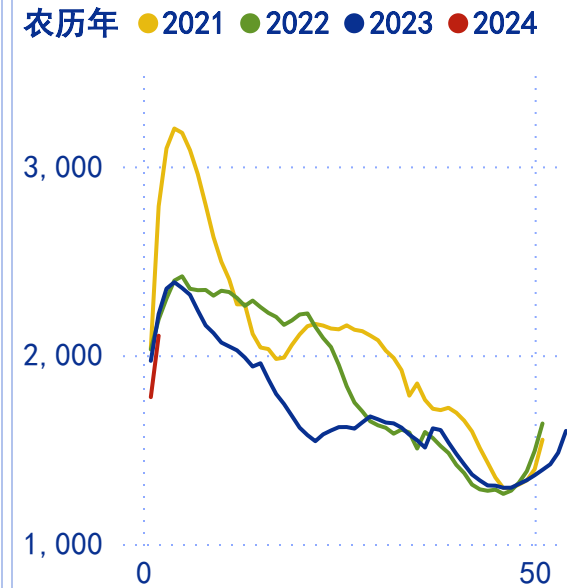
## 五大钢材品种总库存(阳历, 万吨)



## 五大钢材品种总库存(阳历, 万吨)

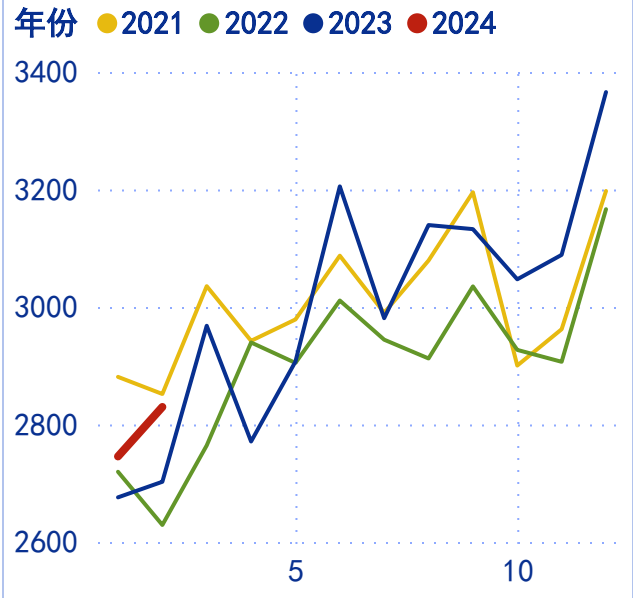


## 五大钢材品种总库存(农历, 万吨)

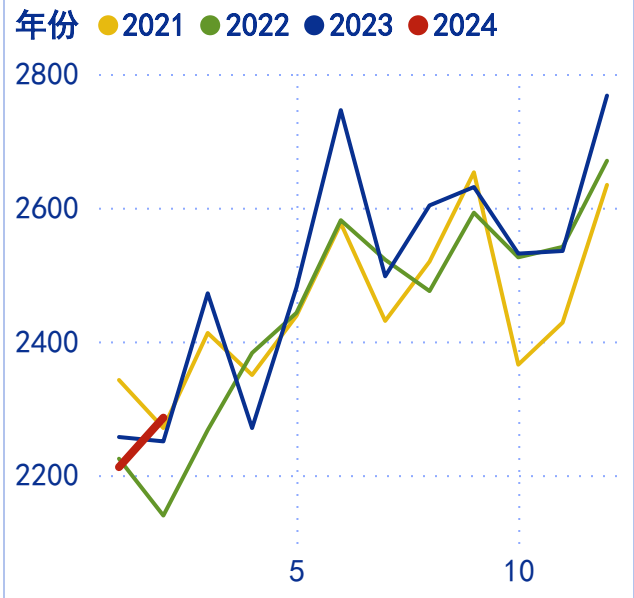


# 发货量增加明显，澳巴发货大幅反弹

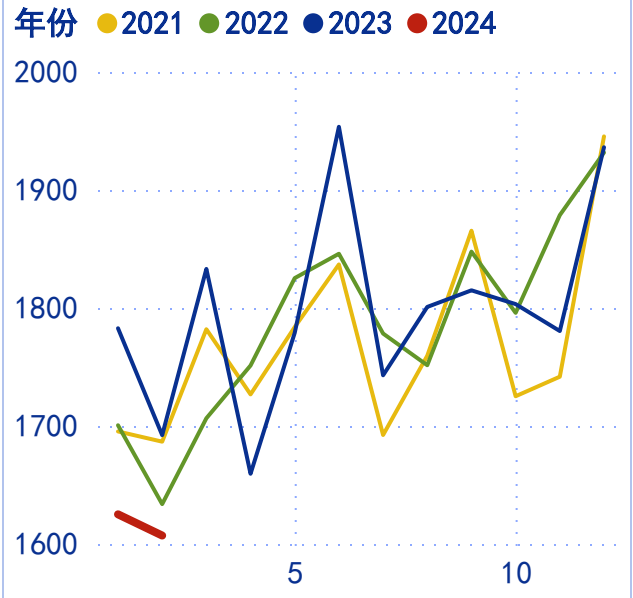
全球铁矿石发货量(按月平均, 万吨)



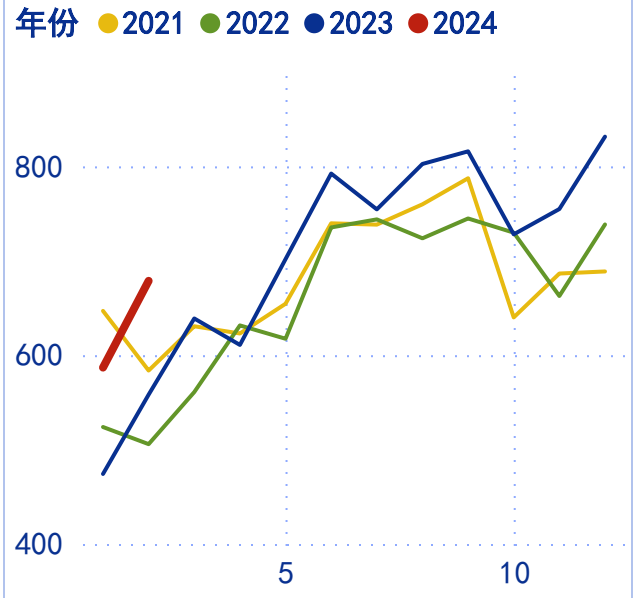
澳巴铁矿石发货量(按月平均, 万吨)



澳洲19港铁矿发货量(月均, 万吨)



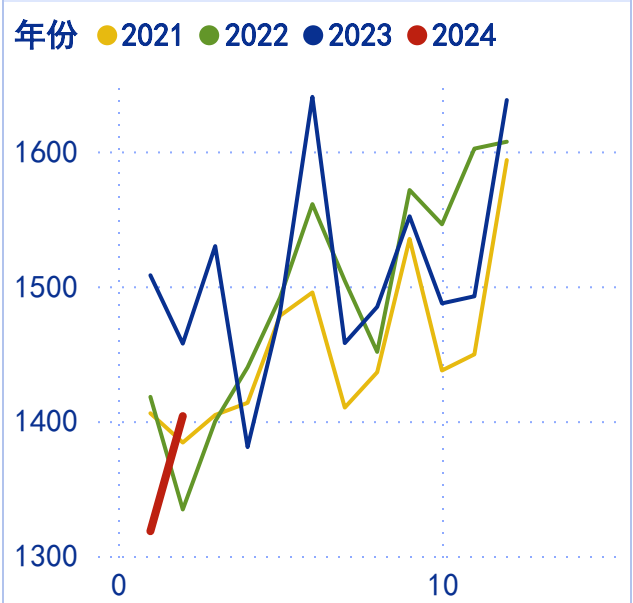
巴西19港铁矿发货量(月均, 万吨)



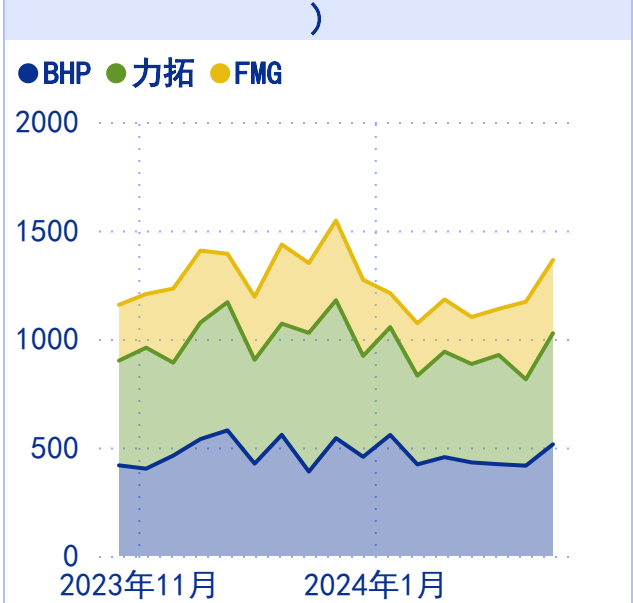
海外铁矿石发运情况(万吨)

日期	全球	澳洲&巴西	澳洲	巴西	除澳巴外
2023. 12. 22	3529. 9	2881. 2	2022. 1	859. 1	648. 7
2023. 12. 29	3347. 6	2757. 4	1811. 9	945. 5	590. 2
2024. 1. 5	2690. 5	2115. 2	1697. 6	417. 6	575. 3
2024. 1. 12	2693. 6	2287. 0	1573. 9	713. 1	406. 6
2024. 1. 19	2629. 0	2152. 9	1508. 8	644. 2	476. 1
2024. 1. 26	2969. 4	2292. 9	1720. 3	572. 6	676. 5
2024. 2. 2	2854. 6	2325. 3	1613. 5	711. 8	529. 3
2024. 2. 9	2588. 5	2056. 4	1482. 3	574. 1	532. 1
2024. 2. 16	3046. 5	2476. 2	1725. 7	750. 4	570. 3

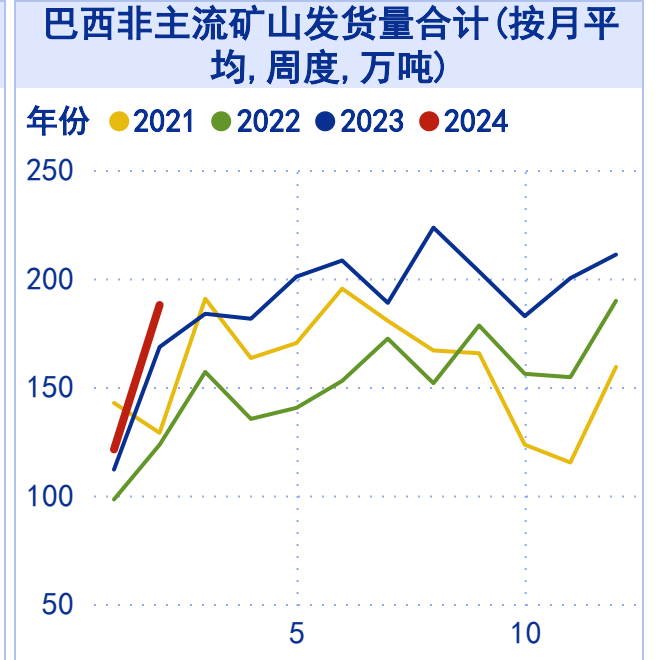
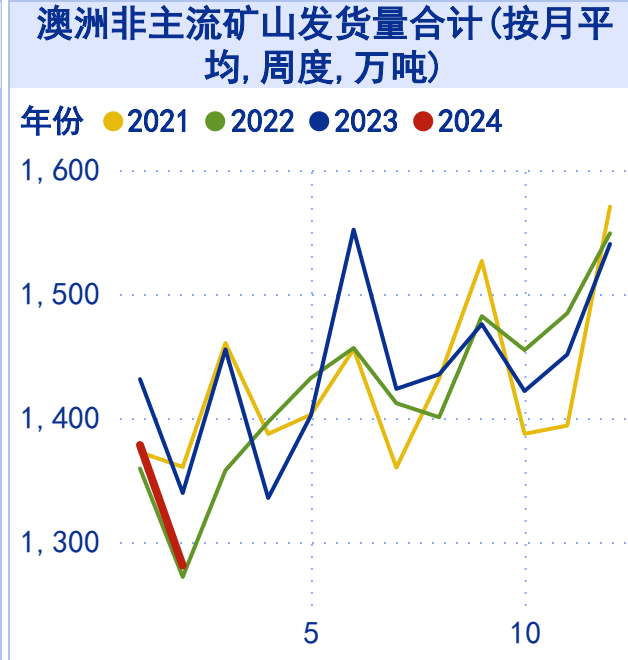
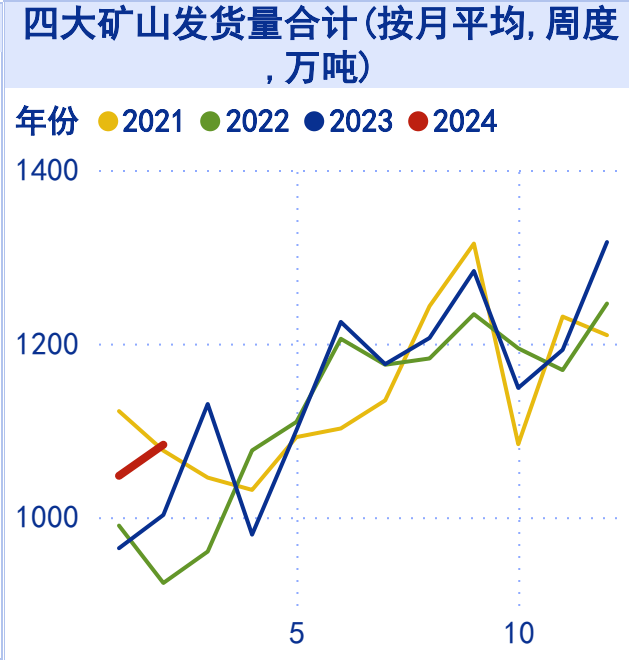
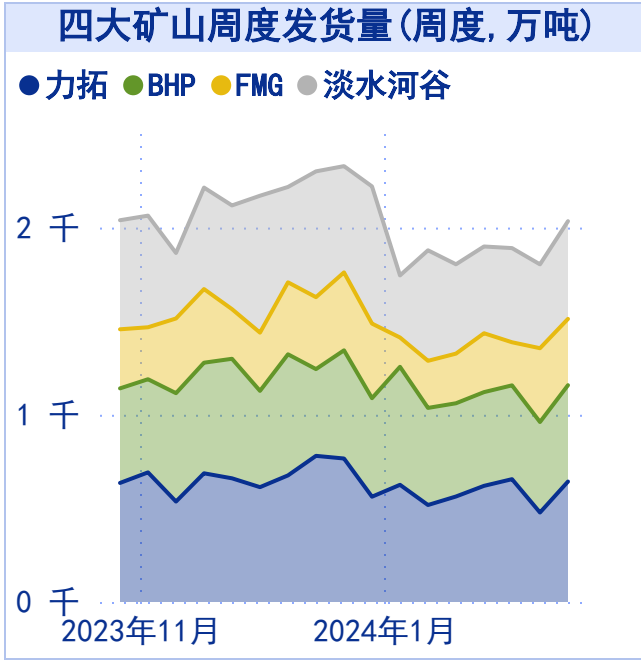
澳洲19港向中国发货量(周度, 万吨)



澳洲三大矿向中国发货量(周度, 万吨)

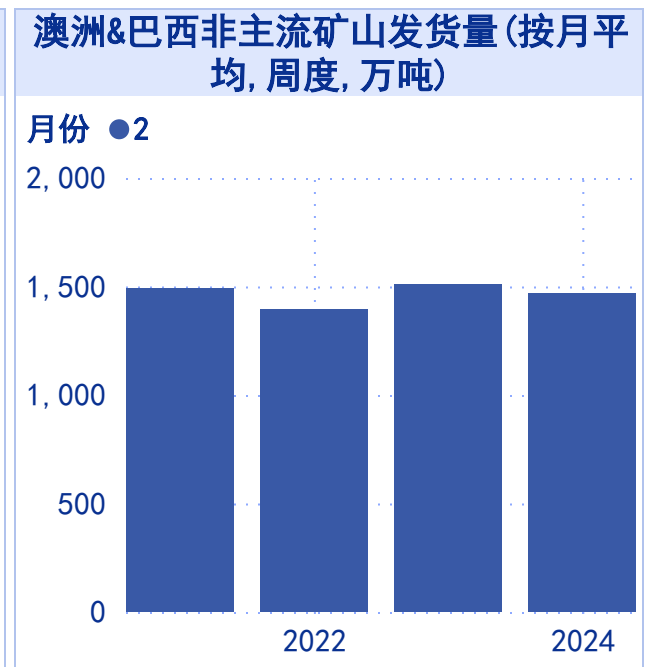


# 主流矿山发运回升，主要贡献来自力拓



### 四大矿山周度发货量(万吨)

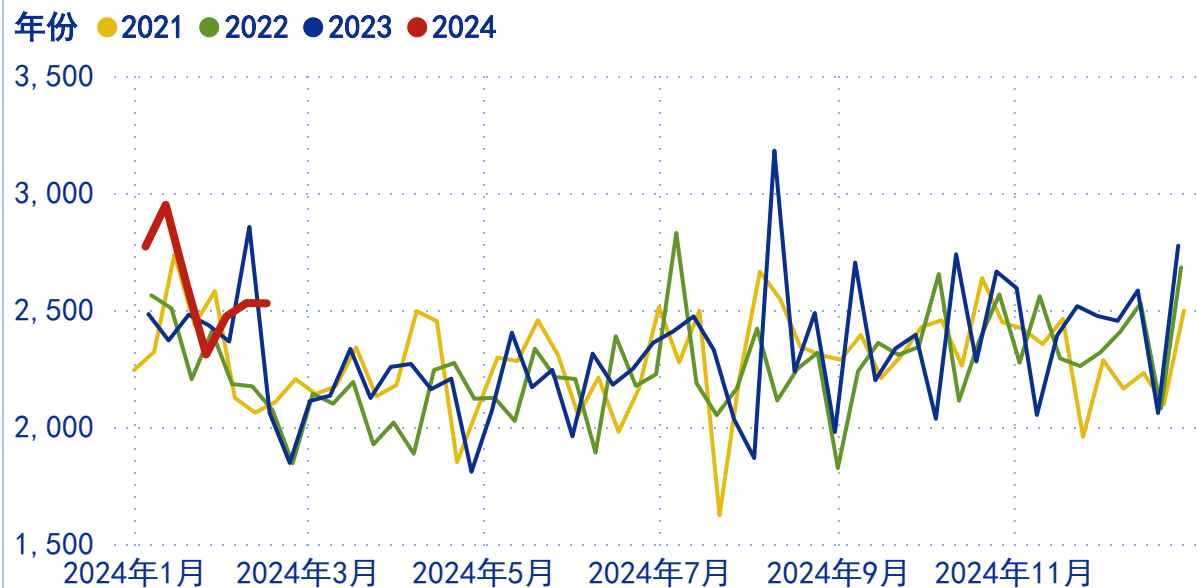
日期	力拓	BHP	FMG	淡水河谷	合计
2023. 12. 22	766.5	577.9	416.3	567.7	1334.2
2023. 12. 29	562.5	526.2	398.5	732.8	1295.3
2024. 1. 5	626.0	630.4	156.5	331.6	957.6
2024. 1. 12	518.1	518.7	251.5	590.4	1108.5
2024. 1. 19	563.6	498.0	265.2	477.2	1040.8
2024. 1. 26	620.4	500.7	314.6	463.4	1083.8
2024. 2. 2	656.1	501.2	230.2	503.0	1159.1
2024. 2. 9	478.0	483.4	394.3	447.9	925.9
2024. 2. 16	643.5	514.8	354.1	522.0	1165.5



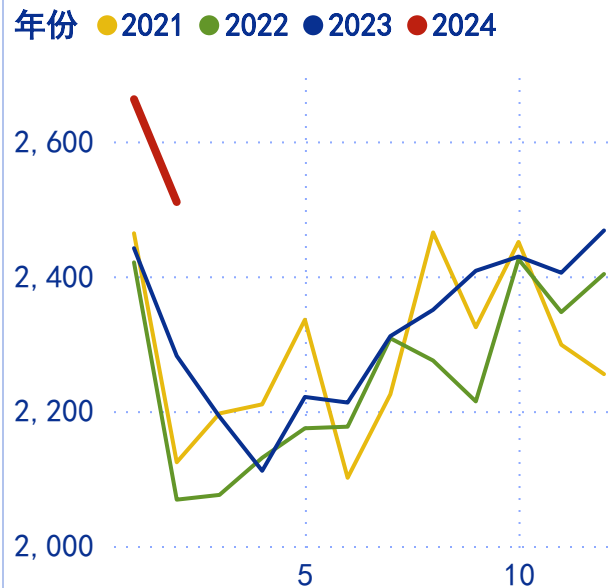


# 到港量持稳

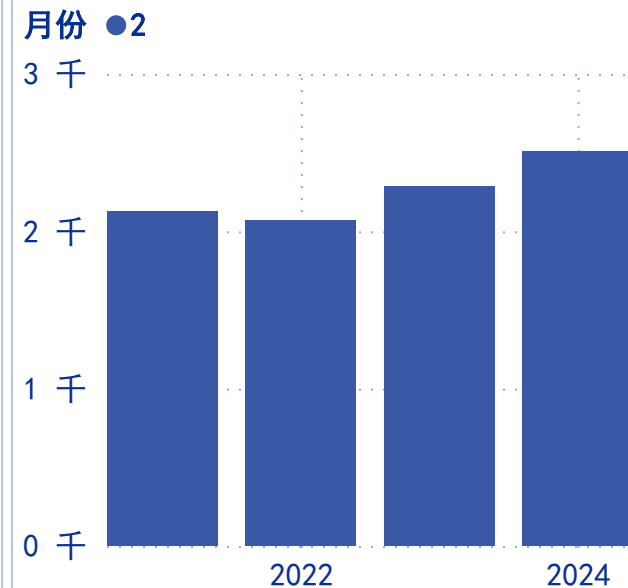
## 45个港口进口铁矿石到港量(万吨)



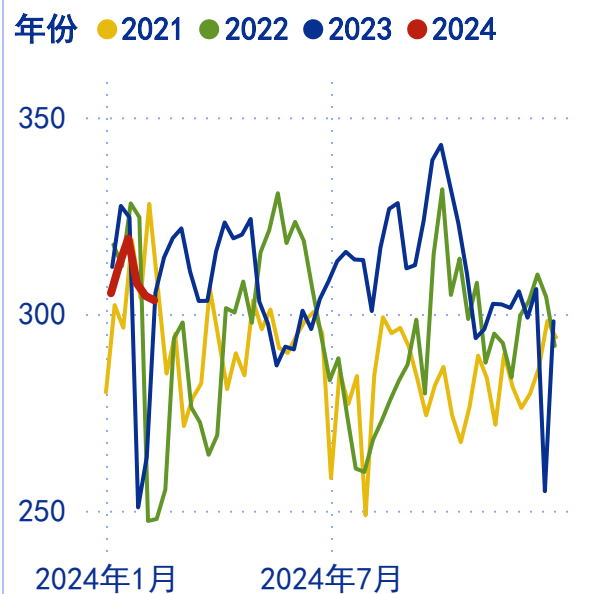
## 45个港口进口铁矿石到港量(万吨)



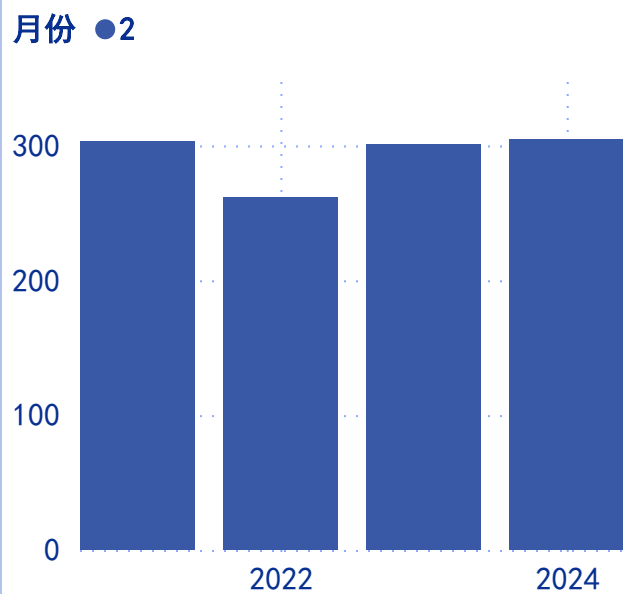
## 45个港口周平均到港量(按月, 万吨)



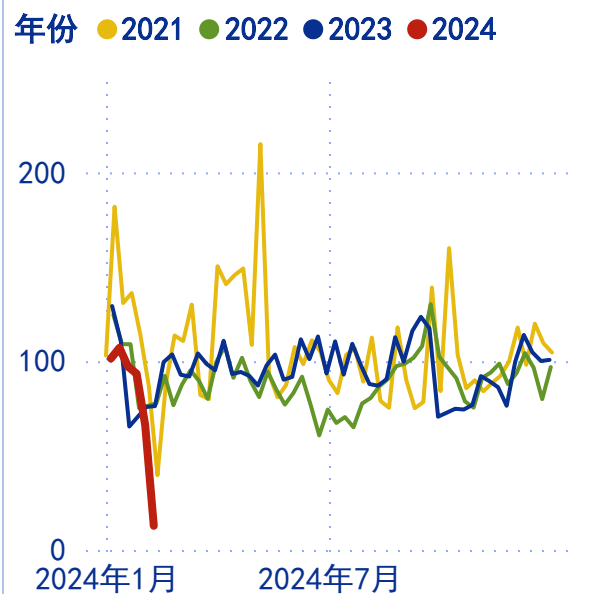
## 45个港口进口矿日均疏港量(万吨)



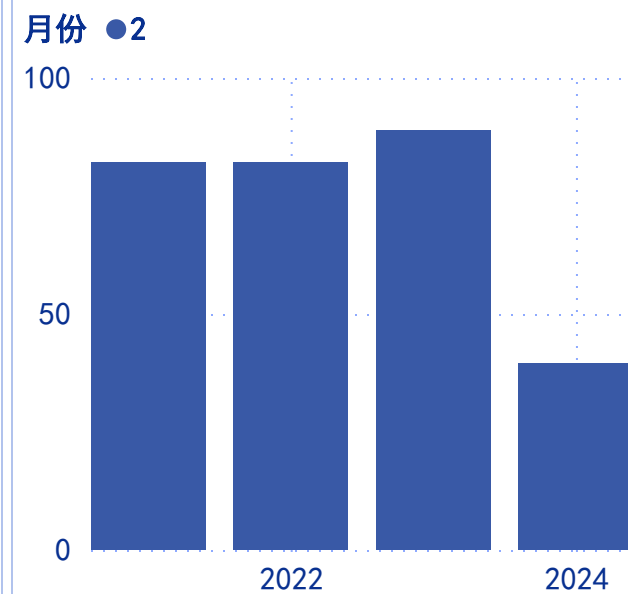
## 45个港口进口矿日均疏港量(万吨)



## 主要港口铁矿贸易商日均成交(万吨)

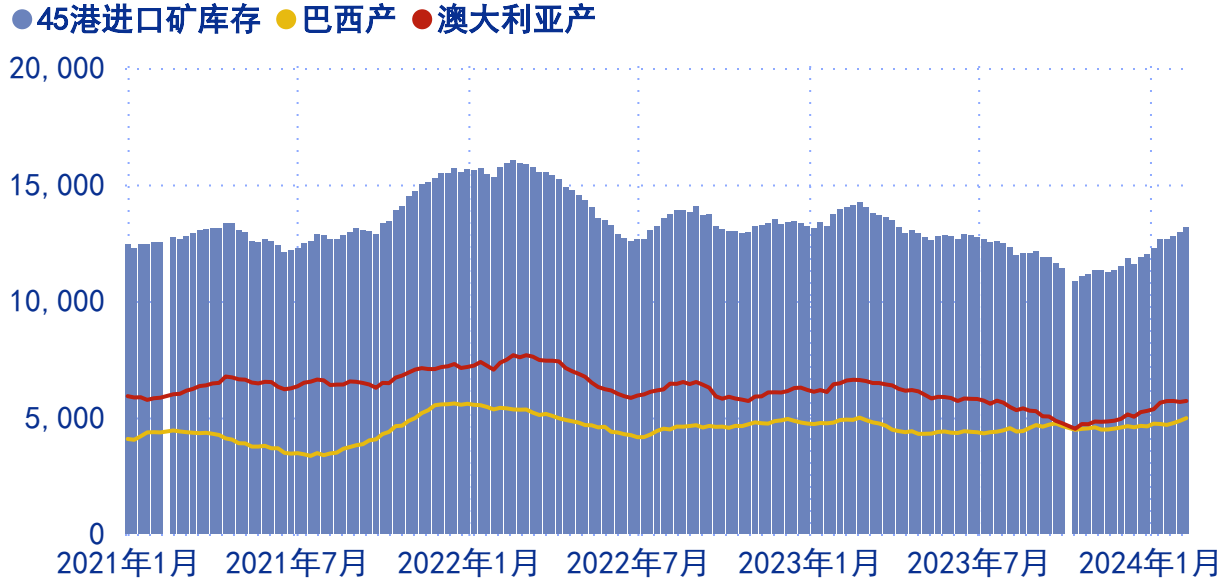


## 主要港口铁矿贸易商日均成交(万吨)

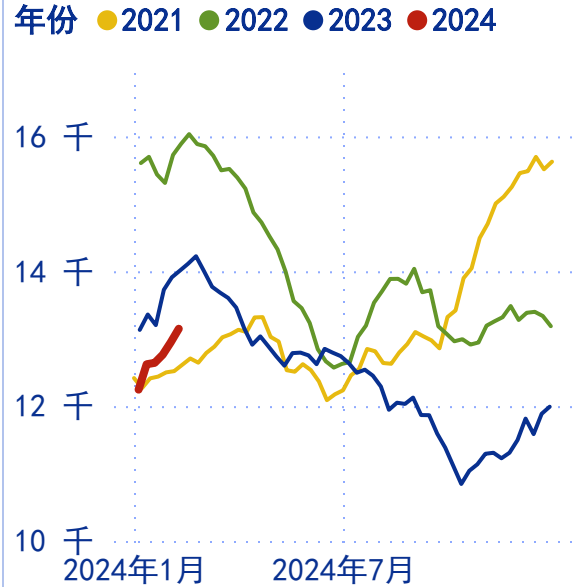


# 港口库存回升，钢厂将面临补库

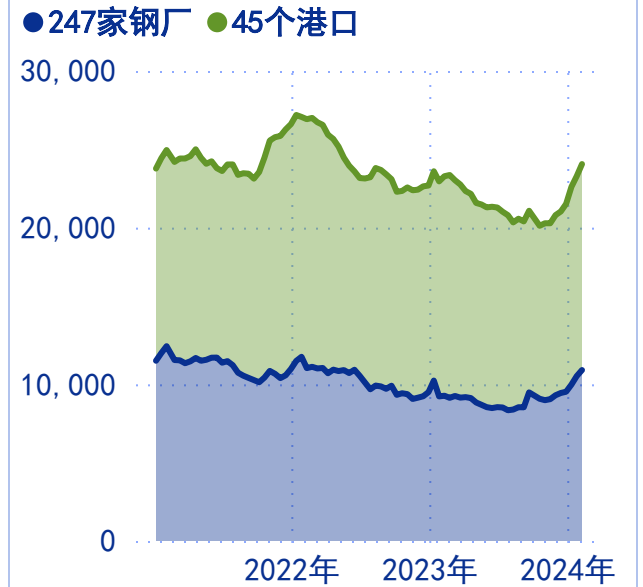
### 45个港口进口铁矿石库存(万吨)



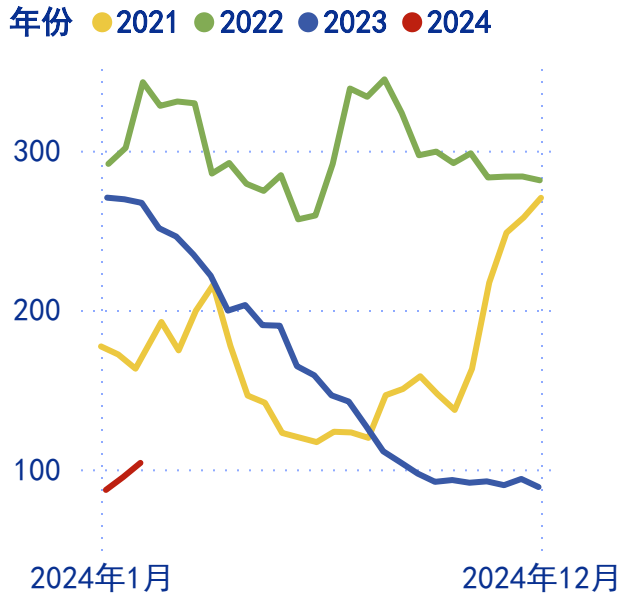
### 45个港口进口铁矿石库存(万吨)



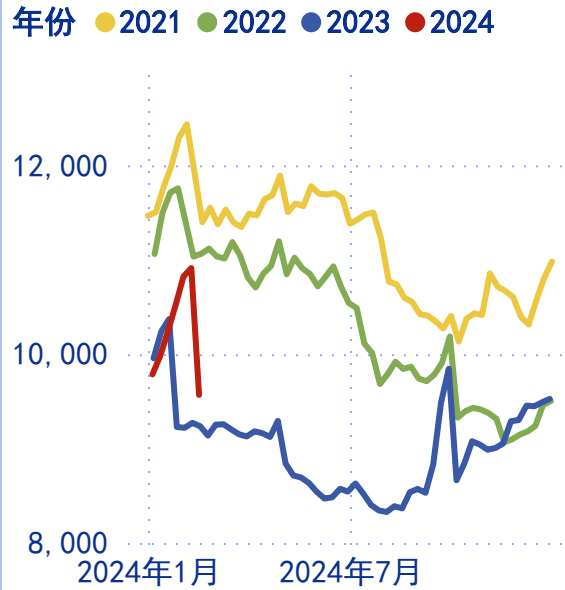
### 港口及钢厂铁矿石库存(万吨)



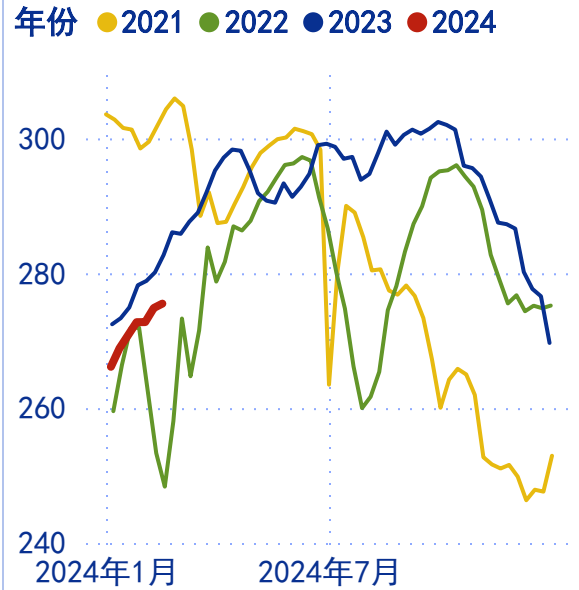
### 186家矿山铁精粉库存(万吨)



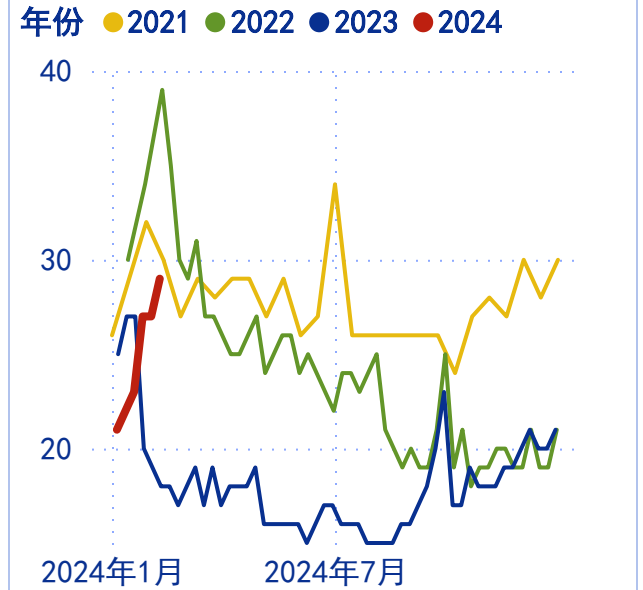
### 247家钢厂进口矿库存(万吨)



### 247家钢厂进口矿日耗(万吨)



### 64家钢厂进口矿库存可用(天)





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# 值得您信赖的金融衍生品服务商

Trustworthy Financial Derivatives Service Provider

**风险提示：**市场有风险，投资需谨慎

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