

一般経済

The Japanese Economy

2010年のわが国経済は、経済対策効果に加え好調な輸出にも支えられ持ち直しの動きが継続した。しかし年後半に至り、円高の進行により輸出は伸び悩み、内需もエコカー補助金の終了など政策効果の剥落から耐久財消費が減速、建設投資も力強さに欠けるなど足踏み状態が続いた。この結果、2010年の実質GDP成長率は+3.9%となった。

The Japanese economy continued to stage a recovery in 2010 that was supported by the benefits of economic stimulus measures as well as strong exports. However, the economy was generally flat in the second half of the year. One reason was weakening exports as the yen appreciated. Second half domestic demand was soft due to slower sales of consumer durables as benefits of stimulus programs ended, including the completion of eco-car subsidies, and to sluggish construction investments and other areas of weakness. As a result, the real GDP growth rate was 3.9% in 2010.

生産

Production

2010年の鉄鋼需要は、2009年後半からの回復傾向が継続し、自動車を中心に製造業向けが回復基調を辿り、輸出がアジア向けを中心に高水準で推移した。これに伴い、粗鋼生産は回復傾向を辿り、2010暦年計では前年比25.2%増の1億960万トンと3年ぶりの増加となり、2年ぶりに1億トン台を回復した。

The recovery in steel demand that started in the second half of 2009 continued in 2010. Demand rebounded in the manufacturing sector, mainly the automobile industry. In addition, exports were consistently high, chiefly to Asia. There was no change in this business climate in 2010. The result was a 25.2% increase over 2009 in crude steel production recovered to 109.60 million tons in 2010. This was the first increase in three years, raising production above 100 million tons for the first time in two years.

国内需給

Domestic Supply and Demand

2010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で低迷が続いたものの、建築は住宅エコポイントなどの各種政策から増加となり、製造業向けはエコカー補助金制度やエコポイント制度など、政府の経済対策により自動車、電気機械などを中心に大幅に前年を上回った。暦年計では16.2%増となり、3年ぶりの増加となった。

Domestic demand for ordinary steel products based on orders received increased 16.2% in 2010, the first upturn in three years. In the construction industry, demand remained soft in the civil engineering sector but demand was higher in the building sector due to the home eco-point program and other government economic stimulus programs. In the manufacturing sector, the eco-car subsidy, eco-point system and other programs produced significant growth in sales of primarily automobiles and electrical products.

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はアジア新興国向けを中心に輸出が持ち直し、10暦年計では大幅に減少した前年から46.3%増と3年ぶりにプラスとなった。

Demand for specialty steel increased for the first time in three years, rebounding 46.3% from 2009, when demand fell sharply. Growth was attributable mainly to a recovery in exports of specialty steel to automobile and industrial machinery manufacturers in emerging countries in Asia.

輸出入

Steel Trade

2010年の全鉄鋼輸出量は前年比26.0%増の4,340万トンと2年ぶりに増加し、2008年の3,813万トンを抜いて過去最高となった。アジア向け輸出を中心に、年間を通じて月間300万トンを越える水準で推移した。最大輸出仕向先は韓国、次いで中国、タイ、台湾の順となった。

Total iron and steel exports from Japan in 2010 were up 26.0% to 43.40 million tons, the first increase in two years. This set a new record by surpassing the previous record of 38.13 million tons in 2008. Exports were more than 3 million tons per month throughout the year, with Asian countries the primary destination. South Korea was the largest buyer of these exports, followed by China, Thailand and Taiwan.

一方、全鉄鋼輸入量は前年比56.3%増の721万トンと3年ぶりに増加した。うち、普通鋼鋼材は円高を背景に46.8%増の366万トンと3年ぶりの増加となった。普通鋼鋼材の最大の仕入先は韓国で、以下、台湾、中国の順となり、この3カ国で輸入量全体の97.7%を占めた。

Japan's iron and steel imports were up 56.3% to 7.21 million tons, the first increase in three years. Imports of ordinary steel products climbed 46.8% to 3.66 million tons because of the yen's strength, the first increase in three years. South Korea accounted for the largest share of ordinary steel imports followed by Taiwan and China. These three countries accounted for 97.7% of Japan's total steel imports.

地球温暖化対策

Initiatives to Combat Global Warming

日本鉄鋼業は、エコプロセス、エコプロダクト、エコソリューションの推進により、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、国内製造業との密接な産業連携の下、優れた製品や省エネ技術を世界に普及することにより、日本経済の成長や雇用創出に貢献しつつ、地球温暖化対策に積極的に取り組んでいる。

The Japanese steel industry is dedicated to using Eco-Process, Eco-Product and Eco-Solution to make further gains in its energy efficiency, which is already the world's highest. The industry is using Japan as a production and R&D base to increase the use of outstanding products and energy-saving technologies worldwide while maintaining close industrial ties with manufacturers in Japan. The goal is to take numerous actions to combat global warming while contributing to economic growth and job creation in Japan. Collectively, these initiatives have reduced annual CO₂ emissions by approximately 70 million tons.

これらの取り組みにより、これまで約7,000万t-CO₂/年の削減に貢献している。

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 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.

財務

Financial Affairs

鉄鋼各社の2010年度の売上高は、内需が製造業の回復により増加し、輸出もアジア向けを中心に大幅な増加となることから、前年度を上回る見込みである。経常利益については、鉄鉱石および原料炭の価格高騰がマイナス要因となるものの、増収に加えて各社の徹底的なコスト改善への取り組みを反映し、前年度の赤字から黒字となる見込みである。

Total sales in the Japanese steel industry in fiscal 2010 are expected to increase. Domestic demand is growing due to a recovery in the manufacturing sector and exports are much higher chiefly because of exports to Asia. Regarding earnings, the industry is expected to post ordinary income following last year's ordinary loss as higher sales and rigorous cost-cutting measures more than offset the large increase in the cost of iron ore and coal.

設備投資額は、能力増強投資が継続するため、6,000億円超えが見込まれる。

Capital expenditures are expected to exceed ¥600 billion as spending on increasing output will continue.

労働

Industrial Relations

2010年の鉄鋼業の従業者数は19.2万人であった。また、総労働時間数については、生産活動の持ち直しや、それに伴う臨時休業取り止めなどにより、前年の151.4時間に対し167.5時間へ増加し、一昨年の水準に近づいた。

The Japanese steel industry had a workforce of 192,000 in 2010. Average monthly working time increased from 151.4 hours in 2009 to 167.5 hours in 2010, returning almost to the 2008 level. A recovery in production and associated end to temporary suspensions of operations was mainly responsible for the growth in working time.

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などに取り組んでおり、労働災害は減少の傾向を示している。

The number of workplace accidents in the steel industry is declining as the entire industry conducts accident-prevention programs under the oversight of the Safety and Hygiene Promotion Committee, which was established in 2006.

海外

Overseas

2010年の世界経済は、新興諸国が押し並べて高成長を遂げる一方、欧米先進諸国の景気回復は緩慢に止まった。こうしたなか、2010年の世界粗鋼生産は前年比14.8%増の14億1,189万トンと3年ぶりに増加し、過去最高を更新した。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、5位がインド。前年3位のインドが5位へ後退し、前年5位の米国が3位へと順位は入れ替わったが、上位5カ国に出入りは無かった。なお、中国は96年に日本の粗鋼生産量を上回って以来、16年連続して世界第1位の座を保持している。

In 2010, economic growth was strong in emerging countries while economies in industrialized countries recovered at only a moderate pace. Crude steel production in 2010 increased for the first time in three years, climbing 14.8% to an all-time high of 1,411.89 million tons. China was the world's largest crude steel producer in 2010, Japan was second, the United States was third, Russia was fourth and India was fifth. India and the United States switched places in 2010 with India falling to fifth and the United States rising to third. But there was no change in the top five countries. China has ranked first for 16 consecutive years since surpassing Japan in 1996.