

## 国内受注は年後半に急減速、7年ぶりの減少

Steep drop in second-half orders lowers annual domestic demand for first time in seven years

### ● 国内需要

2008年の国内向け鋼材受注量は6,724万トンで、前年比5.7%の減少となった。このうち普通鋼鋼材の受注量は同6.2%減の5,370万トンとなった。

普通鋼鋼材受注量を見れば、建築が景況感の悪化により前年比では8.6%減とマイナスに転じ、建設全体でも6.7%減の1,280万トンとなった。他方、製造業は9月に発生した世界同時不況の影響から受注は急減し、自動車、産業機械および電気機械の主要需要産業が前年比でマイナスとなるなど、4.3%減の2,592万トンとなった。

特殊鋼鋼材受注量は、需要の過半を占める自動車向けと次工程向けが景気後退による受注の減少により前年割れに転じ、過去最高記録となった昨年から3.3%減の1,354万トンと7年ぶりの減少となった。

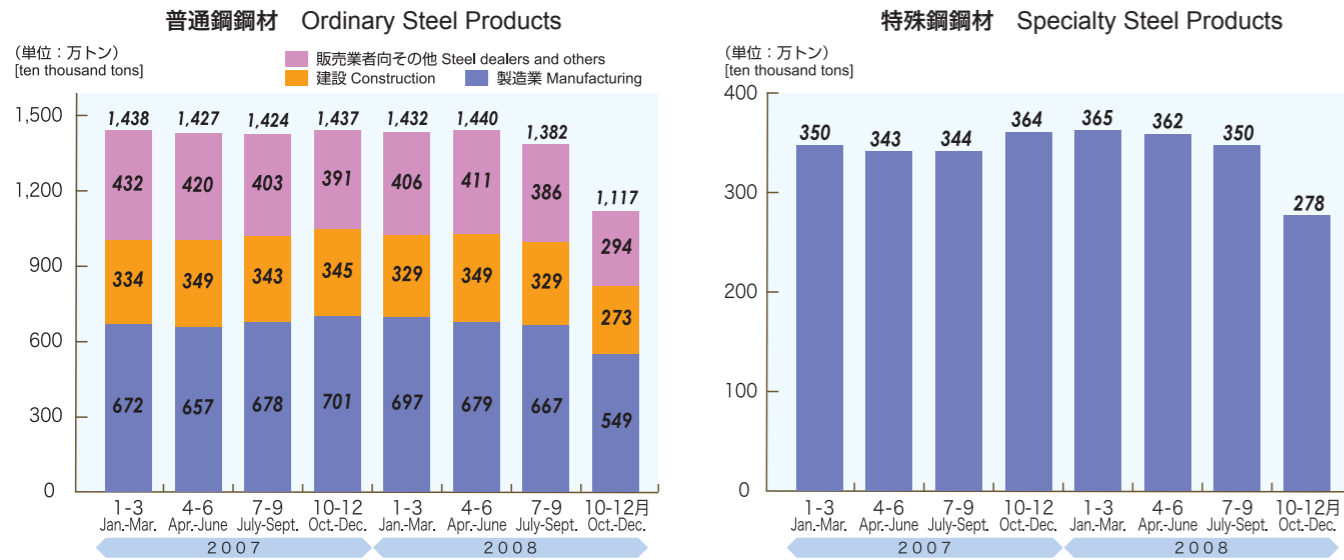
### ● Domestic demand

Steel orders in Japan decreased 5.7% in 2008 to 67.24 million tons, with a 6.2% decrease in ordinary steel orders to 53.70 million tons.

By market sector, ordinary steel product orders were down 6.7% in the construction sector as the downturn in building construction in Japan caused orders in this category to fall 8.6% following a year-on-year increase in 2007. In the manufacturing sector, orders fell rapidly following the September global financial crisis. 2008 orders were lower from the automobile, industrial machinery and electrical machinery industries, the primary sources of demand. Overall, domestic demand for steel from manufacturers decreased 4.3% to 25.92 million tons.

Orders for specialty steel products decreased 3.3% from the record-high level in 2007 to 13.54 million tons, the first decline in seven years. This decrease was attributable mainly to lower orders for steel used in motor vehicles and steel for further processing, which account for the majority of specialty steel demand, as the economy weakened.

### ■ 国内向け鋼材受注量の推移 Domestic Orders for Steel Products



出所: 日本鉄鋼連盟 Source: The Japan Iron and Steel Federation

### ■ 国内向け鋼材用途別受注量 Domestic Orders for Steel Products by Market Classification

部門 Classification	普通鋼鋼材 Ordinary steel products				特殊鋼鋼材 Specialty steel products				合計 Total		
	2007		2008		2007		2008		2007		2008
	数量 Volume	構成比(%) Share(%)	数量 Volume	構成比(%) Share(%)	数量 Volume	構成比(%) Share(%)	数量 Volume	構成比(%) Share(%)	数量 Volume	構成比(%) Share(%)	
土木用 Civil engineering	312	5.7	308	5.7	30	2.0	28	2.0	342	5.0	336
建築用 Building and construction	771	13.1	705	13.1	8	0.7	9	0.7	779	10.6	714
建設用計 Total of construction	1,372	23.8	1,280	23.8	68	5.0	67	5.0	1,440	20.0	1,347
産業機械用 Industrial machinery and equipment	259	4.6	247	4.6	172	12.7	172	12.7	431	6.2	420
電気機械用 Electrical machinery and equipment	210	3.6	195	3.6	15	1.0	14	1.0	225	3.1	209
家庭用・業務用機器用 Home and office appliances	61	1.0	53	1.0	19	1.3	17	1.3	80	1.0	70
船舶用 Shipbuilding and marine equipment	533	10.5	564	10.5	17	1.4	19	1.4	550	8.7	584
自動車用 Motor vehicles	1,208	21.2	1,137	21.2	449	31.7	429	31.7	1,657	23.3	1,566
容器用 Beverage cans and other containers	142	2.5	133	2.5	6	0.4	5	0.4	148	2.1	138
次工程用 Conversion and processing	255	4.2	225	4.2	505	36.4	492	36.4	760	10.7	717
その他 Others	42	0.7	39	0.7	11	0.8	10	0.8	53	0.7	49
製造業用計 Total of manufacturing	2,709	48.3	2,592	48.3	1,194	85.7	1,160	85.7	3,903	55.8	3,752
販売業者向 Steel dealers	1,645	27.9	1,498	27.9	138	9.4	127	9.4	1,783	24.2	1,625
合計 Total	5,726	100.0	5,370	100.0	1,401	100.0	1,354	100.0	7,127	100.0	6,724

出所: 日本鉄鋼連盟 Source: The Japan Iron and Steel Federation

### ● 鋼材需給

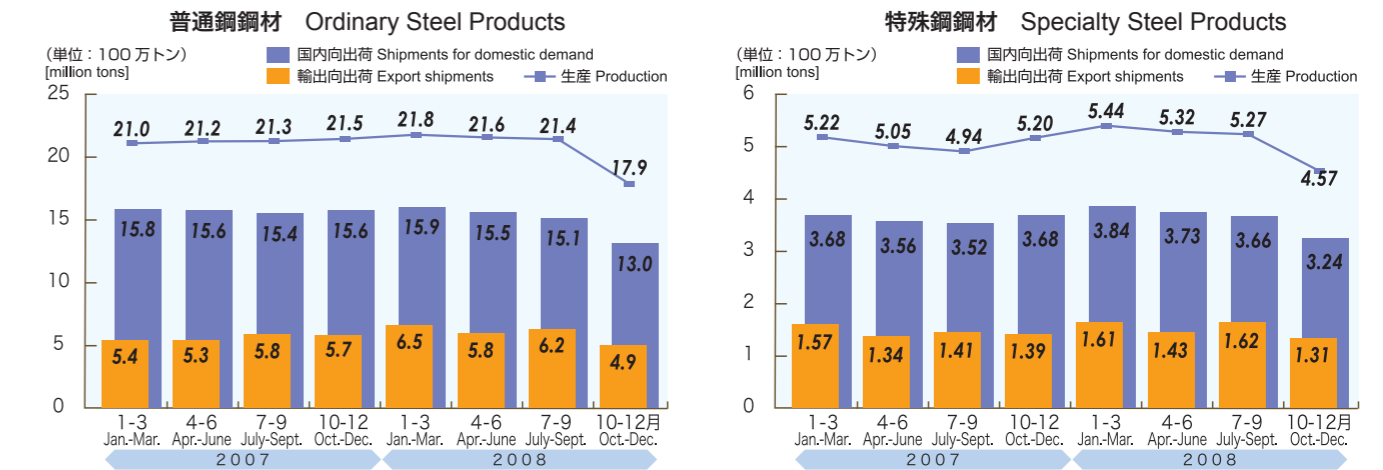
2008年の普通鋼鋼材需給を見ると、国内向け出荷は年前半では横ばいとなったが、9月以降は世界的な景気後退の影響を受けて建設向け、製造業向けともに急減し、暦年計では前年比4.7%の減少となる5,945万トンとなった。

輸出向け出荷は、年前半の世界的な鋼材需要を背景に増勢を維持し、同5.8%増となる2,346万トンとなった。なお、メーカー・問屋国内向け在庫は年間を通して増加傾向で推移し、2007年12月末の566万トンが2008年12月末には588万トンとなり、国内在庫率も40.9ポイント上昇して155.0%となった。

一方、2008年の特殊鋼鋼材の国内向け出荷は微増ながら7年連続の増加となる前年比0.3%増の1,447万トンとなり、また、輸出向け出荷も4.4%増と3年連続増加の597万トンとなった。在庫は増減を繰り返しながら推移し、2008年12月末では前年12月末比で3.4万トン増の153万トンとなった。

以上により、特殊鋼鋼材の最終鋼材生産は前年比0.9%増の2,059万トンとなり、7年連続で最高記録を更新するとともに、3年連続の2,000万トンを超えた。

### ■ 普通鋼鋼材、特殊鋼鋼材需給の推移 Supply and Demand of Ordinary Steel Products and Specialty Steel Products



出所: 経済産業省「鉄鋼・非鉄金属・金属製品統計月報」  
Source: "Monthly of Iron and Steel, Non-ferrous Metal, and Fabricated Metals Statistics," Ministry of Economy, Trade and Industry

### ● Steel supply and demand

For ordinary steel products, domestic shipments were about the same as one year earlier during the first half of 2008. But shipments to both the construction and manufacturing sectors, plummeted as the global economy began to weaken in September. For the year, shipments of ordinary steel products for domestic demand were down 4.7% to 59.45 million tons.

Export shipments increased 5.8% to 23.46 million tons as exports continued to grow in the year's first half because of robust global demand for steel. Domestic inventories of steel for shipment to manufacturers and traders increased steadily throughout 2008. At the end of 2008, these inventories totaled 5.88 million tons compared with 5.66 million tons at the end of 2007. As a result, the domestic inventory-shipment ratio rose 40.9 percentage points to 155.0%.

Domestic shipments of specialty steel products increased for the seventh consecutive year, although only slightly. Overall, these shipments were up 0.3% to 14.47 million tons in 2008. Export shipments increased 4.4% to 5.97 million tons, the third consecutive year of growth. Inventories were up and down during the year, with specialty steel inventories ending the year at 1.53 million tons, 3.4 million tons more than one year earlier.

As a result, production of finished specialty steel products increased 0.9% to 20.59 million tons. This was the seventh consecutive year that specialty steel production reached a record high and the third consecutive year that production exceeded 20 million tons.

### ■ 特殊鋼鋼材の鋼種別国内向け受注量

鋼種別 Product	2007	2008	08/07(%) Change(2008/2007)(%)
工具鋼 Tool steels	24	22	▲ 11.5
機械構造用炭素鋼 Structural carbon steels	456	439	▲ 3.9
構造用合金鋼 Structural alloy steels	291	281	▲ 3.1
ばね鋼 Spring steels	39	36	▲ 8.7
軸受鋼 Bearing steels	77	87	11.8
ステンレス鋼 Stainless steels	177	153	▲ 13.6
快削鋼 Free-cutting steels	79	70	▲ 11.2
ピアノ線材 Piano wire rods	54	52	▲ 3.1
高抗張力鋼 High tensile strength steels	187	197	5.5
その他鋼 Others	17	18	8.4
合計 Total	1,401	1,354	▲ 3.3

出所: 日本鉄鋼連盟 Source: The Japan Iron and Steel Federation

### ■ 普通鋼鋼材の品種別国内向け受注量

品種別 Product	2007	2008	08/07(%) Change(2008/2007)(%)
軌条 Rails and accessories	25	30	20.2
鋼矢板 Sheet piling	66	59	▲ 11.2
形鋼 Shapes	663	624	▲ 5.9
棒鋼 Bars and flat bars	1,059	910	▲ 14.1
線材 Wire rods	243	219	▲ 9.8
厚中板 Heavy and medium plates	1,426	1,453	1.9
熱延薄板類 Hot-rolled sheets and coils	296	280	▲ 5.2
冷延薄板類 Cold-rolled sheets and coils	402	381	▲ 5.3
電気鋼板 Electrical sheets	62	58	▲ 5.4
ブリキ Tinplate	48	43	▲ 9.9
亜鉛めっき鋼板 Galvanized sheets	858	774	▲ 9.8
その他の表面処理鋼板 Other surface-treated and coated sheets	200	186	▲ 7.3
鋼管 Tubular products	379	354	▲ 6.4
合計 Total	5,726	5,370	▲ 6.2

出所: 日本鉄鋼連盟 注: 形鋼にはリムリングバー、サッシバーを含む。線材にはバーインコイルを含む。  
Source: The Japan Iron and Steel Federation Note: "Shapes" includes rim ring bars and sash bars. "Wire rods" includes bar-in-coil.