



迈向高质量发展新阶段

Marching toward New Stage of High Quality Development



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中国石化产业的现状

Introduction of China's Petrochemical Industry

1. 中国石化产业正处于新的转折点/New Turning Point

类别/Item	总额/Total Sum	增幅/Increase
全行业主营业务	13.78万亿元	15.7%
Main Business	13.78 Trillion RMB	15.7%
利润	8462亿元	51.9%
Profit	846.2 Billion RMB	51.9%
进出口	5834亿美元	22.1%
Import and Export	583.4 Billion USD	22.1%

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2. 2017年中国石化产业发展超预期/2017 Petrochemical Industry Development is beyond Expectation

- 经济运行增速超出预期/ Economic growth is faster than expected

主营业务/Main Business	利润/Profit	进出口/Import and Export	出口/Export
15.7%	51.9%	22.1%	12.9%

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2. 2017年中国石化产业发展超预期/2017 Petrochemical Industry Development is beyond Expectation

- 盈利能力的改善超出预期/ The improvement in profitability is beyond expectation

类别/Item	增幅/Growth	亮点/Remark
全行业主营收入利润率 Profit Rate of Petrochemical Industry	6.14%	四年新高 A new high in 4 years
化学工业主营收入利润率 Profit Rate of Chemical Industry	6.65%	自2012年以来首次超过6.0% Exceed 6% for the first time since 2012

2. 2017年中国石化产业发展超预期/2017 Petrochemical Industry Development is beyond Expectation

- 能源效率的提升超出预期/ The improvement in energy efficiency is beyond expectation
 - 2017年石化全行业能源消耗总量创历史最低增幅
 - The total energy consumption increase rate of the petrochemical industry in 2017 was a record minimum
 - 万元收入耗标煤同比下降12.8%，2013年以来首次下降
 - Standard coal consumption per ten thousand income decreased by 12.8%, the first decrease since 2013

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3. 全行业重点工作取得新突破/New Breakthroughs in Key Sectors

- 去产能取得新突破
- Achievements in cutting overcapacity

种类	淘汰产能
炼油/ Refinery	119套装置， 8980万吨/年; 119 Units, 89.8 million ton/year
合成氨/synthesis ammonia	165万吨/1.65 million tons
尿素/urea	280万吨/2.8 million tons
磷肥/phosphate fertilizer	7.5万吨/75 thousand tons
电石/calcium carbide	350万吨/3.5 million tons
PVC	28万吨/ 280 thousand tons
烧碱/caustic soda	27万吨/ 270 thousand tons

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3. 全行业重点工作取得新突破/New Breakthroughs in Key Sectors

- 绿色发展取得新突破
- Achievements in Green Development

起草了《石化产业绿色发展指导意见》

Drafted the Guideline for the Green Development of Petrochemical Industry

发布了《石化行业绿色发展行动计划》
及“六大专项行动计划”

Published the Action Plan for the Green Development of Petrochemical Industry and Six Action Plans

成功举办“2017中国责任关怀促进大会”

Held the 2017 China Responsible Care Conference

到去年底已有553家企业、43家石化园区
签署“责任关怀全球宪章”

By the end of 2017, 553 companies and 43 industrial parks have signed the Responsible Care Global Charter

制定了行业责任关怀工作路线图

Drafted the Responsible Care China Roadmap

3. 全行业重点工作取得新突破/New Breakthroughs in Key Sectors

- 国际合作又有新突破
- Achievements in international cooperation
 - 成为ICCA过渡会员
 - Became the associate member of ICCA
 - 贯彻“一带一路”倡议，成立“走出去”企业联盟
 - Set up the Going Global Confederation under the “Belt and Road” Initiative

中国石化产业正在迈向高质量发展的新阶段

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1. 国际经济环境同步向好是中国石化产业高质量发展的新机遇/**New Chances Bring by the Recover of Global Economy**

- 联合国、国际货币基金组织（IMF）、世界银行以及一些知名的国际咨询机构，都对2018年世界经济做出乐观预计
- Positive estimation on global economy from UN, IMF, and World Bank
- 2018年国际原油价格将继续在震荡中上行，全年均价将高于上年，布伦特均价将在2017年的基础上再上涨5-10美元/桶
- The oil price will increase by 5-10 per barrel

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2. 中国进入新时代是中国石化产业高质量发展的新要求/**New Requirement under New Era**

- 2017年的中国经济实现了2009年以来首次增速回升，增长6.9%
- The growth rate of China's GDP was 6.9% in 2017, the first increase since 2009
- 中国经济已由高速增长阶段转向高质量发展阶段
- China's economy is transforming from rapid growth to high quality growth
- 2018年经济增长的目标为6.5%
- The target of economic growth in 2018 is 6.5%

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3. 2018年中国石化产业高质量发展的总体思路和重点/**Main plan and key issue of 2018**

- 淘汰落后产能/ phase out back ward production facilities
- 创新/ Innovation
- 绿色发展/ Green Development
- 打造产业集群/Build Industry Cluster

1. 全球石化企业在中国拥有更多的发展机遇/**Opportunities for Petrochemical Multinationals in China**

国家/Country	进出口总额/Export and Import	进口额/Import
中美/China-America	476.46亿美元 47.646 Billion USD	225.12亿美元 22.512 Billion USD
中欧/China-Europe	545.63亿美元 54.563 Billion USD	277.84亿美元 27.784 Billion USD
中日/China-Japan	324.11亿美元 32.411 Billion USD	218.43亿美元 21.843 Billion USD
中韩/China-Korea	463.86亿美元 46.386 Billion USD	345.3亿美元 34.53 Billion USD

2. 中国石化行业与全球石化行业的合作与交流也将进一步拓宽和深化/More Cooperation with International Petrochemical Industry

加强与ICCA、AICM、IFA以及美国、欧洲、德国、日韩等国际组织、专业组织和跨国公司的合作与交流

Cooperation with ICCA, AICM, IFA, and other international organizations

时间地点/Time, Venue	活动/Conference
三月北京/March, Beijing	中外跨国公司高层对话会/CEO Dialogue
五月珠海/May, Zhuhai	石化园区高峰论坛/Industrial Park Summit
六月宁波/June, Ningbo	亚洲炼油与科技大会/Asia Downstream
九月成都/September, Chengdu	国际石化大会/China Petroleum and Chemical International Conference
十二月三亚/December, Sanya	三亚国际能源论坛/Sanya International Energy Forum

3. 中国石化市场规模大、并处在不断增长过程中/**the Chinese Market Keeps Growing**

- 2017年，中国石化产品进出口贸易总额5834亿美元，同比增长22.1%
- The total import and export sum of China in 2017 stood at 583.4 billion USD, increased by 22.1%.

- 进口额3904亿美元，同比增长27.2%；贸易逆差大增45.1%
- The import was 390.4 billion USD, increased by 27.2%, the deficit increased by 45.1%

- 工程塑料、膜材料、特种纤维材料等，一直主要依靠进口满足国内市场需求
- Engineering plastics, membrane materials and special fiber materials have been mainly imported to meet the needs of the domestic market

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谢谢
Thank you!