

唐宋100指数数据周报

唐宋大数据产业股份有限公司

2025-03-06

唐宋钢铁市场周数据报告TDR

总览：铁水产量增加 市场情绪偏悲观

• 价格方面：钢材、铁矿石价格震荡偏弱，焦炭价格持稳。

• 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；钢材各品种开工涨跌互现，其中螺纹钢、热卷、带钢、型钢开工下降，线材开工上升。

• 库存方面：本期钢材主要品种社会库存、钢企库存均有所下降；钢企进口矿、焦炭库存有所上升。

基准价 (元/吨)	2025-03-05	2025-02-26	增减值	增减幅
进口矿	780	820	-40.00	-4.88%
焦炭	1350	1350	0.00	0.00%
钢坯	3050	3090	-40.00	-1.29%
螺纹钢	3240	3270	-30.00	-0.92%
热轧	3390	3410	-20.00	-0.59%

开工率 (%)	2025-03-05	2025-02-26	增减值	增减幅
高炉	83.14	82.79	0.35	0.43%
焦炭	81.50	82.51	-1.01	-1.23%
螺纹钢	62.21	62.48	-0.27	-0.43%
线材	60.20	59.53	0.67	1.13%
热卷	82.95	84.45	-1.50	-1.78%
带钢	53.73	58.07	-4.34	-7.47%
型钢	53.02	69.30	-16.28	-23.64%

日产量(万吨)	2025-03-05	2025-02-26	增减值	增减幅
生铁	196.49	195.24	1.25	0.64%
粗钢	254.76	253.29	1.47	0.58%

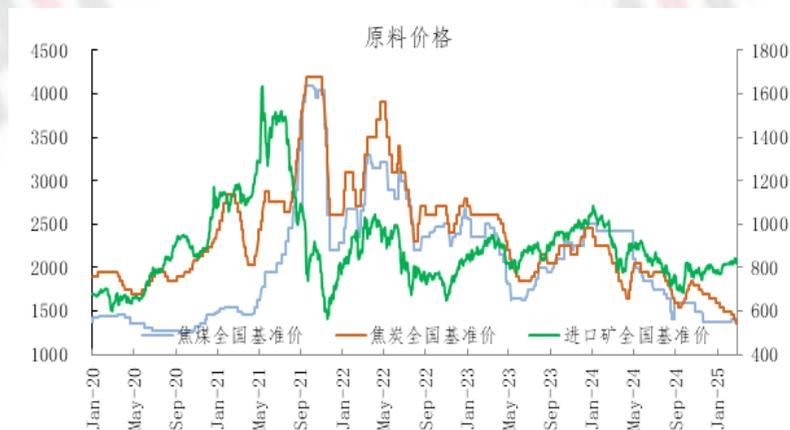
样本钢厂原料库存天数(天)	2025-03-05	2025-02-26	增减值	增减幅
进口矿	19.19	19.11	0.08	0.42%
焦炭	9.58	9.47	0.11	1.16%

样本钢厂钢材库存(万吨)	2025-03-05	2025-02-26	增减值	增减幅
螺纹钢	185.04	194.54	-9.50	-4.88%
线材	112.52	123.84	-11.32	-9.14%
热卷	99.51	105.50	-5.99	-5.68%

社会库存(万吨)	2025-03-05	2025-02-26	增减值	增减幅
唐山钢坯	123.61	124.45	-0.84	-0.67%
唐山带钢	85.64	96.74	-11.10	-11.47%

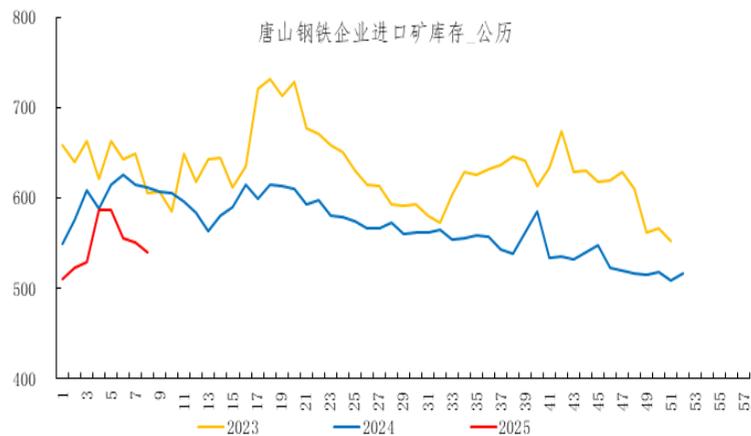
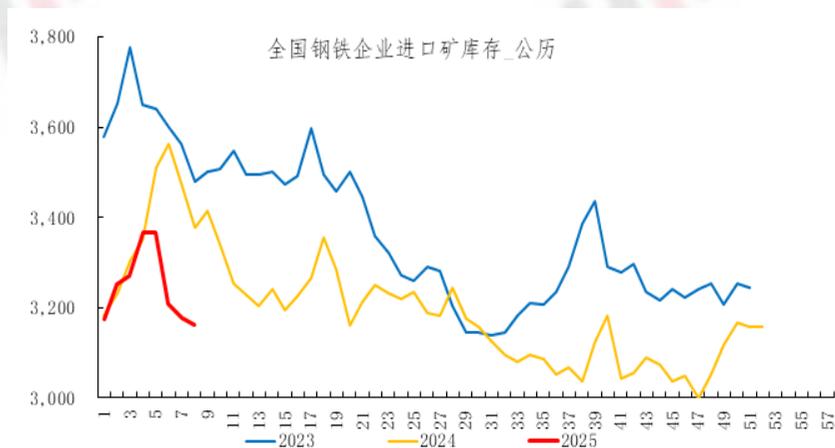
钢材价格震荡下行 焦炭价格持稳

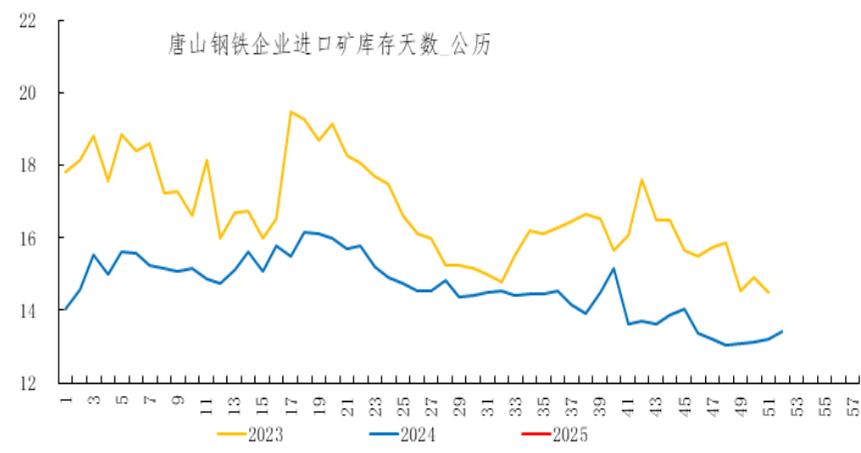
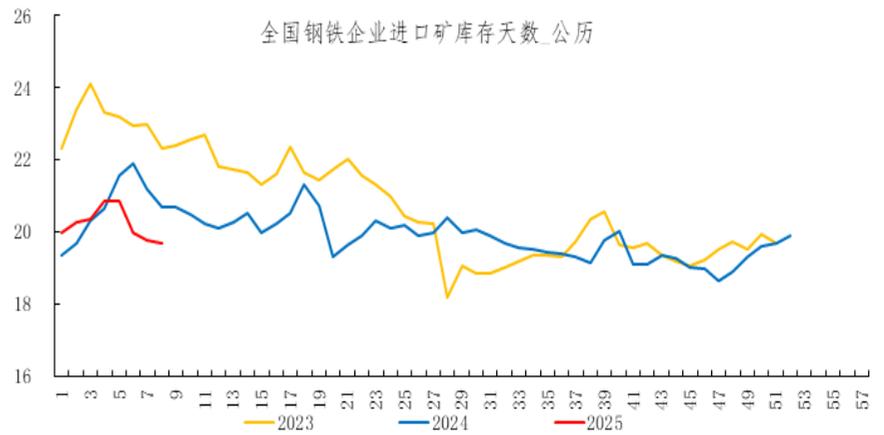
	2025-03-05	2025-02-26	增减值	增减幅
进口矿全国基准价	780	820	-40.00	-4.88%
焦煤全国基准价	1360	1360	0.00	0.00%
焦炭全国基准价	1350	1350	0.00	0.00%
钢坯全国基准价	3050	3090	-40.00	-1.29%
螺纹钢全国基准价	3240	3270	-30.00	-0.92%
热轧全国基准价	3390	3410	-20.00	-0.59%

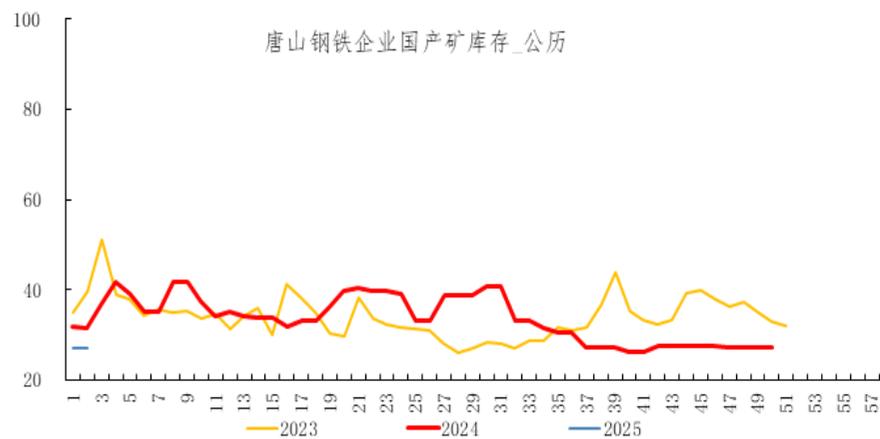
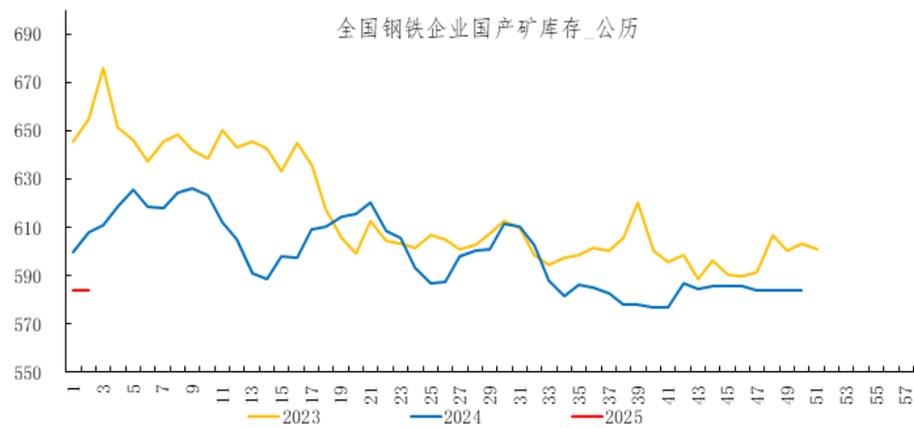


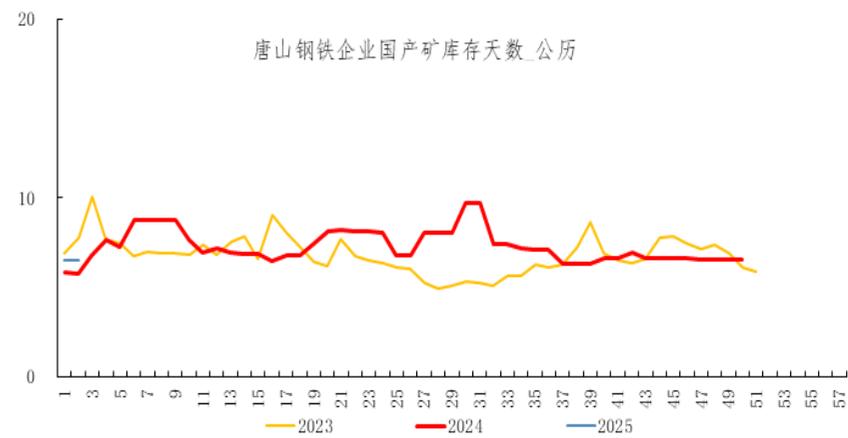
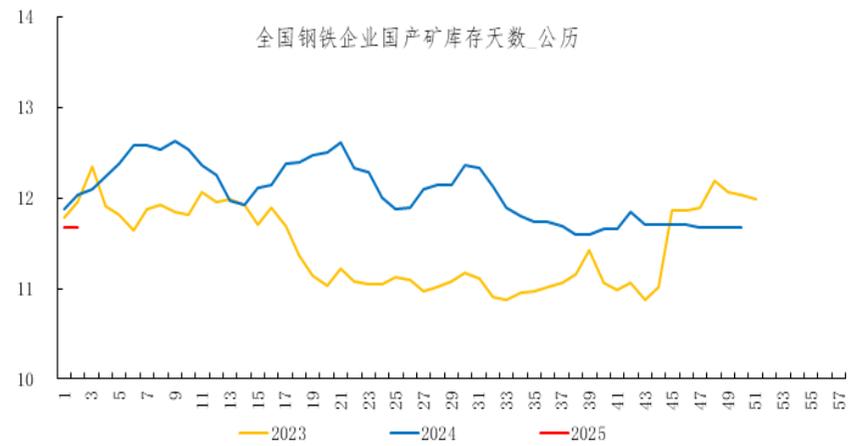
进口矿价格持续下降，钢企以少量刚需采购为主，钢企库存下降

	2025-03-05	2025-02-26	增减值	增减幅
全国钢铁企业进口矿库存 (万吨)	3061.75	3079.66	-17.91	-0.58%
唐山钢铁企业进口矿库存 (万吨)	528.71	529.21	-0.50	-0.09%
全国钢铁企业进口矿库存天数 (天)	19.19	19.11	0.08	0.42%
唐山钢铁企业进口矿库存天数 (天)	13.92	13.77	0.15	1.09%
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%



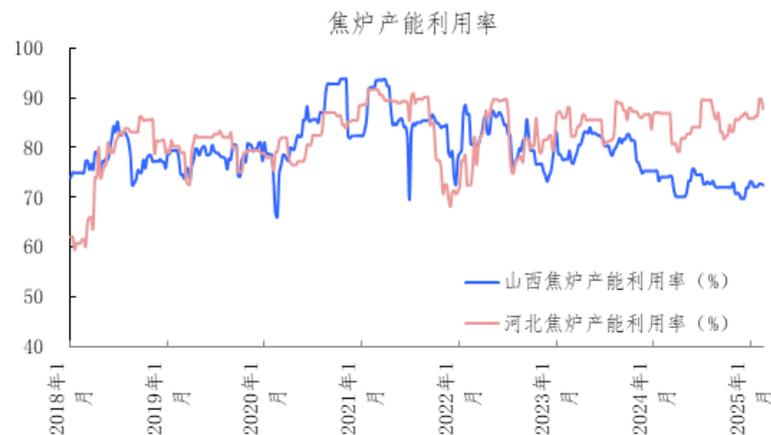
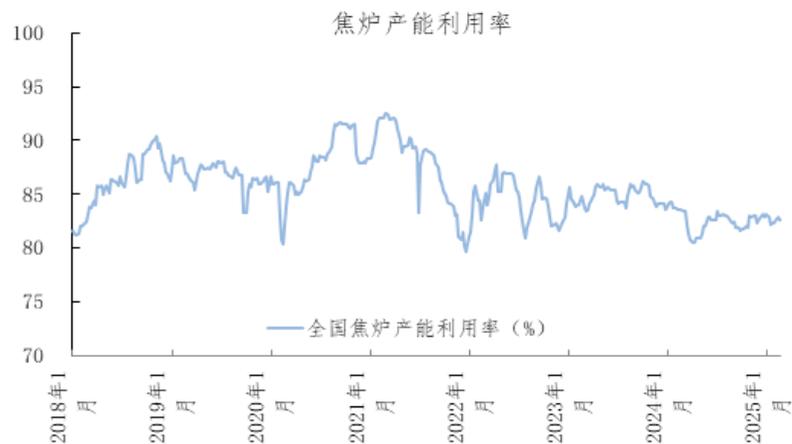


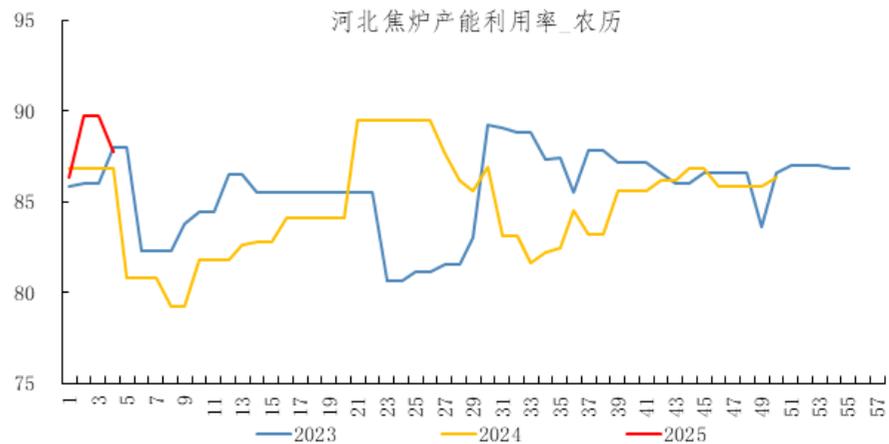
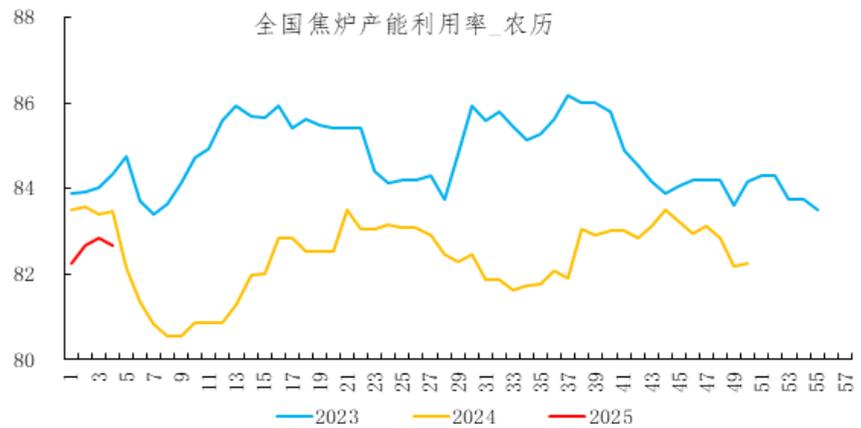


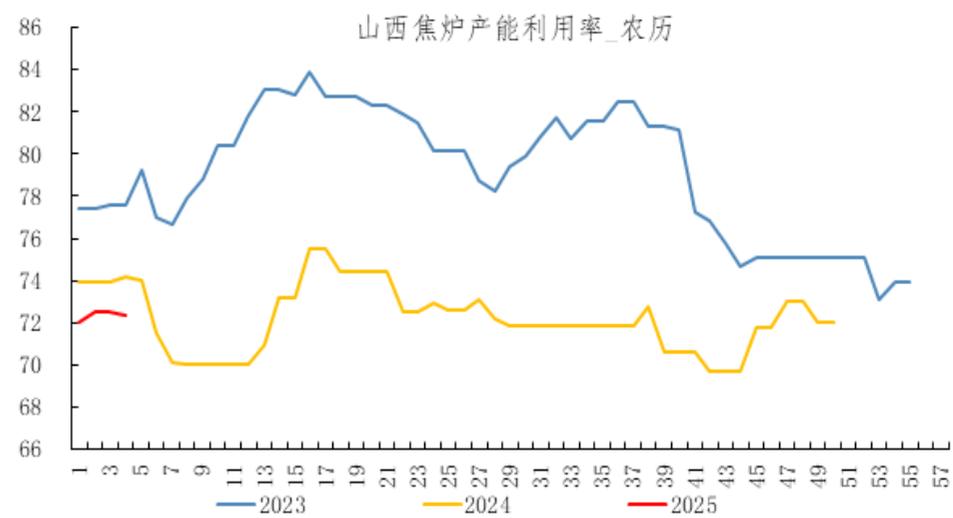


部分焦企延长结焦时间 焦炉开工率小幅下调

	2025-03-05	2025-02-26	增减值
全国焦炉产能利用率 (%)	81.50	82.51	-1.01
河北焦炉产能利用率 (%)	86.80	87.78	-0.98
山西焦炉产能利用率 (%)	70.18	72.00	-1.82

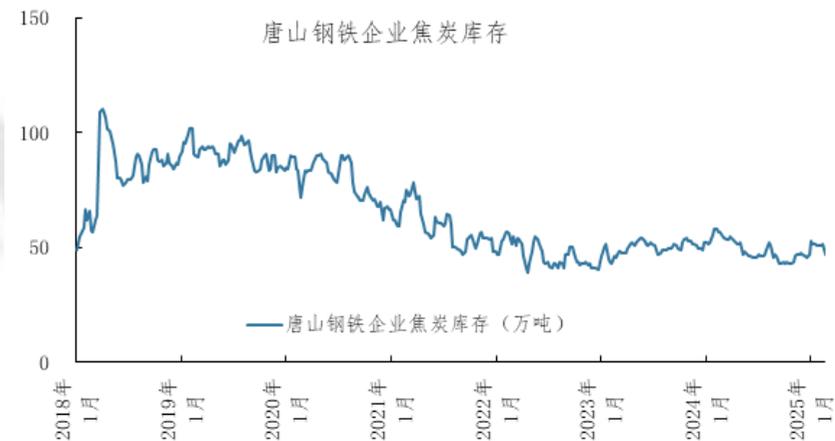
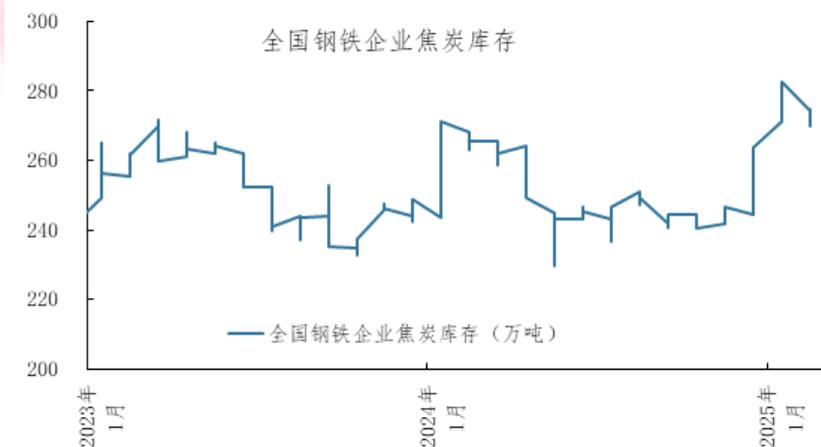


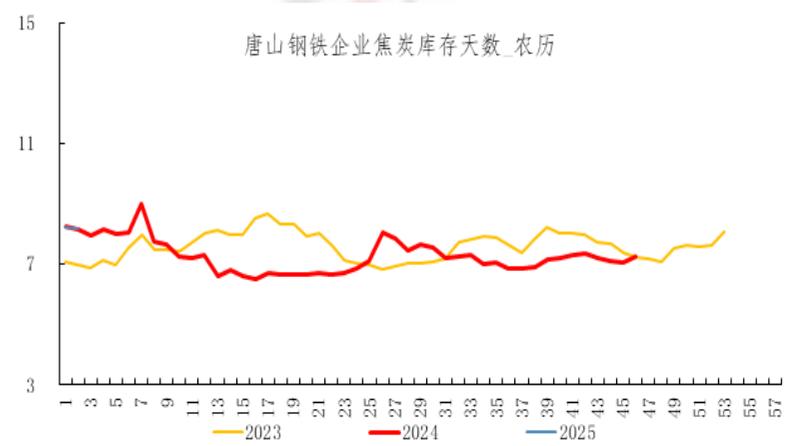
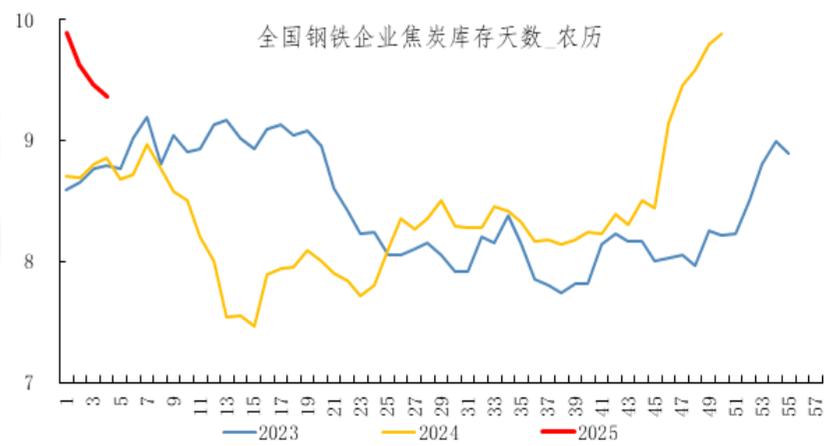




部分钢企有控量采购操作 焦炭厂库微幅调整

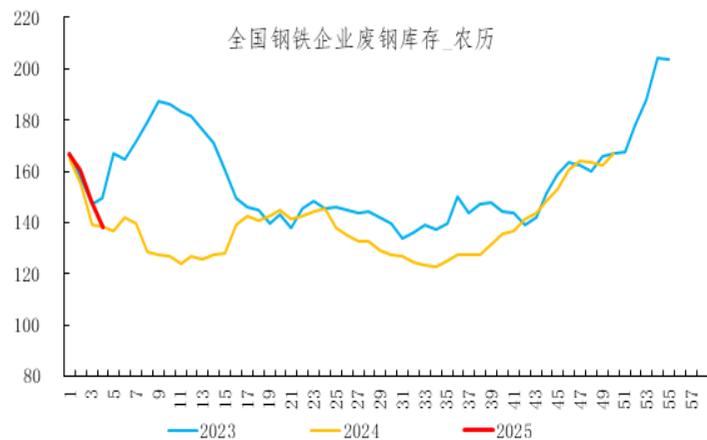
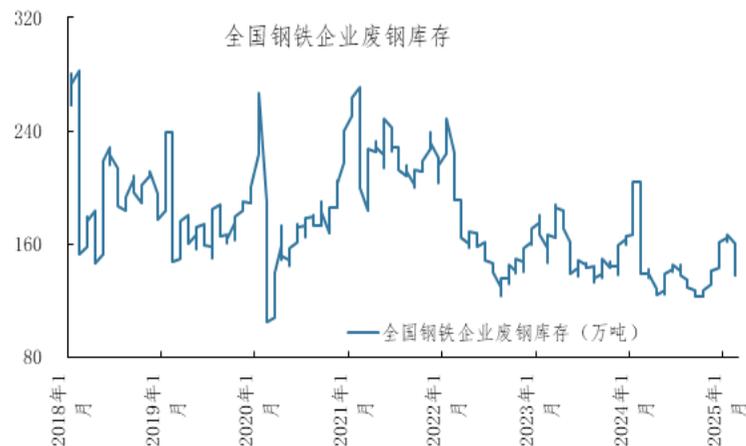
	2025-03-05	2025-02-26	增减值	增减幅
全国钢铁企业焦炭库存 (万吨)	274.18	273.46	0.72	0.26%
河北钢铁企业焦炭库存 (万吨)	71.83	73.50	-1.67	-2.27%
唐山钢铁企业焦炭库存 (万吨)	46.44	46.84	-0.40	-0.85%
全国钢铁企业焦炭库存天数 (天)	9.58	9.47	0.11	1.16%
河北钢铁企业焦炭库存天数 (天)	7.46	7.48	-0.02	-0.27%
唐山钢铁企业焦炭库存天数 (天)	7.64	7.46	0.18	2.41%

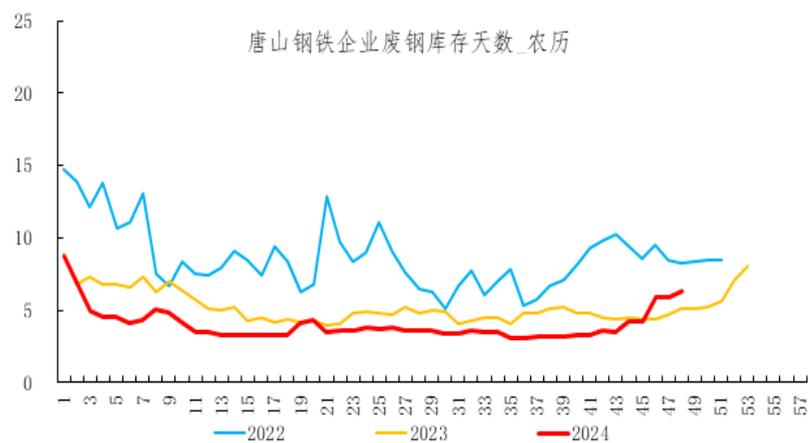
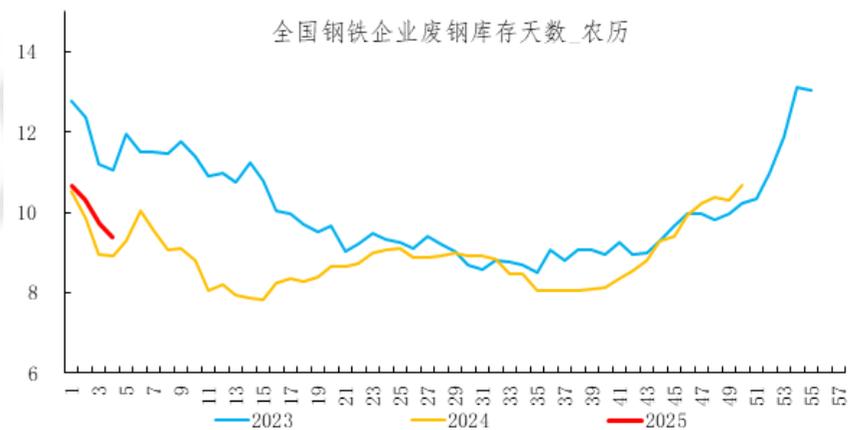




全国废钢库存持续下降

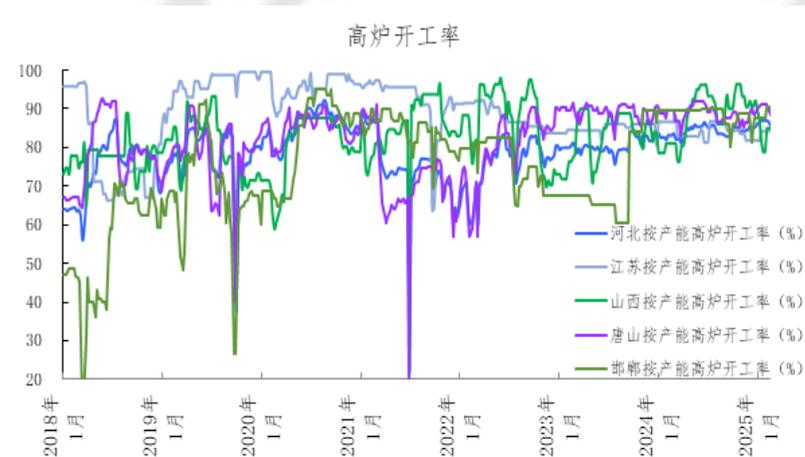
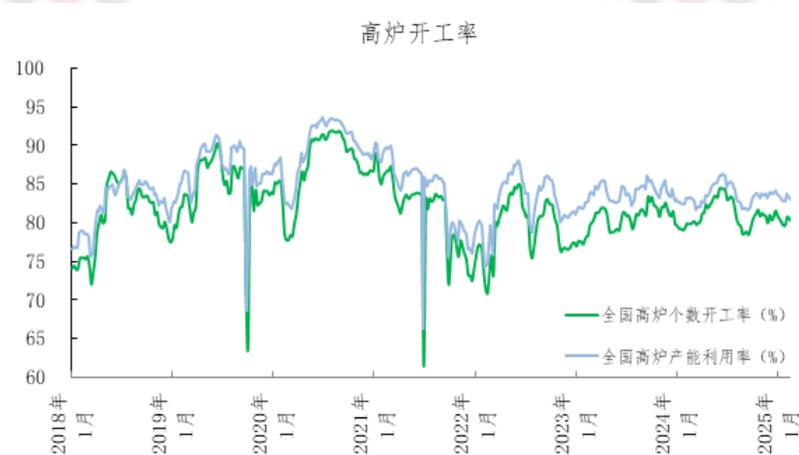
	2025-03-05	2025-02-26	增减值	增减幅
全国钢铁企业废钢库存 (万吨)	124.36	130.36	-6.00	-4.60%
河北钢铁企业废钢库存 (万吨)	23.03	24.83	-1.80	-7.25%
唐山钢铁企业废钢库存 (万吨)	10.10	9.90	0.20	2.02%
全国钢铁企业废钢库存天数 (天)	8.33	8.73	-0.40	-4.58%
河北钢铁企业废钢库存天数 (天)	5.80	6.18	-0.38	-6.15%
唐山钢铁企业废钢库存天数 (天)	5.39	5.28	0.11	2.08%

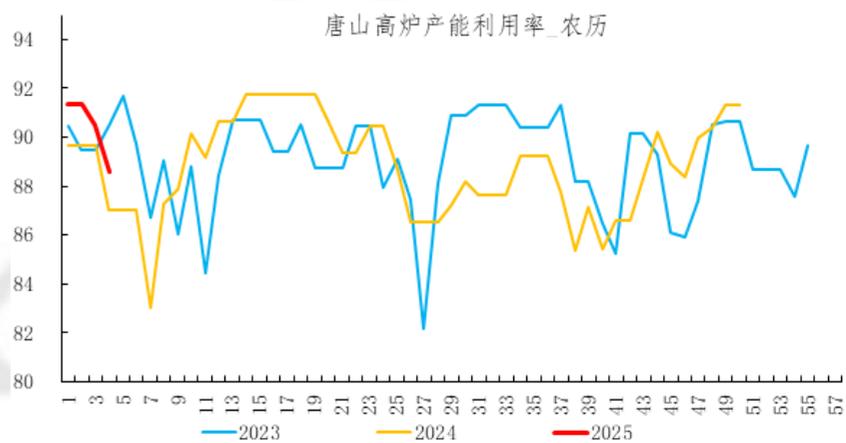
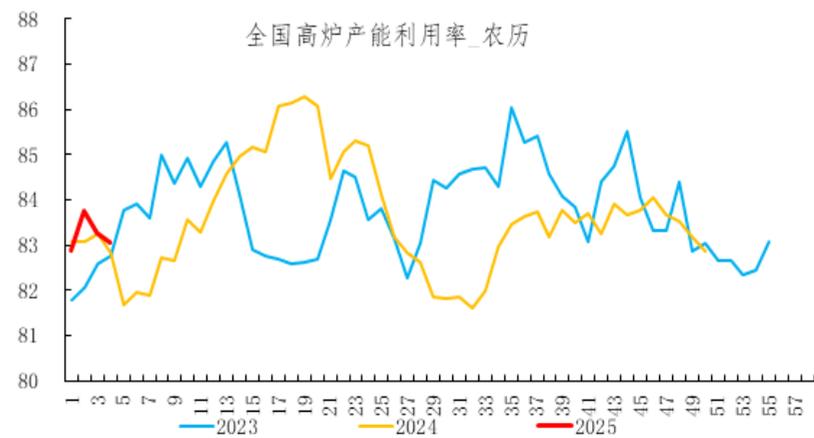




全国高炉开工率小幅拉涨

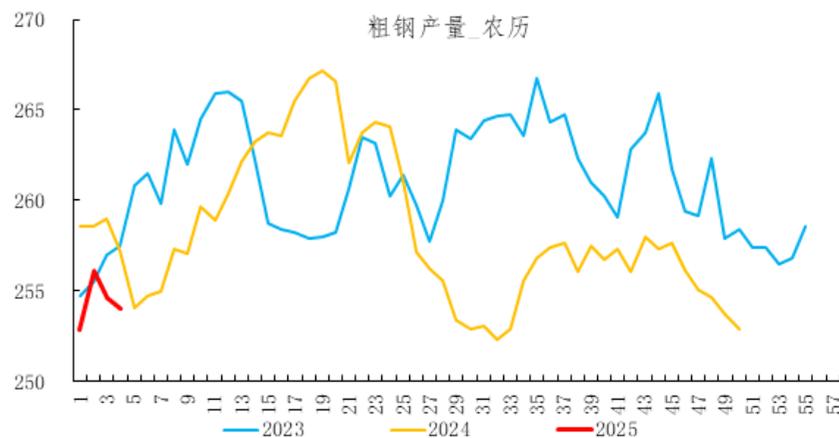
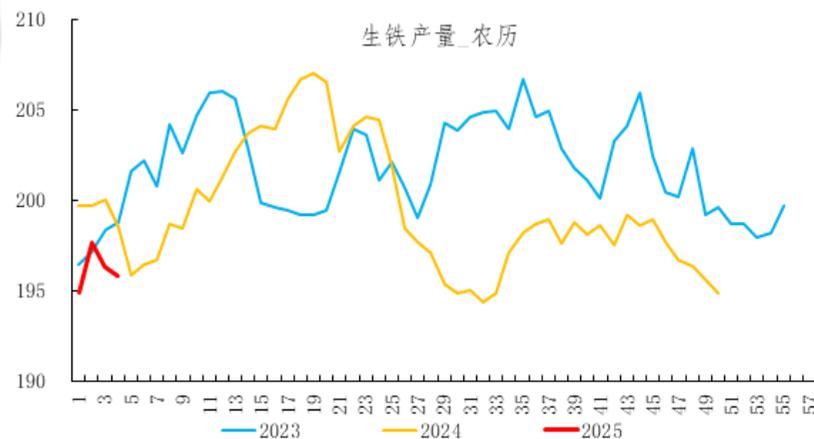
	2025-03-05	2025-02-26	增减值
全国高炉产能利用率 (%)	83.14	82.79	0.35
全国高炉个数开工率 (%)	80.92	80.67	0.25
河北按产能高炉开工率 (%)	82.92	83.70	-0.78
江苏按产能高炉开工率 (%)	87.72	84.30	3.42
山西按产能高炉开工率 (%)	87.22	84.95	2.27
唐山按产能高炉开工率 (%)	83.96	85.35	-1.39
邯郸按产能高炉开工率 (%)	90.39	90.39	0.00





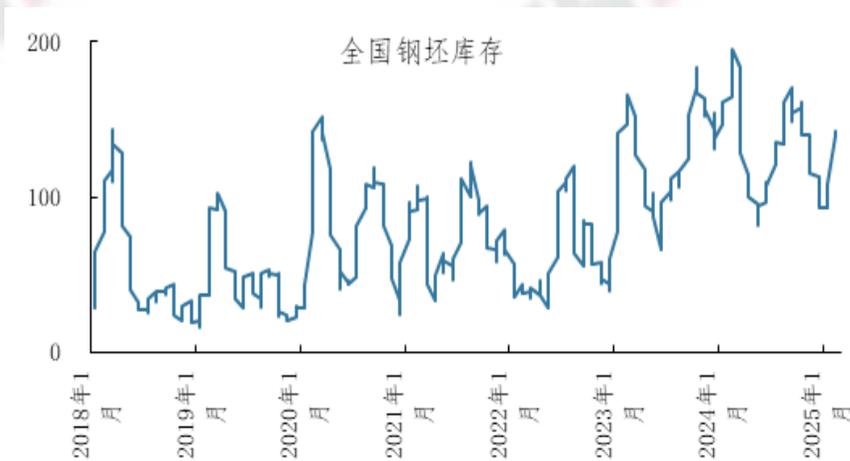
全国生铁、粗钢产量增

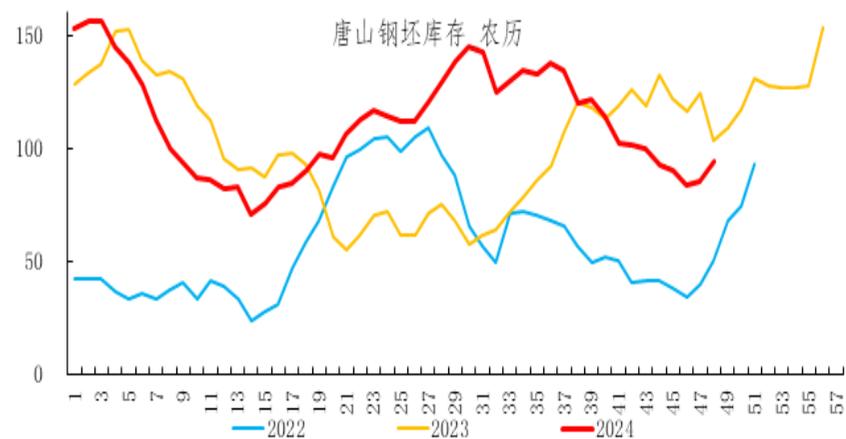
	2025-03-05	2025-02-26	增减值	增减幅
全国生铁日产量(万吨)_测算口径	196.49	195.24	1.25	0.64%
全国粗钢日产量(万吨)_测算口径	254.76	253.29	1.47	0.58%



全国钢坯库存小幅下降

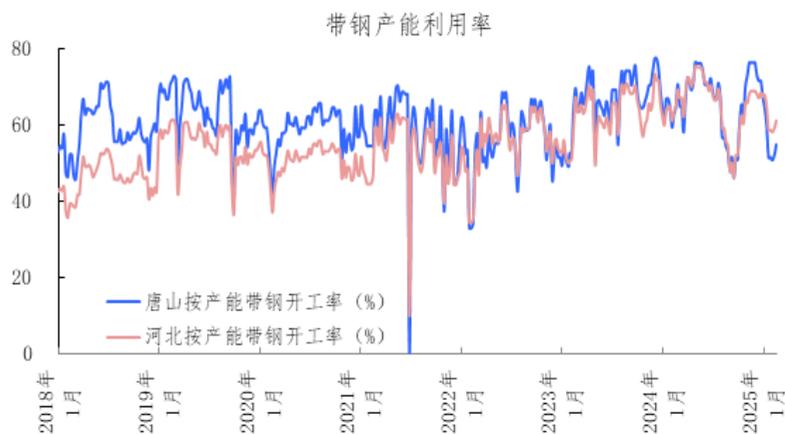
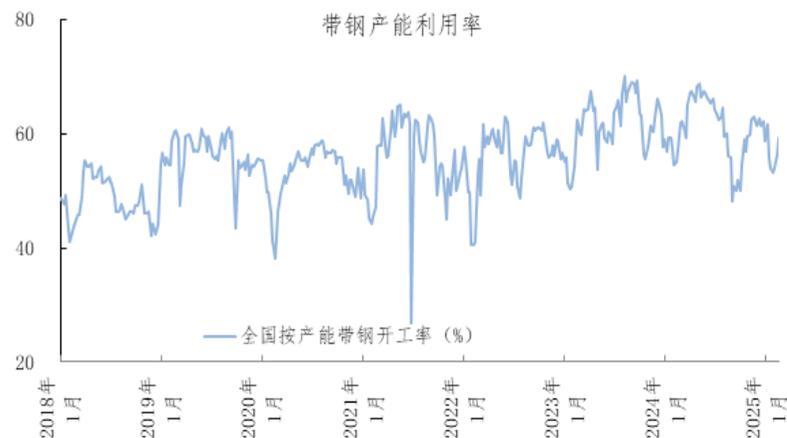
	2025-03-05	2025-02-26	增减值	增减幅
钢坯库存量_全国	127.54	129.25	-1.71	-1.32%
钢坯库存量_唐山	123.61	124.45	-0.84	-0.67%

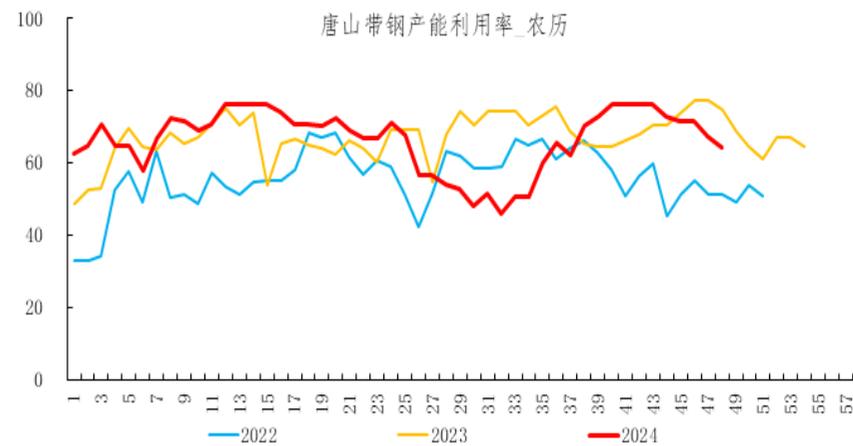


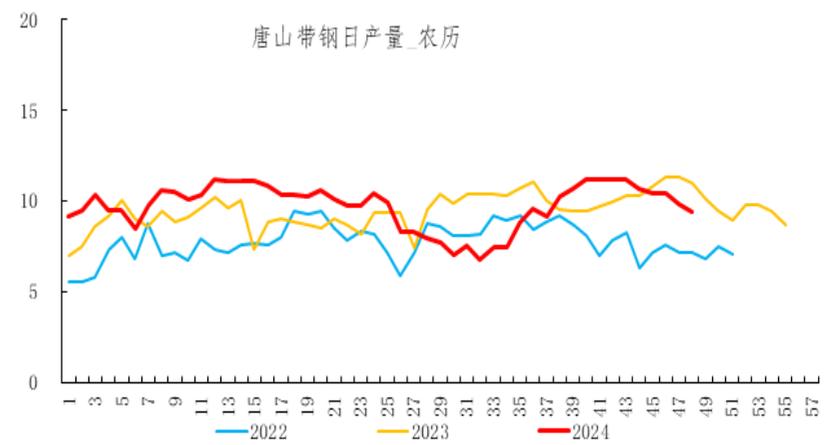


全国带钢按条数开工率下降

	2025-03-05	2025-02-26	增减值	增减幅
全国按产能带钢开工率 (%)	53.73	58.07	-4.34	
河北按产能带钢开工率 (%)	56.46	64.26	-7.80	
唐山按产能带钢开工率 (%)	51.88	59.59	-7.71	
全国按产能调坯带钢开工率 (%)	10.83	29.64	-18.81	
全国带钢日产量 (万吨)	20.90	22.59	-1.69	-7.48%
唐山带钢日产量 (万吨)	7.60	8.73	-1.13	-12.94%

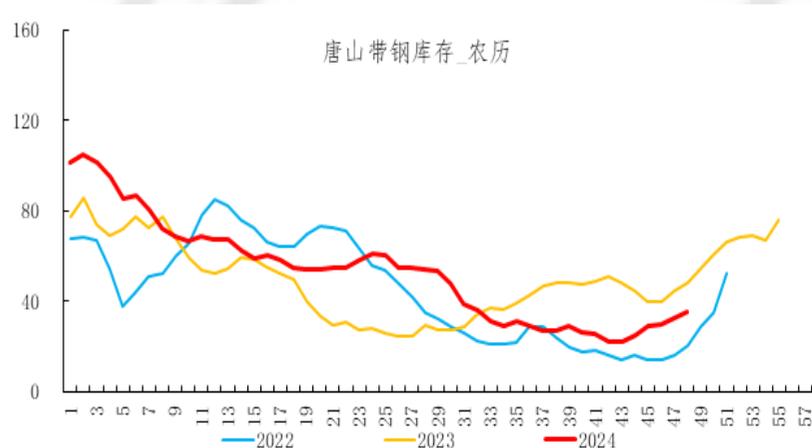
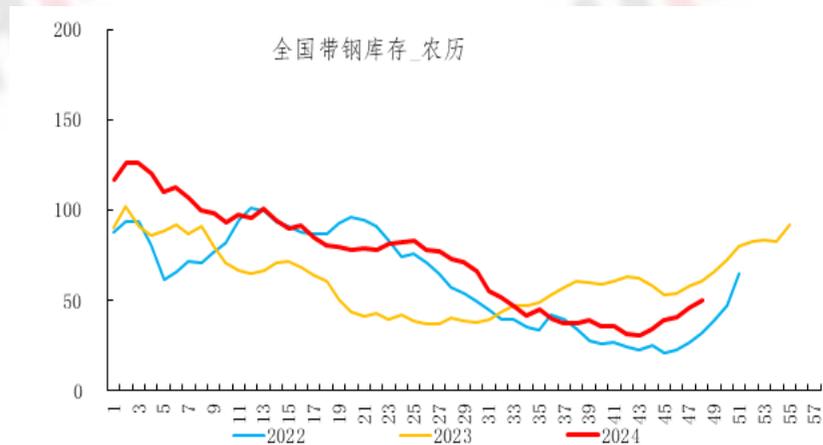


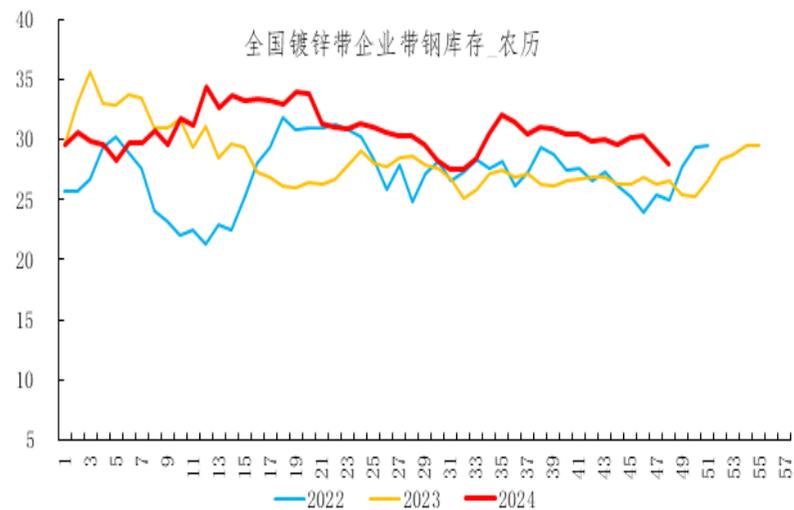
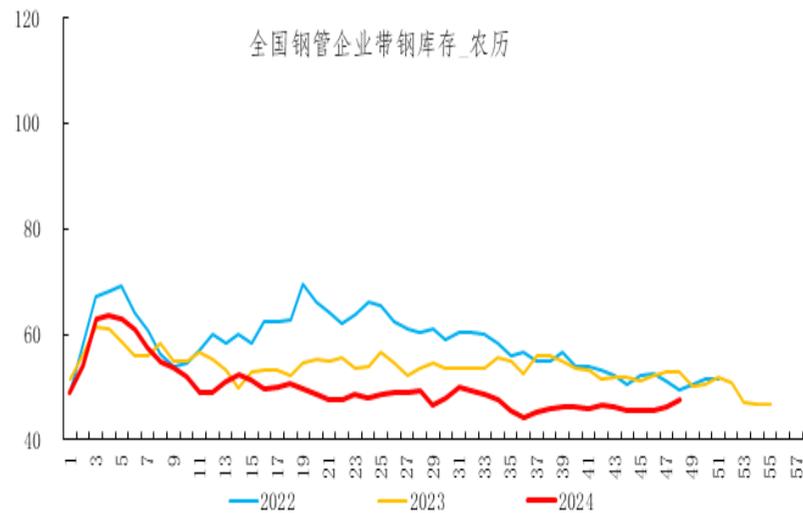




全国重点仓储港口库存下降

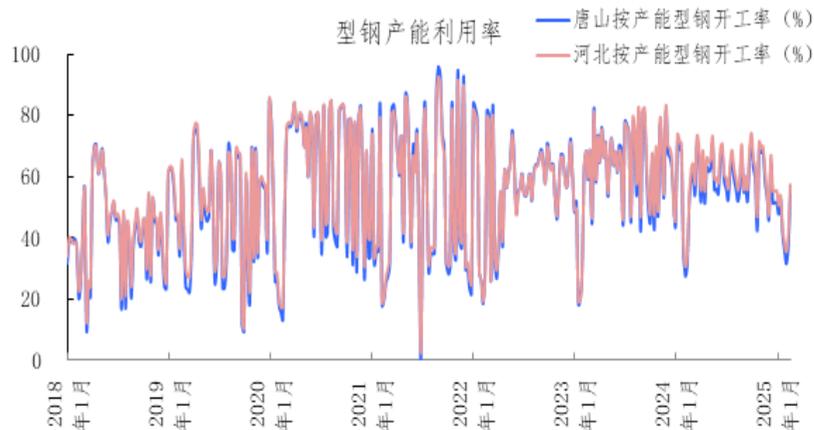
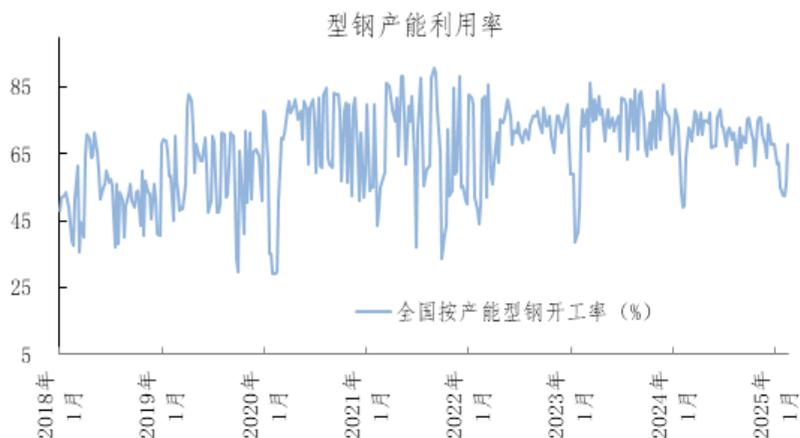
	2025-03-05	2025-02-26	增减值	增减幅
全国带钢社会库存 (万吨)	123.48	133.63	-10.15	-8%
唐山带钢社会库存 (万吨)	85.64	96.74	-11.10	-11%
广东带钢社会库存 (万吨)	29.25	27.95	1.30	5%
全国钢管企业带钢库存 (万吨)	46.82	47.22	-0.40	-1%
全国镀锌带企业带钢库存 (万吨)	26.70	27.00	-0.30	-1%

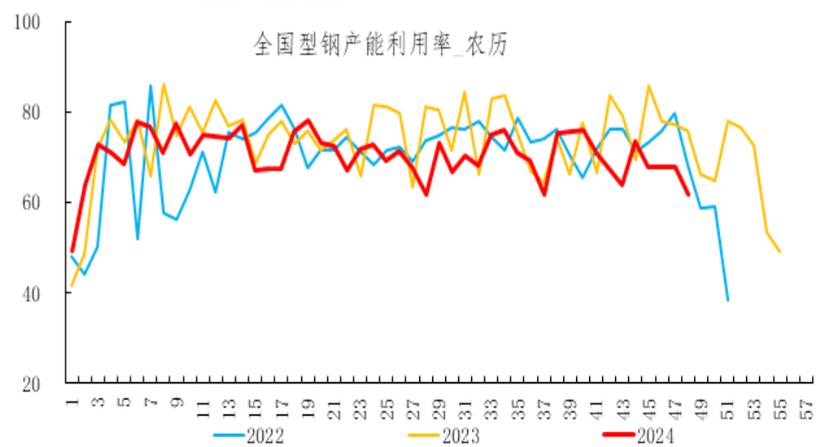
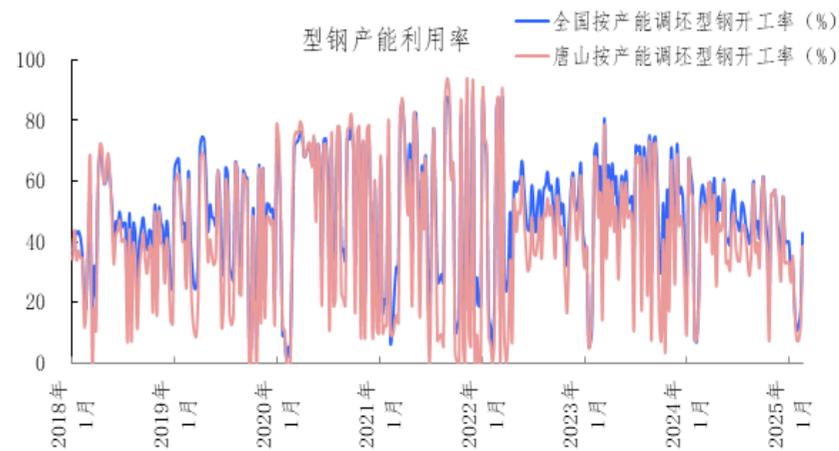


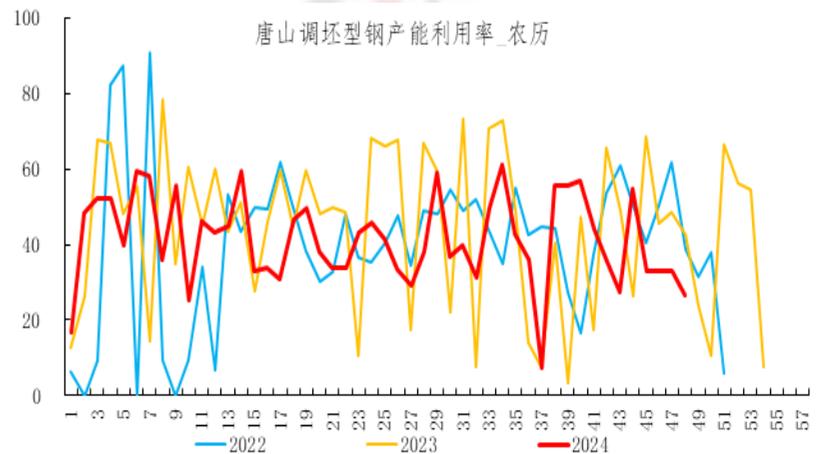
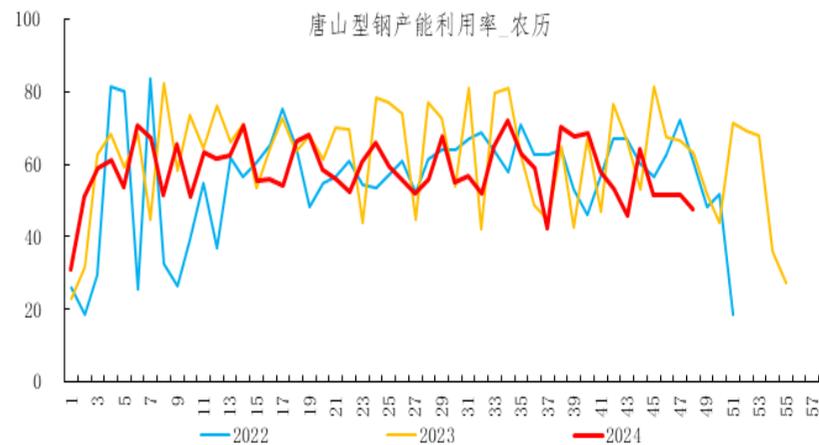


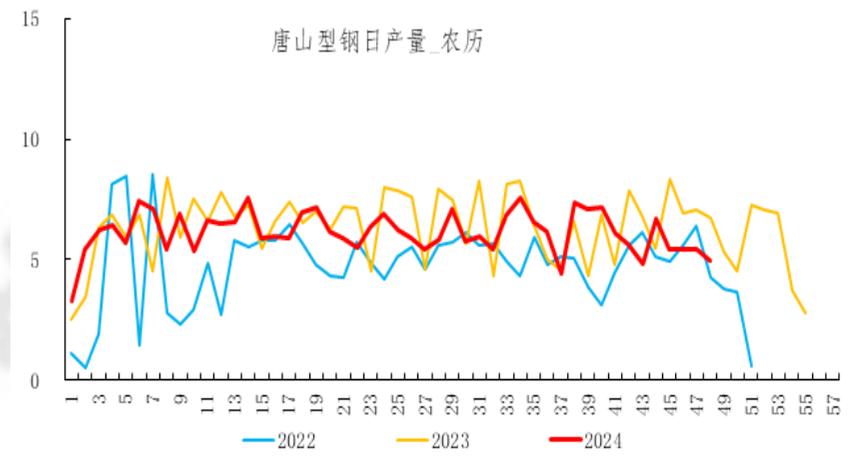
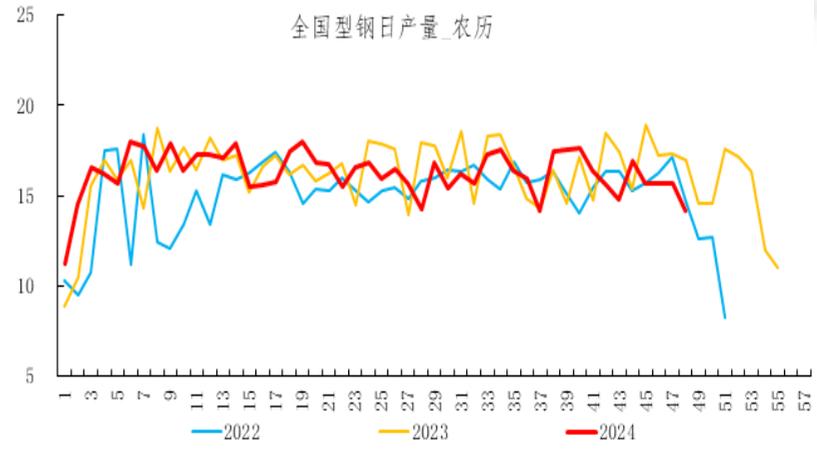
全国型材开工率周比下降

	2025-03-05	2025-02-26	增减值	增减幅
全国按产能型钢开工率 (%)	53.02	69.30	-16.28	
河北按产能型钢开工率 (%)	30.26	60.53	-30.27	
唐山按产能型钢开工率 (%)	27.14	58.57	-31.43	
全国按产能调坯型钢开工率 (%)	14.72	47.00	-32.28	
全国型钢日产量 (万吨)	12.21	15.96	-3.75	-23.50%
唐山型钢日产量 (万吨)	2.85	6.15	-3.30	-53.66%



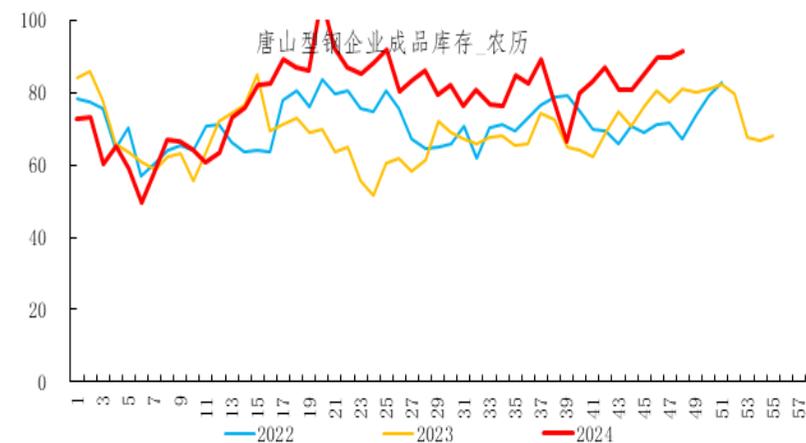
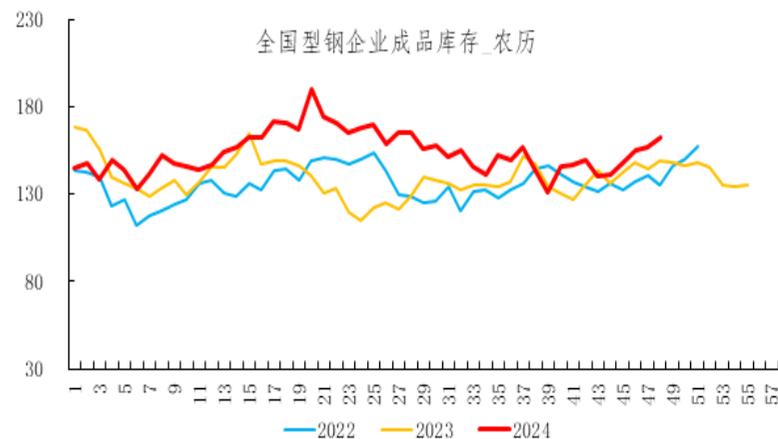


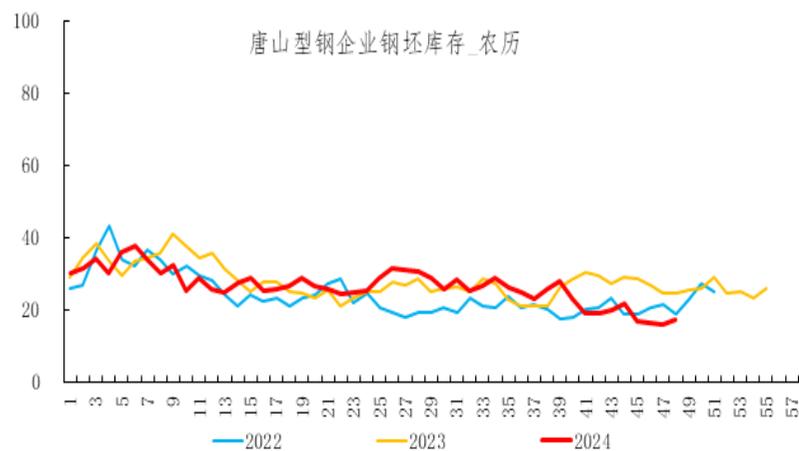
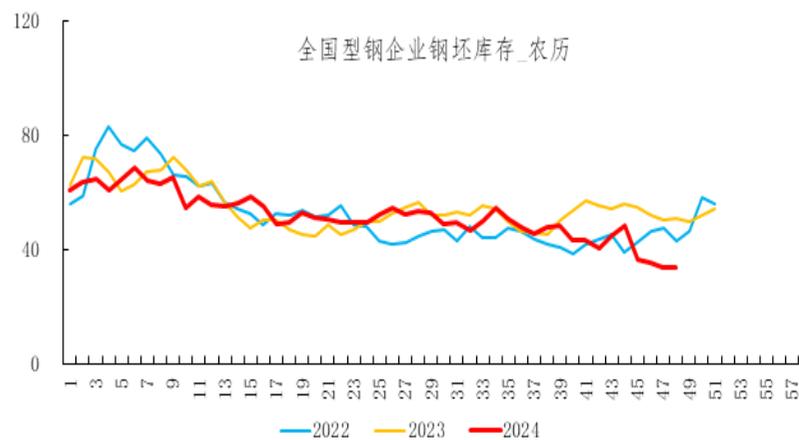




全国型材库存小幅下降

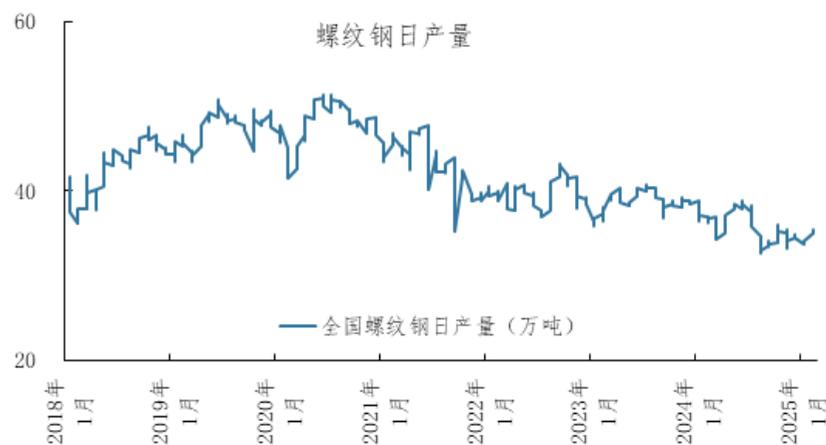
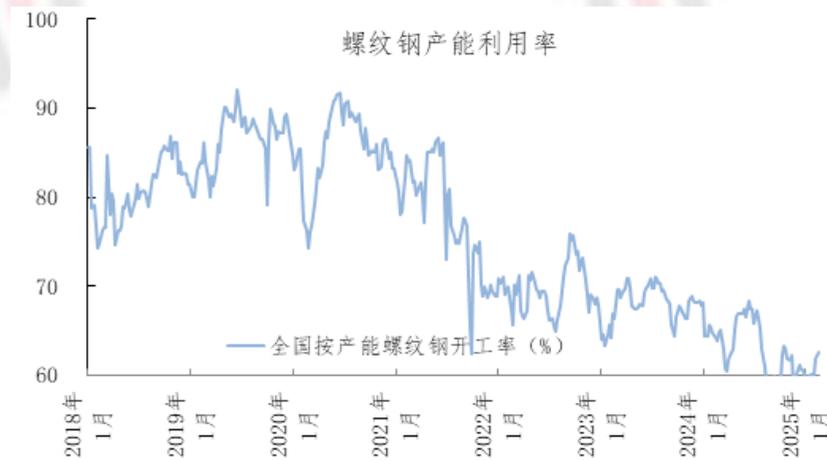
	2025-03-05	2025-02-26	增减值	增减幅
全国型钢企业成品库存 (万吨)	182.60	187.80	-5.20	-2.77%
唐山型钢企业成品库存 (万吨)	97.10	98.90	-1.80	-1.82%
全国型钢企业钢坯库存 (万吨)	47.40	47.35	0.05	0.11%
唐山型钢企业钢坯库存 (万吨)	17.70	17.15	0.55	3.21%

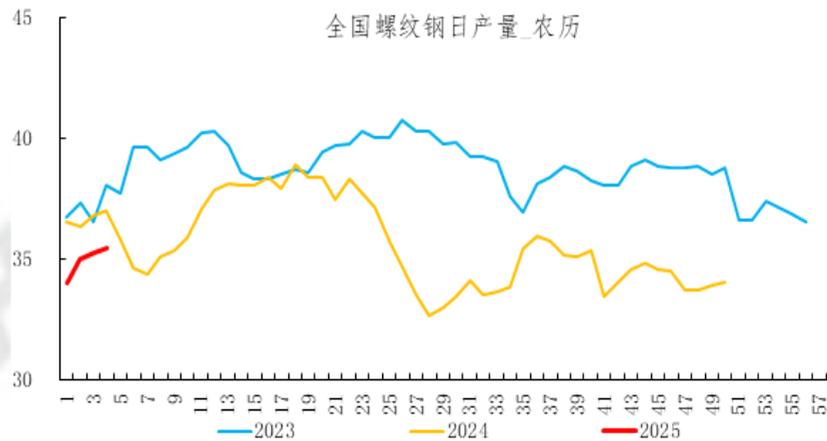
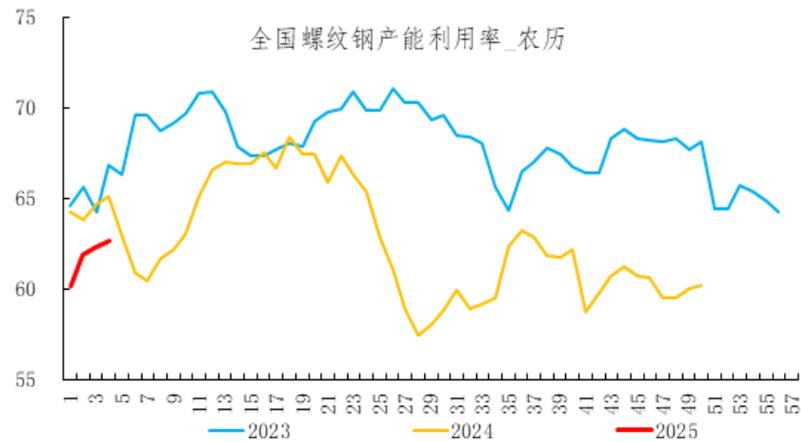




全国按产能螺纹钢开工率周比下降

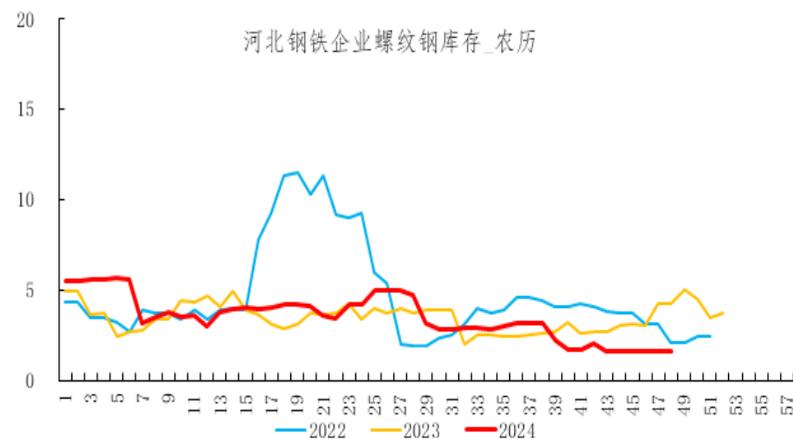
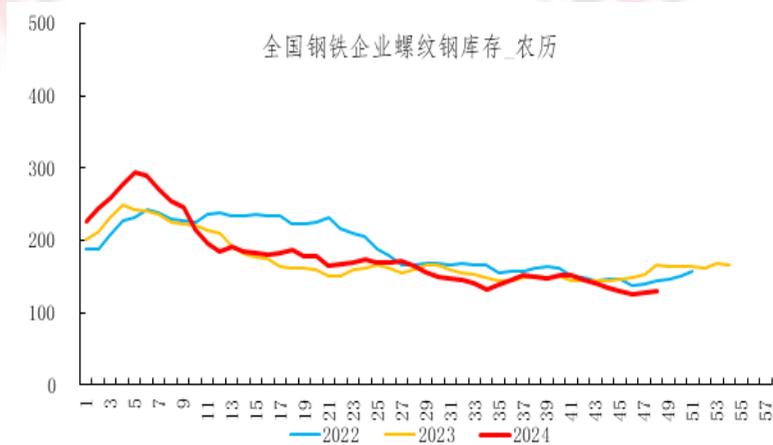
	2025-03-05	2025-02-26	增减值	增减幅
全国按产能螺纹钢开工率 (%)	62.21	62.48	-0.27	
河北按产能螺纹钢开工率 (%)	35.67	35.67	0.00	
唐山按产能螺纹钢开工率 (%)	9.38	9.38	0.00	
全国螺纹钢日产量 (万吨)	35.20	35.35	-0.15	-0.42%
河北螺纹钢日产量 (万吨)	2.80	2.80	0.00	0.00%





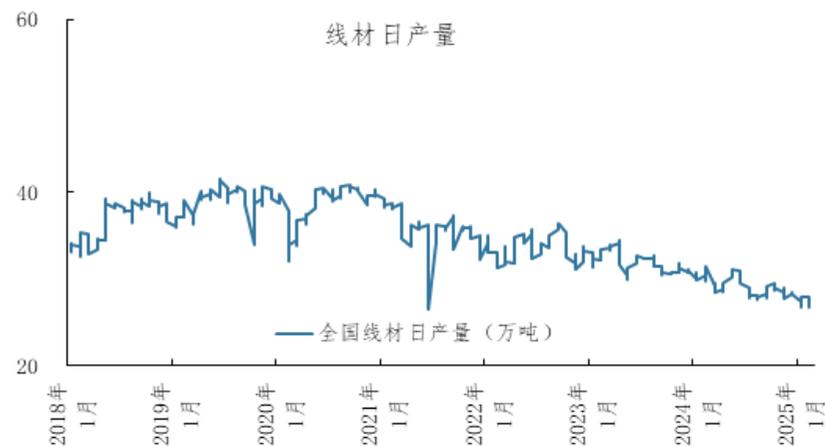
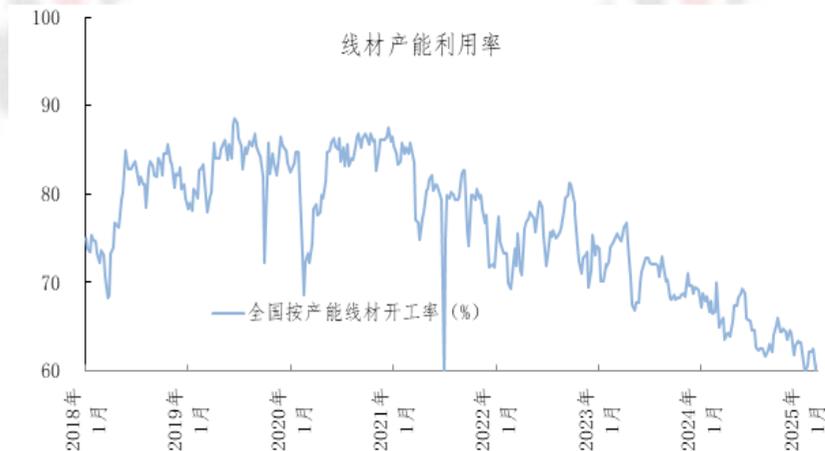
全国钢企螺纹钢库存周比下降

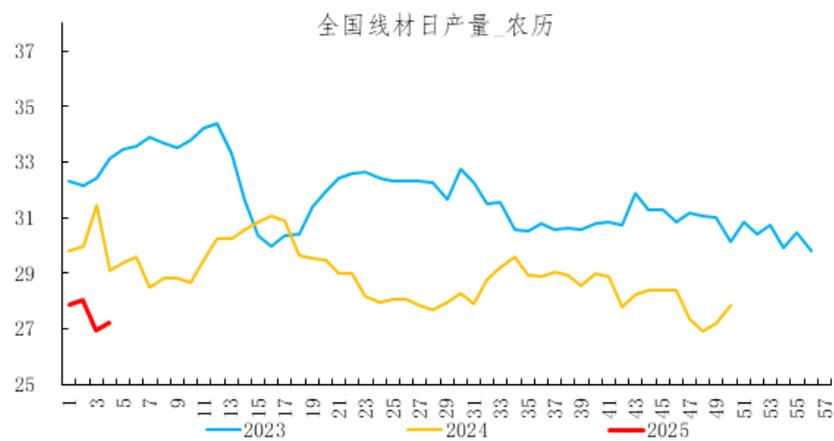
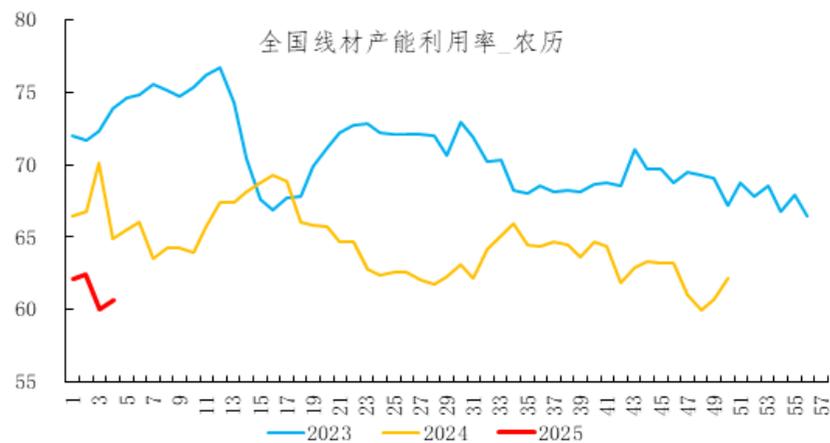
	2025-03-05	2025-02-26	增减值	增减幅
全国钢企螺纹钢库存 (万吨)	185.04	194.54	-9.50	-4.88%
河北钢企螺纹钢库存 (万吨)	3.60	3.60	0.00	0.00%



全国按产能线材开工率周比增加

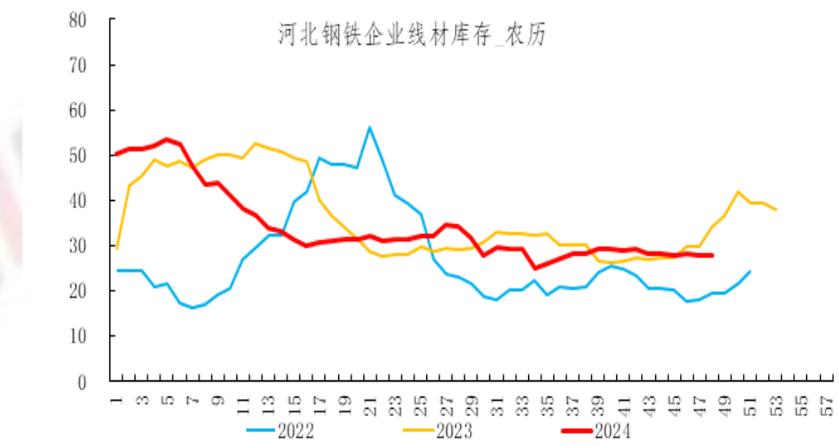
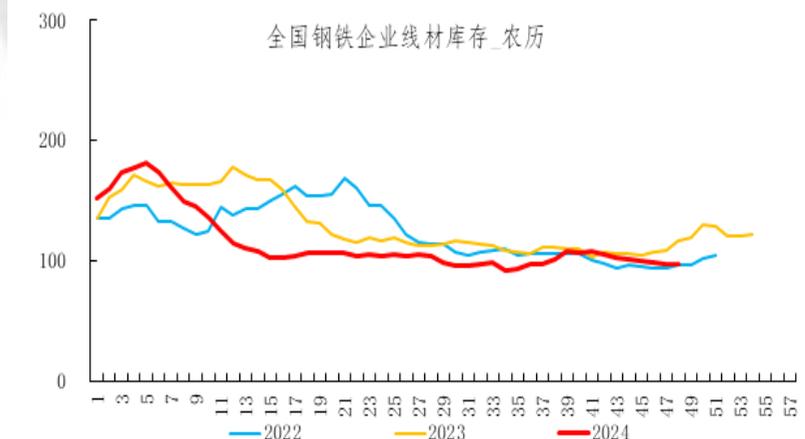
	2025-03-05	2025-02-26	增减值	增减幅
全国按产能线材开工率 (%)	60.20	59.53	0.67	
河北按产能线材开工率 (%)	54.08	54.08	0.00	
唐山按产能线材开工率 (%)	57.73	57.73	0.00	
全国线材日产量 (万吨)	27.01	26.71	0.30	1.12%
河北线材日产量 (万吨)	7.82	7.82	0.00	0.00%





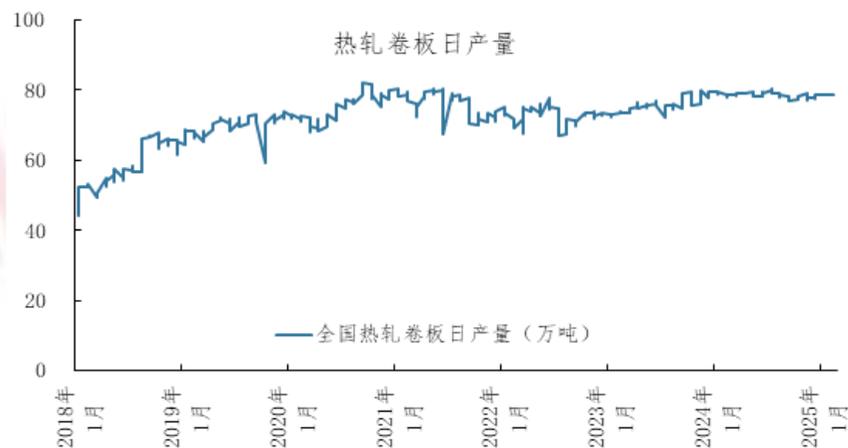
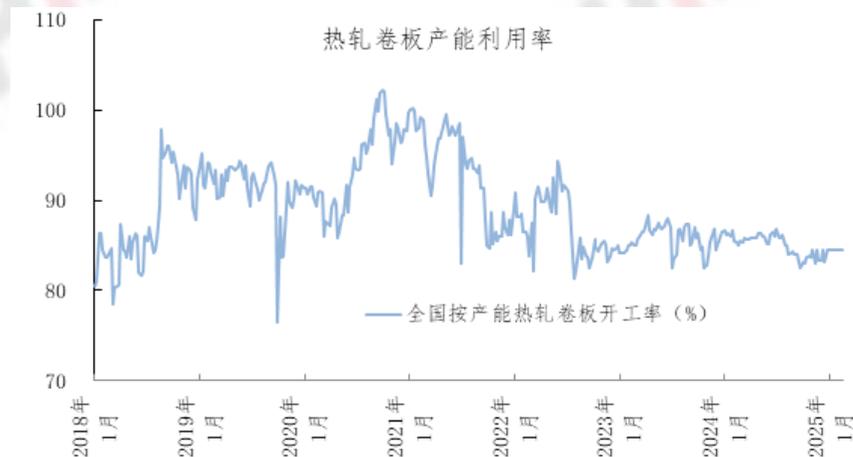
全国钢企线盘库存周比下降

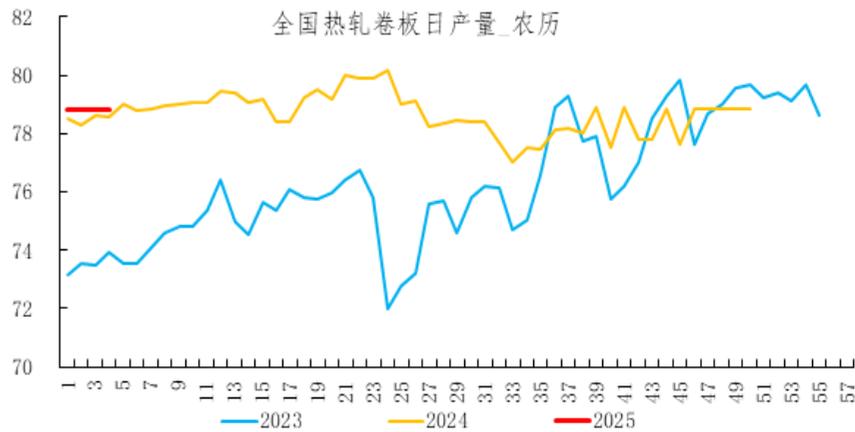
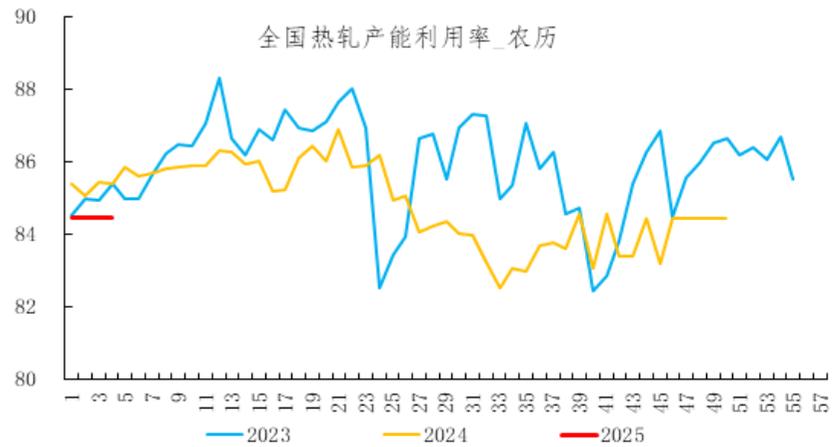
	2025-03-05	2025-02-26	增减值	增减幅
全国钢企线材库存 (万吨)	112.52	123.84	-11.32	-9.14%
河北钢企线材库存 (万吨)	33.58	38.18	-4.60	-12.05%



全国钢企热卷按条数开工率周比小幅下降

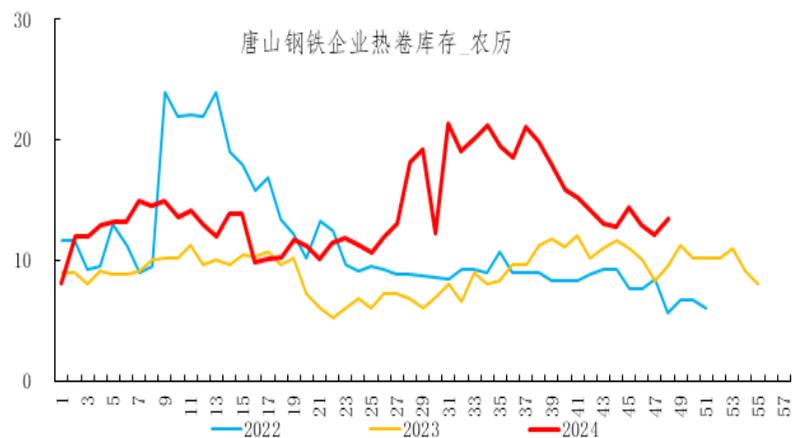
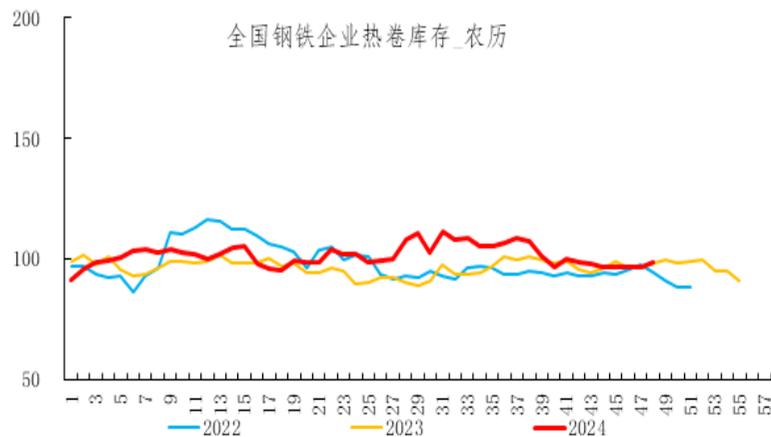
	2025-03-05	2025-02-26	增减值	增减幅
全国按产能热轧卷板开工率 (%)	82.95	84.45	-1.50	
河北按产能热轧卷板开工率 (%)	84.15	87.74	-3.59	
唐山按产能热轧卷板开工率 (%)	85.75	92.29	-6.54	
全国热轧卷板日产量 (万吨)	77.42	78.82	-1.40	-1.78%
唐山热轧卷板日产量 (万吨)	18.35	19.75	-1.40	-7.09%





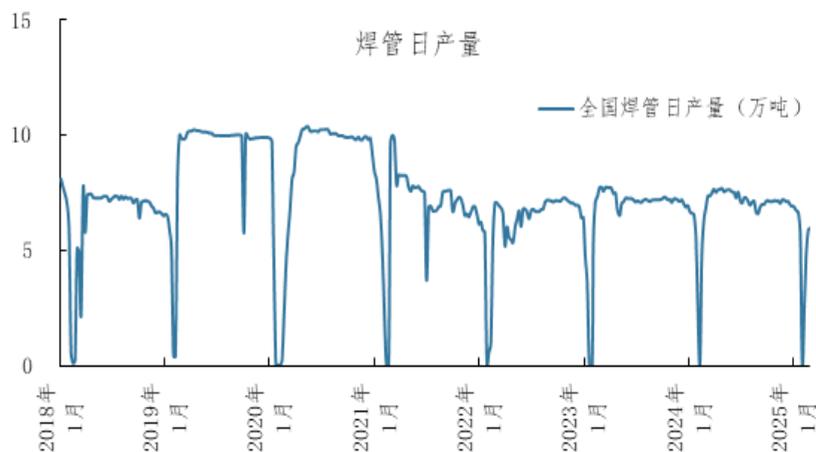
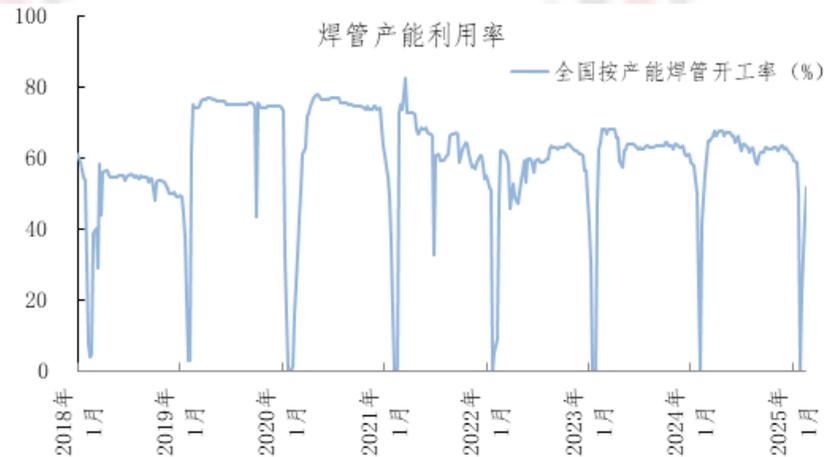
全国钢企热卷库存周比大幅下降

	2025-03-05	2025-02-26	增减值	增减幅
全国钢铁企业热卷库存 (万吨)	99.51	105.50	-5.99	-5.68%
唐山钢铁企业热卷库存 (万吨)	13.81	15.10	-1.29	-8.54%



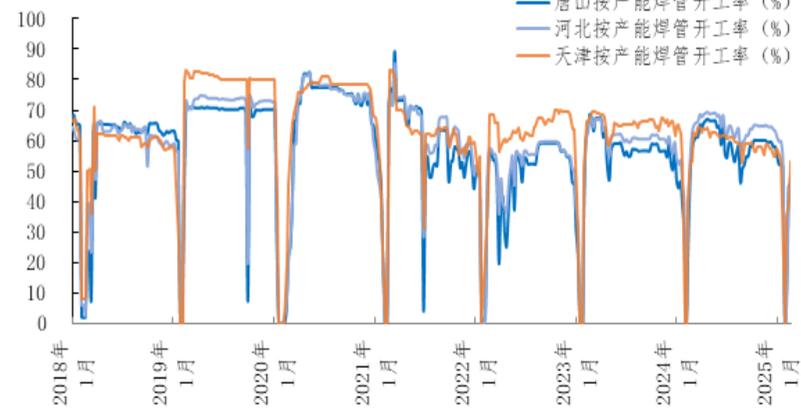
全国按产能管厂开工率较上周继续增加

	2025-03-05	2025-02-26	增减值	增减幅
全国按产能焊管开工率 (%)	56.28	52.44	3.84	
河北按产能焊管开工率 (%)	53.50	48.15	5.35	
唐山按产能焊管开工率 (%)	48.33	44.39	3.94	
天津按产能焊管开工率 (%)	57.85	55.79	2.06	
全国焊管日产量 (万吨)	6.38	5.94	0.44	

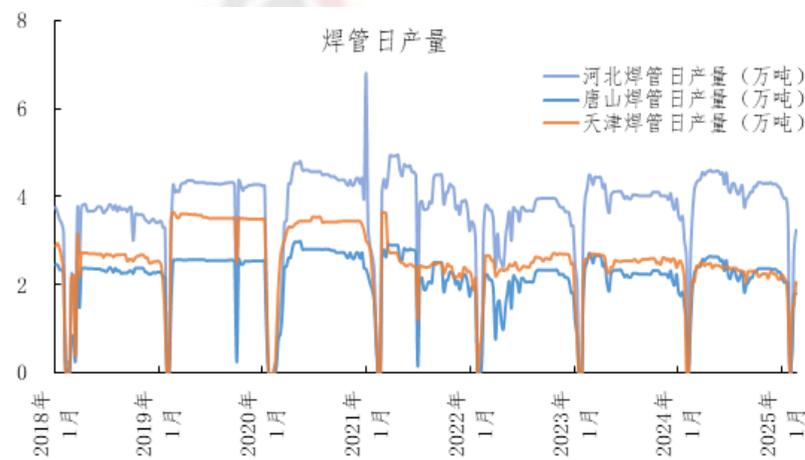


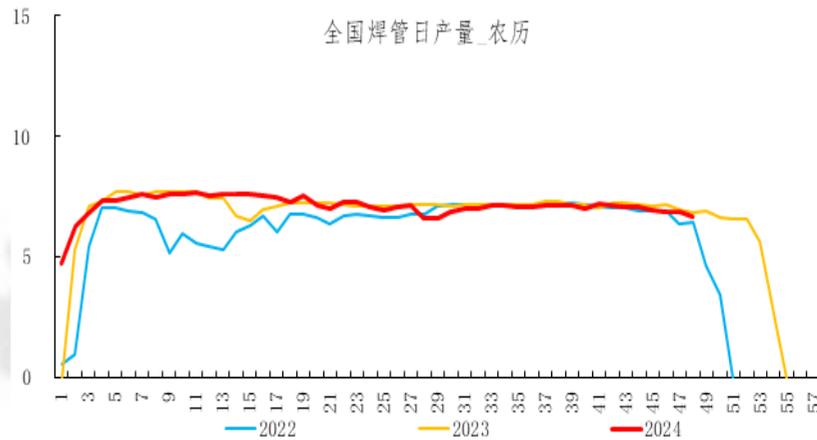
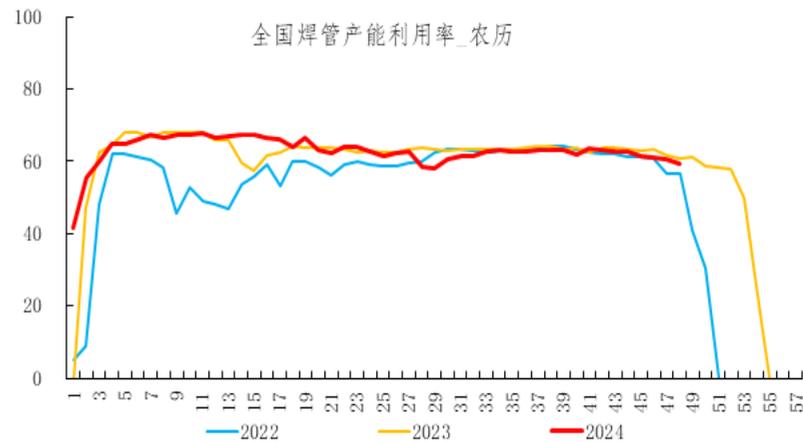
CHINATS | 唐山

焊管产能利用率



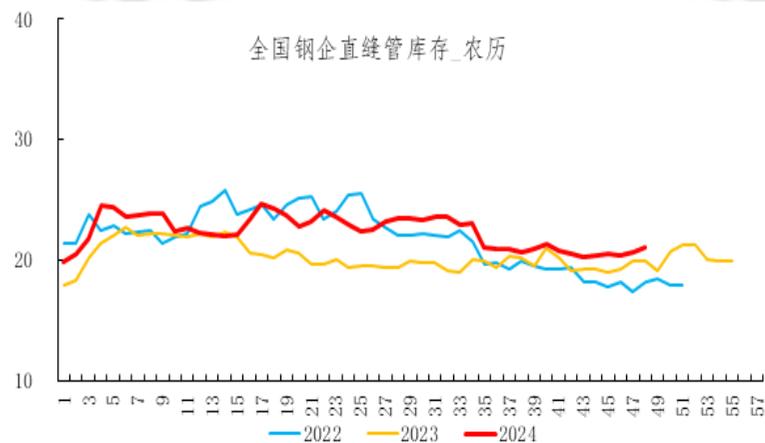
焊管日产量

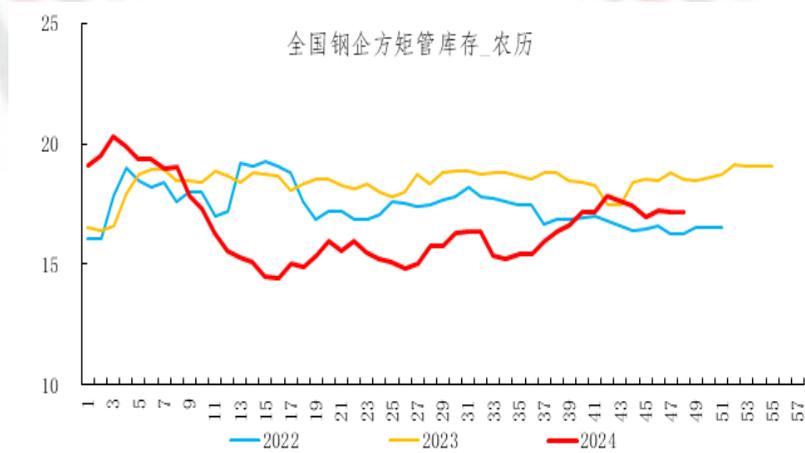




管厂库存较上周小降，下游按需采购为主

	2025-03-05	2025-02-26	增减值	增减幅
全国钢企直缝管库存 (万吨)	21.36	22.06	-0.70	-3.17%
全国钢企方矩管库存 (万吨)	18.65	18.85	-0.20	-1.06%





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。