



**PromiSteel**

# PROMISTEEL

## GLOBAL STEEL INDUSTRY WEEKLY REPORT

Weekly Market Intelligence for  
Global Steel Trade and Industry

**Week 26** | June 16–22, 2026



### Price Trends

Steel & Raw Materials



### Shipping & Logistics

Freight • Global Trade



### Trade Policy

Tariffs • Regulations • Updates



### Industry Intelligence

Supply • Demand • Outlook

 [www.promisteel.com](http://www.promisteel.com)

 [sales@promisteel.com](mailto:sales@promisteel.com)



# 钢材行业周报

## Steel Industry Weekly Report

诺钢钢铁 2026 年 6 月 16 日 — 6 月 22 日 | Week 26

### 1. 本周综述

#### Executive Summary

本周钢材市场呈现"供需双增、库存微降、成本支撑松动"格局。五大品种产量 868MT（环比+1.3%），总库存 1557MT（环比-0.2%），由增转降但淡季累库压力仍存。原材料端分化加剧：焦炭第八轮提涨启动（+50/55 元/吨），但焦煤期货 6 月 18 日暴跌 5.78%至 1271 元/吨后弱势震荡；铁矿石持续走低至\$100.78/dmt（月-7.76%），三年低位附近。海运方面，SCFI 再创新高 3,121.69（+4.6%），BDI 则回落至 2,684（-1.4%）。地缘政治方面，美伊首轮高级别会谈 6/22 在瑞士结束，各方就 60 天内达成最终协议设定时间表，霍尔木兹海峡通航取得进展，WTI 原油跌至\$75.51/桶。贸易政策方面，欧盟 50%关税 7/1 生效倒计时，日本对中国不锈钢冷轧初裁临时关税最高 45%，韩国镀锌板反倾销税已正式实施。国内政策方面，NDRC 等六部门 6/15 发布《重点行业节能降碳改造攻坚三年行动计划》，钢铁位列 9 大攻坚行业之首。

*This week, the steel market showed a pattern of "supply-demand dual increase, slight inventory decline, weakening cost support." Five major varieties output 868mt (+1.3% WoW), total inventory 1557mt (-0.2% WoW), turning from accumulation to decline but seasonal pressure persists. Raw materials diverged: coke 8th round hike launched (+50/55 yuan/mt), but coking coal futures plunged 5.78% on Jun 18 to 1271 yuan/mt; iron ore continued falling to \$100.78/dmt (-7.76% MoM), near 3-year lows. Shipping: SCFI hit new high 3,121.69 (+4.6%), while BDI fell to 2,684 (-1.4%). Geopolitics: US-Iran first high-level talks concluded in Switzerland Jun 22, a 60-day timeline for final agreement set, Strait of Hormuz navigation progress made, WTI dropped to \$75.51/bbl. Trade policy: EU 50% tariff countdown to Jul 1, Japan preliminary AD duty on China stainless CR up to 45%, Korea galvanized AD duty implemented. Domestic: NDRC Jun 15 released 3-Year Energy-saving & Carbon-reduction Plan, steel tops 9 priority industries.*

## 2. 价格行情

### Price Trends

#### 2.1 中国国内市场 / China Domestic Market

品种 Product	6/22 价格 Price 6/22	周变化 WoW Change	备注 Notes
螺纹钢 HRB400E Rebar HRB400E	3,310 元/吨 3,310 yuan/mt	-10~40 -10~40 yuan	全国建材下跌，淡季成交回落 National building materials down; off-season demand falling
热轧板卷 HRC	3,400 元/吨 3,400 yuan/mt	-10~40 -10~40 yuan	多数下跌，钢厂检修减产预期 Most declined; mill maintenance cuts expected
中厚板 Plate	3,560 元/吨 3,560 yuan/mt	-10 -10 yuan	期钢延续弱势，观望情绪浓 Futures weak; cautious sentiment prevalent
冷轧板卷 CRC	3,960 元/吨 3,960 yuan/mt	-10 -10 yuan	偏弱运行，终端补库差 Weak; end-user restocking poor
唐山方坯 Billet Tangshan	2,980 元/吨 2,980 yuan/mt	↓ ↓	成本端走低，成材承压 Cost side falling; finished products under pressure

SteelHome 期货收盘 (6/22)：螺纹钢 2610 3127↓7，热卷 2610 3338↓13

SteelHome futures close Jun 22: Rebar 2610 3127↓7, HRC 2610 3338↓13

#### 2.2 出口 FOB 价格 / Export FOB Prices

品种 Product	FOB 中国 FOB China	周变化 WoW Change	备注 Notes
热卷 SAE1006 HRC SAE1006	\$465~475/MT	-\$8/MT	AISU 数据 6 月第 2 周；成交偏弱 AISU data W2 Jun; trading weak
冷卷 1mm CRC 1mm	\$565~585/MT	Stable	中国 FOB，需求谨慎 China FOB; cautious demand
方坯 Billet	\$460~470/MT	-\$8/MT	中国 FOB，全球最大降幅 China FOB; largest global drop
螺纹 CIS 出口 Rebar FOB CIS	\$545~550/MT	Stable	CIS 出口，需求持稳 CIS export; demand stable

#### 2.3 国际市场价格 / International Market Prices

区域 Region	HRC 价格 HRC Price	趋势 Trend	备注 Notes
欧洲 EU	€620~640/MT €620~640/MT	↑	保障措施预期推动价格上涨 20%+ Safeguard expectations driving 20%+ price

Web: [www.promsiteel.com](http://www.promsiteel.com)

Email: [sales@promisteel.com](mailto:sales@promisteel.com)

			surge
美国 US	\$780~800/ST \$780~800/ST	Stable Stable	Section 232 关税 25%维持 Section 232 tariff 25% maintained
土耳其 Turkey	\$590~600/MT FOB Rebar \$590~600/MT FOB Rebar	Stable Stable	需求偏弱, 价格持稳 Weak demand; prices stable
俄罗斯 Russia	\$535~545/MT FOB HRC \$535~545/MT FOB HRC	Stable Stable	黑海出口稳定 Black Sea exports stable
TE 综合指数 TE Steel Index	\$3,076/MT \$3,076/MT	-0.26% -0.26%	Trading Economics 综合指数 Trading Economics composite index

### 3. 原材料成本

#### Raw Material Costs

原料 Raw Material	6/22 价格 Price 6/22	月变化 MoM Change	年变化 YoY Change	关键动态 Key Dynamics
铁矿石 62%Fe CFR Iron Ore 62%Fe CFR	\$100.78/dmt \$100.78/dmt	-7.76%	+6.36%	三年低位附近; TE 预测 Q2 末 \$101.23 Near 3-year lows; TE forecast \$101.23 by Q2 end
焦煤期货 JM2609 Coking Coal JM2609	1,271 元/吨 (6/18 暴跌 5.78%) 1,271 yuan/mt (Jun 18 plunge -5.78%)	先涨后崩 Up then crash	—	6/18 放量长阴-5.78%至 1271; 6/1 涨停+7.16%至 1377, 剧烈波动 Jun 18 heavy volume drop -5.78% to 1271; Jun 1 limit-up +7.16% to 1377, extreme volatility
焦炭 J2609 Coke J2609	2,019 元/吨 (6/18 跌 3%) 2,019 yuan/mt (Jun 18 -3%)	↑↑	—	第八轮提涨 6/20 启动 +50/55 元/吨; 七轮累计湿+350/干+385/顶装干+405 元 8th round hike launched Jun 20 +50/55 yuan/mt; 7 rounds cum wet+350/dry+385/top-dry+405 yuan
焦炭现货 Coke Spot	第七轮已落地 7th round landed	↑	—	6/15 冀鲁钢厂执行第七轮 湿+50/干+55 元/吨 Jun 15 Hebei-Shandong mills executed 7th round; wet+50/dry+55 yuan/mt
废钢 Scrap	2,383 元/吨 (6/15 参考价) 2,383 yuan/mt (Jun 15 ref price)	-0.61%	—	全国重废 2080~2380 元/吨; 6/22 广东个别钢厂下调 30 元 National heavy scrap 2080~2380 yuan/mt; Jun 22 Guangdong mill cut 30 yuan
钢坯 唐山 Billet Tangshan	2,980 元/吨 2,980 yuan/mt	↓	—	成本端松动, 成材承压 Cost side loosening; finished products under pressure

铁矿石持续走弱至\$100.78/dmt (月-7.76%)，Trading Economics 预测 Q2 末\$101.23。焦煤期货经历"涨停→跌停→再跌"剧烈波动 (6/1 涨停+7.16%至 1377，6/18 暴跌-5.78%至 1271)，山西安全监察持续发力但部分煤矿复产。焦炭第八轮提涨 6/20 启动，七轮累计湿熄焦+350 元/吨。废钢窄幅震荡 6/15 参考价 2383 元/吨 (月-0.61%)。

Iron ore weakened to \$100.78/dmt (-7.76% MoM), TE forecasts \$101.23 by Q2 end. Coking coal futures saw extreme volatility (limit-up Jun 1 +7.16% to 1377, limit-down Jun 18 -5.78% to 1271). Shanxi safety inspections persist but partial mine restarts. Coke 8th round hike launched Jun 20, 7 rounds cumulative wet quenched +350 yuan/mt. Scrap narrow fluctuation 2383 yuan/mt ref price Jun 15 (-0.61% MoM).

## 4. 海运物流

### Shipping & Logistics

指标 Index	6/22 数值 Value 6/22	周变化 WoW Change	年变化 YoY Change	备注 Notes
BDI 综合 Baltic Dry Composite	2,684	-1.4% (日度-38) -1.4% (daily -38)	+36.22% +36.22%	各船型运费走弱; 5 月均值 3049 All vessel types weakening; May avg 3,049
BCI 海岬型 Capesize BCI	4,074	-1.8% (日度-75) -1.8% (daily -75)	— —	6/10 以来最高后回落; 日均获利 \$33,444 Post-Jun 10 peak retreat; daily earnings \$33,444
BPI 巴拿马型 Panamax BPI	— —	↓ ↓	— —	跟随 BDI 走弱 Following BDI decline
SCFI 综合 SCFI Composite	3,121.69 (6/18)	+4.6% (+136.47) +4.6% (+136.47)	+89.55% +89.55%	七连涨创新高! 7 consecutive gains, new all-time high!
SCFI 欧洲线 SCFI Europe Route	— —	↑ ↑	— —	SCFIS 欧洲(6/15) 2821.72 +12.8% SCFIS Europe (Jun 15) 2,821.72 +12.8%
SCFI 美西线 SCFI USWC Route	— —	↑ ↑	— —	SCFIS 美西(6/15) 2650.01 +8.4%; 年初累计涨 87% SCFIS USWC (Jun 15) 2,650.01 +8.4%; YTD cumulative +87%
CCFI 综合 CCFI Composite	1,599.07 (6/18)	↑ ↑	— —	多数航线运价上涨 Most routes freight up

干散货方面: BDI 6/22 报 2,684 (日度-38/-1.4%)，BCI 4,074 (-75/-1.8%)，各船型运费走弱。

5 月 BDI 均值 3,049 (+26.72%环比)，西芒杜铁矿项目驱动散货船需求仍存。集装箱方面: SCFI 6/18 再创新高 3,121.69 (+136.47/+4.6%)，已连续七周上涨; CCFI 1,599.07 (多数航线涨)。

SCFIS 欧洲航线 6/15 报 2821.72 (+12.8%)，美西 2650.01 (+8.4%)。集运旺季节奏显现，美西

Web: [www.promsiteel.com](http://www.promsiteel.com) Email: [sales@promisteel.com](mailto:sales@promisteel.com)

年初累计涨 87%。

Dry bulk: BDI Jun 22 at 2,684 (daily -38/-1.4%), BCI 4,074 (-75/-1.8%), all vessel types weakening. May BDI avg 3,049 (+26.72% MoM), Simandou project still driving demand. Container: SCFI Jun 18 new high 3,121.69 (+4.6%), 7 consecutive weekly gains; CCFI 1,599.07 (most routes up). SCFIS Europe Jun 15 2821.72 (+12.8%), USWC 2650.01 (+8.4%). Peak season emerging, USWC cumulative +87% YTD.

## 5. 贸易政策

### Trade Policy

政策动态 Policy	生效日期 Effective Date	影响范围 Impact Scope	关键内容 Key Content
欧盟钢铁新保障措施 EU Steel Safeguard	7/1/2026 Jul 1, 2026	配额-47%；配额外关税 50% Quota -47%; out-of-quota tariff 50%	606:16 压倒性投票通过；年度免税配额 1830MT；熔炼浇铸追溯 10/1 生效 606:16 overwhelming vote passed; annual duty-free quota 18.3mt; melt-cast traceability effective Oct 1
韩国镀锌板反倾销 Korea Galvanized AD	6/12/2026 (已实施) Jun 12, 2026 (implemented)	22.34%~33.67% 22.34%~33.67%	临时反倾销税正式征收；覆盖镀锌冷轧钢全品类 Provisional AD duty officially collected; covers all galvanized CR steel categories
日本冷轧钢反倾销 Japan CR Steel AD	6/1/2026 (立案) Jun 1, 2026 (filed)	调查期 1 年 Investigation period 1 year	6/1 正式立案；日本制铁/JFE/神户制钢联合申请；中国大陆+中国台湾+韩国 Jun 1 formally filed; Nippon Steel/JFE/Kobe Steel joint application; China mainland + Taiwan, China + Korea
日本不锈钢临时关税 Japan Stainless AD Preliminary	7 月预计 (初裁 6/19) Expected Jul (preliminary Jun 19)	中国最高 45%；中国台湾最高 21% China up to 45%; Taiwan, China up to 21%	6/19 初裁临时关税；含镍≥0.6%不锈钢冷轧；调查延至 11/21 Jun 19 preliminary duty; stainless CR Ni≥0.6%; investigation extended to Nov 21
土耳其冷系壁垒 Turkey Cold Steel Barriers	终裁 Final ruling	冷轧+镀锌+彩涂 高关税 CR + galvanized + PPGI high tariffs	全品类长期终裁高关税 All categories long-term final ruling high tariffs
中国出口许可证 China Export License	1/1/2026 (已生效) Jan 1, 2026 (effective)	300 项钢铁产品 300 steel products	商务部 79 号公告；凭合同+质检证明申领；出口管制常态化 MOFCOM Bulletin 79; apply with contract + QC proof; export control normalized
美国 Section 232 US Section 232	ongoing (持续执行) ongoing	25% 钢铁关税 25% steel tariff	特朗普调整税率；全球钢铁铝关税维持 Trump rate adjustment; global steel/aluminum tariffs maintained

本周贸易政策三大重磅：①欧盟 50%关税 7/1 生效进入最后 9 天倒计时，配额砍至 1830MT (-47%)；②日本 6/19 初裁对中国含镍不锈钢冷轧征临时关税最高 45%，对台湾最高 21%，预计下月实施；③日韩土“三连壁垒”冲击冷系板材出口。此外，韩国镀锌板 22.34%~33.67%反倾销税 6/12 已正式实施。中国出口许可证制度 300 项产品 1/1 起已生效，出口管控常态化。

Web: [www.promisteel.com](http://www.promisteel.com) Email: [sales@promisteel.com](mailto:sales@promisteel.com)

Three major trade policy developments this week: (1) EU 50% tariff countdown 9 days to Jul 1, quota cut to 18.3mt (-47%); (2) Japan Jun 19 preliminary AD duty on China stainless CR up to 45%, Taiwan, China up to 21%, expected next month; (3) Japan-Korea-Turkey "triple barrier" hitting cold-rolled sheet exports. Korea galvanized AD 22.34-33.67% implemented Jun 12. China export license system for 300 products effective since Jan 1.

## 6. 地缘政治

Geopolitics

### 美伊首轮高级别会谈结束 / US-Iran First High-Level Talks Concluded

6月22日，卡塔尔和巴基斯坦发布联合声明：在美伊谅解备忘录框架下，首轮高级别会谈在瑞士结束。各方同意设立高级别委员会，就60天内达成最终协议设定时间表。技术性会谈本周继续在瑞士比尔根山进行。霍尔木兹海峡通航问题取得"良好进展"。

Jun 22, Qatar & Pakistan joint statement: first high-level talks under MOU concluded in Switzerland. High-level committee established, 60-day timeline for final agreement. Technical talks continue this week in Bürgenstock. "Good progress" on Strait of Hormuz navigation.

### 伊朗军方 6/20 宣布关闭霍尔木兹海峡 → 后续谈判推进 / Iran Military Jun 20 Declared Hormuz Closure → Talks Progressed

6月20日伊朗军方宣布关闭霍尔木兹海峡，6月22日会谈后取得通航进展。伊朗石油出口获豁免，封锁解除，部分资产解冻。WTI原油跌至\$75.51/桶，几乎抹去美伊战争以来全部地缘溢价。

Jun 20 Iran military declared Hormuz closure; Jun 22 talks made navigation progress. Iran oil export exemption granted, blockade lifted, partial assets unfrozen. WTI fell to \$75.51/bbl, nearly erasing all geopolitical premium since US-Iran conflict.

### 油价跳水 / Oil Price Plunge

WTI原油6/22跌破\$76/桶至\$75.51（日-1.35%）；布伦特\$78.78/桶。油价几乎抹去美伊冲突以来全部溢价。现货黄金站上4,220美元/盎司，白银+2%至67美元/盎司。

WTI broke below \$76/bbl to \$75.51 (daily -1.35%); Brent \$78.78/bbl. Nearly all geopolitical premium erased. Gold above \$4,220/oz, silver +2% to \$67/oz.

### 国内：节能降碳三年行动计划 / Domestic: 3-Year Energy-Saving Plan

6/15，NDRC等六部门联合发布《重点行业节能降碳改造攻坚三年行动计划》，钢铁位列9大攻坚行业之首。2026年起全面实施，3年内推动能效碳效"应提尽提"，2028年起视情拓展范围。将重塑行业竞争格局，推升高能效钢企竞争力。

Jun 15, NDRC + 5 ministries released 3-Year Energy-saving & Carbon-reduction Plan. Steel tops 9 priority industries. Full implementation from 2026, 3-year push for max efficiency improvement. Will reshape competition landscape, favor high-efficiency steelmakers.

### 宏观环境 / Macro Environment

5月CPI同比+1.2%（持平），PPI同比+3.9%（四年新高）；5月出口美元计+19.4%。美联储6/17-18维持利率3.50-3.75%，点阵图9名官员预期加息。欧央行6/12加息25bp（2023年9月以来首次）。日本央行6/16加息至1.0%（31年最高）。

May CPI +1.2% YoY (flat), PPI +3.9% YoY (4-year high); exports +19.4% YoY USD. Fed Jun 17-18 held 3.50-3.75%, dot plot 9 officials expect hike. ECB Jun 12 +25bp (first since Sep 2023). BOJ Jun 16 raised to 1.0% (31-year high).

## 7. 本周展望

### Weekly Outlook

因素 Factor	方向 Direction	强度 Strength	说明 Description
<b>↑ 利多</b> <b>↑ Bullish</b>			
焦炭提涨持续 Coke hikes persisting	↑	中 Medium	第八轮提涨启动，成本支撑逻辑存在但松动 8th round launched, cost support logic exists but loosening
美伊谈判进展 US-Iran talks progress	↑	中 Medium	海峡通航预期改善，物流风险下降 Strait navigation expectations improved, logistics risk declining
库存由增转降 Inventory turning down	↑	弱 Weak	总库存-0.2%，持续性待观察 Total inv -0.2%, sustainability to be observed
出口数据强劲 Strong export data	↑	弱 Weak	5月出口+19.4%，但7/1后欧盟窗口关闭 May exports +19.4%, but EU window closes after Jul 1
<b>↓ 利空</b> <b>↓ Bearish</b>			
淡季需求走弱 Off-season demand weakening	↓	强 Strong	梅雨+中考，成交持续回落 Plum rain + exam season, trading continuously falling
铁矿石走低 Iron ore falling	↓	中 Medium	\$100.78 三年低位，成本支撑弱化 \$100.78 near 3-year low, cost support weakening
焦煤暴跌 Coking coal plunge	↓	中 Medium	6/18跌5.78%，原料端松动 Jun 18 -5.78%, raw material side loosening
欧盟7/1关税 EU Jul 1 tariff	↓	强 Strong	50%关税倒计时9天，出口抢运窗口即将关闭 50% tariff countdown 9 days, rush-shipping window closing
日本不锈钢AD Japan stainless AD	↓	中 Medium	初裁45%临时关税，冷系板材出口承压 Preliminary 45% duty, cold-rolled sheet exports under pressure

综合判断：本周钢材基本面“中性偏弱”。利多因素集中在成本端（焦炭提涨）和地缘缓解（美伊谈判），但力度有限且边际递减；利空因素更硬——淡季需求、原料走弱、贸易壁垒三重叠加。

预计短期价格偏弱运行，下行空间有限（成本底+低库存），但反弹动力不足。

Web: [www.promsiteel.com](http://www.promsiteel.com) Email: [sales@promisteel.com](mailto:sales@promisteel.com)

Overall assessment: Steel fundamentals "neutral to weak." Bullish factors center on cost (coke hikes) and geopolitics (US-Iran talks), but limited and diminishing. Bearish forces harder — seasonal demand weakness, raw material decline, trade barriers triple overlay. Expect short-term weak performance, limited downside (cost floor + low inventory), insufficient rebound momentum.

## 8. 钢材库存指数

### Steel Inventory Index

指标 Index	6/18 数值 Value Jun 18	周变化 WoW Change	备注 Notes
五大品种总库存 Total 5-variety inventory	1,557.02 MT	-3.2MT (-0.2%)	由增转降；上期+12.05MT Turning from accumulation to decline; previous +12.05MT
建材库存 Building materials inventory	—	-1.09MT (-0.1%)	螺纹社库降（华东去库最大-6.44MT）；厂库增+3.12MT Rebar social inv down (East China largest destock -6.44MT); mill inv up +3.12MT
板材库存 Flat products inventory	—	-2.11MT (-0.3%)	热卷华北华南去库大；西南西北东北累库 HRC North & South China destocking large; Southwest/Northwest/Northeast accumulating
中钢协社会库存 CISA Social Inventory	938 MT(6/月上旬) 938 MT (early Jun)	-1MT (-0.1%)	21 城 5 品种；比年初+217 万(+30.1%)；比去年同期+152 万(+19.3%) 21 cities 5 varieties; +30.1% vs year start; +19.3% YoY
五大品种产量 5-variety Output	868.02 MT	+10.97MT (+1.3%)	螺纹+4.14/线材+3.9/热卷+3.14；钢厂盈利尚可支撑高位 Rebar +4.14/wire +3.9/HRC +3.14; mills profitable supporting high output
表观消费量 Apparent Consumption	871.22 MT	+3.1%	建材+5.1%/板材+2.0%；高考结束修复性反弹 Building +5.1%/Flat +2.0%; post-gaokao restorative rebound

库存格局：五大品种总库存 6/18 报 1557MT（环比-3.2/-0.2%），由增转降但持续性待验证。中钢协 6 月上旬 21 城社会库存 938MT（环比微降 1MT，比年初+30.1%，比去年同期+19.3%）。社库高企、厂库偏低的分化格局延续。产量维持高位 868MT（+1.3%），钢厂盈利尚可未触亏损边际。淡季来临，库存持续性累库拐点隐现。

Inventory pattern: 5-variety total inventory Jun 18 at 1557MT (-0.2% WoW), turning from accumulation to decline but sustainability uncertain. CISA early Jun 21-city social inventory 938MT (-1MT WoW, +30.1% vs year start, +19.3% YoY). High social inventory + low mill inventory pattern persists. Output stays high 868MT (+1.3%), mills profitable above loss margin. Seasonal accumulation turning point looming.

## 免责声明 Disclaimer

本报告仅供信息参考，不构成任何投资、采购或商业决策建议。数据来源包括 Mysteel（我的钢铁网）、Trading Economics、上海航运交易所、Baltic Exchange、S&P Global、SteelHome、AISU（阿拉伯钢铁联盟）等公开渠道，力求准确但不保证完整性与时效性。市场波动风险请自行评估。

*This report is for informational purposes only and does not constitute investment, procurement, or business decision advice. Data sourced from Mysteel, Trading Economics, Shanghai Shipping Exchange, Baltic Exchange, S&P Global, SteelHome, AISU, and other public channels. Accuracy is pursued but completeness and timeliness are not guaranteed. Market volatility risks should be independently assessed.*

报告日期：2026年6月23日 | 覆盖周期：2026W26 (6/16—6/22)