

一般経済

The Japanese Economy

2009年のわが国経済は、前年秋に発生した世界的な金融不安の影響により、前半は景気が大きく停滞した。年後半に入り中国やアジア諸国で実施された大型の景気刺激策などによる経済回復にともない、これら地域に向けた輸出がいち早く回復したことに加え、国内においても政府による内需振興策と雇用対策が講じられ、自動車、家電などの販売が回復し、4～6月期GDPは底を打った。しかし、雇用・所得環境が厳しいことから住宅投資は大きく後退し、設備投資も低迷を続けた結果、2009年の実質GDP成長率は▲5.2%となった。

In the first half of 2009, Japan's economy was severely impacted by the global financial instability that began in the fall of 2008. In the third quarter of the year, the GDP started expanding again. One reason was a quick rebound in exports to Asia as their economies started recovering because of large economic stimulus programs in China and other Asian countries. The economy also benefited from actions by the Japanese government to increase domestic demand and create jobs, which resulted in an upturn in sales of automobiles, home appliances and other products. As a result Japan's GDP hit bottom in the April-June quarter. However, housing investments fell sharply due to high unemployment and low personal income and capital expenditures remained weak as well. The result was a real GDP growth rate of negative 5.2% in 2009.

生産

Production

2009年の鉄鋼需要をみると、前半は内需・輸出とも、世界同時不況の影響を受け低迷した。後半から内需では自動車向けが回復し始め、輸出がアジア向けを中心に高水準で推移した。これにともない、粗鋼生産は8月以降800万トン台に乗せたが、2009暦年計では前年比26.3%減の8,753万トンと2年連続の減少となり、1969年以來の低水準となった。

Steel demand in the first half of 2009 was weak as the global economic recession brought down domestic demand and exports. In the second half, domestic demand was supported by a recovery in the automotive sector and there was a large volume of steel exports, mainly to Asia. Although monthly crude steel production exceeded 8 million tons during the last five months of 2009, crude steel production for the year was down by 26.3% to 87.53 million tons. This was the second consecutive year-on-year decline and the lowest production volume since 1969.

国内需給

Domestic Supply and Demand

2009年の国内鉄鋼需要を受注統計で見ると、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に需要産業の在庫調整にともない記録的低水準で推移したが、下半期は需要産業の在庫調整の完了や進展により受注は上向いてきたものの上半期の大幅減が響き、暦年計では29.7%減と過去最大の減少となり、2年連続の減少となった。

Domestic demand for steel based on orders received for ordinary steel products was down by 29.7% in 2009, the second consecutive year-on-year decline and the biggest annual decrease ever recorded. In the construction industry, orders remained lackluster in both the civil engineering and building sectors. In the manufacturing sector, orders for ordinary steel products fell to a record low as steel-consuming industries cut inventories. In the second half of 2009, orders increased because of the completion of inventory reductions or significant progress made. However, orders were lower for the year because of the big first half downturn.

特殊鋼鋼材においても、主力の自動車向け及び産業機械向けが上半期の在庫調整にともない大幅マイナスとなり、09暦年計では38.6%減と2年連続のマイナスとなった。

For specialty steel as well, orders were lower for the second consecutive year, falling by 38.6% from 2008. The decrease was mainly attributable to large declines in first half orders from the automobile and industrial machinery industries as companies reduced their inventories.

輸出入

Steel Trade

2009年の全鉄鋼輸出量は、前年比9.7%減の3,444万トンと4年振りの減少となった。前半は金融危機から発生した世界同時不況により低迷したが、後半はアジア向けが回復したことに伴い月間300万トン台の高水準で推移した。最大の仕向け先は韓国、次いで中国、台湾、タイの順となった。

In 2009, total iron and steel exports from Japan decreased by 9.7% to 34.44 million tons, the first decline in four years. Exports were sluggish in the first half because of the global economic recession. But monthly steel exports recovered to the 3 million ton level in the second half as exports to Asia rebounded. South Korea was the largest buyer of these exports, followed by China, Taiwan and Thailand.

一方、全鉄鋼輸入量は前年比42.2%減の461万トンと2年連続で減少した。うち、普通鋼鋼材は国内需要の低迷により249万トンと2年連続で減少した。普通鋼鋼材の最大の仕入先は韓国で、以下、台湾、中国の順となっており、この3カ国で輸入の96.1%を占めた。

Total iron and steel imports were down for the second consecutive year, falling by 42.2% to 4.61 million tons. Imports of ordinary steel products decreased to 2.49 million tons, the second consecutive year of decline, because of soft domestic demand. South Korea accounted for the largest share of ordinary steel imports followed by Taiwan and China. These three countries accounted for 96.1% of Japan's total steel imports.

エネルギー・環境

Energy and Environment

日本鉄鋼業は、世界最高水準のエネルギー効率の更なる向上を図るとともに、日本を製造・開発拠点としつつ、製造業との密接な産業連携を強化しながら、エコプロセス、エコプロダクト、エコソリューションを世界に発信し、日本経済の成長や雇用創出に貢献するとともに、地球温暖化対策に積極的に取り組んでいる。

これら3つの取り組みにより、これまで年間約6,600万tのCO₂削減に貢献している。

The Japanese steel industry is taking actions to further improve its energy efficiency, which is already the world's highest. In addition, Japanese steel companies are dedicated supplying eco-processes, eco-products and eco-solutions on a global scale while using Japan as a production and R&D base and deepening industrial ties with manufacturers. By taking these actions, the Japanese steel industry is determined to contribute to economic growth and job creation in Japan and combat global warming.

Collectively, initiatives involving eco-processes, eco-products and eco-solutions have reduced annual CO₂ emissions by approximately 66 million tons.

設備・技術

Equipment and Technology

鉄鋼製品に対する多様化・高度化するユーザーニーズに応えるため、各製造プロセスでは一層の生産性向上を図りながら、高品質の製品、環境調和型の技術開発を進めていることに加え、廃プラスチック、廃タイヤ等のリサイクルへの取り組みを行い、地球温暖化対策にも貢献している。

また、2008年度より、2050年へ向けた製鉄プロセスにおける抜本的な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)」を推進している。

The needs of companies that use steel products are becoming more diverse and exacting year after year. In response, steelmakers are constantly developing high-quality products and environmental technologies while further upgrading the productivity of all manufacturing processes. In addition, the Japanese steel industry is combating global warming by recycling waste plastics, used tires and other materials.

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 has the goal of achieving a substantial reduction in CO₂ emissions associated with ironmaking by 2050.

財務

Financial Affairs

鉄鋼各社の2009年度の売上高は、08年9月に発生した世界的な金融危機にともなう景気後退の影響を受けて、上半期の内外の鉄鋼需要は大きく減少したため、下半期にいたって鋼材輸出の増加や製造業向けの回復がみられるものの、8年振りに減収となる見込みである。そのため、経常損益については、コスト削減努力や鉄鉱石、原料炭価格の下落があったものの、11年振りの赤字となる見込みである。また、設備投資は、高炉の改修等の大型案件が継続したため、7,000億円を超える高水準が見込まれる。

Total sales in the Japanese steel industry are expected to decrease in fiscal 2009 for the first time in eight years. In the fiscal year's first half, internal and external demand for steel plummeted because of the global economic recession that followed the September 2008 financial crisis. In the second half, an increase in steel exports and a recovery in sales to manufacturers are expected. Although earnings are benefiting from cost-cutting programs and the lower cost of iron ore and coal, aggregate steel industry ordinary income is expected to be a loss in fiscal 2009 for the first time in 11 years. Capital expenditures are expected to remain above 700 billion yen as Japanese steelmakers continue to upgrade blast furnaces and invest in other large-scale projects.

労働

Industrial Relations

2009年の鉄鋼業の従業員数は19.5万人であった。また、総労働時間数については、前半の減産対応等により、前年の172.7時間に対し151.4時間と大きく減少した。

The workforce in the Japanese steel industry was 195,000 in 2009. Furthermore, average monthly working time was down significantly, falling from 172.7 hours in 2008 to 151.4 hours in 2009 mainly because of lower production volume in the year's first half of fiscal 2009.

海外

Overseas

2009年の世界経済は金融危機の影響から、前半は先進国を中心に悪化が続いた。景気刺激策効果もあって後半には持ち直し傾向が窺われるようになったが、世界の粗鋼生産は2年連続の前年比マイナスとなった。国別シェアは1位が中国、2位が日本、3位がインド、4位がロシアと続き、新たにインドが3位に躍進する一方、米国は第5位に後退した。主要国の生産が大幅減となるなか、中国で増産が続いたため、世界粗鋼生産に占める中国のシェアは46.4%に達した。

The financial crisis that started in 2008 caused the global economy to continue to weaken in the first half of 2009, particularly in industrialized countries. Signs of a recovery appeared in the second half due in part to economic stimulus measures. However, global crude steel production was down for the second consecutive year. China accounted for the largest share of crude steel production, followed by Japan, India and Russia. India rose to third place in 2009 and the United States fell to fifth place. Crude steel output continued to increase in China despite sharp declines at other major steel-producing countries. As a result, China's share of global output rose to 46.4%.