

唐宋100指数数据周报

唐宋大数据产业股份有限公司

2024-12-18

唐宋预期指数TMI

综合预期指数 **44.86**↓6.6

钢材预期指数 **43.61**↓13.2

原燃料预期指数 **46.11**

本期唐宋综合预期指数环比降低6.6%，市场情绪偏悲观。其中钢材预期指数环比下降13.2%，市场情绪偏悲观；原燃料指数持稳，市场情绪偏悲观。

品种	预期指数
原燃料综合指数	46.11
进口矿	48.33
焦炭	40.0
废钢	50.0

品种	预期指数
钢材综合指数	43.61
建材	47.5
热卷	48.33
钢坯	40.0
型钢	40.0
带钢	48.33
管材	37.5

【说明】唐宋钢铁市场预期指数TMI（简称唐宋预期指数），是唐宋大数据针对市场预期涨跌而设计的主观指数。通过对100指数样本企业典型客户的主观访谈，汇集市场对于次周市场走势预判的多空观点。该指数将与唐宋100指数所反应的市场客观数据、唐宋现货指数以及PMI等行业荣枯指数等形成完整的组合。有助于对市场分析预测获得更加多元的信息。

唐宋预期指数编制方法：“看涨”选项的百分比×1+“震荡”选项的百分比×0.5，综合指数采用加权综合指数方法。数值分布于0-100之间，以50为中位数，数值越高代表市场对于后市看多意愿越强，反之亦然。

唐宋钢铁市场周数据报告TDR

总览：铁水产量的增加 市场情绪偏悲观

- 价格方面：本期黑色系市场预期指数有所下降，市场情绪偏悲观。钢材、原燃料价格均呈现下跌趋势。
- 供应方面：本期全国高炉开工率小幅增加，全国粗钢生铁产量增加；焦企开工降低；钢材各品种开工均呈现下跌，其中型钢降幅明显。
- 库存方面：本期钢材主要品种社会库存涨跌不一，其中钢坯库存下降，带钢库存上升。钢企库存均有所降低，其中螺纹钢库存降幅明显；钢企进口矿库存有所增加，焦炭库存有所下降。

基准价 (元/吨)	2024-12-18	2024-12-11	增减值	增减幅
进口矿	790	805	-15.00	-1.86%
焦炭	1650	1650	0.00	0.00%
钢坯	3090	3130	-40.00	-1.28%
螺纹钢	3350	3400	-50.00	-1.47%
热轧	3460	3490	-30.00	-0.86%

开工率 (%)	2024-12-18	2024-12-11	增减值
高炉	83.77	83.66	0.11
焦炭	83.21	83.50	-0.29
螺纹钢	60.72	61.25	-0.53
线材	63.23	63.34	-0.11
热卷	83.17	84.45	-1.28
带钢	61.52	62.80	-1.28
型钢	67.89	73.62	-5.73

日产量(万吨)	2024-12-18	2024-12-11	增减值	增减幅
生铁	198.93	198.67	0.26	0.13%
粗钢	257.63	257.33	0.30	0.12%

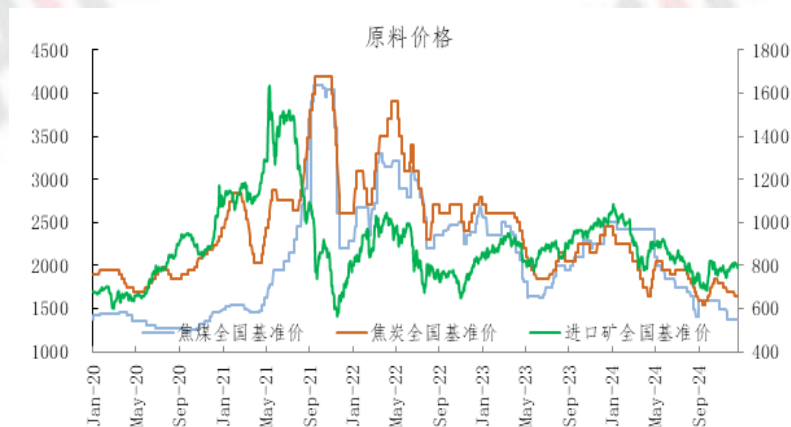
样本钢厂原料库存天数(天)	2024-12-18	2024-12-11	增减值	增减幅
进口矿	19.68	19.63	0.05	0.25%
焦炭	8.44	8.50	-0.06	-0.71%

样本钢厂钢材库存(万吨)	2024-12-18	2024-12-11	增减值	增减幅
螺纹钢	129.57	134.57	-5.00	-3.72%
线材	99.31	100.96	-1.65	-1.63%
热卷	96.61	96.95	-0.34	-0.35%

社会库存(万吨)	2024-12-18	2024-12-11	增减值	增减幅
唐山钢坯	90.23	92.97	-2.74	-2.95%
唐山带钢	29.03	24.94	4.09	16.40%

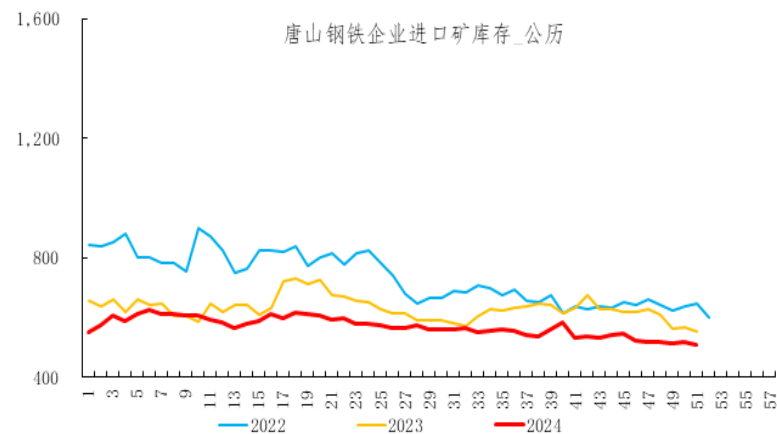
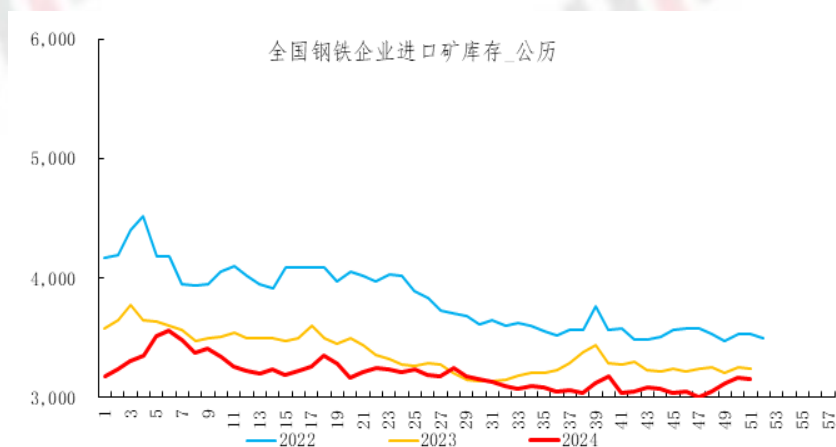
钢材价格下跌 焦炭价格暂稳

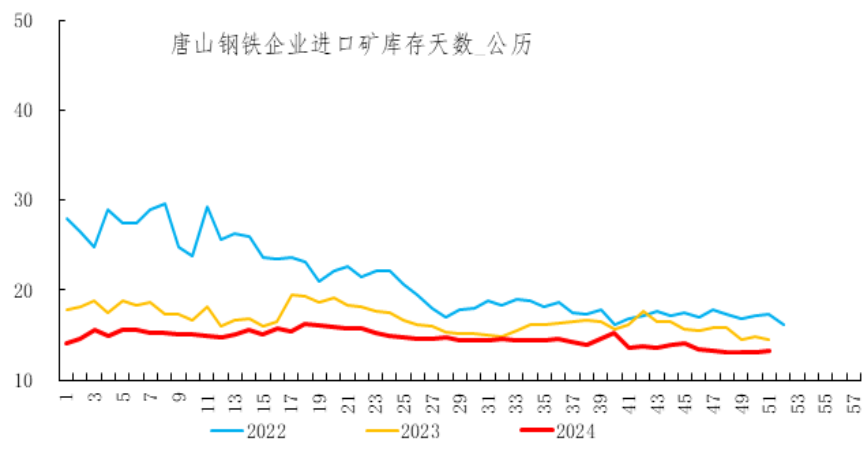
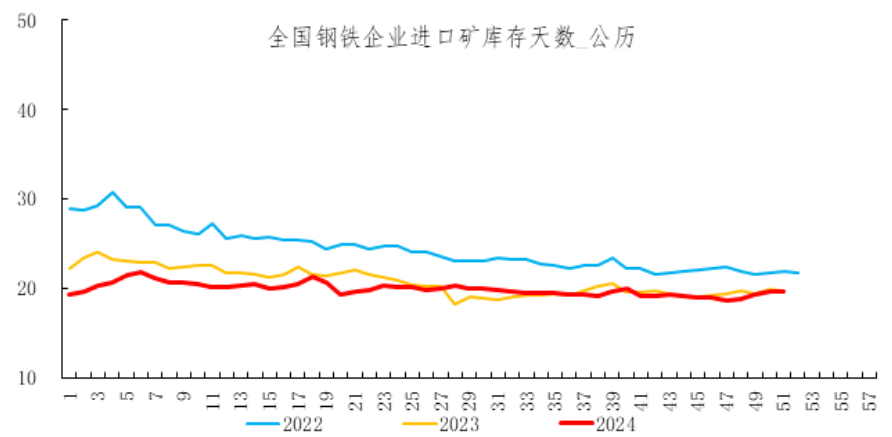
	2024-12-18	2024-12-11	增减值	增减幅
进口矿全国基准价	790	805	-15.00	-1.86%
焦煤全国基准价	1380	1380	0.00	0.00%
焦炭全国基准价	1650	1650	0.00	0.00%
钢坯全国基准价	3090	3130	-40.00	-1.28%
螺纹钢全国基准价	3350	3400	-50.00	-1.47%
热轧全国基准价	3460	3490	-30.00	-0.86%

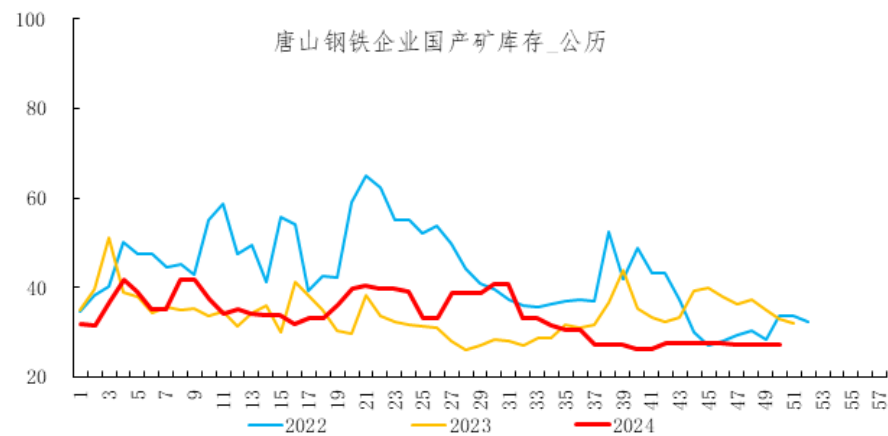
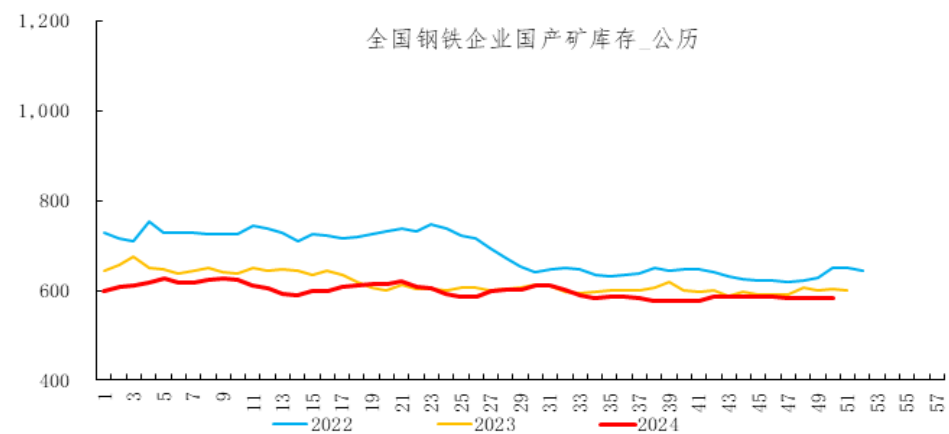


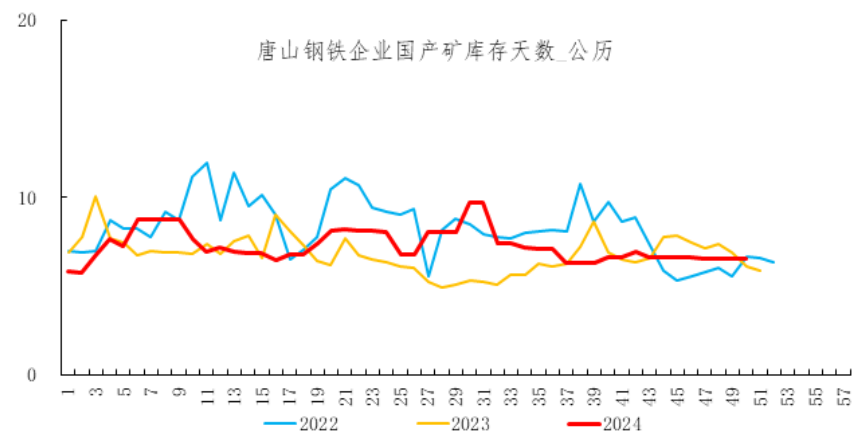
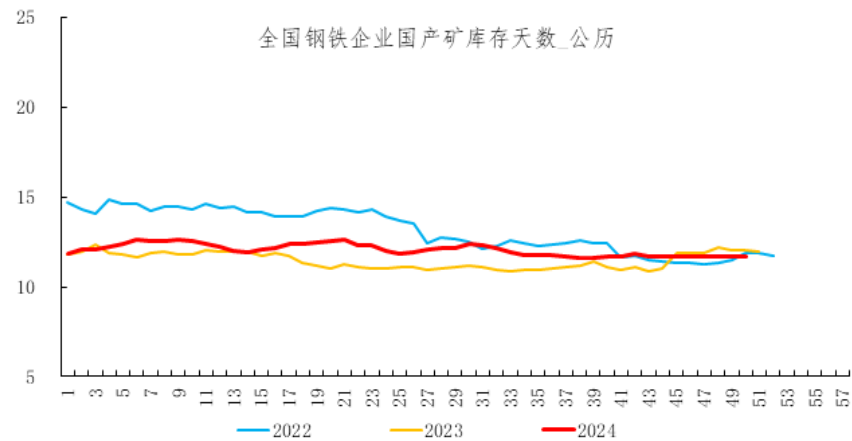
铁矿石价格震荡运行，钢企按需采购，库存小幅下降

	2024-12-18	2024-12-11	增减值	增减幅
全国钢铁企业进口矿库存(万吨)	3156.42	3166.37	-9.95	-0.31%
唐山钢铁企业进口矿库存(万吨)	509.41	518.11	-8.70	-1.68%
全国钢铁企业进口矿库存天数(天)	19.68	19.63	0.05	0.25%
唐山钢铁企业进口矿库存天数(天)	13.21	13.14	0.07	0.53%
全国钢铁企业国产矿库存(万吨)	584.18	584.18	0.00	0.00%
唐山钢铁企业国产矿库存(万吨)	27.07	27.07	0.00	0.00%
全国钢铁企业国产矿库存天数(天)	11.68	11.68	0.00	0.00%
唐山钢铁企业国产矿库存天数(天)	6.51	6.51	0.00	0.00%



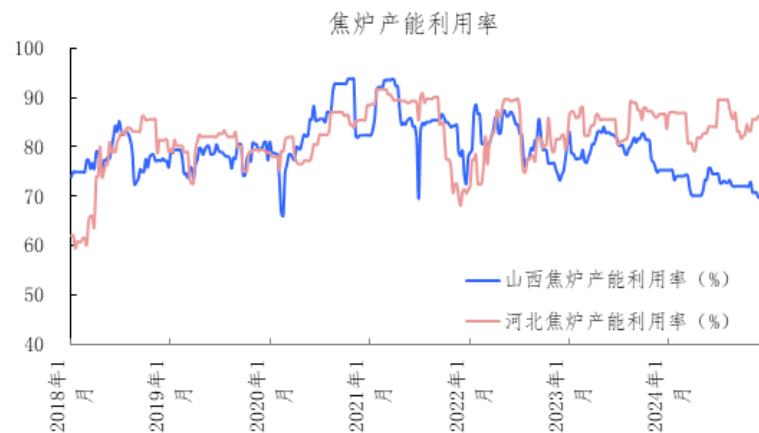
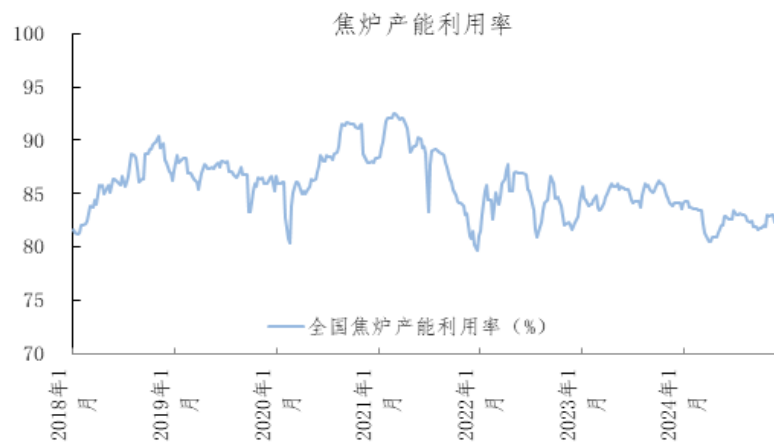


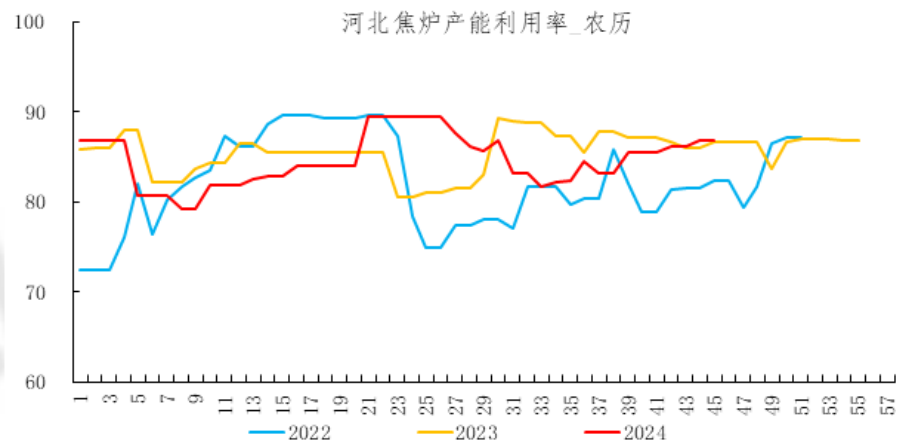
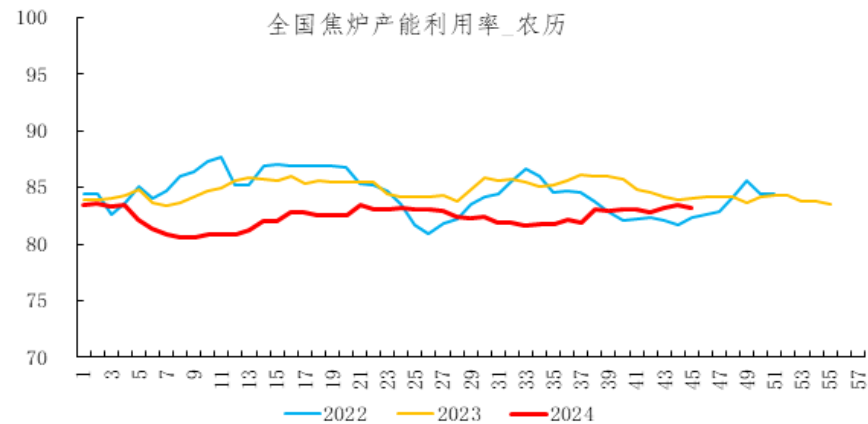


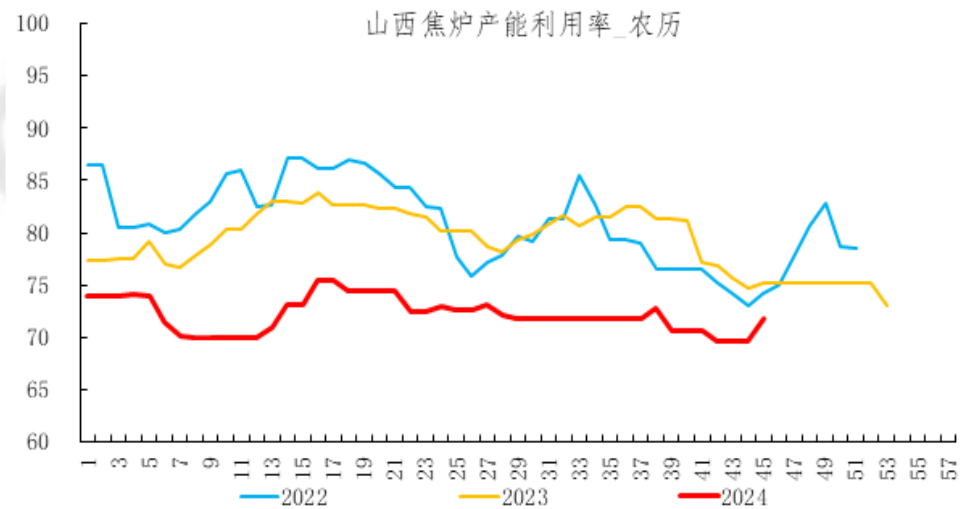


个别焦企有小幅限产，焦炉开工整体小降

	2024-12-18	2024-12-11	增减值
全国焦炉产能利用率 (%)	83.21	83.50	-0.29
河北焦炉产能利用率 (%)	86.87	86.87	0.00
山西焦炉产能利用率 (%)	71.77	69.67	2.10

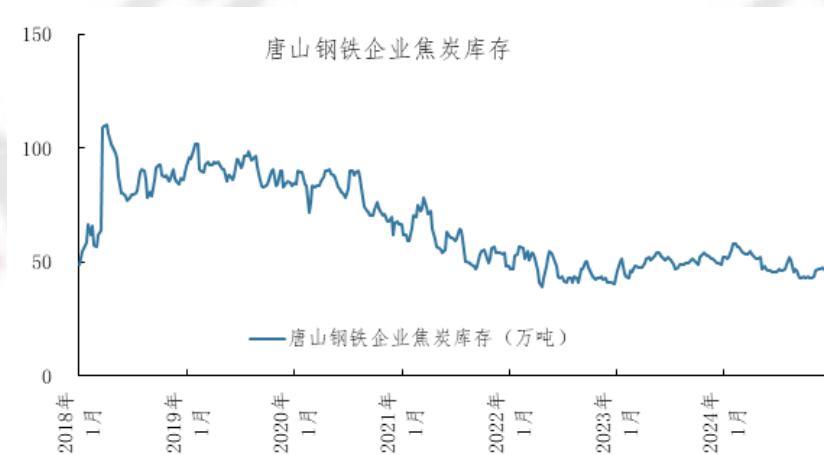
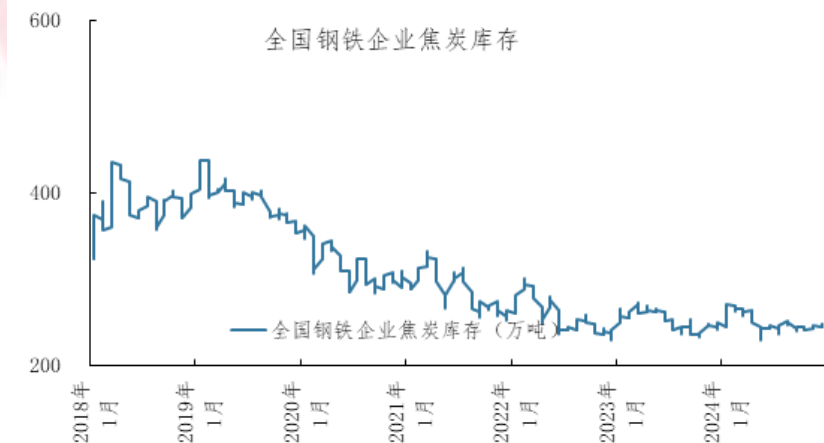


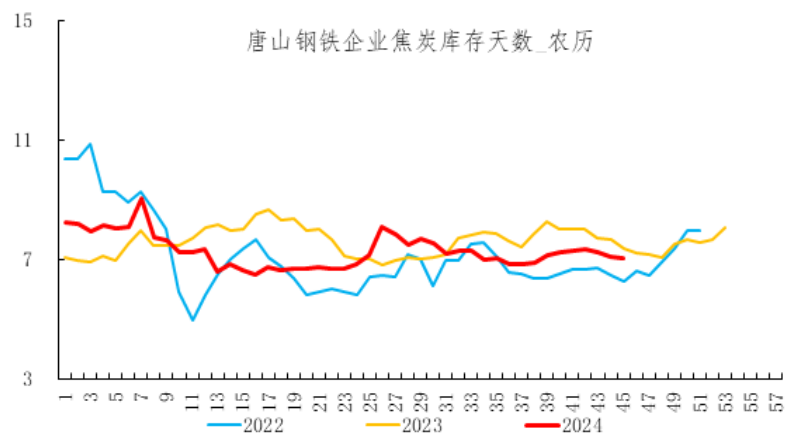
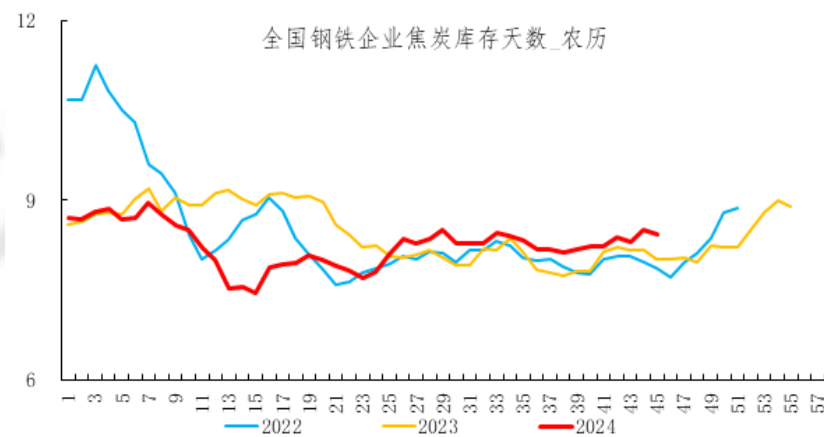




焦炭到货情况好转，部分钢企厂库被动增加

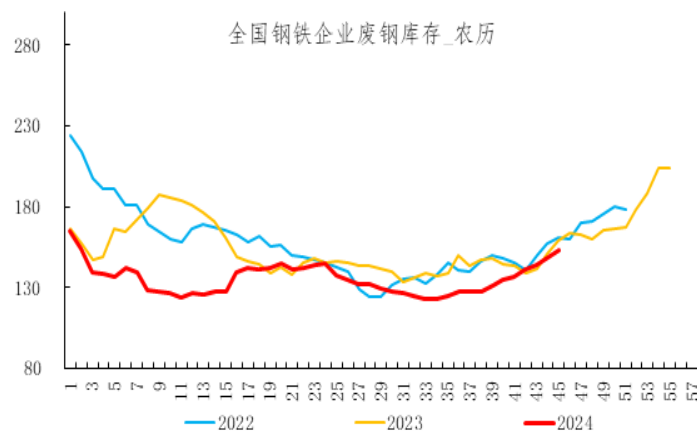
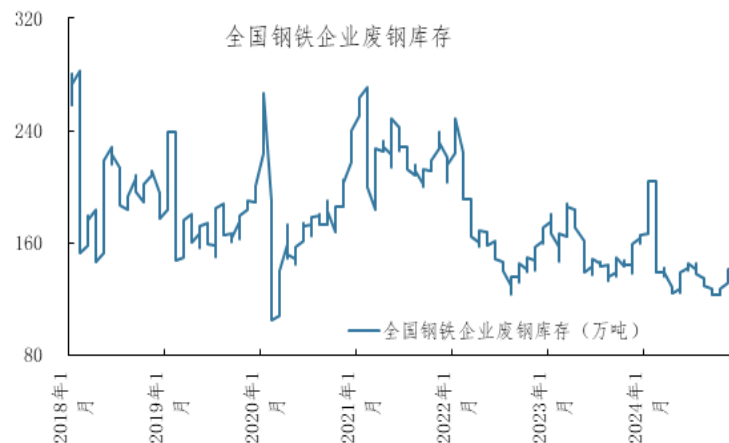
	2024-12-18	2024-12-11	增减值	增减幅
全国钢铁企业焦炭库存 (万吨)	247.76	247.23	0.53	0.21%
河北钢铁企业焦炭库存 (万吨)	71.19	71.66	-0.47	-0.66%
唐山钢铁企业焦炭库存 (万吨)	45.56	46.06	-0.50	-1.09%
全国钢铁企业焦炭库存天数 (天)	8.44	8.50	-0.06	-0.71%
河北钢铁企业焦炭库存天数 (天)	6.85	6.90	-0.05	-0.72%
唐山钢铁企业焦炭库存天数 (天)	7.04	7.11	-0.07	-0.98%

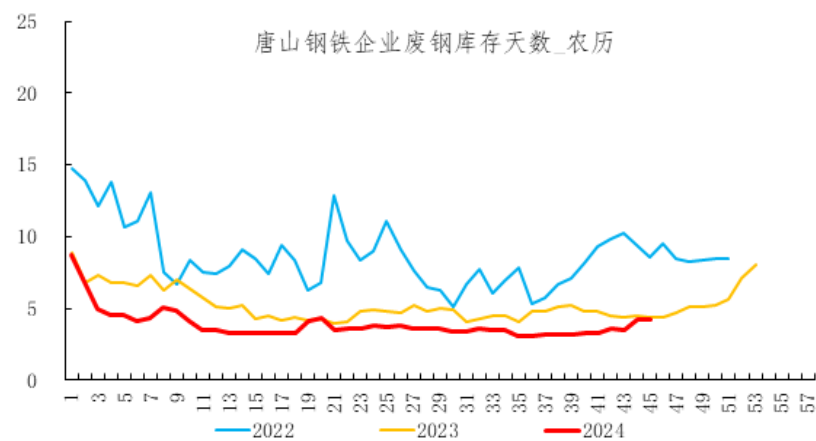
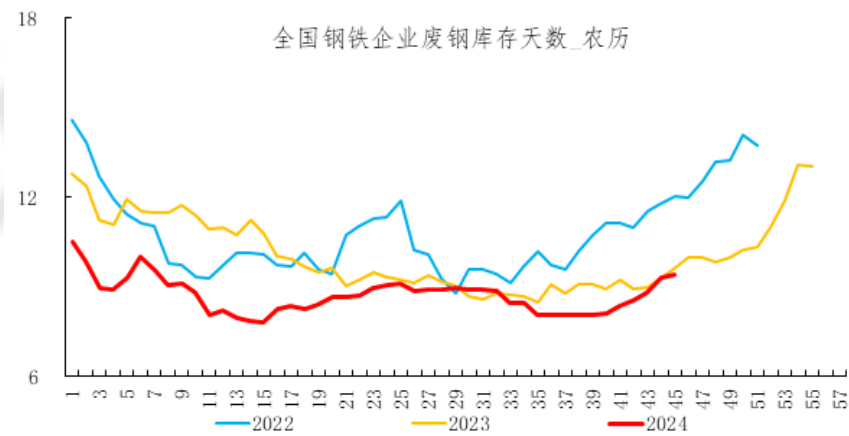




废钢库存小幅上升

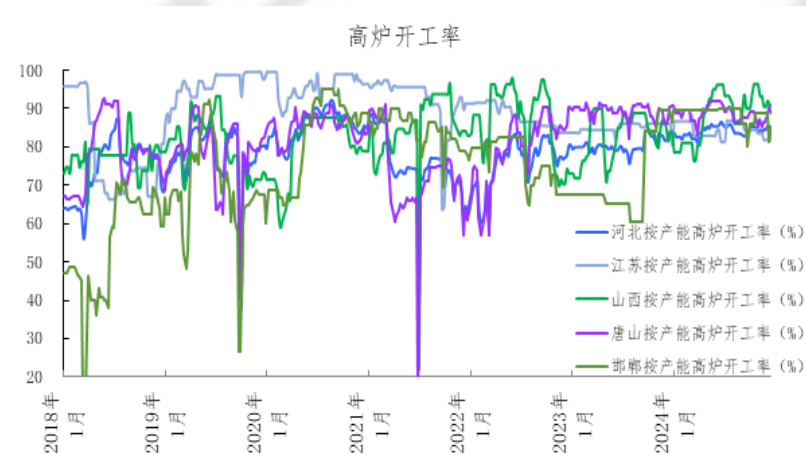
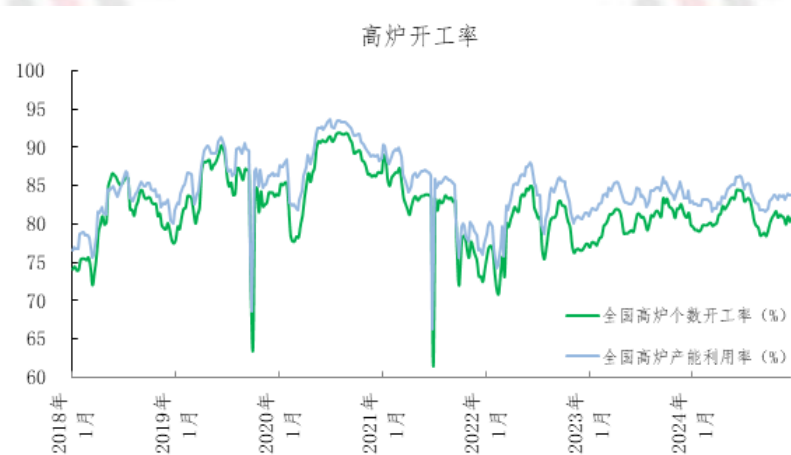
	2024-12-18	2024-12-11	增减值	增减幅
全国钢铁企业废钢库存 (万吨)	153.21	148.30	4.91	3.31%
河北钢铁企业废钢库存 (万吨)	25.63	22.73	2.90	12.76%
唐山钢铁企业废钢库存 (万吨)	9.30	8.90	0.40	4.49%
全国钢铁企业废钢库存天数 (天)	9.41	9.29	0.12	1.29%
河北钢铁企业废钢库存天数 (天)	5.61	5.08	0.53	10.43%
唐山钢铁企业废钢库存天数 (天)	4.24	4.25	-0.01	-0.24%

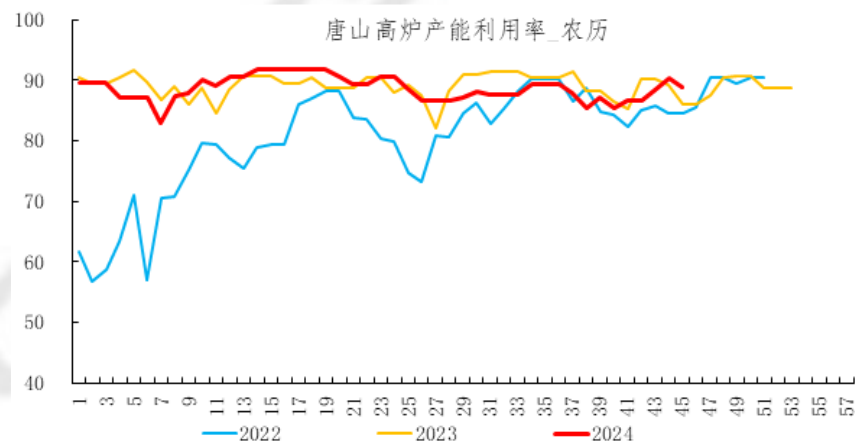
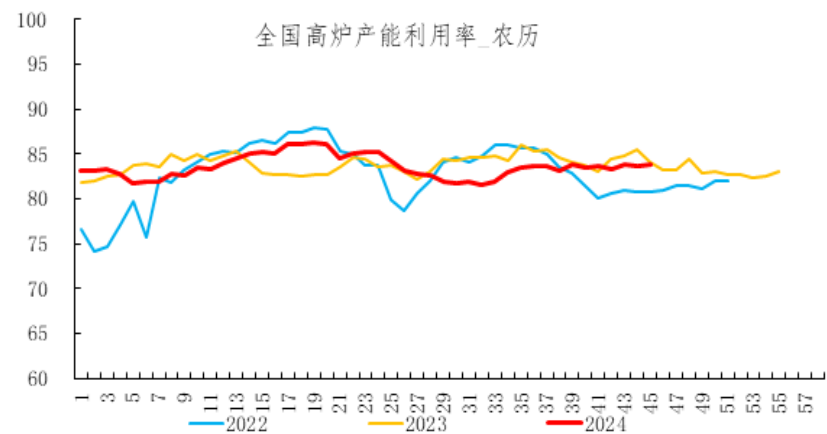




全国高炉开工率小幅上升

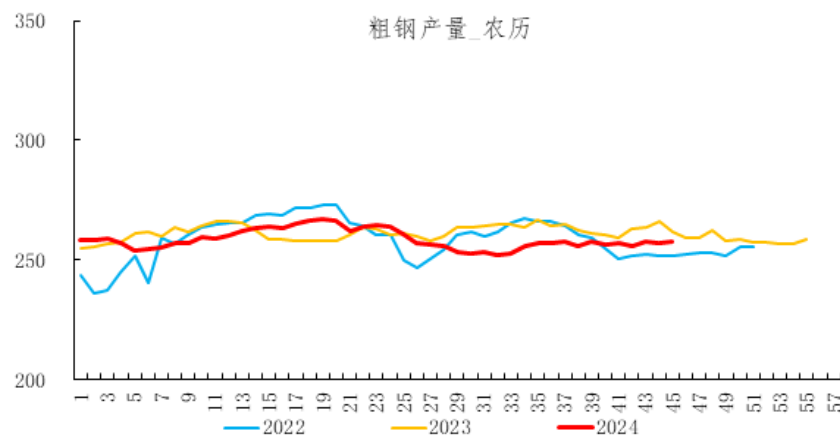
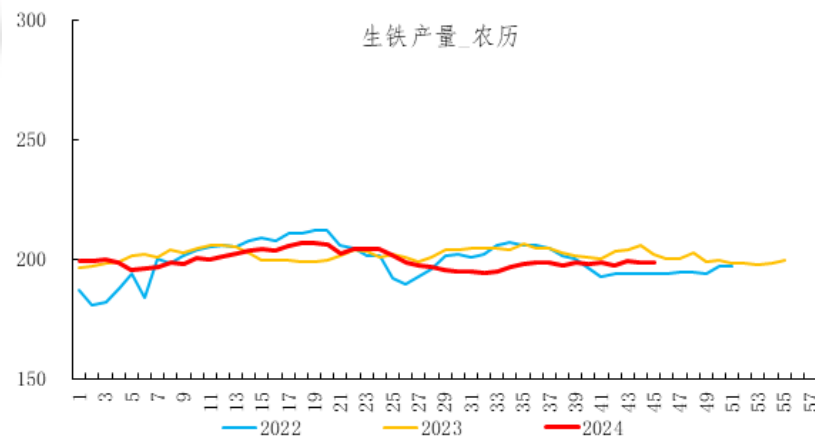
	2024-12-18	2024-12-11	增减值
全国高炉产能利用率 (%)	83.77	83.66	0.11
全国高炉个数开工率 (%)	80.71	80.29	0.42
河北按产能高炉开工率 (%)	85.26	85.21	0.05
江苏按产能高炉开工率 (%)	81.98	81.98	0.00
山西按产能高炉开工率 (%)	90.74	90.74	0.00
唐山按产能高炉开工率 (%)	88.90	90.24	-1.34
邯郸按产能高炉开工率 (%)	85.28	81.41	3.87





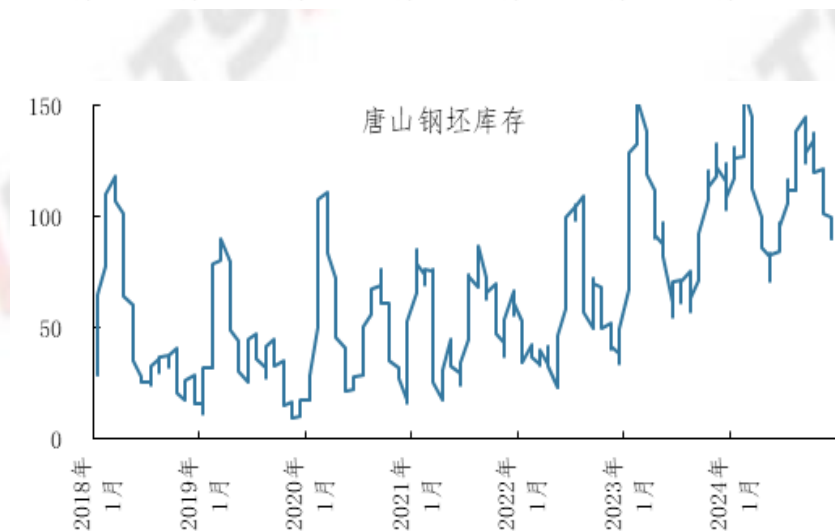
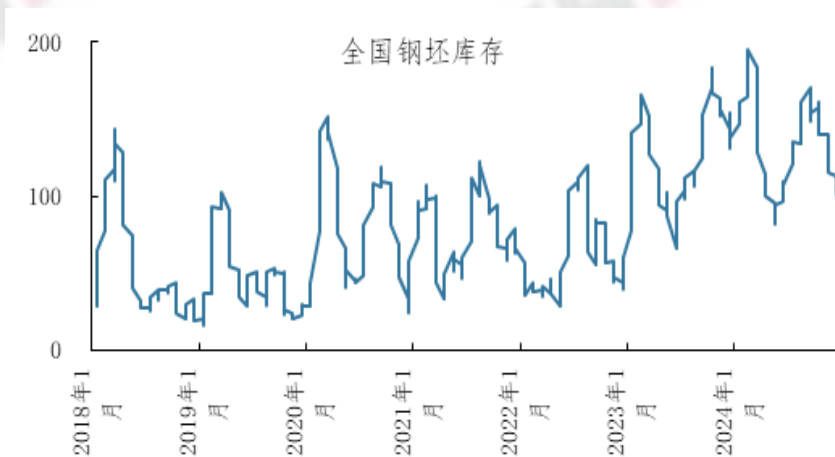
全国生铁、粗钢产量小增

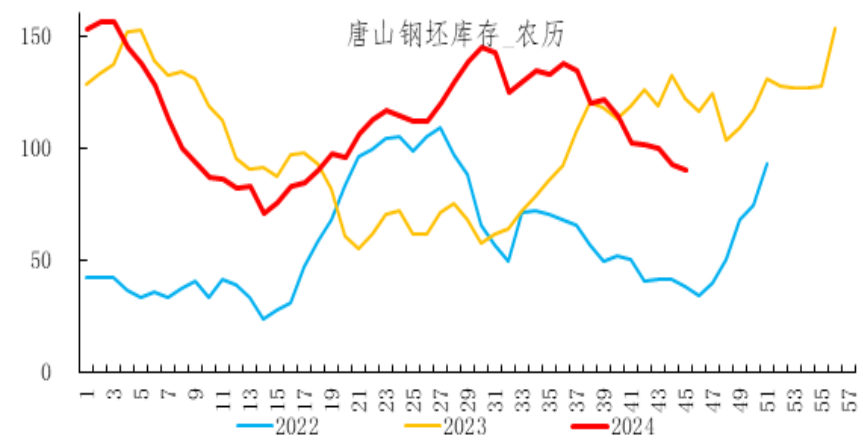
	2024-12-18	2024-12-11	增减值	增减幅
全国生铁日产量(万吨)_测算口径	198.93	198.67	0.26	0.13%
全国粗钢日产量(万吨)_测算口径	257.63	257.33	0.30	0.12%



全国及唐山钢坯仓储库存小幅下降

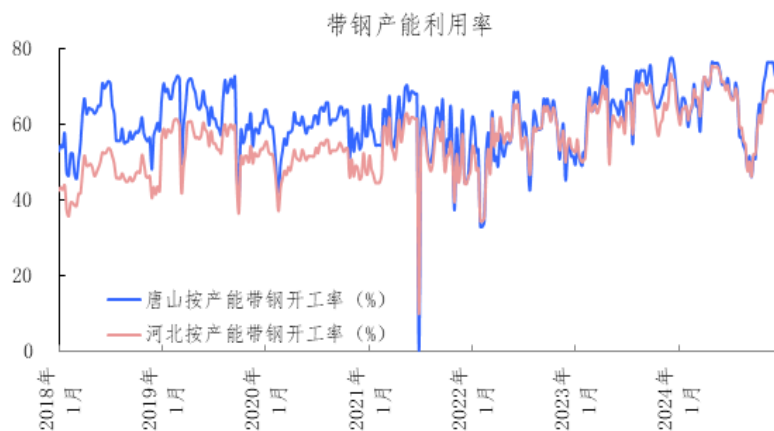
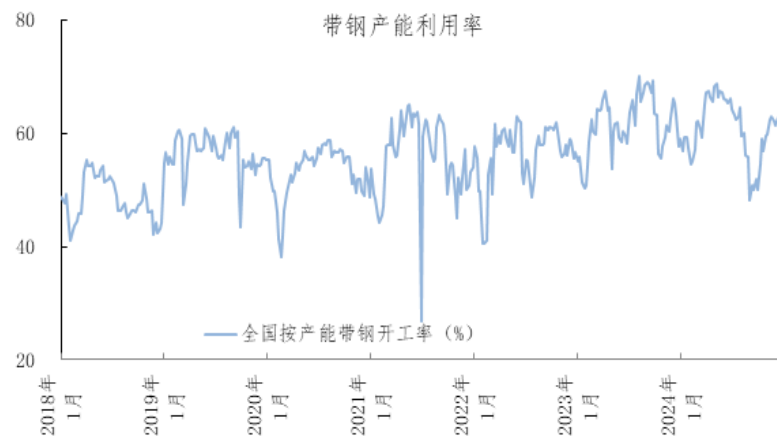
	2024-12-18	2024-12-11	增减值	增减幅
钢坯库存量_全国	101.11	104.60	-3.49	-3.34%
钢坯库存量_唐山	90.23	92.97	-2.74	-2.95%

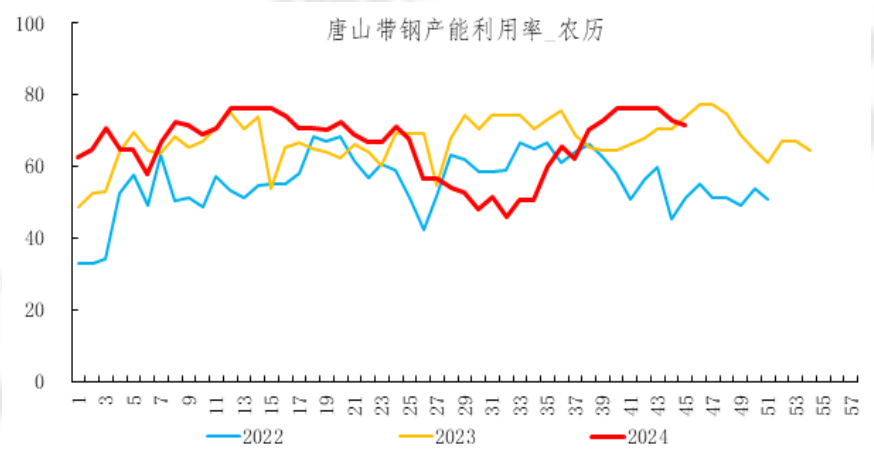
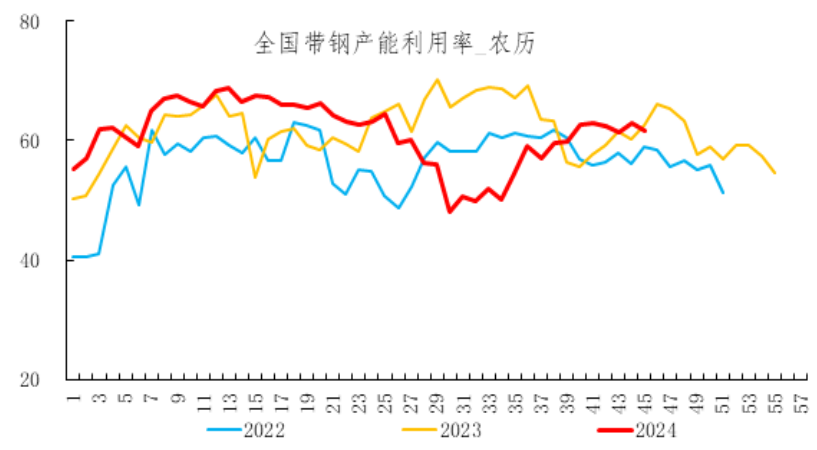


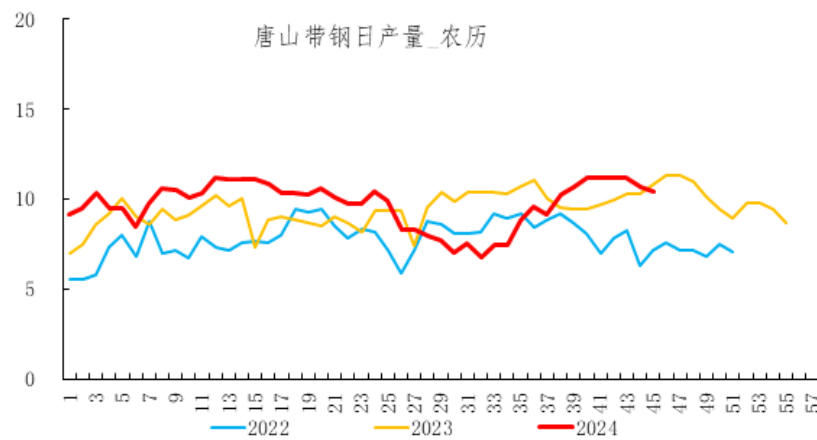
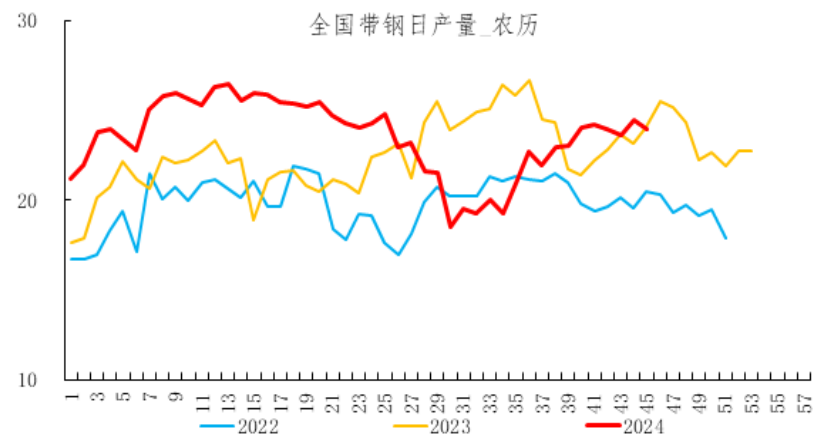


全国按条数带钢开工率周比下降

	2024-12-18	2024-12-11	增减值	增减幅
全国按产能带钢开工率 (%)	61.52	62.80	-1.28	
河北按产能带钢开工率 (%)	66.89	67.85	-0.96	
唐山按产能带钢开工率 (%)	71.54	72.90	-1.36	
全国按产能调坯带钢开工率 (%)	30.12	30.12	0.00	
全国带钢日产量 (万吨)	23.93	24.43	-0.50	-2.05%
唐山带钢日产量 (万吨)	10.48	10.68	-0.20	-1.87%

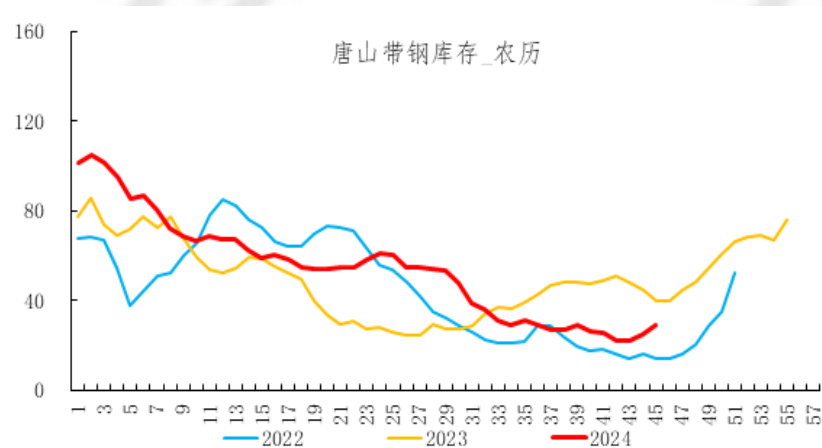
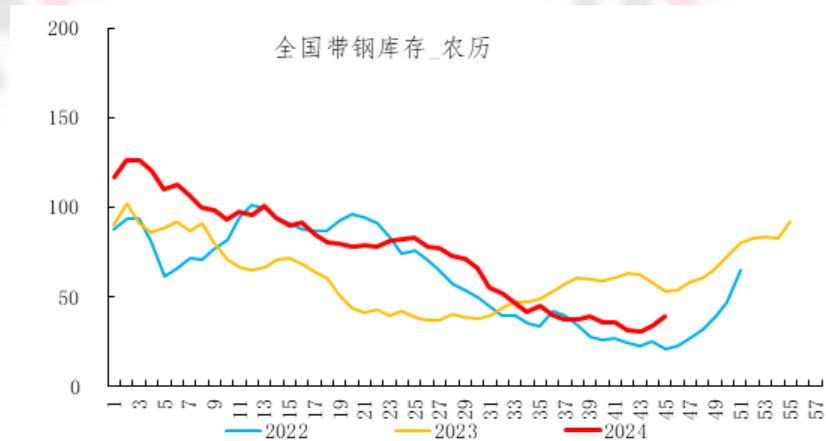


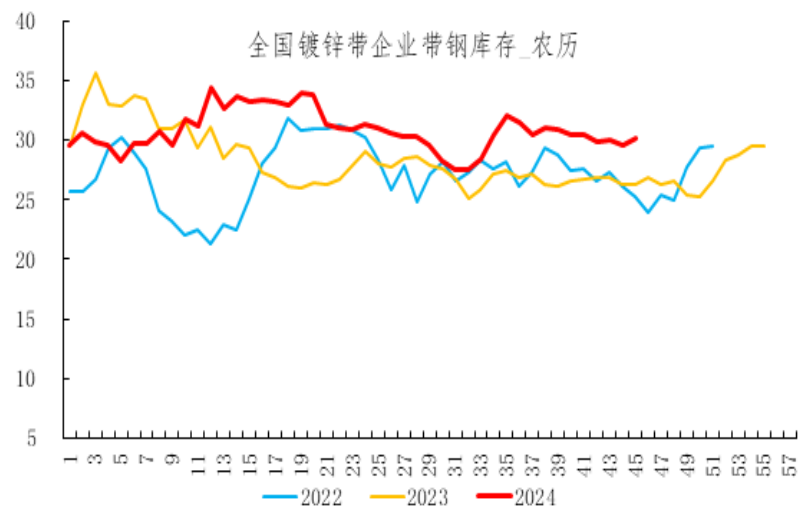
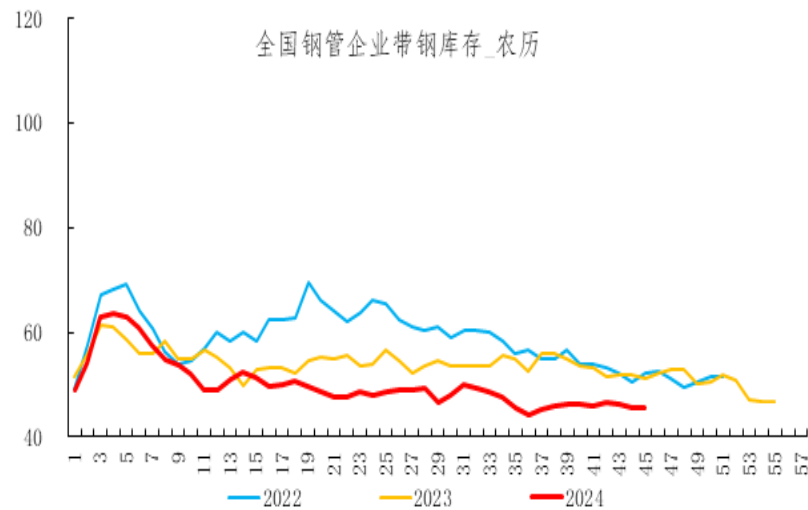




全国重点仓储港口带钢库存周比上升

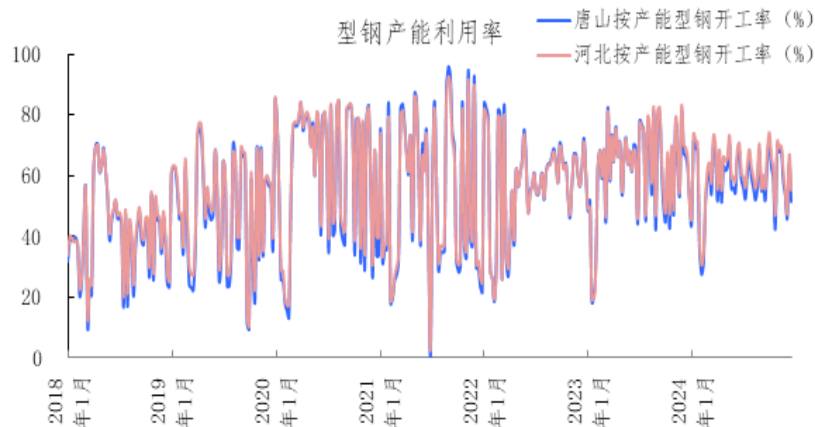
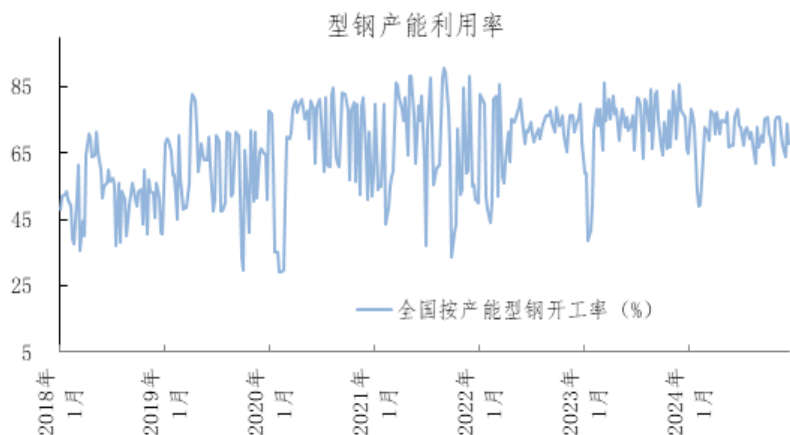
	2024-12-18	2024-12-11	增减值	增减幅
全国带钢社会库存 (万吨)	39.38	33.91	5.47	16%
唐山带钢社会库存 (万吨)	29.03	24.94	4.09	16%
广东带钢社会库存 (万吨)	6.25	4.97	1.28	26%
全国钢管企业带钢库存 (万吨)	45.63	45.55	0.08	0%
全国镀锌带企业带钢库存 (万吨)	30.20	29.50	0.70	2%

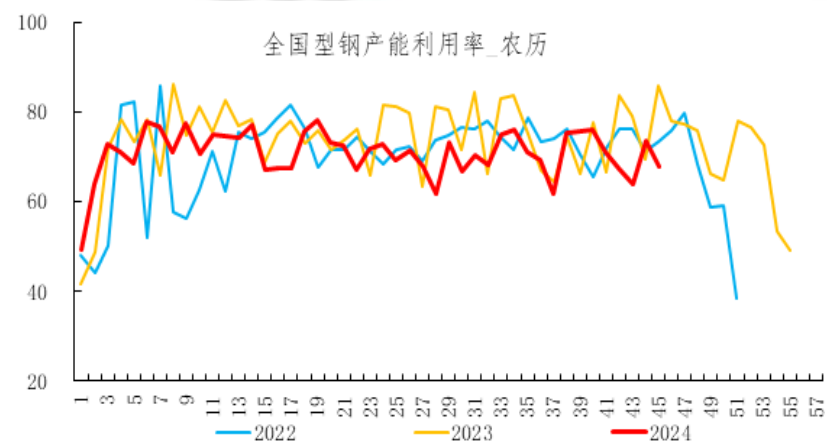
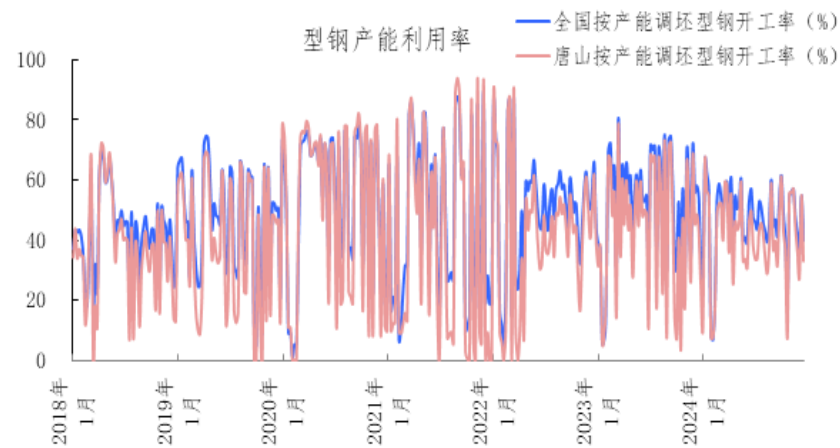


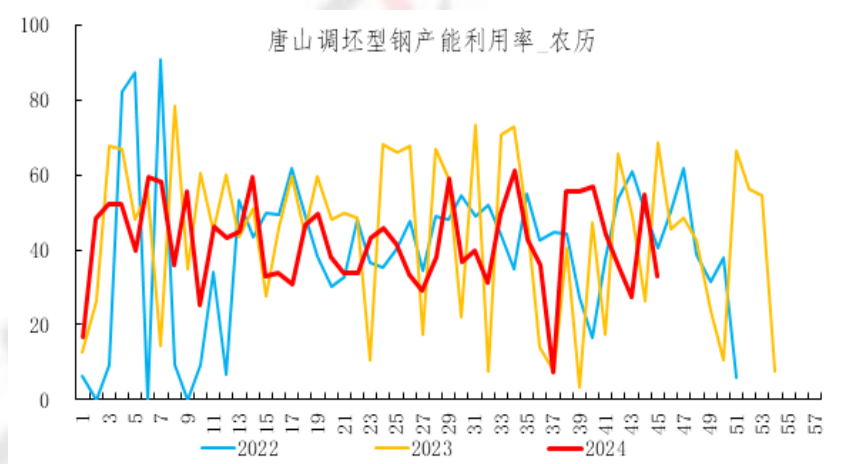
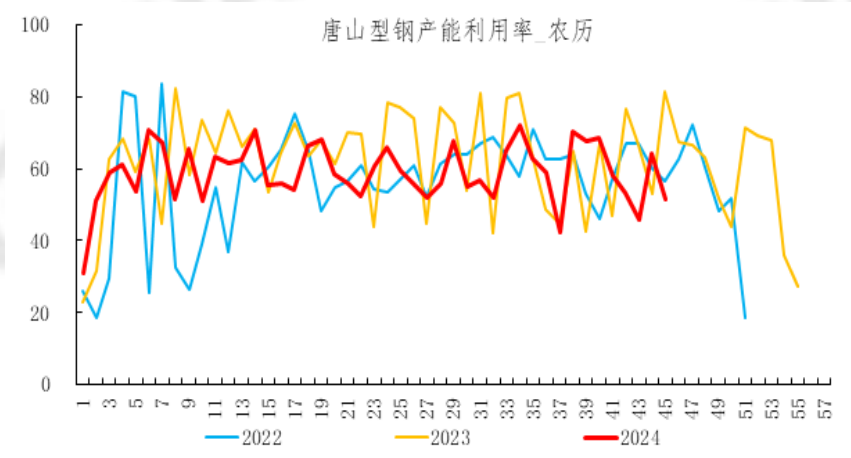


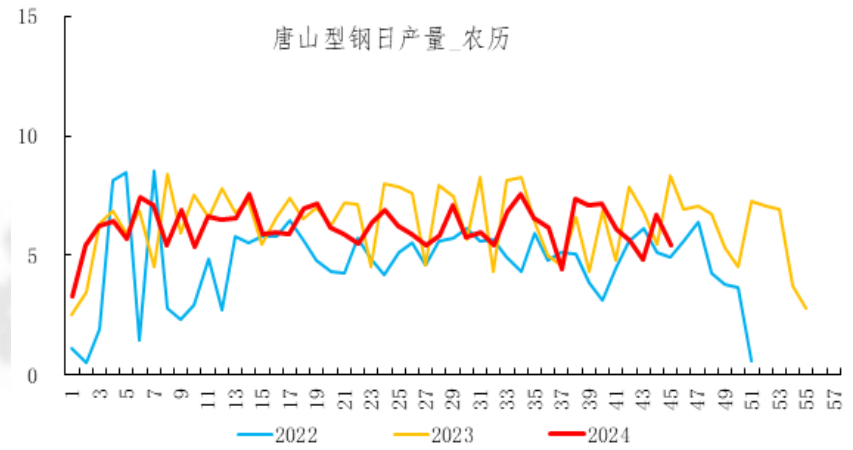
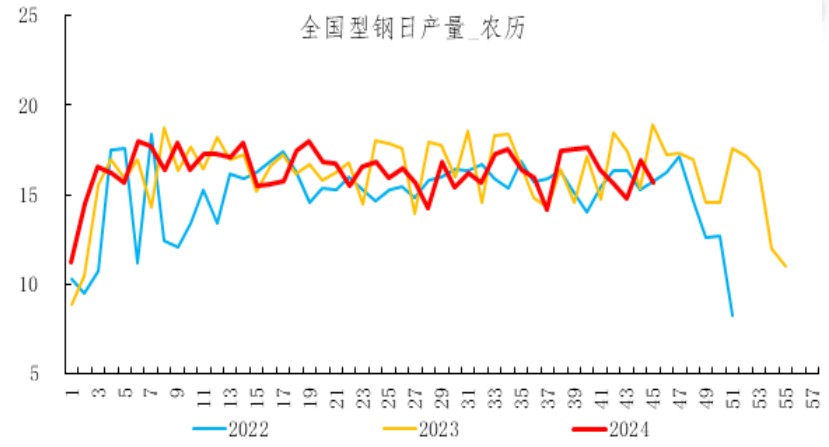
全国型材开工率周比下降

	2024-12-18	2024-12-11	增减值	增减幅
全国按产能型钢开工率 (%)	67.89	73.62	-5.73	
河北按产能型钢开工率 (%)	55.26	66.84	-11.58	
唐山按产能型钢开工率 (%)	51.43	64.00	-12.57	
全国按产能调坯型钢开工率 (%)	39.92	54.87	-14.95	
全国型钢日产量 (万吨)	15.63	16.95	-1.32	-7.79%
唐山型钢日产量 (万吨)	5.40	6.72	-1.32	-19.64%



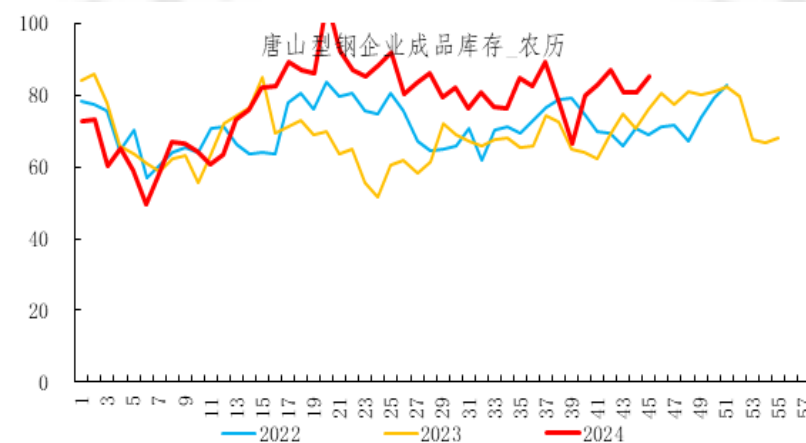
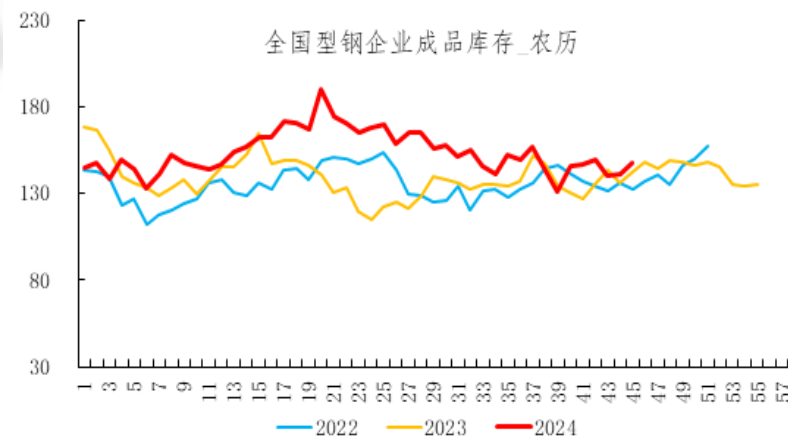


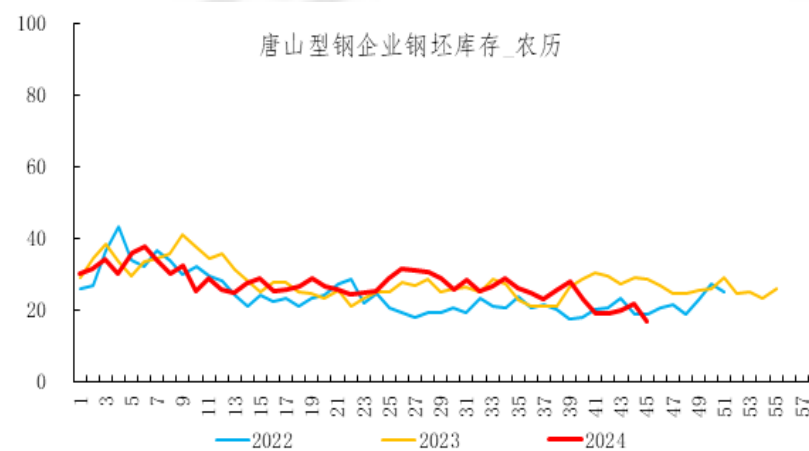
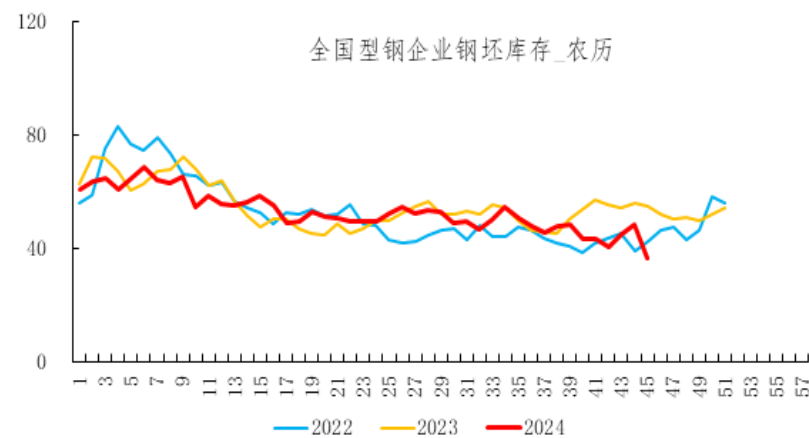




全国型材库存小幅增加

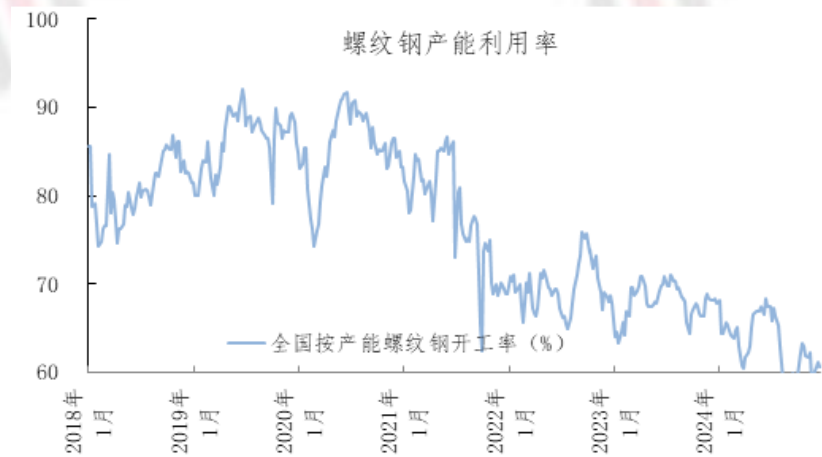
	2024-12-18	2024-12-11	增减值	增减幅
全国型钢企业成品库存 (万吨)	147.57	141.49	6.08	4.30%
唐山型钢企业成品库存 (万吨)	85.25	80.90	4.35	5.38%
全国型钢企业钢坯库存 (万吨)	36.65	48.40	-11.75	-24.28%
唐山型钢企业钢坯库存 (万吨)	16.60	21.85	-5.25	-24.03%

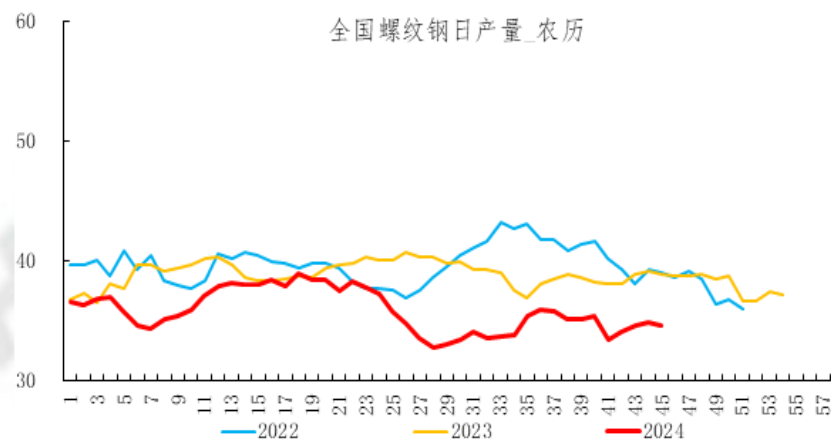
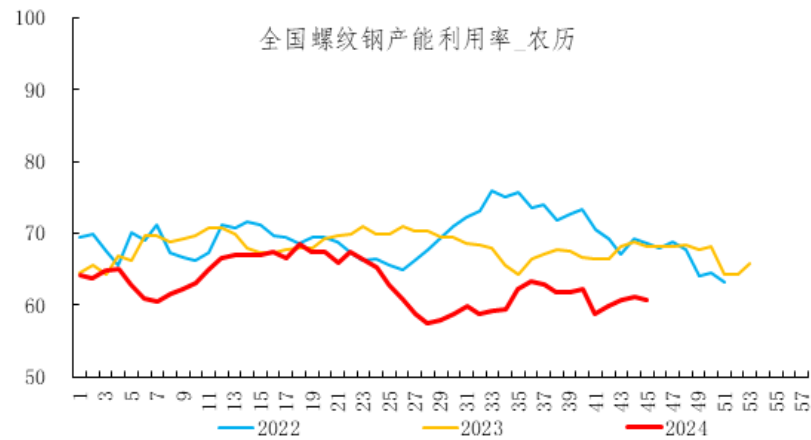




全国按产能螺纹钢开工率周比小降

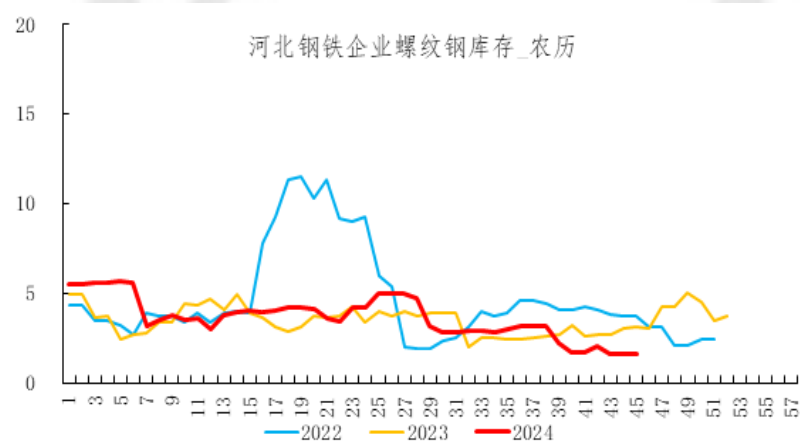
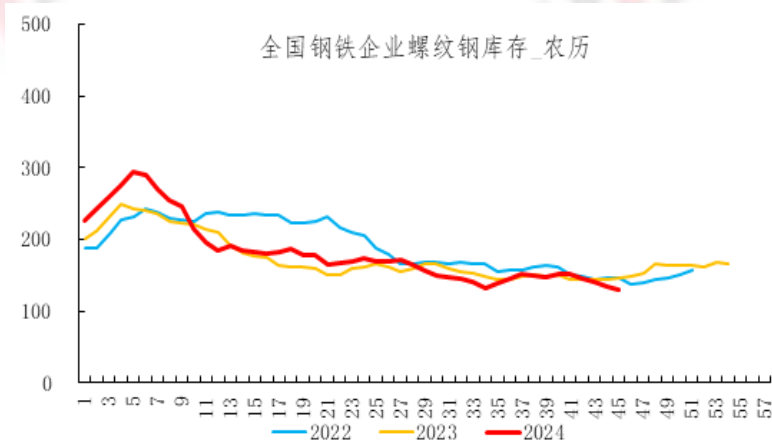
	2024-12-18	2024-12-11	增减值	增减幅
全国按产能螺纹钢开工率 (%)	60.72	61.25	-0.53	
河北按产能螺纹钢开工率 (%)	30.67	34.36	-3.69	
唐山按产能螺纹钢开工率 (%)	0.00	8.57	-8.57	
全国螺纹钢日产量 (万吨)	34.54	34.84	-0.30	-0.86%
河北螺纹钢日产量 (万吨)	2.50	2.80	-0.30	-10.71%





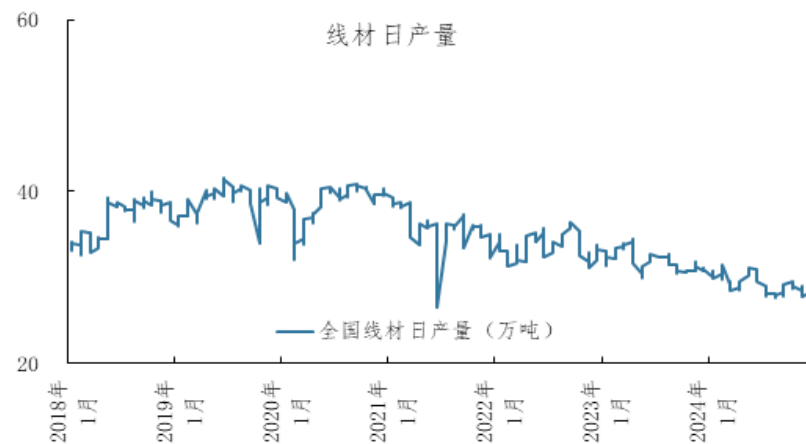
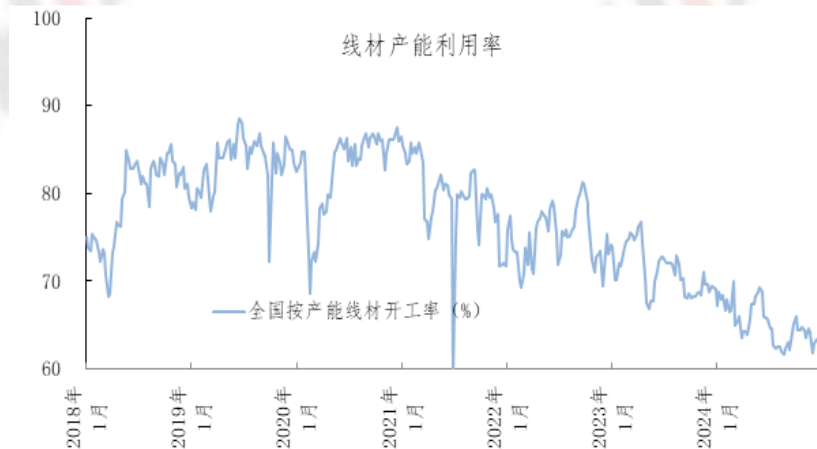
全国钢企螺纹钢库存周比小降

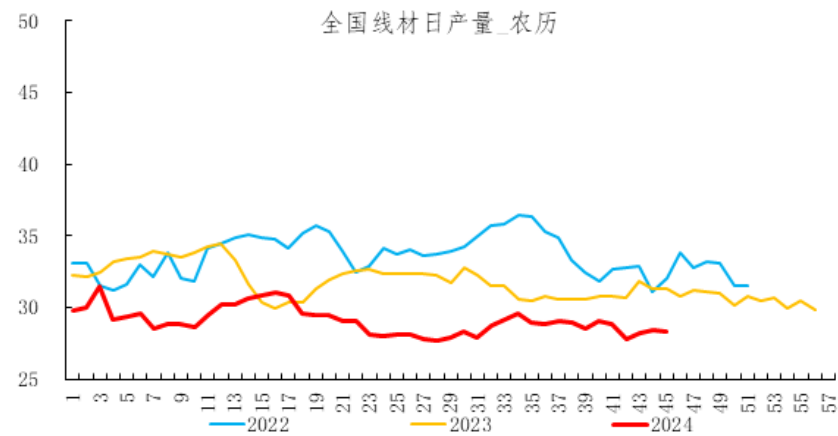
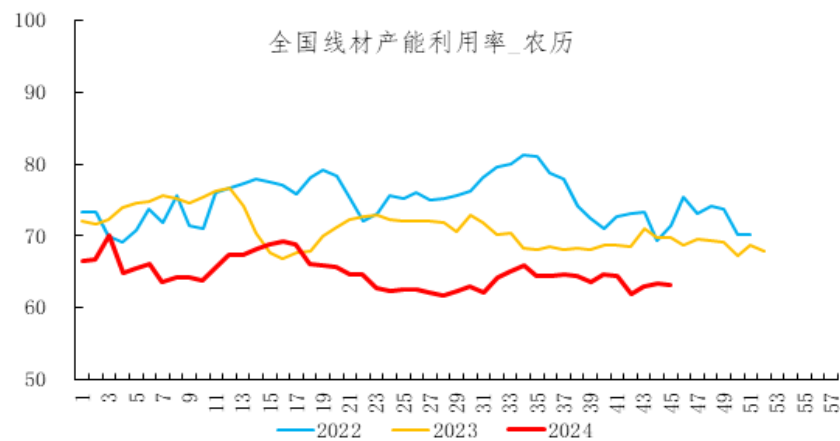
	2024-12-18	2024-12-11	增减值	增减幅
全国钢企螺纹钢库存 (万吨)	129.57	134.57	-5.00	-3.72%
河北钢企螺纹钢库存 (万吨)	1.60	1.60	0.00	0.00%



全国按产能线材开工率周比下降

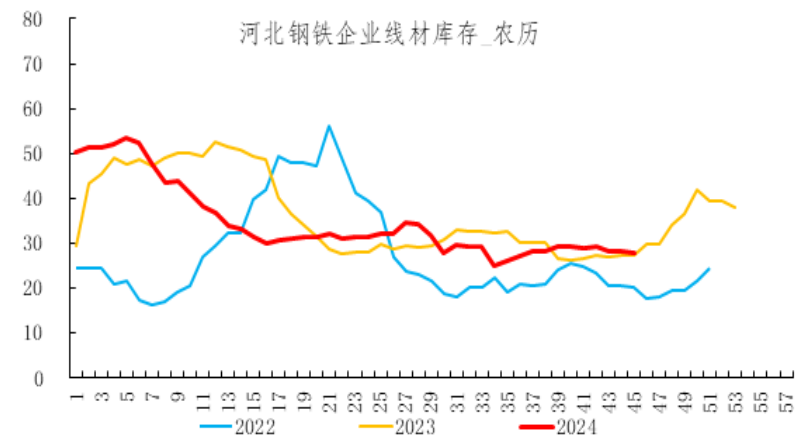
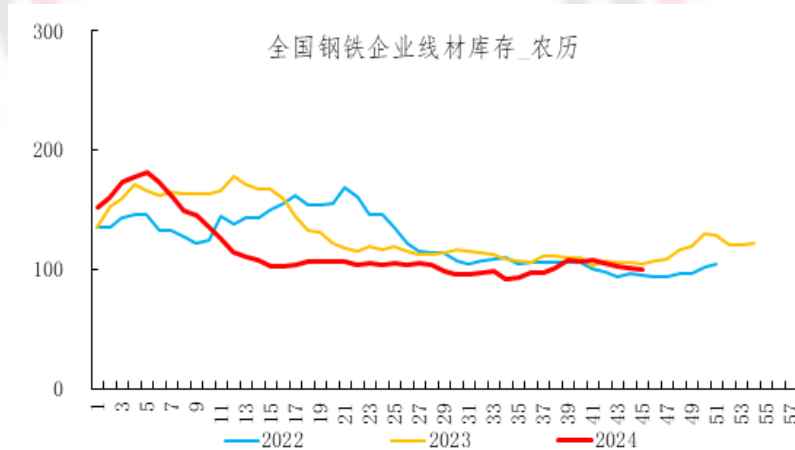
	2024-12-18	2024-12-11	增减值	增减幅
全国按产能线材开工率 (%)	63.23	63.34	-0.11	
河北按产能线材开工率 (%)	60.03	57.95	2.08	
唐山按产能线材开工率 (%)	63.92	57.73	6.19	
全国线材日产量 (万吨)	28.37	28.42	-0.05	-0.18%
河北线材日产量 (万吨)	8.68	8.38	0.30	3.58%





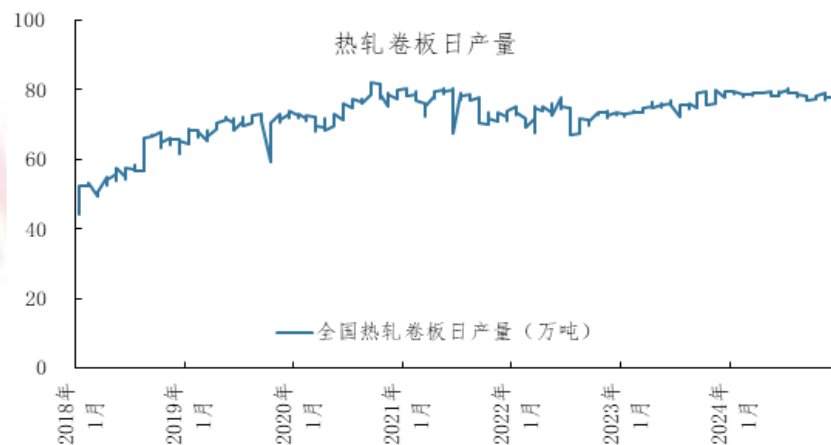
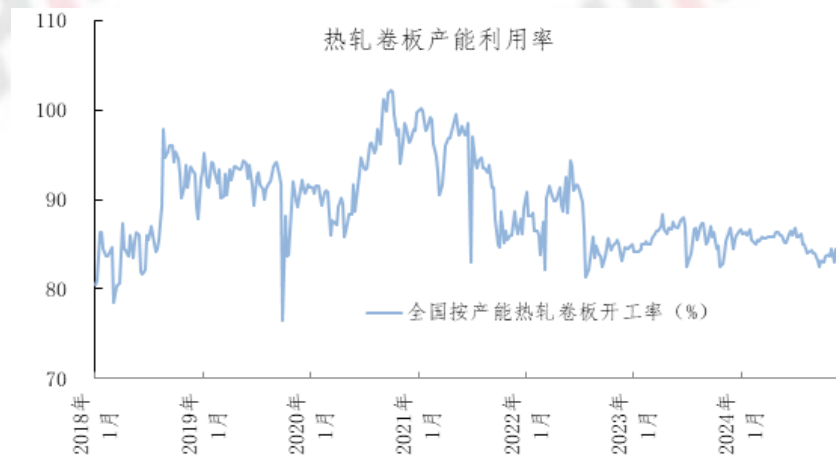
全国钢企线盘库存周比继续减少

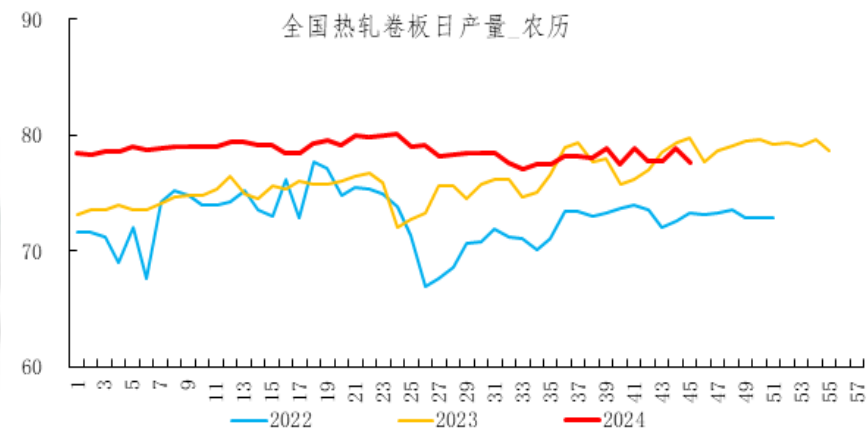
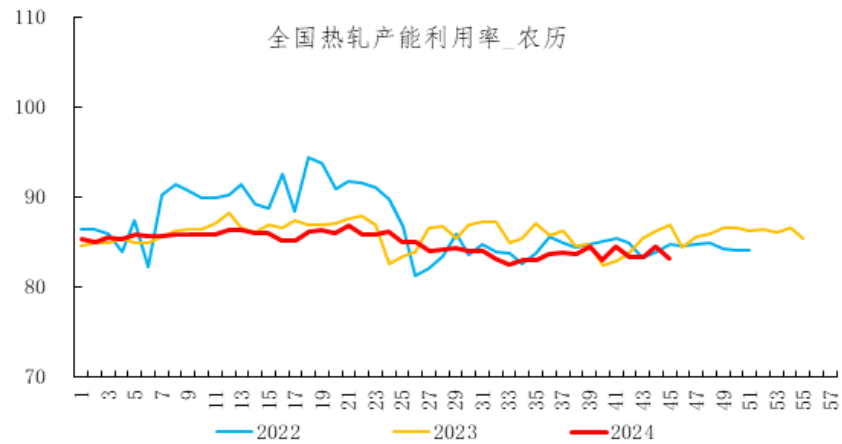
	2024-12-18	2024-12-11	增减值	增减幅
全国钢企线材库存 (万吨)	99.31	100.96	-1.65	-1.63%
河北钢企线材库存 (万吨)	27.78	28.28	-0.50	-1.77%



全国按产能热卷开工率周比小降

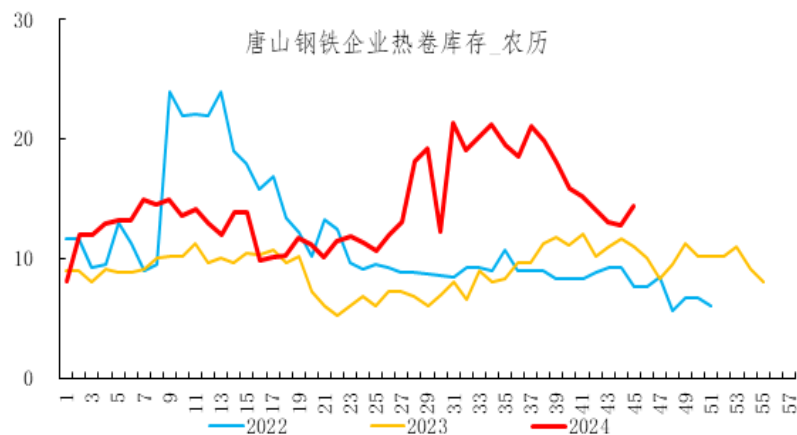
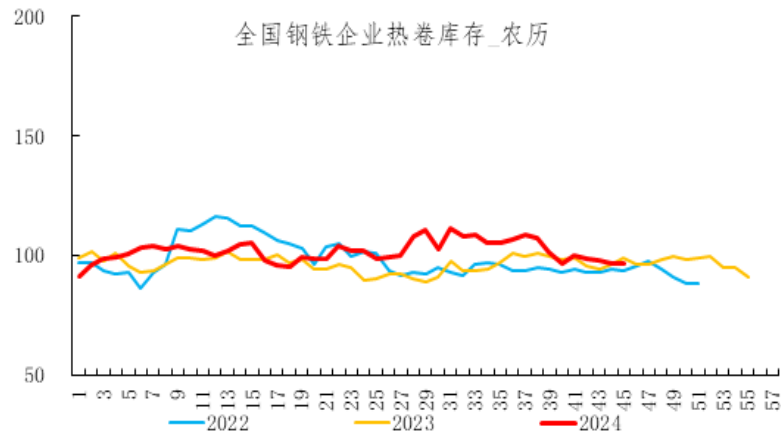
	2024-12-18	2024-12-11	增减值	增减幅
全国按产能热轧卷板开工率 (%)	83.17	84.45	-1.28	
河北按产能热轧卷板开工率 (%)	87.74	87.74	0.00	
唐山按产能热轧卷板开工率 (%)	92.29	92.29	0.00	
全国热轧卷板日产量 (万吨)	77.62	78.82	-1.20	-1.52%
唐山热轧卷板日产量 (万吨)	19.75	19.75	0.00	0.00%





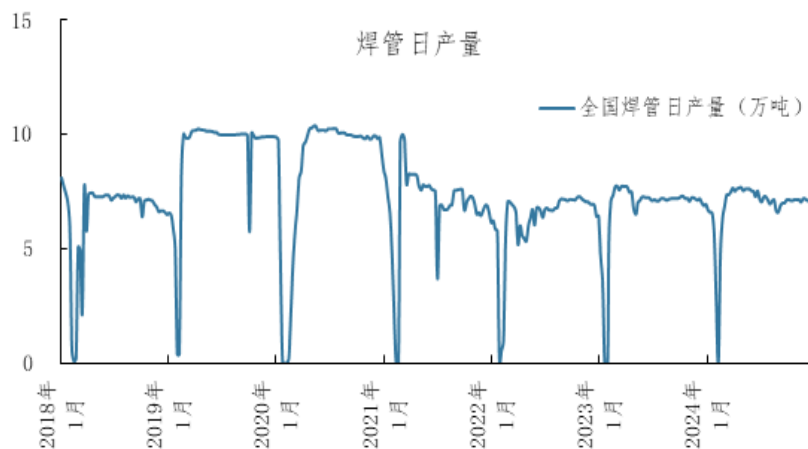
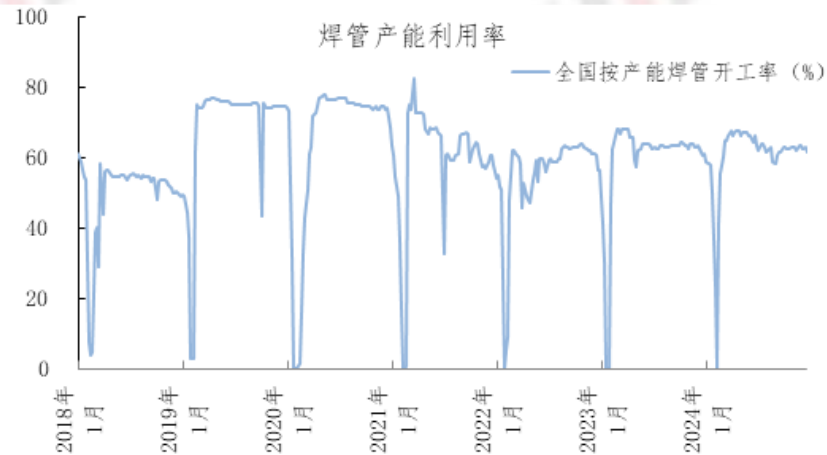
全国钢企热卷库存周比小降

	2024-12-18	2024-12-11	增减值	增减幅
全国钢铁企业热卷库存(万吨)	96.61	96.95	-0.34	-0.35%
唐山钢铁企业热卷库存(万吨)	14.43	12.80	1.63	12.73%

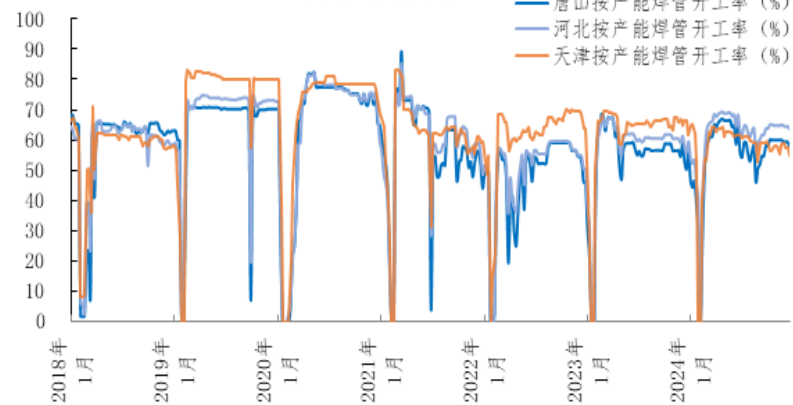


全国按产能管厂开工率较上周减少

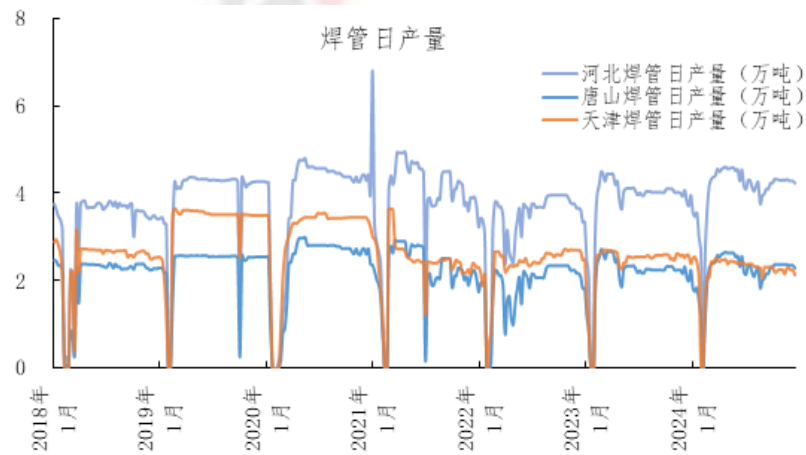
	2024-12-18	2024-12-11	增减值	增减幅
全国按产能焊管开工率 (%)	61.31	62.72	-1.41	
河北按产能焊管开工率 (%)	63.86	64.74	-0.88	
唐山按产能焊管开工率 (%)	58.13	59.60	-1.47	
天津按产能焊管开工率 (%)	54.88	57.51	-2.63	
全国焊管日产量 (万吨)	6.95	7.11	-0.16	

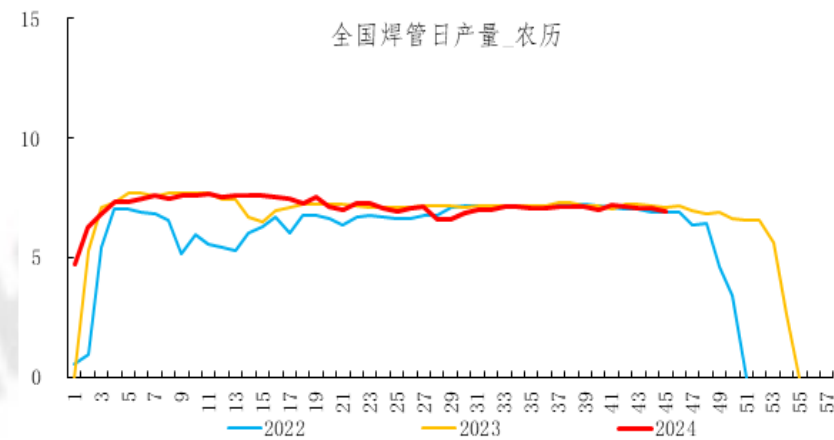
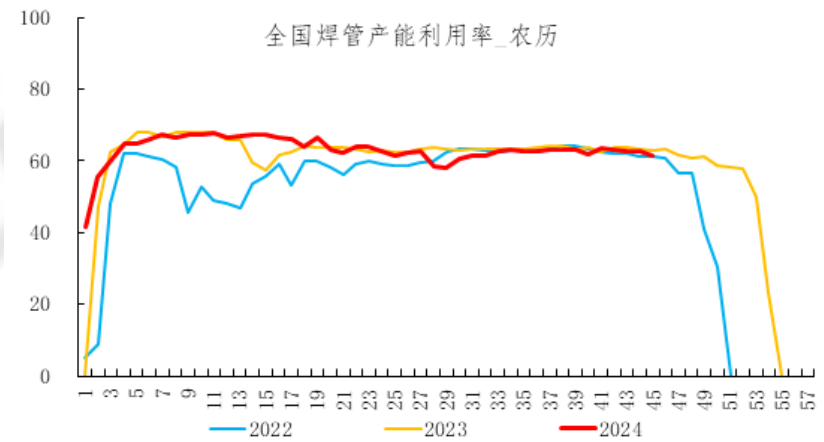


焊管产能利用率



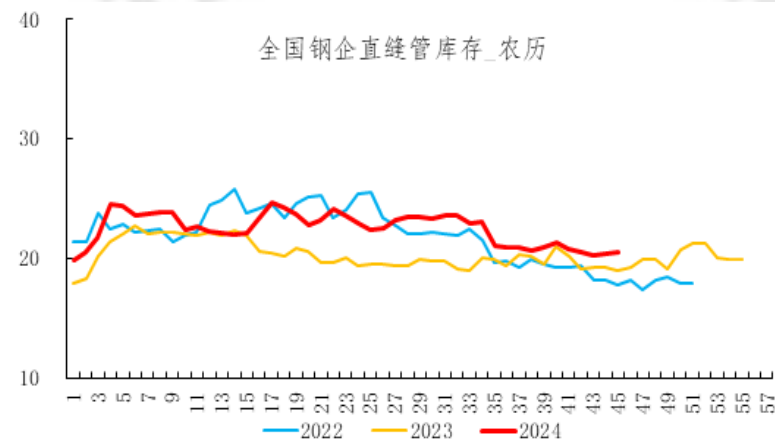
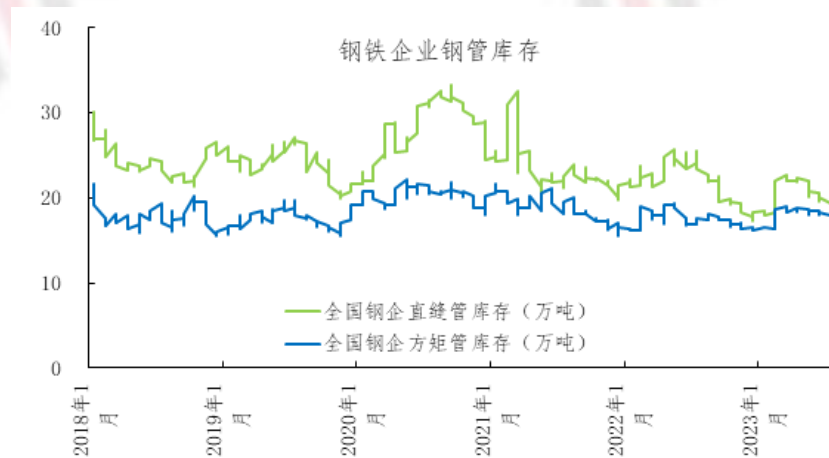
焊管日产量

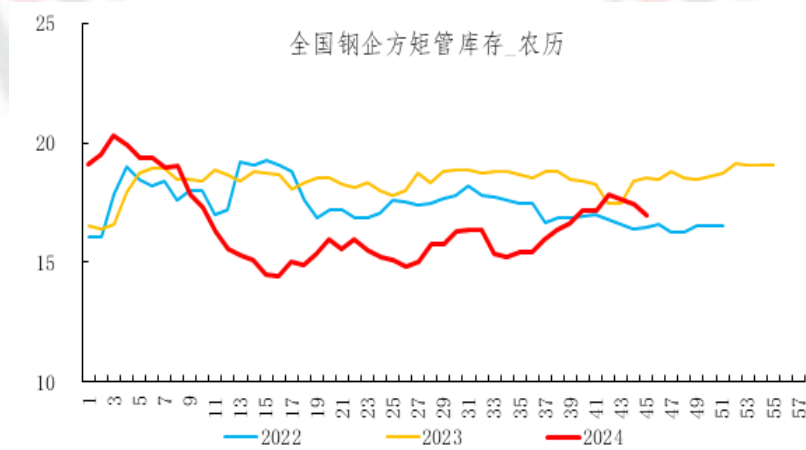




管厂库存较上周小降，下游采购较为谨慎

	2024-12-18	2024-12-11	增减值	增减幅
全国钢企直缝管库存 (万吨)	20.51	20.41	0.10	0.49%
全国钢企方矩管库存 (万吨)	16.95	17.45	-0.50	-2.87%





唐宋100指数说明 Description of TSI 100

唐宋100指数是唐宋大数据产业股份有限公司（以下简称唐宋公司）创立的钢铁市场数据体系。唐宋100指数所有数据由唐宋公司自有数据采集系统原创获得，力求做到“三个全覆盖”：

- 1钢铁产业链全覆盖：**涉及从原料到成品18个大类品种，涵盖装备、产能、生产、销售、库存、成本和利润等主要维度，约150个类别，500个指标。
- 2企业样本全覆盖：**各品种数据采集涉及的企业样本总数超过2000个，采集样本占样本总量单项不低于85%，总体不低于90%，直至实现样本全覆盖。
- 3区域全覆盖：**各品种数据采集涉及的企业样本从重点地区逐步覆盖全部区域，数据指标分为全国、重点地区、区域三个层级。