

国内受注は景気悪化により記録的低水準、2年連続の減少

Down for the second consecutive year as the recession caused domestic orders to fall to an all-time low

国内需要

2009年の国内向け鋼材受注量は4,608万トンで、前年比31.5%の減少となった。このうち普通鋼鋼材の受注量は同29.7%減の3,776万トンとなった。

普通鋼鋼材受注量を用途別にみると、建築が景気の悪化により前年比では27.9%減と2年連続マイナス、建設全体でも26.1%減の946万トンと1970年以来39年ぶりに1,000万トン割れとなった。製造業は08年9月に発生した世界同時不況の影響から、09年上半に自動車、産業機械および電気機械等の主要需要産業の在庫調整にともない受注が急減し、前年比で大幅マイナスとなる29.3%減の1,832万トンとなった。

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需要産業の在庫調整に伴う受注の大幅減により前年割れとなり、38.6%減の831万トンと2年連続の減少となった。

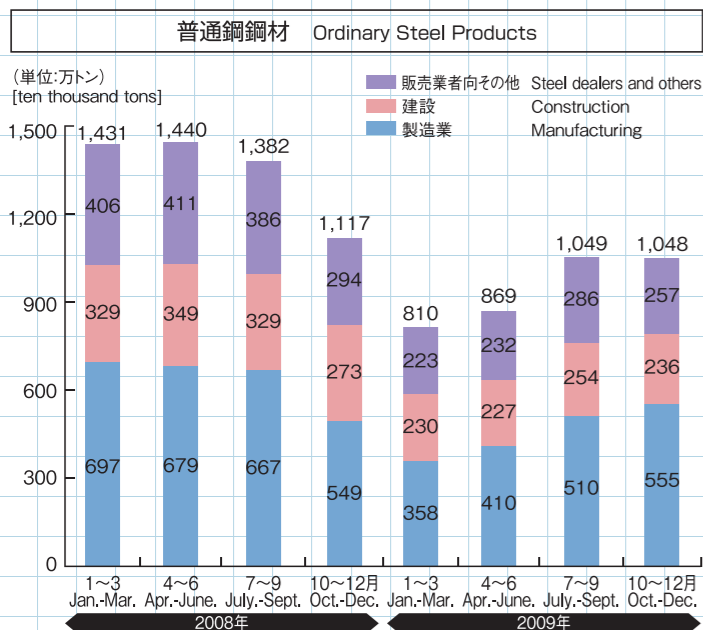
Domestic demand

Steel orders in Japan decreased by 31.5% in 2009 to 46.08 million tons, including a 29.7% decrease in ordinary steel orders to 37.76 million tons.

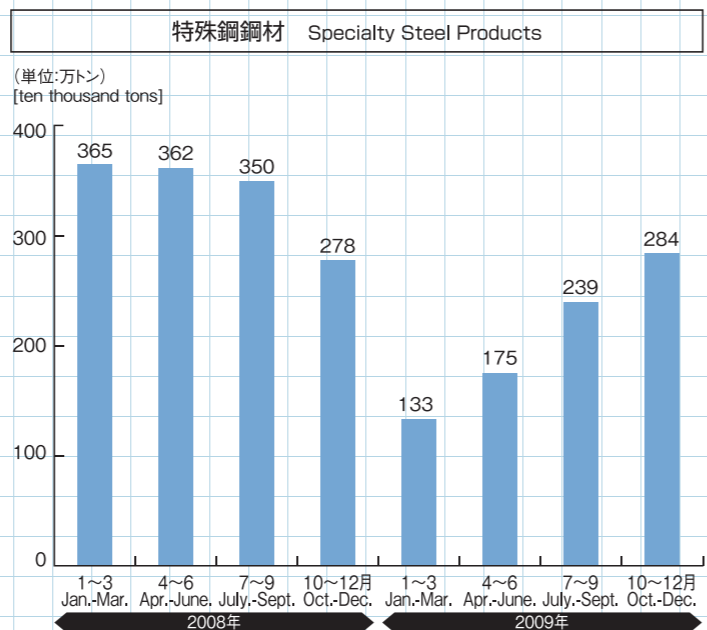
By market sector, domestic orders for ordinary steel products were down by 26.1% in the construction industry to 9.46 million tons. This was the first drop to below 10 million tons since 1970, a period of 39 years. The downturn includes a 27.9% decrease in steel orders for building and construction, the second consecutive year of decline, due to the economic recession. In the manufacturing sector, the worldwide recession that started in September 2008 produced a steep decline in orders in the first half of 2009 in association with inventory reductions in major steel-consuming industries such as automobiles, industrial machinery and electrical machinery. Overall, domestic orders for ordinary steel products from manufacturers dropped by 29.3% to 18.32 million tons.

Orders for specialty steel products were down for the second consecutive year, declining by 38.6% to 8.31 million tons. The primary reason was lower orders for steel used in automobiles and steel for further processing, which account for the majority of specialty steel demand, as steel-consuming industries lowered their inventories.

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			
	2008 数量 volume	2009		2009 数量 volume	2009		2008 数量 volume	2009		2009/2008 (%) change		
数量 volume	構成比 (%) share (%)	2009/2008 (%) change	数量 volume		構成比 (%) share (%)	2009/2008 (%) change		数量 volume	構成比 (%) share (%)			
土木用 Civil engineering	308	241	6.4	▲21.7	28	27	3.3	▲1.5	336	269	5.8	▲20.0
建築用 Building and construction	705	508	13.5	▲27.9	9	5	0.7	▲41.2	714	514	11.1	▲28.1
建設用計 Total construction	1,280	946	25.0	▲26.1	67	57	6.8	▲15.5	1,347	1,003	21.8	▲25.6
産業機械用 Industrial machinery and equipment	247	91	2.4	▲63.2	172	69	8.3	▲60.0	420	160	3.5	▲61.8
電気機械用 Electrical machinery and equipment	195	129	3.4	▲33.9	14	9	1.1	▲31.6	209	139	3.0	▲33.7
家庭用・業務用機器用 Home and office appliances	53	38	1.0	▲27.4	17	13	1.5	▲26.9	70	51	1.1	▲27.3
船舶用 Shipbuilding and marine equipment	564	559	14.8	▲1.0	19	12	1.5	▲36.1	584	571	12.4	▲2.1
自動車用 Automobiles	1,137	736	19.5	▲35.3	429	286	34.4	▲33.5	1,566	1,021	22.2	▲34.8
容器用 Containers	133	113	3.0	▲15.0	5	3	0.3	▲51.2	138	115	2.5	▲16.4
次工程用 For further processing	225	138	3.7	▲38.6	492	300	36.0	▲39.1	717	438	9.5	▲39.0
その他 Others	39	29	0.8	▲25.4	10	7	0.8	▲35.6	49	35	0.8	▲27.5
製造業用計 Total manufacturing	2,592	1,832	48.5	▲29.3	1,160	698	83.9	▲39.8	3,752	2,530	54.9	▲32.6
販売業者向その他 Steel dealers and others	1,498	998	26.4	▲33.4	127	77	9.2	▲39.7	1,625	1,075	23.3	▲33.9
合計 Total	5,370	3,776	100.0	▲29.7	1,354	831	100.0	▲38.6	6,724	4,608	100.0	▲31.5

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

鋼材需給

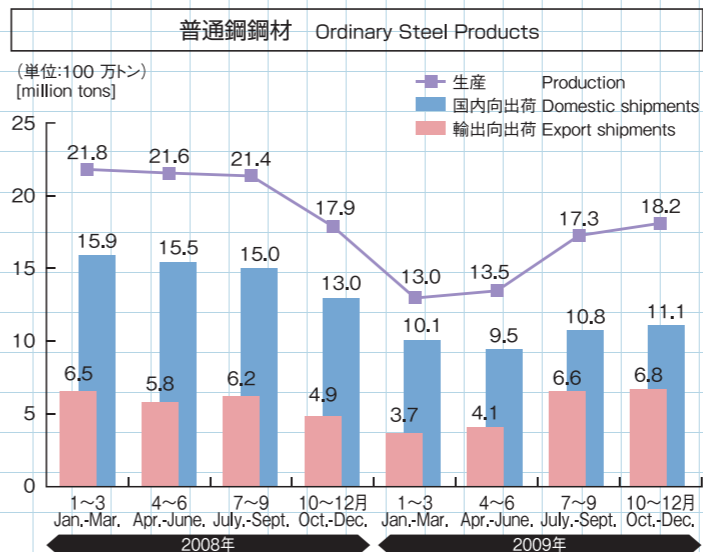
2009年の普通鋼鋼材需給をみると、国内向け出荷は2008年9月以降の世界的な景気後退を受けたことから建設向け、製造業向けともに急減し、暦年計では前年比30.1%の減少となる4,153万トンとなった。

輸出向け出荷は、年後半にアジア向けの回復から前年を上回ったものの、前半の世界的な鋼材需要の減少が響き、同9.6%減となる2,120万トンとなった。なお、メーカー・問屋国内向け在庫は前半に大幅に減少し、2008年12月末の588万トンが2009年12月末には479万トンとなり、国内在庫率は22.2ポイント低下して132.8%となった。

一方、2009年の特殊鋼鋼材の国内向け出荷は8年ぶりに減少となる前年比41.5%減の846万トンとなり、また、輸出向け出荷も34.0%減と4年ぶりに減少し、394万トンとなった。在庫は前半に減少しながら推移し、2009年12月末では前年12月末比で14.8万トン減の138万トンとなった。

以上により、特殊鋼鋼材の最終鋼材生産は前年比39.8%減の1,239万トンとなり、過去最高を更新した前年から一転して10年ぶりに大幅な減少となった。

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 Report of Iron and Steel, Non-ferrous Metals, and Fabricated Metals Statistics," Ministry of Economy, Trade and Industry

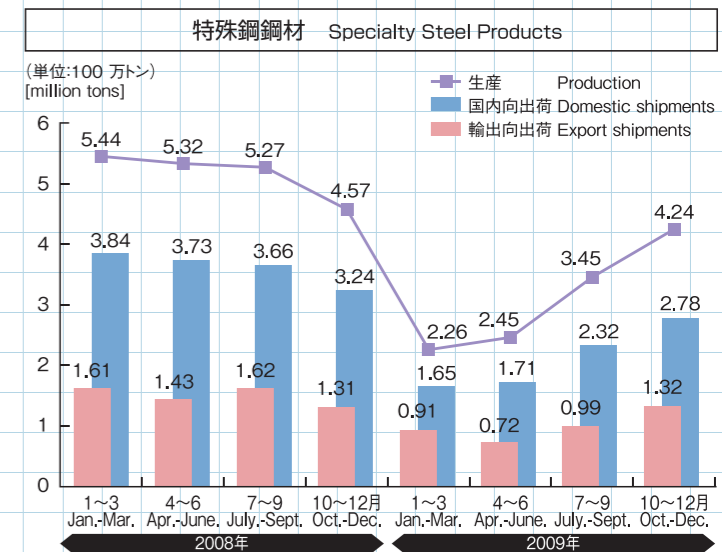
Steel supply and demand

In 2009, domestic shipments of ordinary steel products fell 30.1% to 41.53 million tons as shipments to both the construction and manufacturing sectors plunged because of the global recession that started in September 2008.

Export shipments decreased by 9.6% to 21.20 million tons because of the downturn in global steel demand in the first half of 2009. However, export shipments were higher than one year earlier in the second half of 2009 as shipments to Asia rebounded. Inventories at steel manufacturers and traders plummeted in the first half of 2009. At the end of 2009, these inventories totaled 4.79 million tons compared with 5.88 million tons at the end of 2008. As a result, the domestic inventory-shipment ratio was down by 22.2 percentage points to 132.8%.

Domestic shipments of specialty steel products in 2009 were down for the first time in eight years, falling by 41.5% to 8.46 million tons. In addition, export shipments decreased by 34.0% to 3.94 million tons, the first decline in four years. Inventories decreased in the first half and totaled 1.38 million tons at the end of 2009, down 148,000 tons from one year earlier.

Production of finished specialty steel products was 12.39 million tons, 39.8% less than the record-high production volume of these products in 2008. This was the largest year-on-year decline in 10 years.



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 Products	2008	2009	2009/2008 (%) change
軌条 Rails	30	20	▲34.2
鋼矢板 Sheet pilings	59	42	▲27.6
形鋼 Steel shapes	624	425	▲31.8
棒鋼 Steel bars	910	728	▲20.0
線材 Steel wire rods	219	138	▲37.1
厚中板 Heavy and medium plates	1,453	1,007	▲30.7
熱延薄板類 Hot-rolled sheets	280	179	▲36.1
冷延薄板類 Cold-rolled sheets	381	240	▲37.0
ブリキ Tin plates	43	39	▲9.9
亜鉛めっき鋼板 Galvanized sheets	774	532	▲31.3
その他の表面処理鋼板 Other surface-treated and coated sheets	186	153	▲17.8
鋼管 Steel pipes and tubes	354	235	▲33.8
合計 Total	5,370	3,776	▲29.7

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. "Steel wire rods" includes bar-in-coil.

特殊鋼鋼材の鋼種別国内向け受注量

鋼種別 Kinds of Products	2008	2009	2009/2008 (%) change
工具鋼 Tool steels	22	11	▲49.5
機械構造用炭素鋼 Carbon steel for machine structure	439	248	▲43.5
構造用合金鋼 Alloy steel for structure	281	154	▲45.1
ばね鋼 Spring steel	36	23	▲35.5
軸受鋼 Bearing steel	87	48	▲44.2
ステンレス鋼 Stainless steel	153	113	▲25.9
快削鋼 Free-cutting steel	70	42	▲40.0
ピアノ線材 Piano wire rods	52	36	▲30.5
高抗張力鋼 High-tensile-strength steel	197	146	▲25.9
その他鋼 Others	18	9	▲48.6
合計 Total	1,354	831	▲38.6

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