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加快港口建设 确保矿石运输

交通部水运司综合运输处副处长傅锦秀

各位来宾、女士们、先生们：

上午好！我很高兴在今秋时节并在美丽的青岛与各位来宾相聚，共同交流和探讨钢铁原料领域的合作与发展。至此，我谨代表交通部水运司对2006年第六届中国钢铁原材料国际研讨会的顺利召开表示祝贺，并预祝会议取得圆满成功！借此机会，向多年来关心、支持交通发展的国家发改委、商务部、冶金工业协会及冶金行业的全体代表表示衷心的感谢！下面，我就中国交通水运发展成就和进口铁矿石运输情况向诸位来宾做简单介绍。

一、“十五”期间中国水运发展成就

“十五”期间，中国交通水运行业贯彻落实党中央、国务院提出的一系列战略措施和方针政策，全面落实科学发展观，把握行业发展机遇，深化改革扩大开放，加快水运基础设施建设，推进航运结构调整，整顿水运市场秩序，建立健全法律法规体系，取得了举世瞩目的好成就，成为我国水运史上行业发展速度最快、成效最好的时期。水运行业的快速发展，有力的支撑和保障了国家对外贸易及国民经济持续健康快速的发展。

（一）水运生产快速发展

“十五”期间，水路货运量、货物周转量快速增长。2005年全社会水路货运量21.96亿吨，货物周转量49672亿吨公里，货运量和货物周转量年均增长12.4%和15.9%。五年港口发运煤炭14.95亿吨、装卸进口铁矿石9.3亿吨、进口原油4.7亿吨，远洋运输承担了我国外贸运输量的93%。

“十五”期间，港口吞吐量发展迅猛。2005年全国港口货物吞吐量及集装箱吞吐量分别达到48.5亿吨和7564万TEU，是“九五”末的2.2倍和3.2倍，年均增长17.1%和26.2%。港口吞吐量和集装箱吞吐量连续三年稳居世界第一位，10个港口进入世界亿吨大港行列。

（二）水运基础设施建设成就显著

“十五”期间，沿海港口加快了专业化、大型化、现代化深水码头泊位建设步伐及老港区的功能调整和技术改造力度。相继建成投产集装箱、原油、矿石、煤炭等专业化码头泊位673个，新增港口吞吐能力10.7亿吨。截止2005年底，全国沿海港口共有生产性泊位4933个，吞吐能力28.9亿吨；改善内河航道里程4146公里，建设内河港口泊位248个，新增吞吐能力3500万吨，内河航运现成为世界上最繁忙、运量最大的通航河流；环渤海、长江三角洲、珠江三角洲和西南沿海地区的港口群初具规模，煤炭、原油、铁矿石、粮食、集装箱等重点物资运输体系基本形成，港口通过能力大幅增长，对国民经济的保障能力进一步增强。

（三）航运结构明显改善

“十五”期间，船舶结构进一步调整，船舶大型化、专业化和现代化规模不断扩大，整体技术水平不断提高。截止2005年底，全国运输船舶达20.7万艘/1.02亿载重吨，比“九五”末分别增长84.6%和127.8%，超大型油轮、大型散货船和大型集装箱船拥有量显著增加。

（四）水运市场体系初步完成

“十五”期间，中国水运继续实行对内搞活、对外开放的政策，国有骨干航运企业竞争力

不断增强,民营企业迅速发展,形成了多种经济成分共同发展水运事业的良好局面。跨省运输的国内水路运输企业达到 4000 多家,从事国际运输的船公司 260 多家,中国船舶已挂靠世界 100 多个主要海运国家和地区的 1200 多个港口。

(五) 海事、救助、公安等水运支持系统保障能力全面提高。

稳步推进船舶分道通航制和航行定线制,初步建立海空立体搜救体系,逐步健全安全管理长效机制,安全监管能力有所提高。水路交通的重要地位和基础性作用日益突出,有利地支撑和保障了我国国民经济和对外贸易持续快速健康发展。

二、2006 年外贸进口铁矿石的运输情况和主要特点

2006 年,在我国国民经济和冶金行业快速增长的带动下,我国外贸进口铁矿石继续保持高速增长,1—9 月份外贸港口接卸进口铁矿石 2.49 亿吨,比去年同期增长 25.76%。主要有如下特点:

(一) 外贸铁矿石进口量继续保持高速增长。

1—9 月份外贸进口铁矿石首次突破 2 亿吨。接卸外贸进口铁矿石 1000 万吨以上的港口有 8 个,其中青岛港 4359 万吨、日照港 3964 万吨、天津港 2958 万吨、宁波港 2761 万吨、上海港 2072 万吨、唐山港 1695 万吨、舟山港 1485 万吨、湛江 1183 万吨,同比分别增长 20.5%、71.3%、5.4%、2.6%、10.6%、218.6%、36.9%、60.9%。接卸 500 万吨以上的港口有 5 个:分别是连云港 875 万吨、烟台 713 万吨、防城 646 万吨、营口港 588 万吨、大连 502 万吨。

(二) 大型化、专业化铁矿石码头能力明显增强。

2006 年,我国沿海港口具备 10 万吨级以上的大型化、专业化铁矿石码头主要有大连、营口、秦皇岛、唐山、天津、青岛、烟台、日照、宁波、舟山、湛江、防城和南通港。大型船舶采取水上过驳作业的港口有:上海、广州和深圳港。随着铁矿石大型化、专业化码头能力的建成和投产,港口接卸铁矿石能力和效率也大幅度提高,基本缓解了我国接卸大型进口铁矿石船舶能力不足的严重局面,同时大大减缓了进口铁矿石船舶的待泊停时,基本满足了钢铁行业对原料供应的运输需求,同时也为我国钢铁行业的健康发展和世界钢铁大国提供了有力保障。

(三) 铁矿石港存量有所下降,但个别港口压港依然严重。

由于我国铁矿石外贸进口量继续保持高速增长,今年同 1—9 月相比进口增加 4900 万吨,增幅达到 24.5%。铁矿石日港存量基本保持在 4000 万吨左右,由于港存能力的扩增,使得港存压港状况有所缓解,但个别港口矿石港存仍处于饱和和压港状态。由于进口铁矿石受到国际贸易价格和国内市场需求的影响,铁矿石船舶集中到港情况时有发生,加之铁路运输总体能力不足,铁路部门在优先确保煤炭、粮食及农用物资运输的情况下,在个别时段和时节对主要港口的港存矿进行突击疏运,矿石港存量有不同程度的缓解。但由于我国铁矿石进口量始终保持高速增长,加之大量的贸易矿积压在港,因而导致个别港口矿石港存压港严重。针对矿石港存压港局面,交通部领导高度重视,积极采取措施,加强行业内部的管理与协调,要求港航企业挖潜扩能,加强车、船、货的衔接和沟通,强化调度指挥,煤、矿运力衔接并用,确保煤、矿运输船舶优先装卸。在铁路和有关部门的共同努力下,通过提高装卸效率,加快车船周转等措施,压港状况有所缓解。

(四) 铁矿石水路、公路疏运量明显增加。

由于铁路运能总体不足和进出港物资的不平衡,各有关单位积极采取措施,加强协作与配合,加大了水路、公路疏运铁矿石的组织力度。铁矿石水路疏运量达到 35%,公路疏运量 32 万吨,铁路疏运量 33%。

三、“十一五”交通港口发展规划

“十一五”期间,交通部依据《中华人民共和国港口法》,从国家发展战略和全局考虑,制定了《全国沿海港口布局规划》。规划根据不同区域的经济发展、港口现状、运输关系和主要货类的合理流向及特点,划分为环渤海、长江三角洲、东南沿海、珠江三角洲和西南沿海五大港口群和八大运输系统。使港口更好的服务于国家经济安全、社会进步、贸易发展、结构调整及国防建设,衔接和促进国家综合运输体系,合理有序的开发和利用港口岸线资源,指导和引领港口建设向规模化、专业化、集约化、效益化方向发展,使港口逐步形成布局合理、功能明确、节约资源、安全环保、便捷高效、衔接协调、市场有序的水路客货运输系统,保障国家经济社会、贸易、国防可持续发展。

同志们、朋友们,让我们共同努力,加强协作,将我们中国发展成为世界钢铁生产和钢铁消费的重要平台和最大市场,为我们各个行业的稳定发展和互利共赢而努力奋斗!谢谢大家!

6th China Int'l Steel & Raw Materials Conference 2006

2006 年第六届中国钢铁原材料国际研讨会

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The Development of Iron and Steel Industry and Demand for Imported Iron Ores in China

China Iron & Steel Association

Luo Bingsheng

Oct 24, 2006

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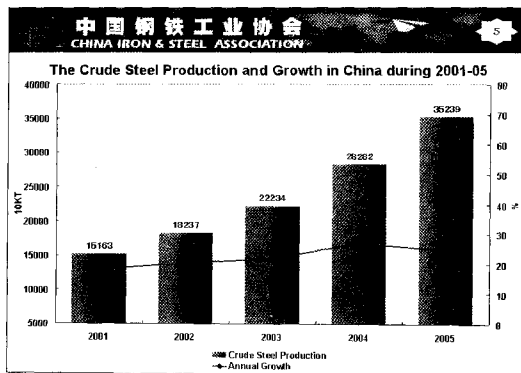
I. The rapid growth of China's iron and steel production in 2001-2005 has led to great increases of iron ore imports.

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In 2001-2005, the strong market demand has driven up the rapid development of China's iron and steel industry. In 2000 the crude steel production reached 128.5 million tons and in 2005, jumped to 352.3 million tons. Within 5 years, the production increased by 223.8 million tons, with a growth rate of 174.16%.

During 2001-2005 the accumulated production of crude steel in China reached 1.1915 billion tons, meeting 92.8% of the domestic market demand.



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The crude steel production in China accounted for 15.2% of the world total in 2000, but in 2005, up to 31.1%, which is 15.9% growth;

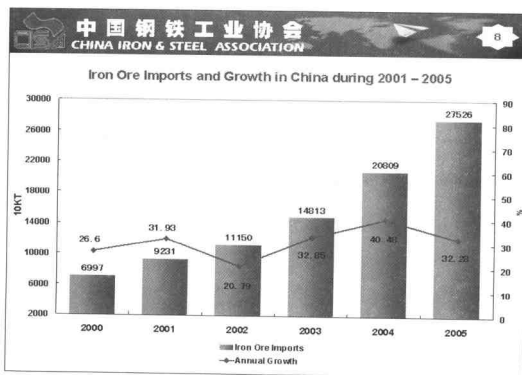
In the first five years of this century, the total increase of crude steel production in the world was 284.8 million tons, in which China's growth has taken up 78.6%.

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The rapid growth of China's iron and steel production has led to increasing imports of iron ores year on year.

In 2000, the imports reached 69.97 million tons and in 2005, increased to 275.26 million tons; within 5 years, the increase was 205. 29 million tons, growing by 2.93 times.



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In the global perspective, according to IISI, in 2005, in 40 countries and regions, the BF pig iron production reached 781.073 million tons, an increase of 8.29% compared with the previous year. If China's BF production is taken out, in these 39 countries and regions, the production was 450.668 million tons, a decrease of 2.78% compared with the previous year;

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The BF Production of 40 Countries and Regions in the World in 2005

Unit: 10KT

Unit: 10Kt					
Countries and Regions	2004	2005	± Comparison b/w 05 & 04	±% Comparison b/w 05 & 04	
EU25	11092.5	10699.1	-394.4	-3.56	
CIS	6569.9	6261.6	-267.3	-3.35	
North America	5539.7	4878.1	-661.6	-11.94	
South America	3679	3842	+37	+0.95	
Africa	713	721.1	+8.1	+1.14	
Asia	40375.5	47639.5	+7264	+17.99	
Incl.	China	25775.4	33040.5	+7265.1	+28.19
	Japan	8297.4	8306.6	+9.2	+0.11
	Korea	2755.6	2730.8	-24.8	-0.9
	Taiwan Province	1035.4	952.7	-82.7	-7.99
Oceania	645.4	685.6	+40.2	+6.23	
Total (40)	72130.9	78107.3	+5976.4	+8.29	
Excl. China (39)	46355.5	45066.8	-1288.7	-2.78	

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According to this statistics, in 2005, the growth in the global BF production came almost all from China. Except China, the demand for iron ores in other countries and regions is steady or goes down.

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II. The trend of total volume of iron ore imports has been changing from rapid growth to steady growth.

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1. China's Imports of Iron Ores in Jan.-Aug. 06

Iron ore imports in this period reached 219,071,800 tons, an increased of 43,138,700 tons compared with the same period last year, growing by 24.52%.

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Iron Ore Imports and Growth Rate during Jan.-Aug., 06

Unit: 10KT

Item Countries Regions	Jan-Aug	Increase comp. wt same period pre. year	± % Increase comp. wt same period pre. year	Accountin g for % of the total	Accountin g for % of the total in pre. year	± % Compared
Total Imports	21907.18	4313.87	24.52	100	100	---
Incl.	Australia	8310.82	1065.24	14.7	37.94	-3.24
	India	5397.23	662.58	14.17	24.36	-2.21
	Brazil	4868.12	1537.31	45.88	22.31	19.04
	South Africa	862.66	135.51	18.64	3.94	4.13

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Based on the analysis on the development trend, there are the following features of iron ore imports in China:

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① Downward Trend in Volume and Growth Rate

In the Q1 of 2006, the imports reached 80,912,300 tons, increased by 17,563,800 tons compared with the same period of last year, a growth of 27.73%;

But in Q2, the imports went down to 80.56 million tons, increased by 12.55 millions compared with the same period of last year, a growth of 18.45%. Q2 increase, compared with that of Q1, was 5.01 million tons less, and the growth rate dropped by 9.26%;

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In July, the imports were 24.735 million tons, a growth of 14.56% compared with the same period of last year, and 2,157,500 tons less than the monthly average import in the 1st half of this year; the growth rate was 8.28% less than the 1st half of this year.

In August, the imports were 32,809,400 million tons, 42.09% increase compared with the same period last year, the imports went up again, as steel works in the north of China purchased raw materials at this time to prepare for their winter production.

