

一般経済 The Japanese Economy

2014年のわが国経済は、4月の消費税増税前に自動車などの家計部門を中心に駆け込み需要が見られ、景気は大きく盛り上がった。増税による反動減からの回復は夏場以降に期待されたが、個人消費や住宅投資を中心に回復の遅れが目立ったほか、企業の設備投資も力強さを欠いた。政府は消費税再引き上げを17年4月に延期し、景気回復のテコ入れを図ったが、2014年の実質GDP成長率は、0.0%と横ばい成長であった。

生産 Production

2014年の粗鋼生産は、年初は消費税増税前の駆け込み需要などから建築や自動車向けを中心に高水準で推移したが、増税後は反動減により建築や自動車向けが落ち込んだ一方で、造船、産業機械向けは円安効果等により堅調に推移した。こうしたなか暦年計では、前年比0.1%増の1億1,067万トンと2年連続の増加で、リーマン・ショック後では最高となった。

国内需要 Domestic Supply and Demand

2014年の国内鉄鋼需要を鋼材受注統計からみると、普通鋼鋼材受注は消費税増税後の住宅の反動減が大きく、建設全体では5年ぶりに前年実績を下回った。他方、製造業では、自動車は増税の反動減が顕著にみられたものの、円安により受注競争力が改善した造船をはじめ、企業の設備投資意欲が増勢となり、重電にけん引された電気機械の下支えなどから増加した。この結果、内需全体では2年ぶりに前年水準を下回った。

特殊鋼鋼材受注は、海外生産向けの自動車部品需要が旺盛に推移したことに加えて、産業機械も内需・外需ともに堅調に推移したことなどから、全体では2年連続の増加となった。

輸出入 Steel Trade

2014年の全鉄鋼輸出は、5年連続で4,000万トンを超えたものの、近隣諸国の生産拡大や東南アジア経済の停滞などによる需給の緩和にとまひ、韓国、中国やアセアン諸国向けを中心に減少傾向を辿り、3年ぶりの減少となった。

全鉄鋼輸入は、高水準な入着が続き、前年比2割増となった。このうち、普通鋼鋼材は年間を通じて高水準な入着が続き、同18.0%増の491万トンと、1997年の566万トン以来17年ぶりの高水準となった。

In the first months of 2014, the Japanese economy recorded strong growth due to a surge in demand, mainly for automobiles and other consumer goods in the household sector, prior to the April consumption tax hike. Although there were hopes for a recovery starting in the summer following the drop after the tax hike, there was a delay in the recovery, chiefly for consumer spending and housing investments. Corporate capital expenditures were weak, too. Japan pushed back the next consumption tax hike to April 2017 and took other actions to turn the economy around. But Japan's real GDP growth in 2014 was flat.

In 2014, crude steel output in Japan was high in the first months of the year mainly for steel used in building construction and automobiles to meet strong demand before the consumption tax hike. Demand for construction and automobile steel dropped after the tax hike but overall steel demand remained solid as the weaker yen supported demand in the shipbuilding and industrial machinery sectors. As a result, 2014 crude steel output increased for the second consecutive year, rising 0.1% to 110.67 million tons, the highest since the start of the global financial crisis.

Domestic demand for ordinary steel products based on orders received was lower than in the prior year for the first time in two years. Construction demand decreased for the first time in five years because of the sharp drop in the housing category after the consumption tax hike. But demand was up in the manufacturing sector. Although automobile demand plunged after the tax hike, demand for shipbuilding increased as the industry became more competitive due to the weaker yen. In addition, demand for electrical equipment, supported by heavy electrical equipment, rose as sentiment for corporate capital expenditures improved. In sum, domestic demand was lower than in the previous year for the first time in two years.

For specialty steel products, demand was up for the second consecutive year. There was strong demand for automotive parts used for overseas automobile production. In addition, specialty steel demand benefited from healthy internal and external demand for industrial machinery.

Japan's iron and steel exports in 2014 were above 40 million tons for the fifth consecutive year. However, exports decreased for the first time in three years. The primary cause was declining exports to South Korea, China and the ASEAN region as there was an ample supply of steel owing to higher production in other Asian countries and the sluggish Southeast Asian economy.

Iron and steel imports increased 20% as the volume of imports remained high. The volume of ordinary steel imports was high throughout the year. In 2014, these imports were up 18.0% to 4.91 million tons, the highest level since 5.66 million tons in 1997.

地球温暖化対策 Initiatives to Combat Global Warming

日本鉄鋼業は2013年度以降の自主的取り組みとして「低炭素社会実行計画フェーズI」を推進している。同計画においては、エコプロセス、エコプロダクト、エコソリューション、革新的技術開発を計画の4本柱として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・開発拠点に、国内製造業との産業連携の下、優れた製品や省エネ技術を世界に普及することにより、地球規模での温暖化対策に積極的に取り組んでいる。

設備・技術 Equipment and Technology

各製造プロセスでは一層の生産性向上を図りながら、ユーザーからの鉄鋼製品に対する多様化・高度化するニーズに応じた高級鋼化に向けた技術開発を進めている。また、廃プラスチック、廃タイヤなど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。

さらに、2008年度より、2050年に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。

財務 Financial Affairs

鉄鋼各社の2014年度の収益は、鉄鋼需要が内需、輸出ともに概ね前年度並みの水準と見込まれ鋼材出荷量も前年度と同水準となることから、売上高は横ばい、経常利益はコスト低減から増加となる見通しである。2014年度の設備投資は、前年度比27.7%増の6,437億円となる見込みである。

労働 Industrial Relations

2014年の鉄鋼業の従業者数は前年比微減の17.4万人であった。また、月平均の総労働時間は6年ぶりに170時間台となった。

一方、安全衛生に関しては、2006年に設置した「安全衛生推進本部」の下、業界をあげた災害防止活動に取り組んでおり、労働災害は長期的にみて減少傾向を示している。

海外 Overseas

世界経済は、米国を牽引役として緩やかな回復基調を辿っていたが、2014年後半より原油価格の急落を受け、ロシアをはじめとした資源国経済に先行き不透明感が強まるなど、景気下振れリスクが顕在化することとなった。こうしたなか、2014年の世界粗鋼生産量は前年比1.0%増の16.7億トンと5年連続で過去最高を更新したものの、伸び率は鈍化した。

国別シェアは、1位の中国が49.4%と前年から低下し、2位の日本も6.6%と前年から僅かに低下した。3位以下は米国、インド、韓国となり、ロシアを抜いて韓国が9年ぶりに第5位となった。

As one way to fight global warming, the Japanese steel industry is going ahead with the “Commitment to a Low Carbon Society-Phase I” as a new voluntary initiative that started in fiscal 2013. There are four central components: eco-process, eco-product, eco-solution and the development of innovative technologies. One goal is to further improve the steel industry's energy efficiency, which is the highest in the world. This initiative also aims to increase the use of outstanding products and energy-conservation technologies worldwide. Japan will function as a manufacturing and development base by using cooperation among manufacturers in Japan.

The Japanese steel industry is constantly developing technologies to supply high-grade steel that can meet the diversifying and exacting requirements of companies that use steel products. At the same time, steelmakers are achieving more productivity gains in all manufacturing processes. In addition, the Japanese steel industry is fighting global warming by recycling waste plastics, used tires and other materials.

Furthermore, 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.

In the Japanese steel industry, total sales in fiscal 2014 are expected to be flat and ordinary income is expected to increase because of cost-cutting. This is based on the outlook for basically unchanged domestic and export demand for steel, resulting in steel shipments that are the same as in fiscal 2013. Capital spending in fiscal 2014 is expected to increase 27.7% to ¥643.7 billion.

The Japanese steel industry had a workforce of 174,000 in 2014. Average monthly working time reached the 170-hour level for the first time in six years.

Under the oversight of the Safety and Hygiene Promotion Committee that was established in 2006, the steel industry has been using many activities to prevent accidents. Due to these activities, there has been a long-term decline in workplace accidents.

The global economy recovered at a moderate pace in 2014 with the United States as the primary source of growth. But the risk of an economic downturn increased in the year's second half. The main cause was increasing uncertainty about the economic outlook for Russia and other resource-producing countries as the price of crude oil plummeted. Global crude steel production increased 1.0% to 1.67 billion tons. Although this was the fifth consecutive year of record-high output, the growth rate has declined.

China's share of global crude steel production decreased to 49.4% and Japan, which ranks second, also decreased slightly to 6.6%. The remainder of the top five was the United States, India and South Korea, which surpassed Russia to rank fifth for the first time in nine years.