

一般経済

The Japanese Economy

2008年のわが国経済は、前年に引き続き新興経済諸国を中心とする世界経済の拡大にともない輸出が堅調に推移し、内需も企業部門の好調継続による設備投資の増加が続き、外需と民間企業の活動に牽引されて緩やかな回復基調が継続していた。しかしながら、9月に発生した金融危機により世界経済全体が急速に縮小するなか、外需に依存していた製造業がその影響を直接受けて生産が急減し、年末にかけて月を追う毎に減産幅の拡大を余儀なくされた。この結果、2008年の実質GDP成長率は0.7%のマイナスとなった。

Japan's economy in 2008 benefited from growth in exports due to continuing expansion of the global economy, particularly in countries with emerging economies. Internal demand was also solid as capital expenditures continued to increase because of strong corporate earnings. The result was a moderate economic recovery that was supported by external demand and strong sales and earnings at private-sector companies. However, the global economy began to contract rapidly during the last few months of 2008 due to the financial crisis. The crisis severely impacted export-dependent manufacturers in Japan, resulting in a sharp drop in production volumes. Manufacturers were forced to make increasingly greater cuts in production each month as 2008 drew to a close. As a result, Japan's real GDP growth rate in 2008 was negative 0.7%.

生産

Production

2008年の鉄鋼需要をみると、内需・外需とも、年初から前年を上回る高水準が続いていたが、秋口以降急速に減少した。これにともない、粗鋼生産も9月までは前年比増で推移したが、10月以降は急降下となり、2008暦年計では3年ぶりの減少となる1億1,874万トンとなった。ただし、9月まで過去最高のペースで推移したことにより、粗鋼生産の水準としては2007年、1973年に次ぐ史上第3位の規模となった。

Internal and external demand for steel in 2008 was high for much of the year, remaining consistently above demand one year earlier. But demand began to drop sharply in the fall of 2008. Japan's crude steel production, which had been posting year-on-year growth every month through September, began a steep decline in October. Because of this downturn, 2008 crude steel production was 118.74 million tons, the first year-on-year decrease in three years. However, the record-setting production volumes in the year's first nine months made 2008 crude steel production the third highest in Japan's history. Only output in 2007 and 1973 was higher.

国内需要

Domestic Demand

2008年の国内鉄鋼需要を受注統計でみると、普通鋼鋼材では建設向けは土木・建築とも低迷が続き、製造業向けは上半期まで好調に推移したが、下半期からは世界同時不況の影響を受けて急減し、暦年計では6.2%のマイナスと3年ぶりの減少となった。

Domestic demand for steel in 2008 based on orders received decreased 6.2%, the first year-on-year decline in three years. Orders for ordinary steel products remained lackluster in both the civil engineering and architectural sectors of the construction industry. Orders from manufacturers were strong in the first half of 2008 but decreased rapidly in the second half because of the global economic downturn.

特殊鋼鋼材においても、9月までは前年比増で推移したが、10月以降は主力の自動車向け及び産業機械向けが急速に減少し、2008暦年計では過去最高となった前年から一転して3.3%減と7年ぶりのマイナスとなった。

Orders for specialty steel products were higher than one year earlier through September. In October, orders from the automobile and industrial machinery industries, the primary sources of demand, started falling rapidly. Because of this weakness, specialty steel orders were down for the first time in seven years, declining 3.3% from the record-high level in 2007.

輸出入

Steel Trade

2008年の全鉄鋼輸出力は、前年比3.5%増の3,813万トンと3年連続で増加し、これまでの最高だった1976年を上回り過去最高を更新した。全体の69.3%を普通鋼鋼材が占め、次いで特殊鋼鋼材、鋼塊・半製品の順となっている。最大の仕向け先は韓国、次いで中国、タイ、台湾の順となった。

Japan's total steel exports in 2008 increased 3.5% to 38.13 million tons, the third consecutive year of growth. Furthermore, exports surpassed the previous record that was set in 1976 to set a new all-time high. Ordinary steel products accounted for 69.3% of exports with specialty steel products ranking second and steel ingots and semi-finished products third. The largest share of exports went to South Korea, followed by China, Thailand and Taiwan.

一方、全鉄鋼輸入量は前年比8.0%減の797万トンと2年ぶりに減少した。うち、普通鋼鋼材が371万トンで全体の46.5%を占め、次いでフェロアロイ、銑鉄、二次製品、特殊鋼鋼材の順となっている。普通鋼鋼材の最大の仕入先は韓国で、以下、台湾、中国の順となり、この3カ国で輸入の96.4%を占めた。

Steel imports decreased 8.0% to 7.97 million tons, the first decline in two years. Imports of ordinary steel products totaled 3.7 million tons, representing 46.5% of all imports. Ferroalloys were second, pig iron third, secondary products fourth and specialty steel fifth. The largest share of ordinary steel imports came from South Korea, followed by Taiwan and China. These three countries collectively accounted for 96.4% of Japan's steel imports.

エネルギー・環境

Energy and the Environment

わが国の鉄鋼業は、1996年に自主行動計画を策定し、業界が一丸となって省エネルギー、リサイクルの推進等の対策に多面的に取り組んでいる。

Since establishing a voluntary action program in 1996, Japan's steel companies have been working in unison to conserve energy, recycle resources and take many other actions aimed at protecting the environment.

鉄鋼業はわが国全体の最終エネルギー消費量の約12%を占めているが、1970年以降2度にわたる石油危機を経て20年間で約20%の省エネを達成し、世界最高レベルのエネルギー効率を維持している。自主行動計画では、2010年度までに基準年の1990年度に対し、10%の省エネを図るといった厳しい目標を設定し、取り組んでいる。

The steel industry accounts for about 12% of final energy consumption in Japan. Over the two decades since 1970, a period that includes two oil shocks, Japan's steel industry has cut its energy consumption by approximately 20%. Due to these improvements, Japan has the most efficient steel industry in the world. Presently, steel companies are working toward achieving the ambitious voluntary action program target for fiscal 2010 of lowering energy consumption by 10% compared with the fiscal 1990 level.

設備・技術

Equipment and Technology

近年、鉄鋼製品に対し多様化・高度化するユーザーニーズに対応するため、各製造プロセスでは、一層の生産性向上を図りながら、高品質かつ環境調和型の製品開発を進めている。

The needs of companies that use steel products are becoming more diverse and exacting year after year. In response, steelmakers are constantly developing products that have greater quality and environmental properties while further upgrading the productivity of all manufacturing processes.

また、2008年度からは、2050年へ向けた製鉄プロセスにおける根本的なCO₂排出削減を目指す「環境調和型製鉄プロセス技術開発(COURSE50)」がスタートした。

Going one more step, fiscal 2008 was the beginning of a project called COURSE50 (CO₂ Ultimate Reduction in Steelmaking process by Innovative technology for cool Earth 50) which goal is to achieve a sharp reduction in CO₂ emissions associated with ironmaking by 2050.

財務

Financial Affairs

鉄鋼各社の2008年度の財務状況は、下半期に顕在化した世界的な景気後退の影響により、内外需とも落ち込んだため、上半期の販売量拡大や販売価格上昇を織り込んでも、売上高は減少する見込みである。経常利益については、鉄鉱石・原料炭を中心とした主原料調達コストの増大により、2年連続の減益となる見込みである。設備投資は、高炉の改修を中心とした大型の案件が継続し、2年連続7,000億円超えの高水準が見込まれる。

In fiscal 2008, aggregate sales of Japan's steelmakers are expected to decrease because of the drop in internal and external demand caused by the global recession that began in the fiscal year's second half. The impact of this downturn will probably offset contributions to sales in the fiscal year's first half from growth in sales volumes and higher sales prices. Steel industry ordinary income is expected to decrease for the second consecutive year. The main cause is the rising cost of raw materials, particularly iron ore and coal. Capital investments by steelmakers are expected to exceed 700 billion yen for the second consecutive year as companies continue to make large expenditures, chiefly for upgrading blast furnaces.

労働

Industrial Relations

鉄鋼業の従業員数は、いわゆる「団塊の世代」の退職にともなう技能伝承への対応などから、2003年以降増加に転じており、2008年12月末時点で、21万人となった。

The workforce in the Japanese steel industry has been increasing since 2003. One reason is the need to pass on skills to younger workers as members of the baby-boom generation reach retirement age. At the end of 2008, total employment was 210,000.

海外

Overseas

2008年の世界経済は米国発金融危機の影響から先進国を中心に実体経済の悪化が目立ち、年後半に景気後退に陥る国が多く現れるなかで世界の粗鋼生産も10年ぶりに前年比マイナスに転じた。粗鋼生産の国別シェアは1位が中国、2位が日本、3位が米国、4位がロシア等と続き、昨年より1～10位までの順位に変動はなかった。このうち、中国はこれで14年連続して世界第1位の座を保持している。

In 2008, global crude steel production decreased for the first time in 10 years due to the financial crisis that began in the United States. The crisis had a severe impact on the real economies of many countries, especially industrialized nations, that produced an economic downturn in the year's second half. Although crude steel production was down, there was no change in the rankings of the world's top-ten producers. China was first, followed by Japan, the United States and Russia. Furthermore, China retained its number-one ranking for the 14th consecutive year.