

全鉄鋼輸出は3,813万トンと過去最高を更新、輸入量は797万トンと2年ぶりの減少

Exports of 38.13 million tons set a new record but imports were 7.97 million tons, the first decline in two years

2008年の全鉄鋼輸出は前年を3.5%上回る3,813万トンと2年連続で増加し、これまで最高の1976年(3,704万トン)を109万トン上回った。また、ドルベースの輸出額は464億ドルと6年連続で過去最高を更新した。しかしながら、9月の金融危機以降は輸出環境が急激に悪化し、10~12月は前年同期比15.4%減と大幅に落ち込んだ。なお、暦年での最大仕向先は韓国(928万トン)で、以下、中国(667万トン)、タイ(463万トン)、台湾(370万トン)の順。

全鉄鋼輸出を品種別にみると、普通鋼鋼材が全体の69.3%を占め、次いで特殊鋼鋼材、鋼塊・半製品の順となっている。このうち、普通鋼鋼材は前年を4.9%上回る2,643万トンで、その内訳をみると、鋼板類は厚中板、冷延鋼板類、亜鉛めっき鋼板などが増加、条鋼類では棒鋼が大幅に増加した。

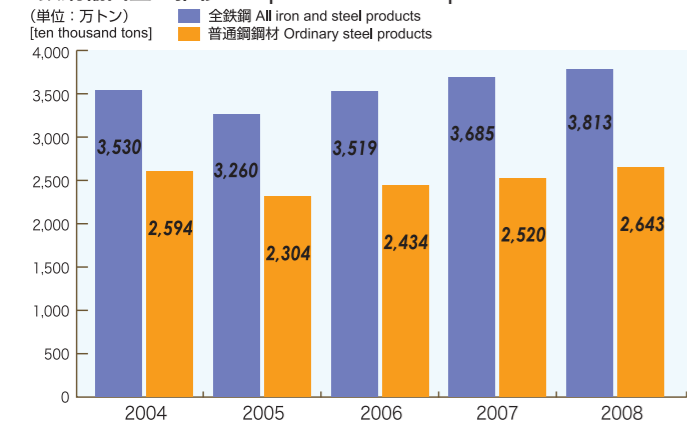
2008年の全鉄鋼輸入は前年比8.0%減の797万トンと2年ぶりに減少した。うち、普通鋼鋼材が371万トンで全体の46.5%を占め、次いでフェロアロイ、銑鉄、二次製品、特殊鋼鋼材の順となっている。普通鋼鋼材の内訳をみると、厚中板、冷延鋼板類は増加も、最大の輸入品種である熱延薄板・鋼帯が減少、その他、亜鉛めっき鋼板、線材なども減少した。普通鋼鋼材の最大の仕入先は韓国(217万トン)で、以下、台湾(70.8万トン)、中国(69.2万トン)の順となり、この3か国で輸入量全体の96.4%を占めた。

Steel exports increased 3.5% to 38.13 million tons in 2008, the second consecutive year of growth. This was 1.09 million tons higher than the previous record for exports that was set in 1976 (37.04 million tons). On a dollar basis, exports totaled \$46.4 billion, an all-time high for the sixth consecutive year. However, the sudden deterioration in the export climate following the September financial crisis caused steel exports to fall 15.4% in the final quarter of 2008 compared with one year earlier. South Korea was the largest buyer of Japanese exported steel (9.28 million tons), China was second (6.67 million tons), Thailand was third (4.63 million tons) and Taiwan was fourth (3.70 million tons).

By product type, ordinary steel products accounted for 69.3% of 2008 exports followed by specialty steel products and ingots and semi-finished products. Exports of ordinary steel products increased 4.9% in 2008 to 26.43 million tons. In the flat-rolled products category, there were higher exports of heavy and medium plates, cold-rolled sheets and coils, and galvanized sheets. In addition, there was a big increase in exports of bars in the long products category.

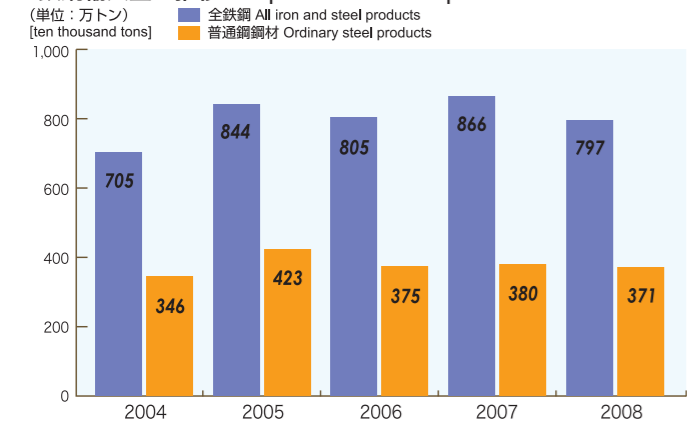
Steel imports decreased 8.0% to 7.97 million tons, the first year-on-year decrease in two years. Imports of ordinary steel products totaled 3.71 million tons, 46.5% of all imports. Ferroalloys ranked second, followed by pig iron, secondary products and specialty steel products. In the ordinary steel product category, imports of heavy and medium plates and cold-rolled sheets and coils increased. But there was a decline in imports of hot-rolled sheets and strips, which is the largest single import category. Imports of galvanized sheets, wire rods and other products were down, too. For ordinary steel products, South Korea is the largest exporter to Japan (2.17 million tons). Other major suppliers of these products are Taiwan (708 thousand tons) and China (692 thousand tons). Together, these three countries account for 96.4% of Japan's imports of ordinary steel products.

鉄鋼輸出量の推移 Japanese Steel Exports



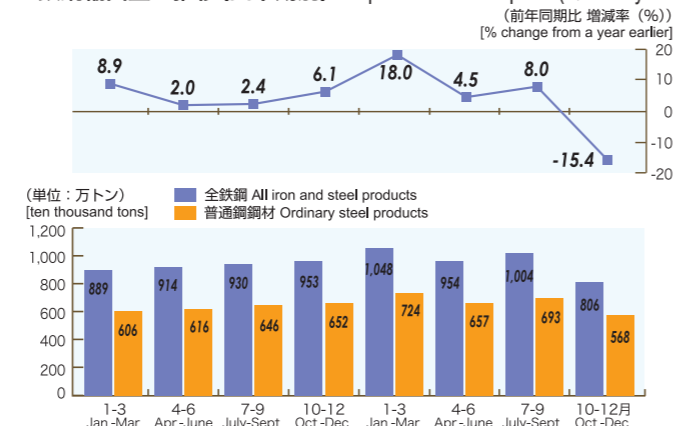
出所: 財務省「通関統計」 Source: "Customs Clearance Statistics," Ministry of Finance

鉄鋼輸入量の推移 Japanese Steel Imports



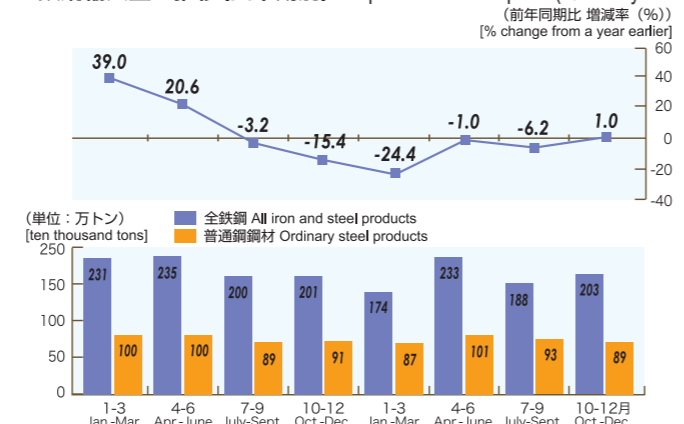
出所: 財務省「通関統計」 Source: "Customs Clearance Statistics," Ministry of Finance

鉄鋼輸出量の推移(四半期別) Japanese Steel Exports (Quarterly Basis)



出所: 財務省「通関統計」 Source: "Customs Clearance Statistics," Ministry of Finance

鉄鋼輸入量の推移(四半期別) Japanese Steel Imports (Quarterly Basis)



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2年ぶりの減少

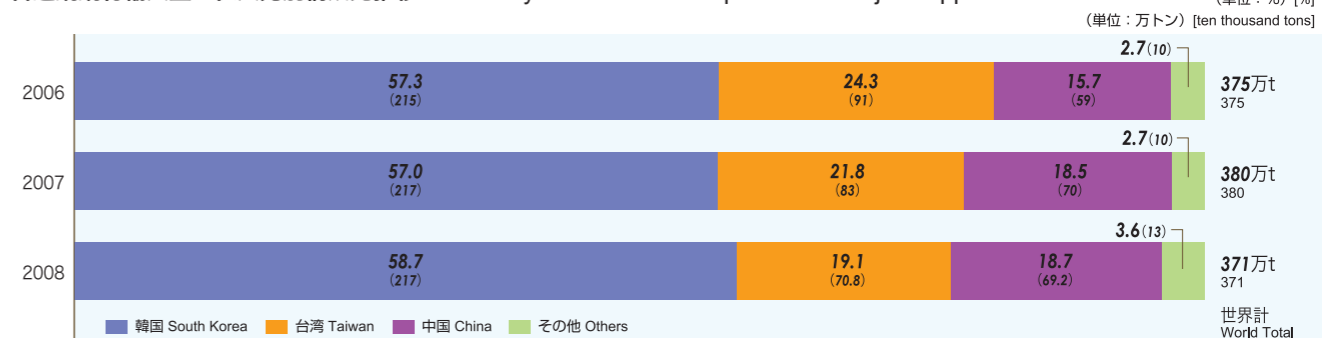
decline in two years

全鉄鋼輸出量の仕向先別構成比推移 Iron and Steel Exports by Destination



出所: 財務省「通関統計」 Source: "Customs Clearance Statistics," Ministry of Finance

普通鋼鋼材輸入量の仕入先別構成比推移 Ordinary Steel Product Imports from Major Suppliers



出所: 財務省「通関統計」 Source: "Customs Clearance Statistics," Ministry of Finance

鉄鋼品種別輸出実績 Iron and Steel Exports by Type of Steel

品名 Product	2006	2007	2008	
			構成比 (%) Share (%)	前年比増減 (%) Change (2008/2007) (%)
銑鉄 Pig iron	39	48	42	0.1
鋼塊・半製品 Ingots and semis	4,514	4,831	4,761	▲ 12.1
普通鋼鋼材 条鋼類 Long products	2,332	2,456	2,834	7.4
軌条 Rails and accessories	328	360	369	1.0
形鋼 (含鋼矢板) Shapes and sheet piling	975	1,279	1,322	3.5
棒鋼 Bars and flat bars	533	401	695	1.8
線材 Wire rods	496	416	448	1.2
鋼板類 Flat-rolled product	19,506	20,424	21,119	55.4
厚中板 Heavy and medium plates	2,996	3,265	3,467	9.1
熱延薄板・鋼帯 Hot-rolled sheets and coils	6,848	7,054	7,056	18.5
冷延鋼板類 Cold-rolled sheets and coils	3,063	3,109	3,239	8.5
電気鋼板 Electrical sheets	782	801	857	2.2
ブリキ Tinplate	459	489	627	1.6
亜鉛めっき鋼板 Galvanized sheets	4,884	5,193	5,370	14.1
その他表面処理鋼板 Other surface-treated and coated sheets	474	512	503	1.3
鋼管 Tubular products	2,504	2,317	2,476	6.5
計 Total	24,342	25,197	26,428	69.3
特殊鋼鋼材 Specialty steel products	5,326	5,789	5,909	15.5
二次製品 Secondary products	626	698	698	1.8
その他 Others	338	289	291	0.8
合計 Total	35,185	36,852	38,128	100.0
総額 (100万ドル) Value (US\$ million)	32,011	36,610	46,436	26.8

出所: 財務省「通関統計」 注: その他はフェロアロイ、鑄鉄管、合わせ鋼材等の計。
Source: "Customs Clearance Statistics," Ministry of Finance
Note: "Others" comprises the total of ferroalloys, cast-iron pipes and clad steel.

鉄鋼品種別輸入実績 Iron and Steel Imports by Type of Steel

品名 Product	2006	2007	2008	
			構成比 (%) Share (%)	前年比増減 (%) Change (2008/2007) (%)
銑鉄 Pig iron	1,426	1,474	956	12.0
鋼塊・半製品 Ingots and semis	63	242	140	1.8
普通鋼鋼材 条鋼類 Long products	475	369	344	4.3
軌条 Rails and accessories	6	6	10	0.1
形鋼 (含鋼矢板) Shapes and sheet piling	158	98	92	1.2
棒鋼 Bars and flat bars	25	13	15	0.2
線材 Wire rods	286	253	226	2.8
鋼板類 Flat-rolled product	3,173	3,330	3,291	41.3
厚中板 Heavy and medium plates	215	187	227	2.9
熱延薄板・鋼帯 Hot-rolled sheets and coils	1,590	1,712	1,641	20.6
冷延鋼板類 Cold-rolled sheets and coils	913	962	972	12.2
電気鋼板 Electrical sheets	18	20	19	0.2
ブリキ Tinplate	14	9	6	0.1
亜鉛めっき鋼板 Galvanized sheets	357	371	357	4.5
その他表面処理鋼板 Other surface-treated and coated sheets	66	68	68	0.9
鋼管 Tubular products	101	100	71	0.9
計 Total	3,749	3,799	3,706	46.5
特殊鋼鋼材 Specialty steel products	237	286	205	2.6
二次製品 Secondary products	592	632	636	8.0
その他 Others	1,981	2,231	2,332	29.2
合計 Total	8,048	8,664	7,973	100.0
総額 (100万ドル) Value (US\$ million)	8,692	8,764	11,985	36.8

出所: 財務省「通関統計」 注: その他はフェロアロイ、鑄鉄管、合わせ鋼材等の計。
Source: "Customs Clearance Statistics," Ministry of Finance
Note: "Others" comprises the total of ferroalloys, cast-iron pipes and clad steel.