

Shandong Provincial People's Government

On the issuance of the steel industry restructuring in Shandong Province

**Notice of the revitalization plan**

*Lu Zheng Fa [2009] No. 45*

Municipal People's Government, the county (city, district) people's government, provincial government ministries door, each affiliated institutions, major enterprises, institutions of higher learning:

Now "the steel industry adjust Shandong Province revitalization plan" (hereinafter referred to as "Plan") issued to you, please conscientiously implemented.

Iron and steel industry is the backbone of the national economy of our province competitive industries of the province's economic and social development has an important supporting role. At present, the steel industry in our province the front face unprecedented challenges and test experience. Develop and implement "plan" is to implement the country falling real "steel industry adjustment and revitalization planning" positive response to the crisis, pushing forward the province's steel industry structure adjustment and optimization upgrades, enhanced industrial prime Important For quality and international competitiveness of the measure, for the steel industry in the province to maintain steady growth, promote the province's economy steady and relatively rapid development of great significance. Country, various departments should take Deng Xiaoping theory and the important thought of "Three Represents" as guidance, thoroughly implement the scientific concept of development off the solid, the unified thought and action to the provincial party committee, the provincial government's decision to deploy up into further enhance the overall awareness, strengthen leadership, close cooperation, and vigorously promote the enterprise independent innovation and technological transformation, and actively push forward industrial restructuring, promote the optimization of industrial structure upgrading, ensure that the province Steel Industrial Revitalization Planning adjusted to achieve the target of 3 years.

The country in accordance with objectives, tasks and policy measures "planning" to determine the grasping down real tight to develop specific programs to implement cut real grasp tissue. Provincial relevant departments according to "plan" a clear division of labor and work requirements, as soon as possible to develop and improve the various items of supporting policies and measures to strengthen research, do a good job, "planning" the implementation of guidance and support.

"Planning" also identified a number of supporting screened under construction and the proposed construction of key projects, the provincial Economic and Trade Commission issued a separate printing, please the country, various departments and relevant enterprises together grasp implemented.

People's Government of Shandong Province

April 21, 2009

The steel industry is an important pillar industry of national economy, but also the backbone industries of our province, involving a wide range associated degree, strong pulling force of regional economic development has an important supporting role. Since the second half of 2008, the US subprime mortgage crisis sent the lead international financial crisis quickly spread to the real economy, China's steel industry become one of the most severely affected by the industry, faced with unprecedented challenges and test test. In order to implement the national "steel industry adjustment and revitalization plan," and expanding domestic demand and promote steady and relatively fast economic growth policies and measures to deal with the crisis and overcome the difficulties, advancing the province's steel industry structure adjustment integration and optimization of upgrades, enhancing the quality and international industrial prime competitiveness, to achieve industrial revitalization formulated plan.

First, the status quo and development trend

(A) development of the status quo. By the end of 2008, the total assets of the province's iron and steel enterprises above the scale of 270 billion yuan, from the industry about 150,000 personnel. More than 200,000 tons of steel production capacity of about 30 enterprises, of which 100 million tons of iron and steel enterprises have Shandong Group (including Jigang, Levin Steel, Zhang Gang, special steel stone cross, Yongfeng Steel), Rizhao Iron and Steel, Qingdao Iron and Steel, Weifang Steel, Taishan Steel, Zibo South Jinzhao Group, Luli Steel, steel Foulon, Shouguang giant to special steel, wide enrichment group, Jiang Xin Steel, three Gaudet steel. In 2008, the province's cumulative production of 46.57 million tons of iron, steel 44.59 million tons, 50.27 million tons of steel sheet, respectively, the country accounted for 9.76% of iron, steel, wood total yield of 8.88% and 8.7%, respectively, than - 3.8% growth last year, 1.17% and 1.35%; to achieve industrial added value of 92.917 billion yuan, accounting for 3% of the GDP of the province; to achieve sales revenue 370.546 billion yuan, profits of 27.902 billion yuan, 15.206 billion yuan profit, respectively year on year increase of 23.36% - 19.82% - 29.71%. The province's key steel enterprises tonne integrated steel consumption reached 640.23 kg standard coal, tons of steel comparable energy consumption reached 640.85 kg standard coal per ton of steel reached 3.53 tons of fresh water consumption, ahead of the country "Steel Industry Development Policy" The primary energy consumption indicators.

The impact of international financial crisis, falling demand at home and abroad steel materials, iron and steel products generally fall into steep decline, sales are not smooth, sharp yield decrease, inventory increases, benefits decline, capital tense predicament, long-term Since the extensive development mode caused significant structural contradiction projections. Concrete table now:

First, productivity irrational. Iron and steel industry in our province is only about 20% of capacity allocation in raw materials, transport, market and other coastal areas have a comparative advantage. In the three traditional steel enterprises, the restriction factor

CITIES, transportation, water resources, environmental protection, land and other places at Jigang increasingly prominent; Levin Steel to place dryland, transportation conditions are relatively poor ; blue steel to tourist cities, development space is limited. Other small iron and steel enterprises in the province are located in the resource, environmental, transport and production costs within a limited land area. The overall point of view, the layout of the steel industry in our province and the national steel industry policy requirements and future development trends in the steel industry should not apply.

Second, the overall low level of loading equipment. According to the province's 22 major steel producing enterprises in the survey results display, the existing blast furnace, more than 1000 cubic meters of blast furnace blast furnace accounts for only 37% of the total number; the existing furnace in turn, more than 120 tons turn oven only 47% of the total number of rotation furnace; existing electric furnace, more than 70 tons electric furnace is only accounting for 38% of the total number of electric furnace. Currently, the province's largest steel industry blast furnaces of 1,880 cubic meters, the largest turn oven to 120 tons, the largest electric furnace of 70 tons, the most wide plate rolling machine is 3500mm, the widest of hot-rolled sheet mill 1700mm, the lack of large-scale, modern equipment of technical equipment, the presence of domestic and foreign advanced a larger gap between the steel enterprises.

Third, unreasonable product structure, product quality is not high. According to statistics, in 2008 the province's symbiosis produced 50.27 million tons of steel sheet, which type of steel 5.99 million tons, 7.19 million tons bars, 9.78 million tons of steel bars, wire rod 6.2 million tons, 1.83 million tons thick steel sheet, plate 1.9 million tons, 1.78 million tons of hot-rolled sheet, cold-rolled sheet 1.32 million tons, 6.4 million tons in the thick wide strip, cold-rolled thin wide strip 710,000 tons, 1.59 million tons of hot-rolled narrow strip, cold rolled narrow steel with 280,000 tons, 890,000 tons for coating plate, welded steel pipe 1.55 million tons, seamless steel pipe 2.1 million tons, the province's plate and pipe ratio is only 40%, not only far lower than the international advanced level, but also lower than the national average. These steel timber species, the proportion of ordinary non-alloy steel and low alloy steel accounted for more than 80% of imports and the required amount of larger economic development of the province of high-end car plate, home plate, with a high-speed railway steel, high magnetic induction oriented steel, corrosion-proof Kang Da deformation pipeline steel, high strength steel machinery, nuclear power and other key species with steel production or not yet production is very small, the steel industry in Shandong production of high-grade products, high-end product research and development, independent innovation and other aspects of domestic and international advanced level in the gap larger.

Fourth, industry concentration is low. To adapt to the development trend of the global steel industry, and promote Shandong steel industry from large to strong, the province in accordance with the "asset reorganization, eliminating the backward, adjust the layout, enhance the grade," the square needle, the group set up to build the mountain East Iron and Steel Group Co., Ltd. At present, Shandong Iron and Steel Group's crude steel production accounted for only about 40% of the province, and the "People's Government of Shandong Province on the steel

industry to further accelerate structural adjustment of Opinion" (Lu Zheng [2007] 83 No.) proposed 70 per cent of the target has a big gap. The province's steel industry concentration is low, leading to irrational allocation of resources and enterprise competitiveness is not strong, it is difficult to form on product markets and raw material resources, control and pricing power. Expedite the settlement of outstanding problems in the province made about the development of the steel industry, promote industrial structure adjustment and optimization of upgrades, both fundamental way the province's steel industry out of the woods, but also revitalizing the province's steel industry the only way.

(ii) the development trend. July 2005, promulgated the implementation of the "National Iron and Steel Industry Development Policy", guide and promote China's steel industry to improve technical equip level and competitiveness of the market. To prevent risks, protect stability, adjusting structure, promoting growth, and when the State introduced the "steel industry adjustment and revitalization plan." At the national steel industry policy and adjust Revitalization Planning of lead collar, China's steel industry was now developing the following trends:

First, the steel production capacity to continue to accelerate the pace of transfer to coastal. In recent years has been basically completed Angang Spanish mackerel circle, the Shougang Gaofeidian steel base basis, National Steel adjusted Revitalization plan and made it clear when proper construction of Zhanjiang, Fangchenggang coastal steel bases, promote Rizhao Steel Boutique base construction. At the same time, clearly the implementation of Beijing, Guangzhou, Hangzhou, Hefei and other cities steel plant relocation project, co-ordinate research advancing Fushun, Qingdao, Chongqing, Shijiazhuang and other cities steel plant relocation. The next three years, China's steel industry will accelerate in the center of the city by land and transfer to the coast, forming a new development pattern.

Second, the iron and steel enterprises Joint restructuring trend become more pronounced. China's steel industry international competitiveness is not strong industry is an important reason is dispersed, low concentration. National Steel Revitalization adjustment plan clearly support and push forward with large iron and steel enterprises as the leading inter-provincial city, cross-regional, cross-ownership of strategic restructuring, the formation of a few more than 50 million tons of large steel set group, a number of large steel 1000-3000 ton Group. The next three years, the steel joint enterprise group will become increasingly important to the steel industry as an important development.

Thirdly, the total amount control, eliminate backward, energy conservation efforts to increase sustainability. National Steel Revitalization adjustment plan made it clear that the total amount under the control of the premise, the new and the elimination of backward production capacity to bind, to further improve the elimination of outdated standards. Before the end of 2010, out of 300 cubic meters and below blast furnace, 20 tons and below, converter gas and electric furnace; before the end of 2011, out of 400 cubic meters and below blast furnace, 30

tons and below, converter gas and electric furnaces; in conjunction with the elimination of backward construction Steel makers and other areas where conditions permit, to eliminate backward production capacity increase to 1,000 standard cubic meters of blast furnace and the corresponding steelmaking capacity; steel industry achieve technical economic indicators of the overall increase, tons of steel Syndicated news standard coal consumption dropped to 620 kg or less, tons of steel consumption of fresh water to 5 tons.

Fourth, independent innovation, technology advances further enhanced. National Steel Revitalization adjustment plan clearly advancing technological transformation, independent innovation, accelerate technical progress. Support of key steel enterprises develop high technology content, high added value steel timber species and the extension of the product, the market outlook is especially good support, development potential, can replace imports of key steel product varieties.

Said the development trend of the steel industry in our province to say that both challenge and opportunity. Must grab seize opportunity, expanding markets, security focus, adjusting the structure, breaking problems, promote development, to survive in a crisis, the challenge in seeking development, achieve the province's steel industry revitalization.

Second, the guiding ideology, basic principles and objectives Mandate

(A) guiding ideology. According to the scientific development concept, in order to speed up the implementation of the national steel industry adjustment and revitalization plan for the main line, in order to adjust the structure, control the total amount, eliminating the backward, joint restructuring, technological transformation, adjustment layout, improve grades, focusing on efforts to resolve the contradictions and problems existing in the development, to achieve structural optimization upgrade, enhance the industry's core competitiveness, promote the province's steel industry from large to strong, comprehensive revitalization achieve goals .

(B) basic principles.

1. Based on current and long-term perspective. Both efforts to resolve the province's steel industry faces difficulties, but also made efforts to solve the bottleneck of about development issues, taking sustainable development path.

2. maintain pressure and focus. Paul advanced productive forces, the pressure of backward production capacity, to support key enterprises to accelerate the development, push forward joint restructuring, improve industrial concentration.

3. The total amount control, excellent layout. The total amount under the premise of control, eliminating the backward, urban steel plant relocation, adjusting the industrial layout, speed up the construction of Rizhao steel base.

The independent innovation, technical progress. Push forward independent innovation, increase the technological efforts to improve innovation capability, breakthrough key technology, process equipment upgrade equipment level and brand effect.

5. The market tone control, policy guide. Insist on market regulation and government promote binding, the use of market adjustment control means, play the role of policy guidelines to achieve stable development of the industry.

6. domestic demand as the main global configuration. Insist on full use of the two markets, two resources, to meet the domestic market as the main, optimization of direct exports, indirect exports expanded at reasonable development and utilization with domestic iron ore resources, the establishment of foreign ore resource security system.

(Iii) the target task. By 2011, the total amount of steel effective control, control of the province's crude steel production capacity of around 50 million tons; significantly enhance the industrial concentration, foster Shandong Iron and Steel Group into domestic large steel enterprise groups, international competition Competition of significantly enhanced, foster specialization 3-5 medium-sized enterprises; to achieve rational distribution of industry, coastal steel production capacity of more than 40%; in line with the national steel industry policy process equip (greater than 1000 cubic meters of blast furnace, turn over more than 120 tons) more than 70%, process optimization equip upgrades; ratio to above 60%, the product structure significantly improved plate and pipe; tons of steel comprehensive standard coal consumption dropped to 620 kg or less, tons steel consumption of fresh water to 3.5 tons, tons of steel smoke dust emissions to 1.0 kilograms or less, tons of steel SO<sub>2</sub>

Emissions to 1.5 kilograms or less, energy reduction deepen sustainability; industrial added value of the province's GDP, one percentage point increase from the current 3 percent, total profits and taxes more than the 2008 increase of 30%.

Third, development priorities

(A) Rizhao steel base construction. The construction of Rizhao steel base as the province's steel industry structure adjustment of the core. In accordance with the national steel industry adjustment and revitalization plan on "according to Shougang Gaoferidian reduce capacity, develop circular economy model, in conjunction with Jinan Iron and Steel, Levin steel, blue steel compression capacity and the relocation of Shandong iron and steel enterprises in the province to implement restructuring and elimination of backward production capacity, promote Rizhao steel base-building "requirements, make full use of national policy support and the current construction cost reduction opportunities to accelerate off the real steel base construction of Rizhao set of preliminary preparation work, grab tight project approval and start construction as soon as possible. After the project is eligible for the grant, the province focused on the inclusion of construction projects, and strive to the end of 2011 basically completed a project put into production.

(Ii) expansion of backbone enterprises. Support the Shandong Iron and Steel Group owned Jigang, Levin steel in accordance with the national steel industry adjustment Revitalization planning requirements, eliminating the backward, a gradual reduction in production capacity, accelerate technological transformation and new product's research and development efforts to enhance product quality. Green steel support system according to the provincial government's plan to implement a whole relocation. Support Japanese steel production capacity to accelerate the elimination of backward, capacity will remain incorporated into Rizhao steel base. At the same time, urging the province of other small and medium steel enterprises eliminate backward schedule to complete the task, is strictly prohibited without large-scale expansion.

(Iii) development of a number of key products. Rizhao steel base products to high-end wide-plate, high-grade hot-rolled sheet, cold-rolled sheet is the master; Jigang plate series product to the Lord, increase the proportion of high special plate; Levin steel products to H-type steel series, excellent special steel for the main; blue steel moved to Jiaonan as Rizhao steel base of deep processing zones, major construction galvanizing lines, tin lines, coating lines and aboard deep processing and distribution centers. Shandong Iron and Steel Group to support the sheet steel, stone cross special steel, steel and other Yong-feng enterprises without expanding the production capacity of the foundation to increase the intensity of technological transformation, optimized product variety, improve product quality the amount. Among them, Zhang Gang, according to regional building materials professional metaplasia steel production requirements, as soon as a complete set of building materials production system, and gradually become integrated iron and steel enterprises in Zibo City area platform. Support Weifang Steel companies play advantage now focus development steel cords with wire rod, high-quality wire rod, bar and other high strength product series, become the province of the professional bar, wire rod production enterprises. Support Luli Steel Company to accelerate the technological transformation, focusing on the development of high-quality bars, high strength threaded steel bars. South Jinzhao Group supports the development and production of spring flat steel products processing. Support Taishan Iron and Steel Company to accelerate the elimination of backward, through technological transformation, improve the grade of stainless steel products, extending existing stainless steel products industry chain, formed stainless steel series product superiority, support chuen letter Stainless steel companies enterprise

development focus stainless steel deep processing products. Support Giant Special Steel, Qilu special steel companies play excellent special steel production advantages, adaptation needs oil, machinery manufacturing, automotive, shipbuilding, aerospace and other industries, the production of alloy structural steel, bearing steel, tool steel and other products, the formation of excellent special steel product line. Support Lubao Steel Pipe, Shandong ink dragon enterprise development dedicated seamless steel tubes and steel tube processing. Encourage the development of iron and steel products deep processing, extend the industrial chain, the formation of industrial clusters. Guanzhou Support Group, Zibo Fengyang and other enterprise development more specifications cold rolled sheet, painted sheet metal plating and processing, support Linyi Lingang industrial zone around Rizhao steel base material developments steel deep processing products. Encourage competitive iron and steel enterprises to accelerate product structure adjustment, eliminate backward, developing "specialized, sophisticated, unique, new" products, build brand.

In terms of the key steel timber species, focusing on development of production with high-speed rail steel, higher grade shipbuilding plate, X80 pipe line and above board, high-end car plate, home plate, high-intensity mechanical wear plate manufacturing, quality alloy structural steel, tool steel, gear steel, bearing steel, spring steel, specification above 900mm hot-rolled H-shaped steel and heavy steel sheet pile, strength above 400MPa steel bars, in line with market needs, with more than comparative advantage in the high-end product market share and brand awareness has been significantly improved.

(Iv) control the total amount, the elimination of backward. According to the national steel industry policy, accelerate the pace of eliminating backward, strictly control the total amount of iron and steel. Eliminated before the end of 2011 and below 400 cubic meters of blast furnace, 30 tons and below, converter gas and electric stove, and further improve the elimination of outdated standards. Phasing out the production process equip backward, high energy consumption, heavy pollution, low-grade products small iron and steel enterprises.

Fourth, the policy measures

(A) perform conscientiously implement the national steel industry policy adjustment and revitalization plan of measures. Actively seeks to raise the export tax rebate for some steel products national steel industry adjustment and revitalization plan proposed, technical progress and technological transformation of special funds, to prevent large-scale backbone enterprises broken chain risk capital financial loans Interest shall stickers, mineral resources right outside special interests investment funds, foreign economic and technical cooperation to the special funds, overseas mineral resources exploration risk special funds and other policy support.



(Ii) accelerate the pace of corporate mergers and joint re-group. When the machine seize the current restructuring of the United States to support, in accordance with the "Government Steering, corporate body, according to action" principle, promote Shandong Iron and Steel Group's steel enterprises in the province of substantial restructuring, iron and steel industrial concentration. In conjunction with the elimination of backward mergers and relocation inland steel production capacity to accelerate the transfer to the coastal areas. Conscientiously do a good job of Rizhao steel base construction preliminary preparation work, and try to start construction as soon as possible. Inland areas are no longer new distribution point, the existing small and medium steel enterprises no longer expand production capacity, does not meet the entry conditions of enterprises to phase out the market. No longer inland steel production enterprises approved new land, approved projects. Accelerate backward, accountability, no tasks and eliminate backward enterprises press shall not extend capacity to transform and transfer off-site.

(C) advancing enterprise technological transformation and technological innovation. Encourage and support the key steel enterprises to establish production and research integration of technology research and development institutions, enterprises accelerate the pace of independent innovation, increase new processes, new technology, new product research and development efforts, developed with independent intellectual property rights and broad prospects for the market brand products. Support of key steel enterprises in the province grasp efficient beneficiation and comprehensive utilization of mineral resources, the humidity coking coal, coke dry quenching, sintering flue gas desulfurization, sintering waste heat power generation, iron and water pre-processing, steel water refining, storage thermal heating furnace, controlled rolling and cooling, blast transfer furnace gas dry dust control and waste heat utilization, waste slag processing and comprehensive utilization, integrated sewage treatment, energy, centralized control, clean production and other crucial key technologies, to promote industrial technology progress, development of circular economy. Screening of major projects and organize the papers comply with national requirements, and actively strive for the national steel industry technology advances and technological transformation of special funds to accelerate the pace of upgrading the steel industry.

(Iv) efforts to open up the market space. Continue to play the "two markets" policy guiding role, and actively explore the international market, to achieve direct steel exports accounted for about 10% of the total amount. Stable international market share, optimized steel material direct exports and encourage contact between the steel timber exports. Increase domestic market development efforts, seize the country increase investment, expand domestic demand and increase traffic Infrastructure for construction and other favorable time machine, production merchantability of road products, increase product market share. Encourage the province's steel industry and downstream industries to carry out strategic cooperation, to improve the direct supply ratio. Infrastructure for the province and the province downstream steel construction industry in the province to be a priority to use material from steel production. Guide enterprises to consolidate traditional markets and vigorously develop emerging markets, and constantly enhance the ability to withstand market risks.

(V) improve resource security capacity. Key steel enterprises are encouraged to actively implement the "going out" strategy, to develop international resources market, the establishment of ore resources security system. Specification iron ore imports and circulation order to limit the flow of illegal imports of iron ore illegal construction law, environmental protection is not up to standard, do not meet industrial policy and adjust Revitalization Planning of the steel enterprises. The rational allocation of development of iron ore resources in the province, reservoir large (30 million tons) of iron ore resources in priority configure the province of large iron and steel enterprises. Support large steel enterprises invested mine exploration and development as well as participation in existing ore mountains purchase both groups, small iron ore businesses increase remediation efforts, normative order small iron ore mining businesses. Iron and steel enterprises in the province and encourage independent coking enterprises, focusing on iron alloy franchise businesses take direct supply or hold shares in a variety of ways to set strategic alliance, provide resources guarantee for the development of the steel industry.

(Vi) broaden financing channels for enterprises. Governments at all levels should actively organize enterprises to expand the financing channels, through the issuance of bonds, the stock market, attract investment capital, absorbing private capital in many ways satisfied and so on, to solve enterprise financing difficult problem. Financial sector to recognize the true fall real central monetary policy, expanding credit scale, increase investment in key businesses, focusing on product development of loan support, promote enterprise structure adjustment and technology renovation.

(Vii) increase the fiscal tax policy support. First off a real fiscal duties conscientiously preferential policies. Increase policy advocacy, falling real efforts to implement and actively guide enterprises make full use of full and good fiscal tax preferential policies, strengthening of policy falling real situation of supervision and inspection, cut real use to the full the preferential policies, with Well, using live. At the same time, fiscal tax departments at all levels should give full play to the role of the post can, actively supporting research to develop fiscal tax policy and tax administration measures to promote industry adjustment Revitalization. Second, the positive fiscal consolidation special funds, support enterprise technical progress, move forward, pushing businesses to optimize the product structure upgrading; vigorously supports enterprise independent innovation, and strive to improve enterprise core competitiveness capacity; support energy saving and emission reduction, structural adjustment and technological transformation, with pushing forward the economic development pattern. Third, to determine the focus of national support projects, governments at all levels to create a new way to raise funds, adjust the structure of capital expenditure, in accordance with the relevant national provisions, to be supported by matching funds. Fourth, falling real tangible new tax provisions of the national value-added tax transformation tax policy.

(Viii) give full play to the role of industry associations. Establish and improve industry associations, and play in the planning, standards, policies, markets, technologies,

information, and other services coordination role, the focus on corporate planning, investment, innovation, management, marketing, etc. production and business sectors, strengthening guidance services, promote the steel industry adjust revitalization plan of implementation.

Accessories: relevant departments and division of work progress schedule

Main inscription: economic management Steel Planning notice

Cc: PROVINCIAL various departments, General Office of Provincial People's Congress, the provincial association of public hall, Provincial Court, Provincial Procuratorate, Jinan Military Region, the provincial military area. Provincial Committee of the democratic parties.

Shandong Province People's Government General Office of April 22, 2009 print issue

**山东省人民政府 关于印发山东省钢铁工业调整 振兴规划的通知**

**鲁政发〔2009〕45号**

**各市人民政府，各县(市、区)人民政府，省政府各部门、各直属机构，各大企业，各高等院校：**

**现将《山东省钢铁工业调整振兴规划》(以下简称《规划》)印发给你们，请认真贯彻执行。**

**钢铁工业是我省国民经济的骨干优势产业，对我省经济社会发展具有重要的支撑作用。当前，我省钢铁工业正面临前所未有的挑战和考验。制定并实施《规划》是贯彻落实国家《钢铁产业调整和振兴规划》，积极应对危机，推进我省钢铁产业结构调整和优化升级，增强产业素质和国际竞争力的重要举措，对于保持我省钢铁工业稳定增长、促进全省经济平稳较快发展具有重要意义。**

**各地、各部门要以邓小平理论和“三个代表”重要思想为指导，深入贯彻落实科学发展观，把思想和行动统一到省委、省政府的决策部署上来，进一步增强大局意识，加强领导，密切配合，大力推动企业自主创新和技术改造，积极推进产业重组，促进产业结构优化升级，确保我省钢铁工业调整振兴规划3年目标的实现。**

**各地要按照《规划》确定的目标、任务和政策措施，抓紧制定具体落实方案，切实抓好组织实施。省政府有关部门要根据《规划》明确的分工和工作要求，尽快制定和完善各项配套政策措施，加强调查研究，做好对《规划》实施的指导和支持。**

**《规划》还筛选确定了一批配套的在建和拟建重点项目，由省经贸委另行印发，请各地、各部门和有关企业一并抓好落实。**

**山东省人民政府**

**二〇〇九年四月二十一日**

钢铁工业是国民经济的重要支柱产业，也是我省骨干优势产业，涉及面广，关联度大，拉动力强，对区域经济发展具有重要支撑作用。2008年下半年以来，美国次贷危机引发的国际金融危机迅速向实体经济蔓延，我国钢铁行业成为受其影响最严重的行业之一，面临着前所未有的挑战和考验。为贯彻落实国家《钢铁产业结构调整 and 振兴规划》以及扩大内需、促进经济平稳较快增长的政策措施，应对危机，克服困难，推进我省钢铁产业结构调整和优化升级，增强产业素质和国际竞争力，实现产业振兴，特制定本规划。

## 一、发展现状及趋势

(一)发展现状。截至2008年底，全省规模以上钢铁企业资产总额2700亿元，从业人员约15万人。钢铁产能20万吨以上的企业约30家，其中100万吨以上的企业有山东钢铁集团(含济钢、莱钢、张钢、石横特钢、永峰钢铁)、日照钢铁、青岛钢铁、潍坊钢铁、泰山钢铁、淄博南金兆集团、鲁丽钢铁、富伦钢铁、寿光巨能特钢、广富集团、江鑫钢铁、三德特钢等。2008年，全省累计生产铁4657万吨、钢4459万吨、钢材5027万吨，分别占全国铁、钢、材总产量的9.76%、8.88%和8.7%，分别比上年增长-3.8%、1.17%和1.35%；实现工业增加值929.17亿元，占全省GDP的3%；实现销售收入3705.46亿元、利税279.02亿元、利润152.06亿元，分别同比增长23.36%、-19.82%、-29.71%。全省重点钢铁企业吨钢综合能耗达到640.23千克标煤，吨钢可比能耗达到640.85千克标煤，吨钢耗新水达到3.53吨，提前实现了国家《钢铁产业发展政策》提出的主要能耗指标。

受国际金融危机的影响，国内外钢材需求下降，钢铁产品普遍陷入价格急跌、销售不畅、产量锐减、库存增加、效益下滑、资金紧张的困局，长期以来粗放型发展模式造成的结构性矛盾凸显。具体表现在：

一是生产力布局不合理。我省钢铁产业只有约20%的产能布局在原料、运输、市场等具有比较优势的沿海地区。传统的三大钢铁企业中，济钢地处省会大城市，交通运输、水资源、环保、土地等制约因素日益突出；莱钢地处缺水地区，交通运输条件较差；青钢地处旅游城市，发展空间受限。省内其他中小钢铁企业均分布在资源、环境、运输和生产成本受限的内陆地区。总体来看，我省钢铁产业布局与国家钢铁产业政策要求和今后钢铁产业发展趋势不适应。

二是装备水平总体偏低。据对省内22家主要钢铁生产企业的调查结果显示，现有高炉中，大于1000立方米高炉仅占高炉总数的37%；现有转炉中，大于120吨转炉仅占转炉总数的47%；现有电炉中，大于70吨电炉仅占电炉总数的38%。目前，我省钢铁产业最大的高炉为1880立方米，最大的转炉为120吨，最大的电炉为70吨，最宽的中厚板轧机为3500mm，最宽的热轧薄板轧机为1700mm，缺少大型化、现代化技术装备，与国内外先进钢铁企业存在较大差距。

三是产品结构不合理，产品档次不高。据统计，2008年全省共生产钢材5027万吨，其中，型钢599万吨、棒材719万吨、钢筋978万吨、线材620万吨、厚钢板183万吨、中板190万吨、热轧薄板178万吨、冷轧薄板132万吨、中厚宽钢带640万吨、冷轧薄宽钢带71万吨、热轧窄钢带159万吨、冷轧窄钢带28万吨、涂镀层板89万吨、焊接钢管155万吨、无缝钢管210万吨，全省板管比仅为40%，不仅远低于国际先进水平，也低于国内平均水平。这些钢材品种中，普通的非合金钢和低合金钢的比例占80%以上，我国进口量较大和省内经济发展所需的高档汽车板、家电板、高速铁路用钢、高磁感取向钢、抗腐蚀抗大变形管线钢、高强度机械用钢、核电用钢等关键品种尚不能生产或生产量很小，山东钢铁产业在高档产品生产、高端产品研发、自主创新等方面与国内外先进水平差距较大。

四是产业集中度较低。为适应全球钢铁行业的发展趋势，推动山东钢铁产业由大变强，我省按照“资产重组、淘汰落后、调整布局、提升档次”的方针，组建成立了山东钢铁集团有限公司。目前，山东钢铁集团粗钢产能仅占全省的40%左右，与《山东省人民政府关于进一步加快钢铁工业结构调整的意见》（鲁政发〔2007〕83号）中提出的占70%的目标有很大差距。我省钢铁产业集中度低，导致资源配置不合理和企业竞争力不强，难以形成对产品市场以及原料资源的控制力和定价权。加快解决制约我省钢铁产业发展的突出问题，促进产业结构调整和优化升级，既是我省钢铁产业走出困境的根本途径，更是振兴我省钢铁产业的必由之路。

（二）发展趋势。2005年7月，我国颁布实施《国家钢铁产业发展政策》，引导和促进我国钢铁产业技术装备水平和市场竞争力的提高。为防风险、保稳定、调结构、促增长，国家及时出台了《钢铁产业调整和振兴规划》。在国家钢铁产业政策和调整振兴规划的引领下，我国钢铁产业呈现以下发展趋势：

一是钢铁产能向沿海转移步伐继续加快。在近年已基本建成的鞍钢鲅鱼圈、首钢曹妃甸钢铁基地的基础上，国家钢铁调整振兴规划又明确提出适时建设湛江、防城港沿海钢铁精品基地，推动日照钢铁精品基地建设。同时，明确提出实施北京、广州、杭州、合肥等城市钢厂搬迁项目，统筹研究推进抚顺、青岛、重庆、石家庄等城市钢厂搬迁。未来3年内，我国钢铁产业将加快由内陆和中心城市向沿海转移，形成新的发展格局。

二是钢铁企业联合重组趋势更加明显。我国钢铁产业国际竞争力不强的一个重要原因是产业分散、集中度低。国家钢铁调整振兴规划明确提出支持并推进以特大型钢铁企业为龙头的跨省市、跨地区、跨所有制的战略重组，形成几个5000万吨以上的特大型钢铁集团，若干个1000-3000万吨级的大型钢铁集团。未来3年内，钢铁企业联合重组将成为钢铁产业发展的重要趋向。

三是总量控制、淘汰落后、节能减排力度持续加大。国家钢铁调整振兴规划明确提出，在控制总量的前提下，新增产能要与淘汰落后结合，进一步提高淘汰落后标准。2010年底前，淘汰300立方米及以下高炉、20吨及以下转炉和电炉；2011年底前，淘汰400立方米及以下高炉、30吨及以下转炉和电炉；结合淘汰落后建设钢铁大厂和其他有条件的地区，要将淘汰落后产能标准提高到1000立方米以下高炉及相应炼钢产能；实现钢铁行业技术经济指标的全面提升，吨钢综合能耗降到620千克标煤以下、吨钢耗新水降到5吨以下。

四是自主创新、技术进步进一步增强。国家钢铁调整振兴规划明确提出推进技术改造、自主创新，加快技术进步。支持重点钢铁企业发展高技术含量、高附加值钢材品种及其延伸产品，尤其支持市场前景好、发展潜力大、能替代进口的关键钢材品种。

上述发展趋势，对我省钢铁产业来讲，既是挑战又是机遇。必须抢抓机遇，扩市场、保重点、调结构、破难题、促发展，在危机中求生存，在挑战中谋发展，实现我省钢铁产业振兴。

## 二、指导思想、基本原则及目标任务

（一）指导思想。按照科学发展观的要求，以加快实施国家钢铁产业调整和振兴规划为主线，以结构调整、控制总量、淘汰落后、联合重组、技术改造、调整布局、提升档次为重点，着力解决发展中存在的矛盾和问题，实现结构优化升级，增强产业核心竞争力，推动我省钢铁产业由大变强，全面实现振兴目标。

（二）基本原则。

1. 立足当前，着眼长远。既着力解决我省钢铁产业面临的困难，又着力解决制约发展的瓶颈问题，走可持续发展之路。

2. 有保有压，突出重点。保先进生产力，压落后产能，支持重点企业加快发展，推进联合重组，提高产业集中度。

3. 控制总量，优化布局。在控制总量、淘汰落后、城市钢厂搬迁前提下，调整产业布局，加快日照钢铁精品基地建设。

4. 自主创新，技术进步。推进自主创新，加大技改力度，提高创新能力，突破关键技术，提升工艺装备水平和品牌效应。

5. 市场调控，政策引导。坚持市场调节与政府推动结合，运用市场调控手段，发挥政策导向作用，实现产业稳定发展。

6. 内需为主，全球配置。坚持充分利用两个市场、两种资源，以满足国内市场为主，优化直接出口，扩大间接出口，在合理开发利用国内铁矿资源的同时，建立境外矿石资源保障体系。

(三) 目标任务。到2011年，钢铁总量有效控制，全省粗钢产量控制在5000万吨左右；产业集中度显著提高，培育山东钢铁集团成为国内特大型钢铁企业集团，国际竞争力明显增强，培育3-5个专业化中型企业；实现产业合理布局，沿海钢铁产能达到40%以上；符合国家钢铁产业政策的工艺装备(高炉大于1000立方米，转炉大于120吨)达到70%以上，工艺装备优化升级；板管比提高到60%以上，产品结构显著改善；吨钢综合能耗降至620千克标煤以下，吨钢耗新水降至3.5吨以下，吨钢烟粉尘排放量降至1.0千克以下，吨钢SO<sub>2</sub>

排放量降至1.5千克以下，节能减排持续深化；工业增加值占全省GDP比重由目前的3%提高1个百分点，利税总额比2008年增长30%以上。

### 三、发展重点

(一) 建设日照钢铁精品基地。把建设日照钢铁精品基地作为我省钢铁产业结构调整的核心。按照国家钢铁产业调整和振兴规划关于“按照首钢在曹妃甸减少产能、发展循环经济的模式，结合济钢、莱钢、青钢的压缩产能和搬迁，对山东省内钢铁企业实施重组和淘汰落后产能，推动日照钢铁精品基地的建设”的要求，充分利用国家政策支持 and 当前建设成本下降的机遇，加快落实日照钢铁精品基地建设的前期准备工作，抓紧项目审批并尽早开工建设。项目获批后，列入我省重点建设项目，力争2011年底一期工程基本建成投产。

(二) 壮大骨干企业。扶持山东钢铁集团所属济钢、莱钢按照国家钢铁产业调整振兴规划要求，淘汰落后，逐步压缩产能，加快技术改造和新产品的研发，着力提升产品档次。支持青钢按省政府的统一规划实施整体搬迁。支持日钢加快淘汰落后生产能力，将保留的产能纳入日照钢铁精品基地。同时，督促省内其他中小钢铁企业按期完成淘汰落后任务，严禁擅自扩大规模。

(三) 发展一批重点产品。日照钢铁精品基地产品以高档宽厚板、高档热轧薄板、冷轧薄板为主；济钢产品以中厚板系列为主，提高高专板比例；莱钢产品以H型钢系列、优特钢为主；青钢搬迁至胶南作为日照钢铁精品基地的深加工区，主要建设镀锌线、镀锡线、彩涂线以及船板深加工配送中心等。支持山东钢铁集团中的张钢、石横特钢、永锋钢铁等其他企业在不扩大产能的基础上加大技术改造力度，优化产品品种，提高产品质量。其中，张钢按照区域性建筑钢材专业化生产的要求，尽快配套完善建材生产系统，逐步成为整合淄博市区域钢铁企业的平台。支持潍坊钢铁公司发挥现有优势，重点发展钢帘线用线材、优质线材、高强度棒材等产品系列，成为我省的专业棒、线材生产企业。支持鲁丽钢铁公司，加快技术改造，重点发展优质棒材、高强度螺纹钢筋。支持南金兆集团发展弹簧扁钢和产品深加工。支持泰山钢铁公司加快淘汰落后，通过技术改造，提升不锈钢产品档次，延伸现有不锈钢产品产业链，形成不锈钢系列产品优势，支持泉信不锈钢公司等企业重点发展不锈钢深加工产品。支持巨能特钢公司、齐鲁特钢公司发挥优特钢的生产优势，适应石油、机械制造、汽车、船舶、航天等产业的需要，生产合金结构钢、轴承钢、模具钢等产品，形成优特钢产品系列。支持鲁宝钢管、山东墨龙等企业发展专用无缝钢管和钢管深加工。鼓励发展钢铁产品深加工，延伸产业

链，形成产业集群。支持冠洲集团、淄博凤阳等企业发展多规格冷轧板材、涂镀板材和深加工，支持临沂临港产业区围绕日照钢铁精品基地发展钢材深加工产品。鼓励优势钢铁企业，加快产品结构调整，淘汰落后，发展“专、精、特、新”产品，打造品牌优势。

在关键钢材品种方面，重点开发生产高速铁路用钢，高等级造船板，X80级以上管线板，高档汽车板、家电板，高强耐磨机械制造用板，优质合金结构钢、模具钢、齿轮钢、轴承钢、弹簧钢，规格900mm以上的热轧重型H型钢和钢板桩，强度400MPa以上钢筋等，符合市场需要、具有比较优势的高端产品市场占有率及品牌知名度得到显著提高。

(四)控制总量、淘汰落后。根据国家钢铁产业政策要求，加快淘汰落后步伐，严格控制钢铁总量。在2011年底前淘汰400立方米及以下高炉、30吨及以下转炉和电炉，并进一步提高淘汰落后标准。淘汰生产工艺装备落后、能耗高、污染重、产品档次低的小钢铁企业。

#### 四、政策措施

(一)认真贯彻执行国家钢铁产业调整和振兴规划的政策措施。积极争取国家钢铁产业调整和振兴规划中提出的提高部分钢铁产品出口退税、技术进步及技术改造专项资金、防范大型骨干企业资金断链风险的财政贷款贴息、境外矿产资源权益投资专项资金、对外经济技术合作专项资金、国外矿产资源风险勘探专项资金等政策支持。

(二)加快企业兼并联合重组步伐。抓住当前国家支持联合重组的时机，按照“政府督导，企业主体，依法操作”原则，推动山东钢铁集团对省内钢铁企业的实质性重组，提高钢铁产业集中度。结合淘汰落后和兼并搬迁，加快内陆钢铁产能向沿海地区转移。认真做好日照钢铁精品基地建设前期准备工作，争取尽快开工建设。内陆地区不再布新点，现有中小钢铁企业不再扩大产能，不符合准入条件的企业逐步退出市场。不再为内陆钢铁企业新增产能批准用地、核准项目。加快淘汰落后，建立问责制，没有按时淘汰落后任务的企业，不得扩容改造和异地转移。

(三)推进企业技术改造和科技创新。鼓励支持重点钢铁企业建立产学研一体化技术研发机构，加快企业自主创新步伐，加大新工艺、新技术、新产品研发力度，开发具有自主知识产权和市场前景广阔的品牌产品。支持省内重点钢铁企业抓好高效选矿及矿产资源综合利用，炼焦煤调湿、干熄焦，烧结烟气脱硫、烧结余热发电，铁水预处理、钢水精炼，蓄热式加热炉、控轧控冷，高炉转炉煤气干法除尘及余热利用，废渣处理及综合利用、综合污水处理、能源集中管控、清洁生产等关键技术，促进产业技术进步，发展循环经济。组织筛选和上报符合国家要求的重大项目，积极争取国家钢铁产业技术进步和技术改造专项资金，加快钢铁产业升级的步伐。

(四)大力开拓市场空间。继续发挥“两个市场”的政策引导作用，积极开拓国际市场，实现钢铁直接出口占总量的10%左右。稳定国际市场份额，优化钢材直接出口，鼓励钢材间接出口。加大国内市场开拓力度，抓住国家增投入、扩内需以及加大交通基础设施建设等有利时机，生产适销对路产品，增加产品市场份额。鼓励省内钢铁产业与上下游产业开展战略合作，提高直供比例。省内基础设施建设及省内钢铁下游产业要优先使用省内自产钢材。引导企业巩固传统市场，大力开拓新兴市场，不断增强抵御市场风险能力。

(五)提高资源保障能力。鼓励重点钢铁企业积极实施“走出去”战略，开拓国际资源市场，建立矿石资源保障体系。规范铁矿石进口及流通秩序，限制进口铁矿石流向违法违规建设、环保不达标、不符合产业政策和调整振兴规划的钢铁企业。合理配置、开发省内铁矿资源，储量大(3000万吨以上)的铁矿资源优先配置省内大型钢铁企业。支持大型钢铁企业投资矿山勘探开发以及参与现有铁矿山的购并重组，加大小铁矿企业整治力度，规范小铁矿企业开采秩序。鼓励省内钢铁企业与独立焦化企业、重点铁合金专营企业采取直供或参股、控股等多种方式组成战略联盟，为钢铁工业发展提供资源保障。



**(六) 拓宽企业融资渠道。**各级政府要积极组织企业拓展融资渠道，通过发行债券、股票上市、招商引资、吸纳民资等多种途径，解决企业融资难的问题。金融部门要认真落实中央金融政策，扩大信贷规模，加大对重点企业、重点产品发展的贷款支持，促进企业结构调整和技术改造。

**(七) 加大财税政策支持力度。**一是认真落实财税优惠政策。加大政策宣传、贯彻落实力度，积极引导企业充分用足用好财税优惠政策，强化对政策落实情况的监督检查，切实把优惠政策用足、用好、用活。同时，各级财税部门要充分发挥职能作用，积极研究制定财税配套政策和税收管理措施，促进行业调整振兴。二是积极整合财政专项资金，大力支持企业技术进步，着力推动企业产品结构优化升级；大力支持企业自主创新，着力提高企业核心竞争能力；大力支持节能减排、结构调整和技术改造，着力推进经济发展方式转变。三是对国家确定的重点支持项目，各级政府要创新资金筹集方式，调整资金支出结构，按照国家有关规定，给予配套资金支持。四是切实落实国家新税法规定的增值税转型税收政策。

**(八) 充分发挥行业协会作用。**建立健全行业协会，并在规划、标准、政策、市场、技术、信息等方面发挥协调服务作用，重点围绕企业规划、投资、创新、管理、销售等生产经营环节，强化指导服务，推动钢铁产业调整振兴规划的实施。

**附件：有关部门工作分工及进度安排表**

**主题词：经济管理 钢铁 规划 通知**

**抄 送：省委各部门，省人大常委会办公厅，省政协办公厅，省法院，省检察院，济南军区，省军区。各民主党派省委。**

**山东省人民政府办公厅2009年4月22日印发**