

مروری بر بازار جهانی فولاد و اثر آن بر بازار داخل

(ششمین همایش چشم انداز صنعت فولاد و معدن ایران)

بهرام سبحانی

مدیر عامل شرکت فولاد مبارکه اصفهان

رئیس هیئت مدیره انجمن تولید کنندگان فولاد ایران

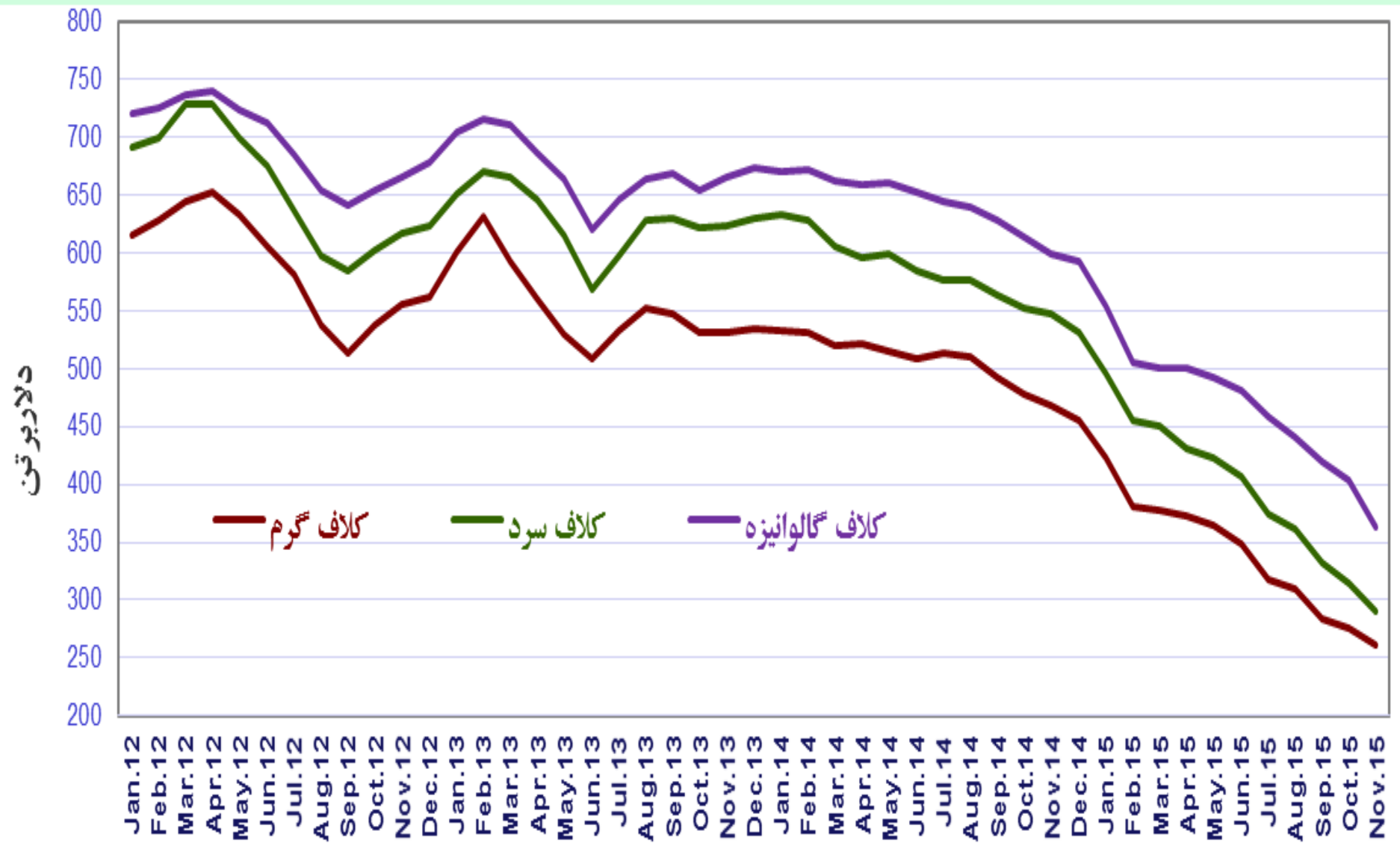
(تهران- بهمن 94)



روند تغییرات قیمت:

- تغییرات قیمت در بازار جهانی
- تغییرات قیمت در بازار داخلی

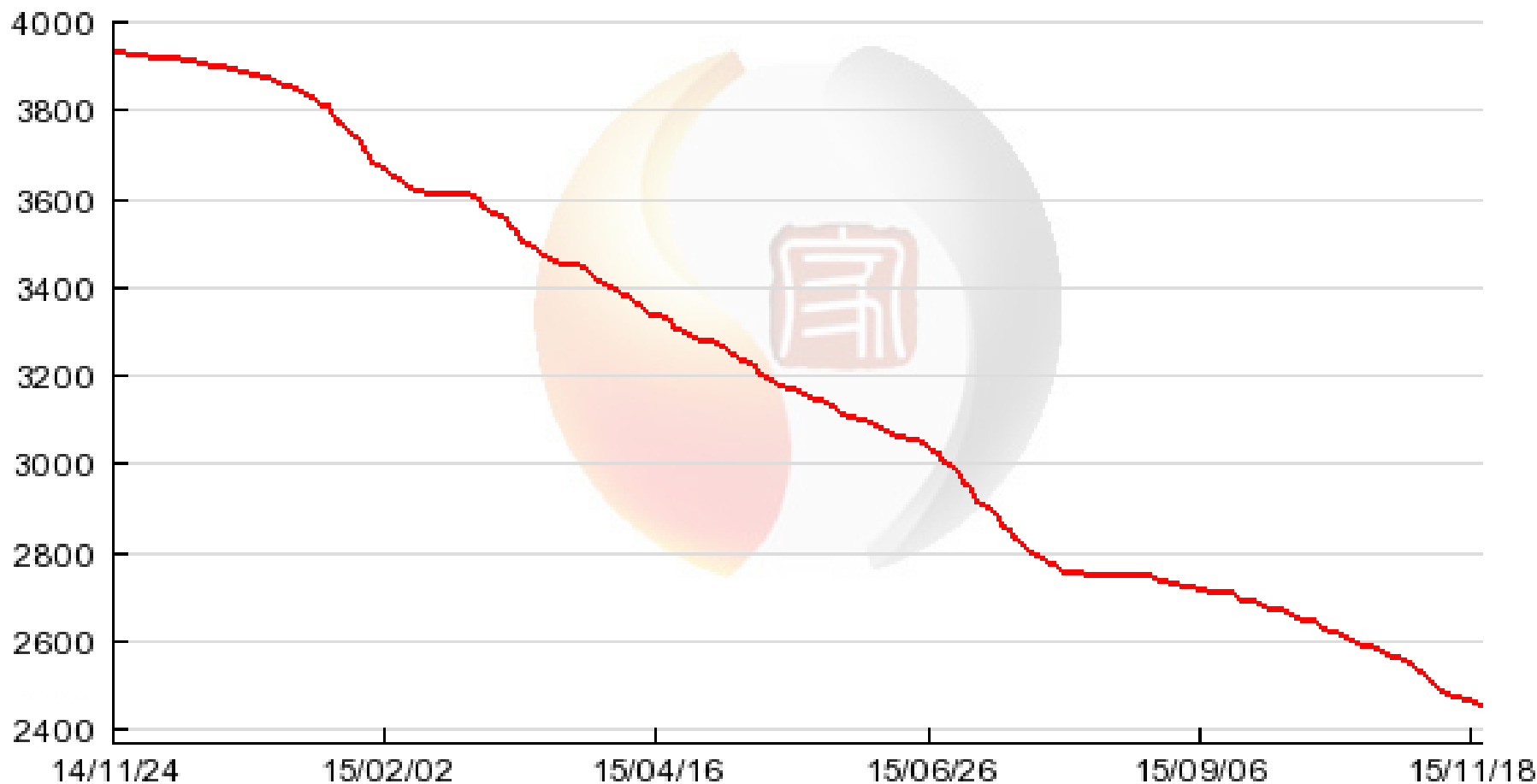
روند تغییرات قیمت در بازار جهانی



روند تغییرات قیمت در بازار جهانی

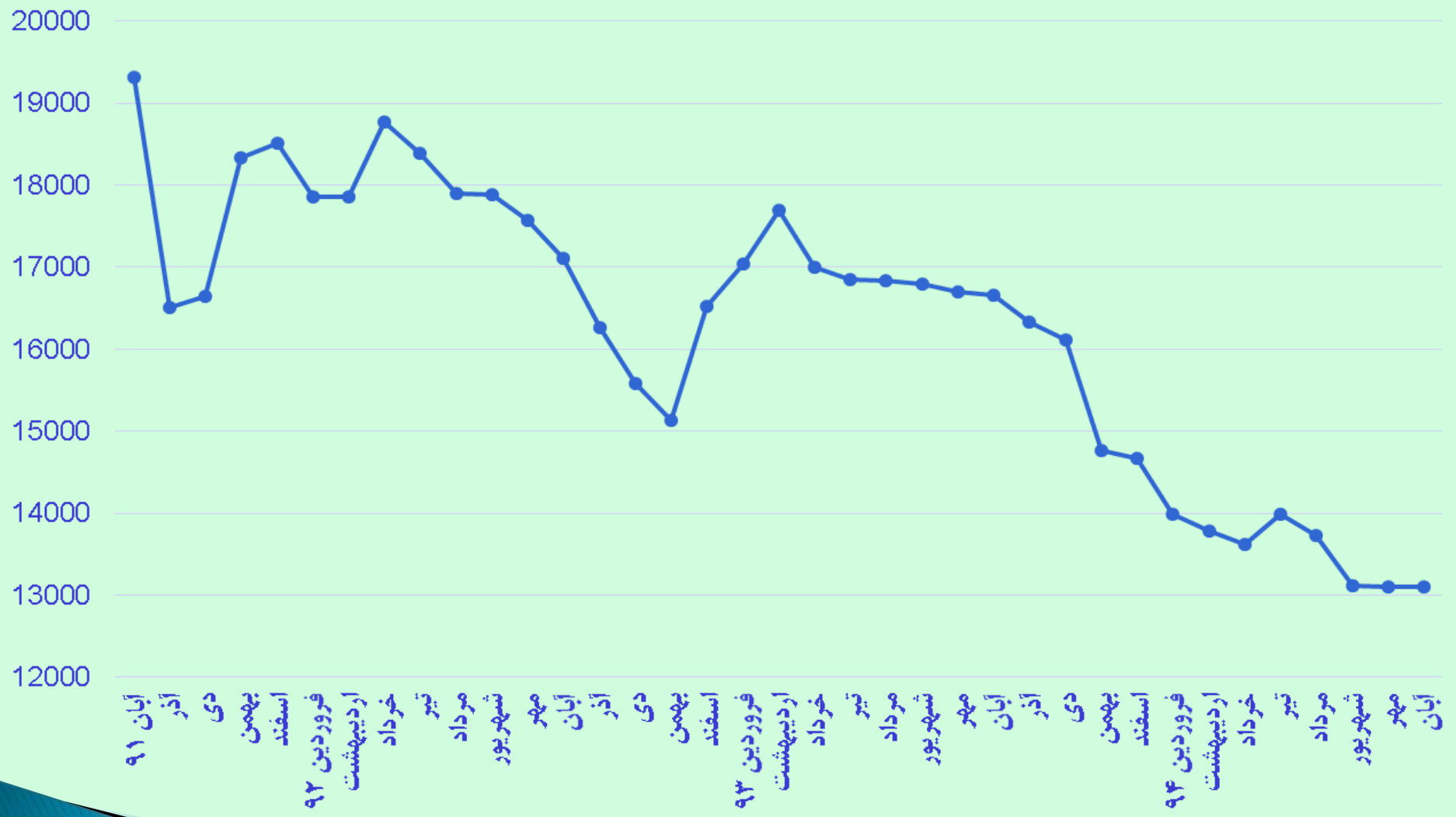
SteelHome (China) Steel Average Price(2014-11-22--2015-11-22)

Source: SteelHome website (www.steelhome.cn)



— CR Sheet/Coil 1.0mm(avg:3187RMB)

تغییرات قیمت فروش میلگرد داخلی از سال ۹۱ تا کنون



نقش چین در ایجاد بحران و تاثیر کاهش قیمت ها بر اقتصاد فولاد سازان

December 9, 2015 6:56 pm

China steel exports climb to above 100m tonnes

By Henry Sanderson

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China's steel exports have hit a record level this year at over 100m tonnes, illustrating how the country is relying on global sales to help reduce its surplus production.

Rising Chinese exports of processed raw materials from steel to aluminium have helped pushed commodity prices down to their lowest level in almost a decade, hitting shares of global miners and steel producers.

A weaker Chinese currency is likely to help exporters in the country even further. The renminbi traded at a four-year low on Wednesday, after the People's Bank of China cut its reference rate to the lowest level since 2011.

The country's total steel exports rose 22 per cent in the first 11 months of the year to 101.7m tonnes, data show. In addition, China's Ministry of Finance said Wednesday it will cut export taxes on steel billet from 25 per cent to 20 per cent.

Chinese steel imports push mills to brink of 'catastrophe'

Michael Pooler, Jim Pickard and Christian Oliver

Union leaders have warned the government that Britain's steel industry faces "catastrophe" unless ministers block Chinese attempts to achieve "market economy status" at the WTO later this year.

The warning came as Britain's biggest steelmaker said it was cutting more than 1,000 jobs, prompting recriminations that the UK was failing to stand up for the steel industry in the face of a deluge of cheap Chinese imports.

Tata Steel said 750 positions would go at its Port Talbot plant, the UK's biggest steelworks by output and workforce, along with 100 jobs at mills in Trostre, Corby and Hartlepool and 200 support roles.

The decision underlines the evisceration of Britain's steel industry, which during the past

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ArcelorMittal slumps to \$8bn loss as Chinese supply throttles steel prices

The world's biggest steelmaker is looking to raise funds to pay down debt as it tackles falling prices



TOP NEWS

Sun Jan 17, 2016 | 11:44 PM EST

China steel firms suffered \$8 bln in losses in Jan - Nov 2015 -assn



By David Stanway

BEIJING Jan 18 (Reuters) - China's major steel firms lost 53.1 billion yuan (\$8.07 billion) from January to November last year, as prices fell because of overcapacity and slumping demand, the China Iron and Steel Association (CISA) said on Monday.

China's steel sector, responsible for around half of global output, has been one of the biggest casualties of the country's economic slowdown, with prices now at multi-decade lows as a result of a massive supply glut.

Thyssenkrupp Posts Net Loss on Record Chinese Steel Imports

Tino Andresen

February 12, 2016 — 9:30 AM IRST

Updated on February 12, 2016 — 8:39 PM IRST

- ▶ Adjusted earnings before interest and taxes miss estimates
- ▶ Company says it needs materials recovery to meet profit target

Thyssenkrupp AG, Germany's largest steelmaker, swung to a net loss in the fiscal first quarter as the industry reeled from a slide in prices wrought by record Chinese exports.

The net loss was 23 million euros (\$26 million) in the three months through Dec. 31 compared with net income of 50 million euros a year earlier, the Essen-based company said Friday in a statement.

Adjusted earnings before interest and taxes declined 26 percent to 234 million euros, just missing the 239.6 million-euro average of 11 estimates compiled by Bloomberg. The company reiterated a full-year profit target of 1.6 billion to 1.9 billion euros.

The world's largest steel companies are suffering from China's slowdown which is sapping demand and fueling a global glut as the nation floods the market with cheap exports. The European Union on Friday imposed tariffs as high as 26 percent on Russian and Chinese makers of non-stainless products after it found imports from the two countries unfairly undercut producers in Europe.

اقدام کشورها برای مقابله با بحران

Notice of Initiation of Antidumping Investigation against Alleged Dumping of Colled Rolled Coils/Sheets into Pakistan Originating in and/or Exported from China and Ukraine.

The National Tariff Commission (the "Commission") received an antidumping application under Section 20 of the Antidumping Duties Ordinance, 2015 (the "Ordinance") on June 11, 2015 from Aisha Steel Mills Limited, Karachi, Pakistan, (the "Applicant"), a domestic producer of Cold Rolled Coils/Sheets (the "domestic like product") alleging that Cold Rolled Coils/Sheets are being exported to Pakistan at dumped prices from the People's Republic of China and Ukraine (hereinafter collectively referred to as "Exporting Countries"), which have caused and are causing material injury to the domestic industry producing like product.

Product under Investigation

The product allegedly being dumped into Pakistan is Cold Rolled Coils/Sheets (originating in and/or exported from the Exporting Countries and is classified under Pakistan Customs Tariff classification numbers. Nos. 7209.1690, 7209.1790, 7209.1890, 7209.1610, 7209.1710, 7209.1810, 7209.2690, 7209.2790, 7209.2890, 7209.2610, 7209.2710 and 7209.2810 (the "investigated product"). The investigated product is used in the manufacturing of Auto Skin Parts, Auto Sub Assembly/Inner Body Parts, Fabricated Goods like Doors, Cabinets Drums, Tin plates etc., Pipes, Tubes and Refrigerators, Washing Machines, Geysers and Ovens.

U.S. Calls for 256% Tariff on Imports of Steel From China

Sonja Elmquist

December 23, 2015 — 1:43 AM IRST

Updated on December 23, 2015 — 7:42 AM IRST

- ▶ Imports from South Korea, India and Italy also face tariffs
- ▶ Taiwan found not to have dumped steel in U.S. markets

Corrosion-resistant steel imports from China were sold at unfairly low prices and will be taxed at 256 percent, according to a preliminary finding of the U.S. Department of Commerce.

Imports from India, South Korea and Italy will be taxed at lower rates, the agency said Tuesday in a statement. Imports from Taiwan and Italy's Marcegaglia SpA will not face anti-dumping

QUICKTAKE
Iron Ore Wars

tariffs. The government found dumping margins of 3.25 percent for most South Korean steel imports, with Hyundai Steel Co.'s shipments subject to duties of 3.5 percent. Imports from Italian companies excluding Marcegaglia will be taxed at 3.1 percent. Indian imports are subject to duties from 6.6 percent to 6.9 percent.

THE WALL STREET JOURNAL.

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<http://www.wsj.com/articles/u-s-steel-projects-worse-than-expected-shipments-in-2015-1446589798>

BUSINESS | EARNINGS

U.S. Sets New Duties on Chinese Steel

Ruling places preliminary duties of up to 236% on some imports; U.S. Steel posts another loss

US Opens Anti-Dumping Probe on \$2 Billion in Steel Imports

Agence France-Presse

Sep 2, 2015

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Seven nations are accused of "dumping," and undercutting America's domestic steel industry.



WASHINGTON – The U.S. Commerce Department launched a probe Tuesday into alleged dumping by several foreign steel producers accused of undercutting America's domestic industry.

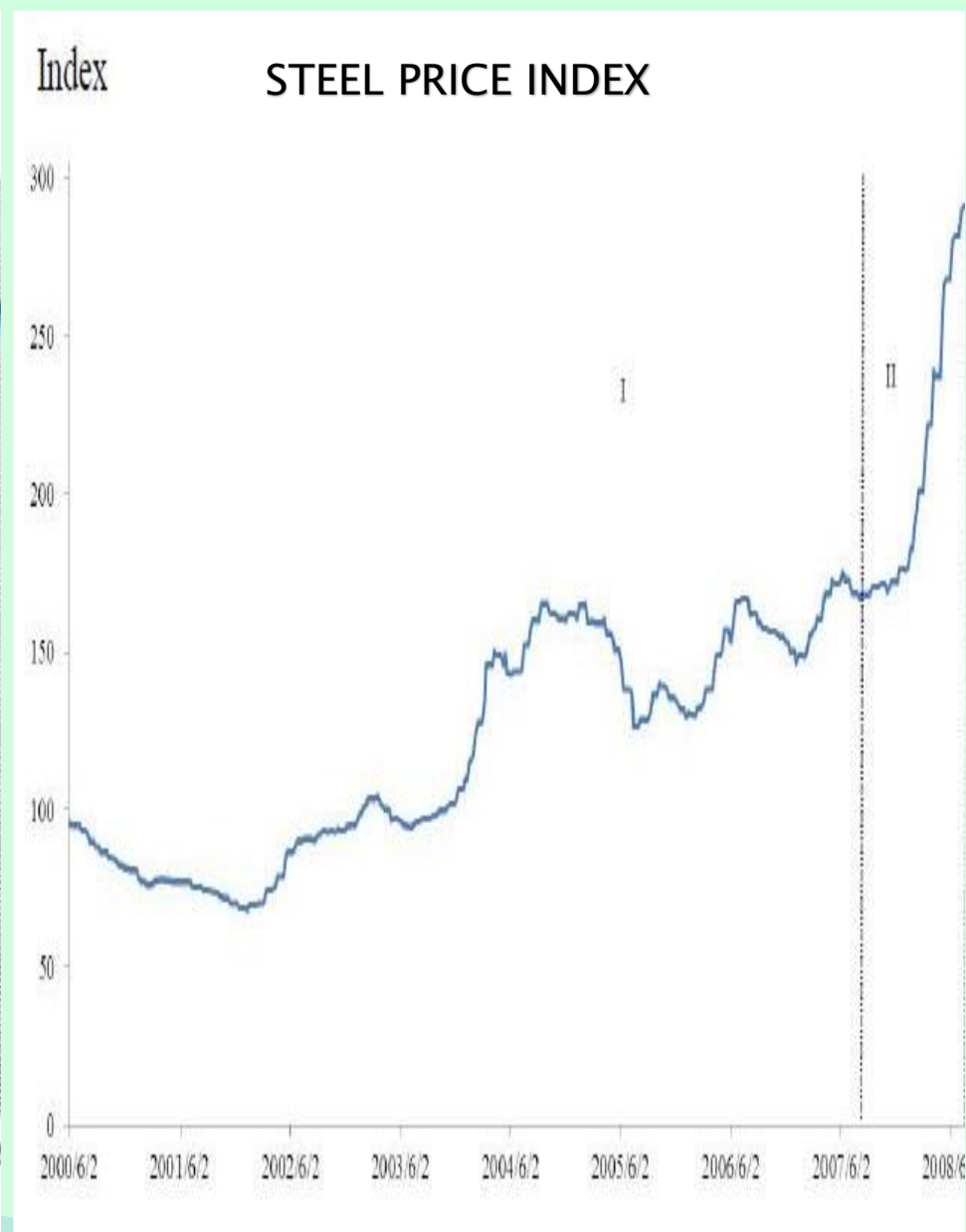
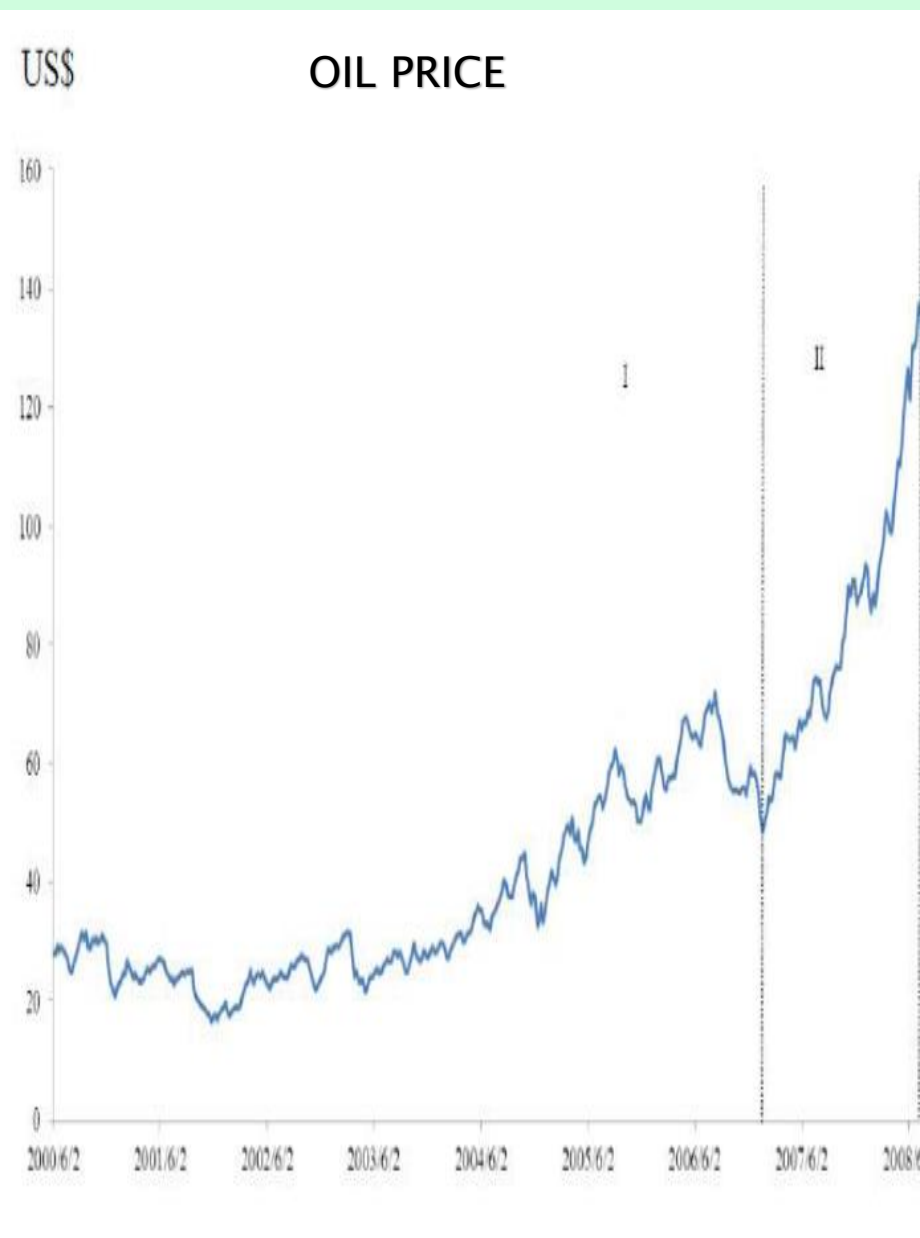
U.S. officials said seven nations were involved in underpricing some \$2 billion worth of steel: Australia, Brazil, South Korea, the Netherlands, Britain, Japan and Turkey.

Japanese producers were selling hot-rolled steel flat products into the United States at 16% under the market prices while producers from Turkey discounted their steel by one-third.

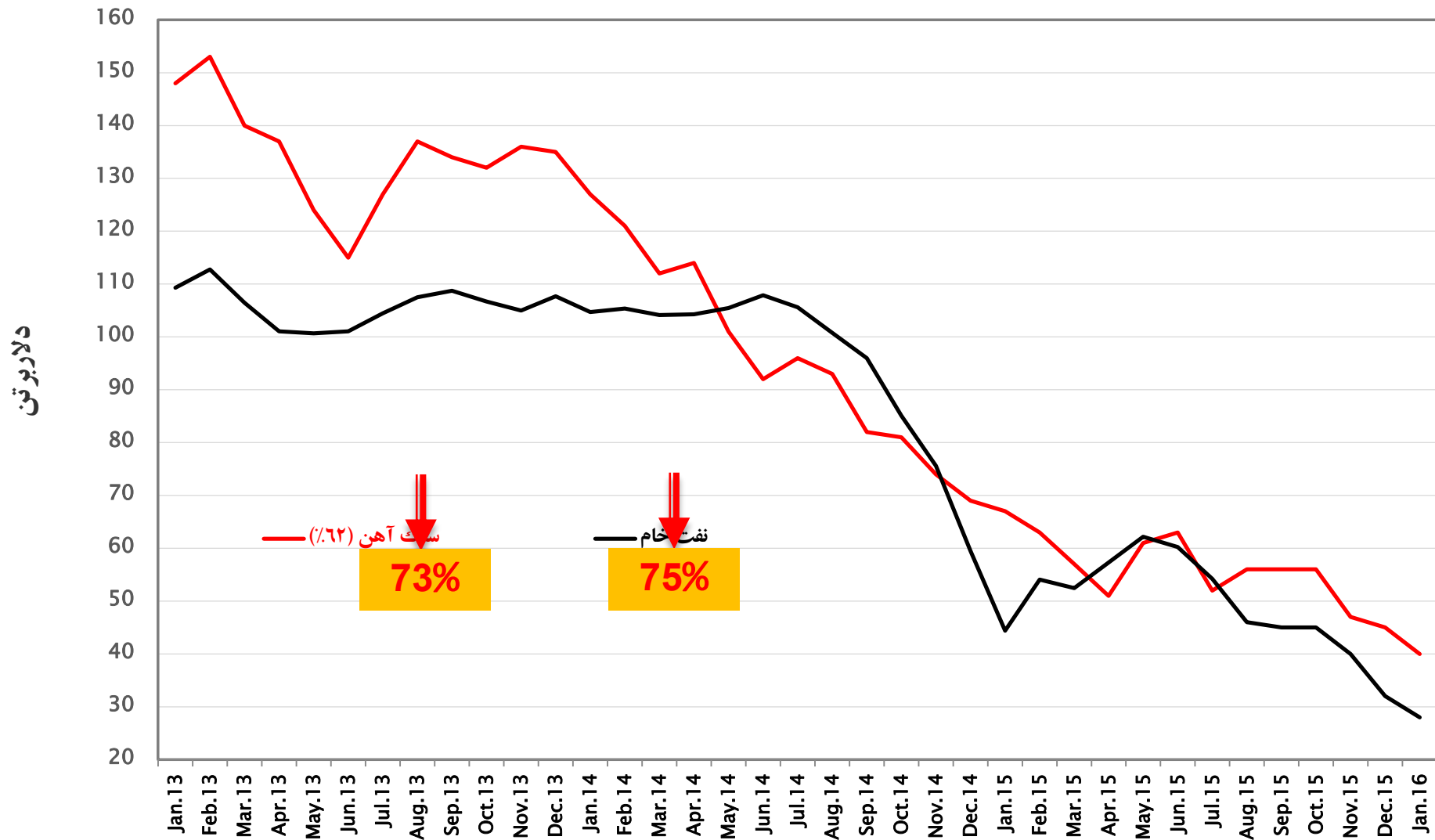
South Korea is the largest supplier of cold-rolled flat steel to the United States, exporting \$678.8 million worth last year.

مقایسه رابطه قیمت نفت با قیمت فولاد، سنگ آهن، و زغالسنگ در بازار جهانی و ایران

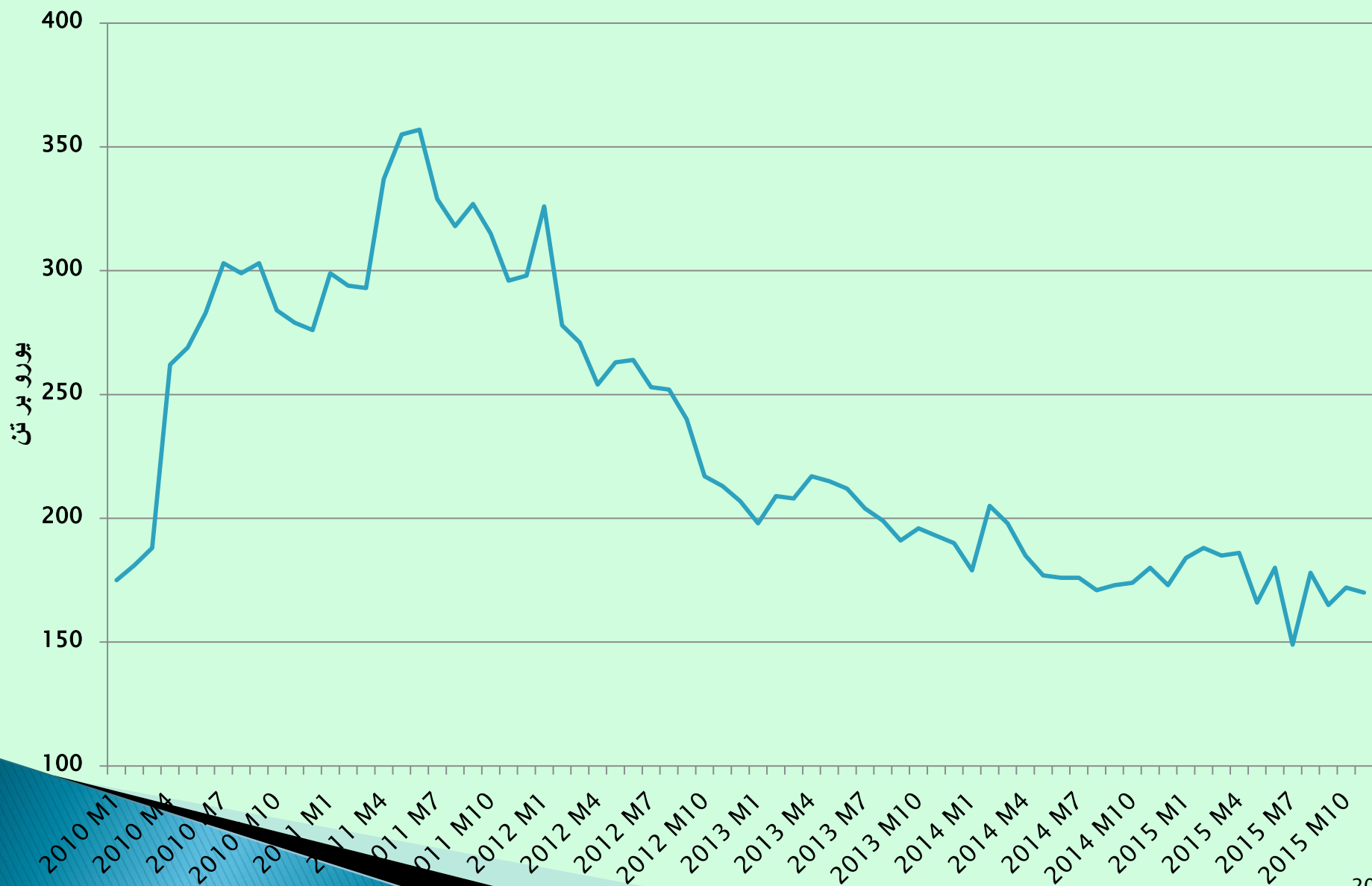
تغییرات قیمت نفت خام از سال ۲۰۰۰ تا ۲۰۰۸



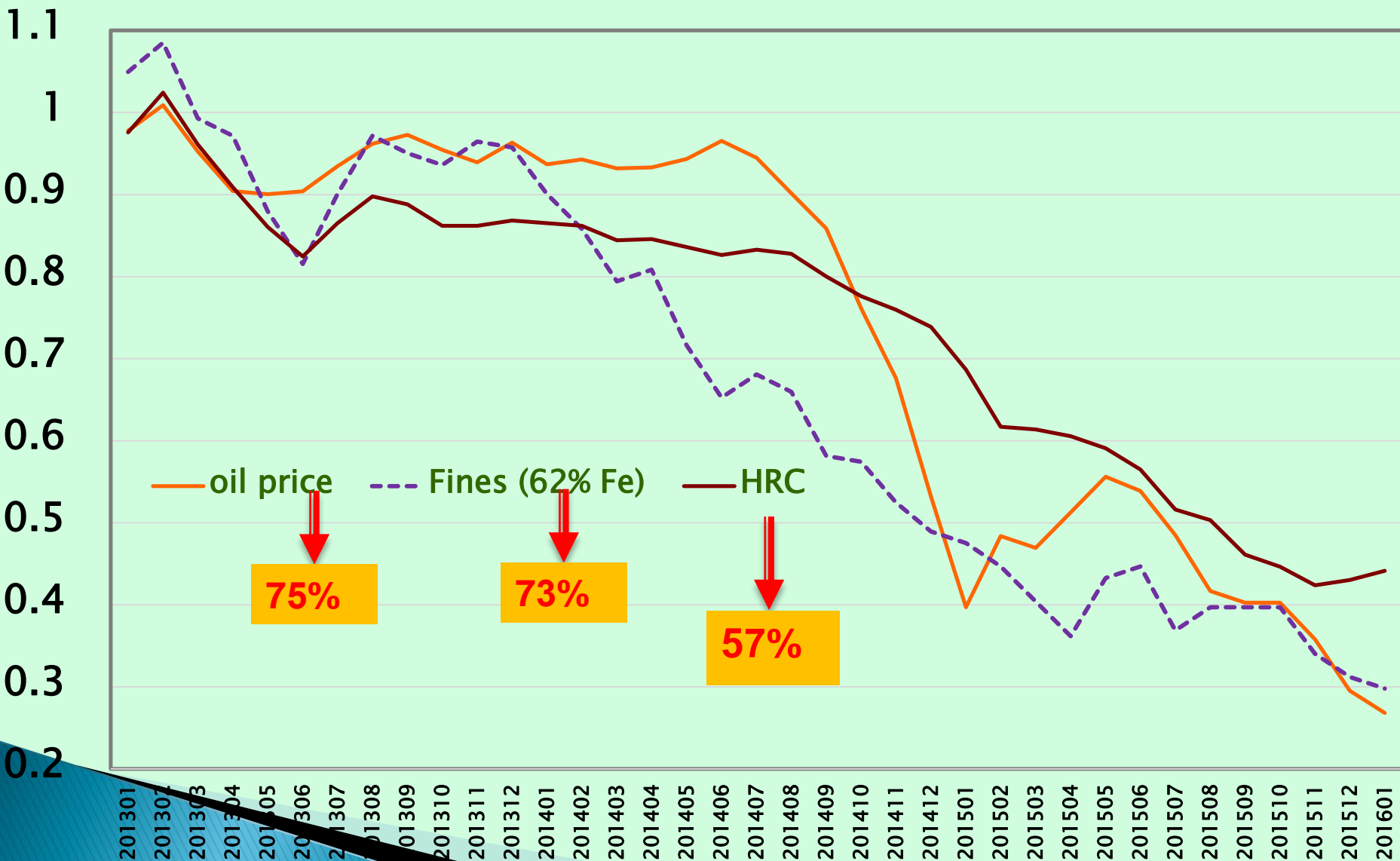
تغییرات قیمت نفت خام و سنگ آهن از سال ۲۰۱۳ تاکنون



تغییرات قیمت زغالسنگ کک شواز سال ۲۰۱۰ تا ۲۰۱۵

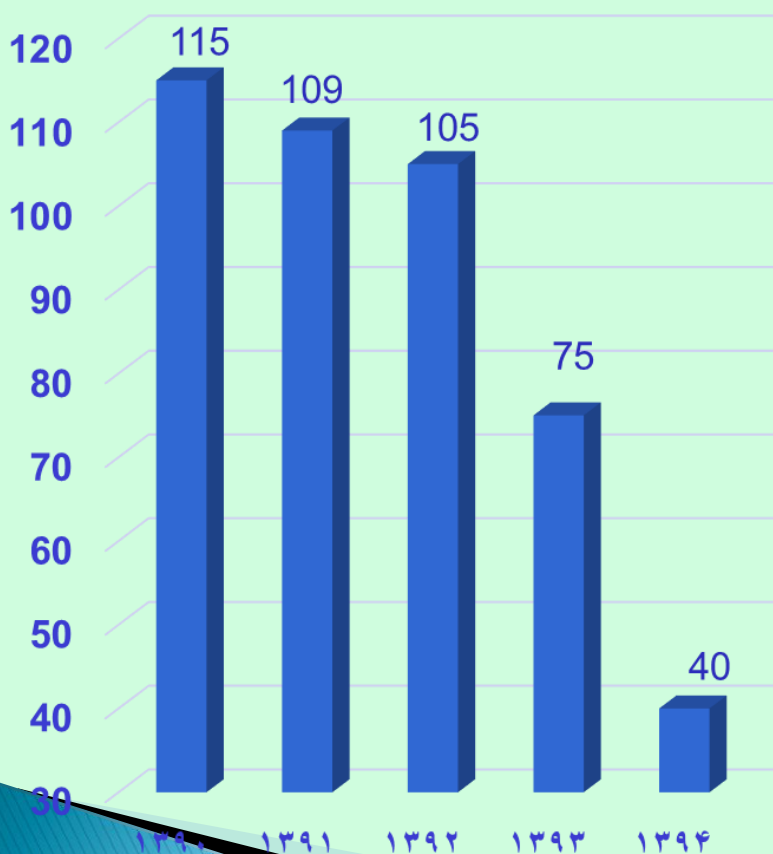


مقایسه قیمت نفت و سنگ آهن و کلاف گرم از سال ۲۰۱۳ تاکنون

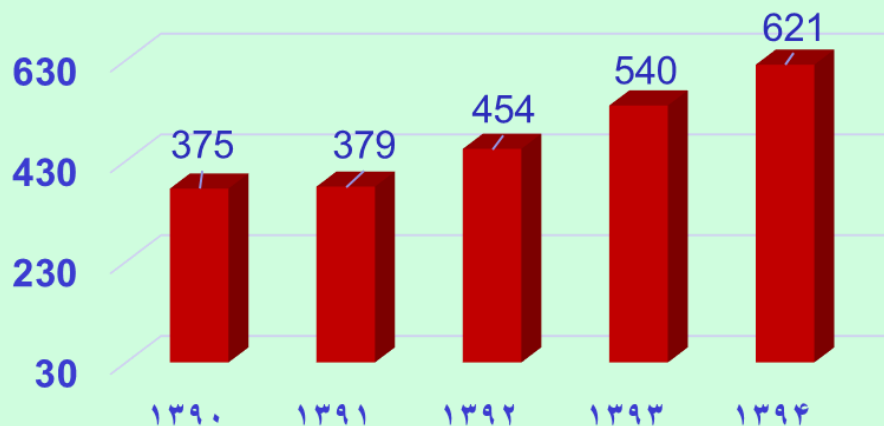


مقایسه تغییرات قیمت انرژی در بازار جهانی و داخل

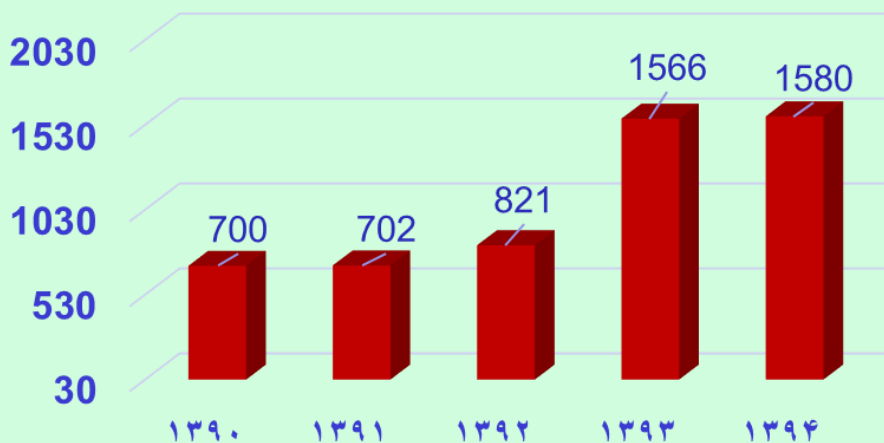
متوسط قیمت جهانی نفت
(دلار در هر بشکه)



متوسط قیمت خرید برق با ارزش افزوده (ریال بر کیلو وات ساعت)

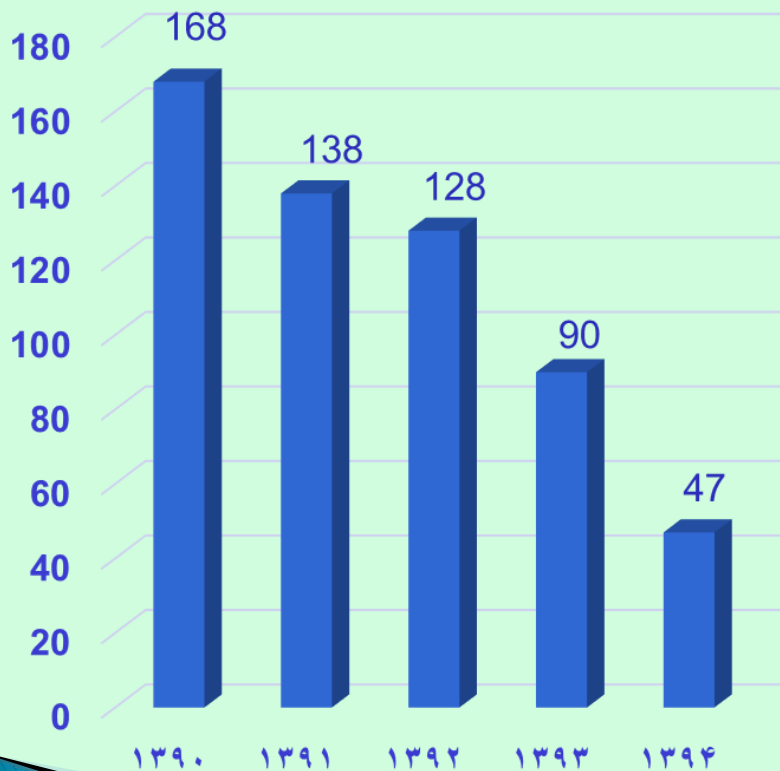


متوسط قیمت خرید گاز با ارزش افزوده (ریال بر نرمال مترمکعب)

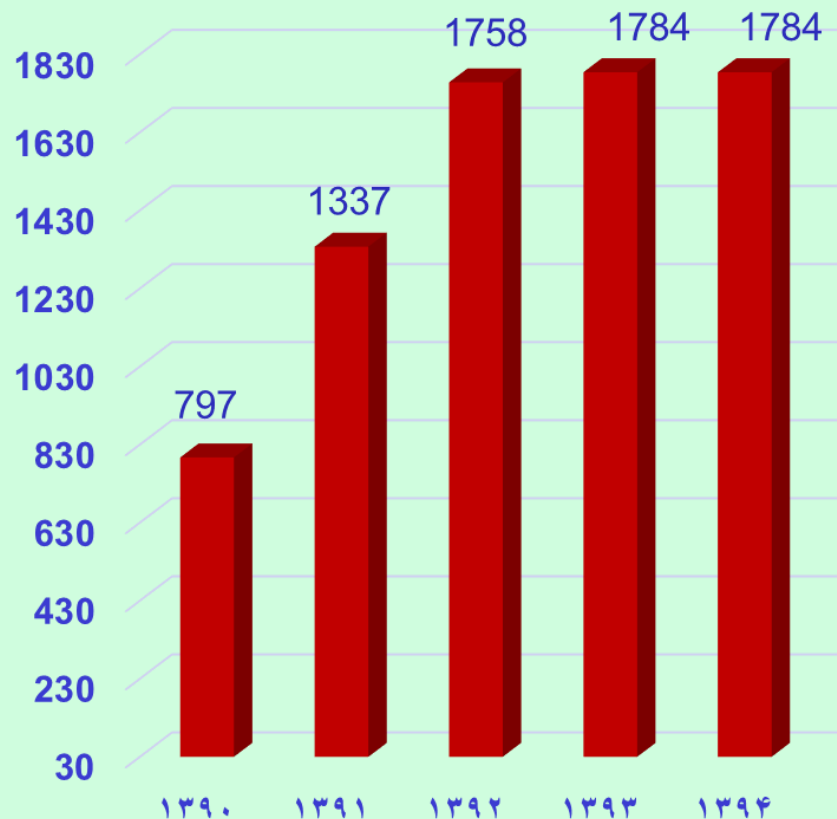


مقایسه روند تغییرات قیمت سنگ آهن در بازار جهانی و داخلی

قیمت جهانی سنگ آهن ۶۲٪
 دلار بر تن CFR (چین)



قیمت خرید سنگ آهن داخلی
 (ریال بر کیلوگرم بدون هزینه حمل)



چشم انداز سال ۹۵

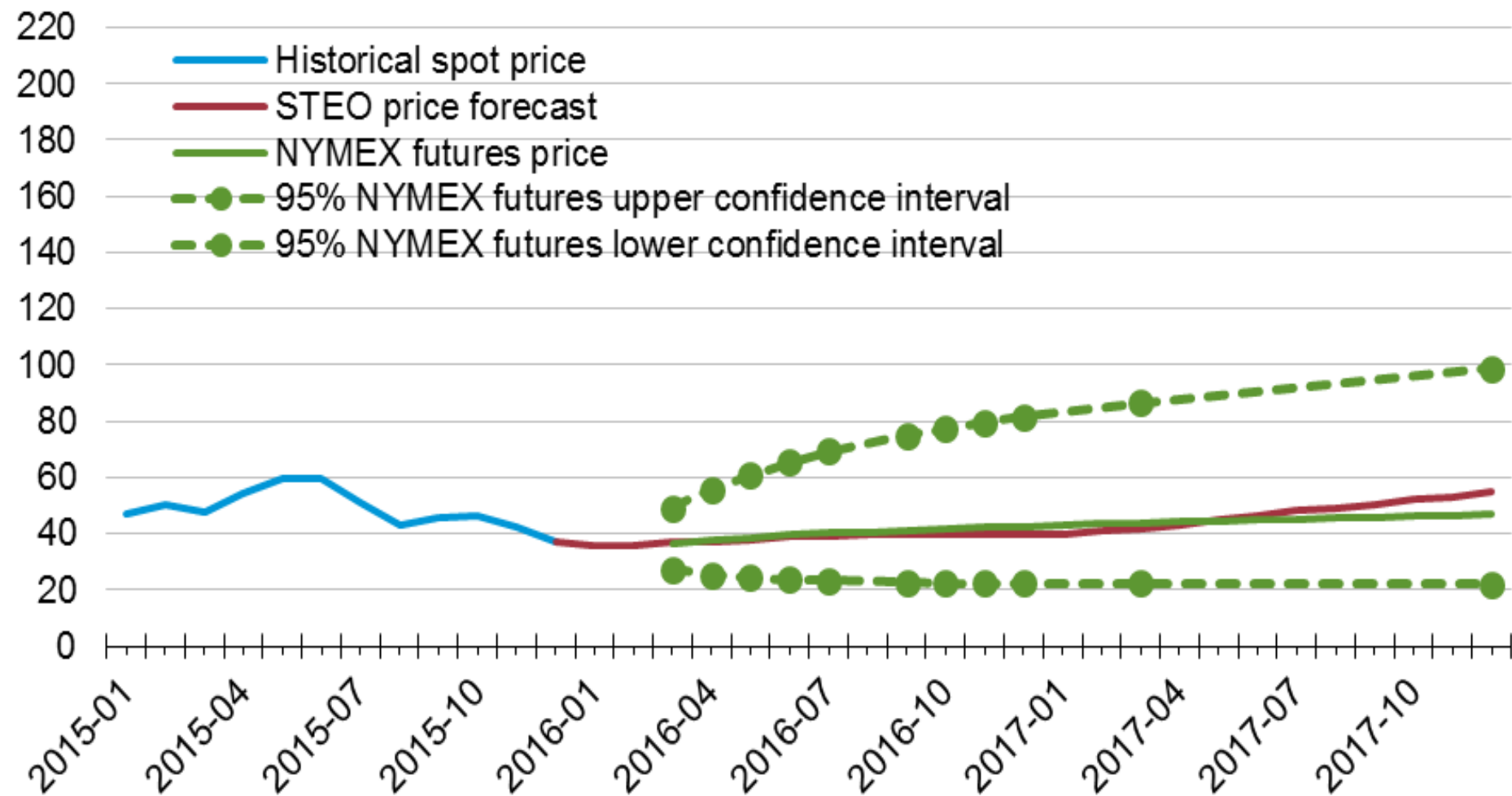
و

چگونگی برخورد با چالش موجود

West Texas Intermediate (WTI) Crude Oil Price



dollars per barrel



Source: Short-Term Energy Outlook, January 2016.

الف) اقدامات درون بنگاهی:

- مدیریت کاهش هزینه
- مدیریت منابع بنگاه
- تولید محصولات کیفی با ارزش افزوده بالاتر
- تولید محصول صادراتی
- گسترش بازار صادرات
- ایجاد کنسرسیوم برای احداث واحدهای جدید با ظرفیت بالا و با هدف تولید فولادهای صادراتی

ب) اقدامات مورد انتظار از دولت:

- ارائه تسهیلات ارزان قیمت برای سرمایه در گردش
- تثبیت نرخ حامل های انرژی و عدم افزایش در سال 95
- تخصیص و پرداخت یارانه تولید
- حمایت از تولید داخل در مقابل واردات از طریق وضع تعرفه موثر بر واردات
- در نظر گرفتن مشوق های صادراتی (جایزه صادراتی)
- اجازه هزینه کردن مالیات در سرمایه گذاری های جدید و توسعه ای

پا تشکر

و

سپاس از تو چمتان