

国内受注は、建設、製造業ともに増加し、3年ぶりに前年比増

Domestic orders were higher for the first time in three years with growth in the construction and manufacturing sectors

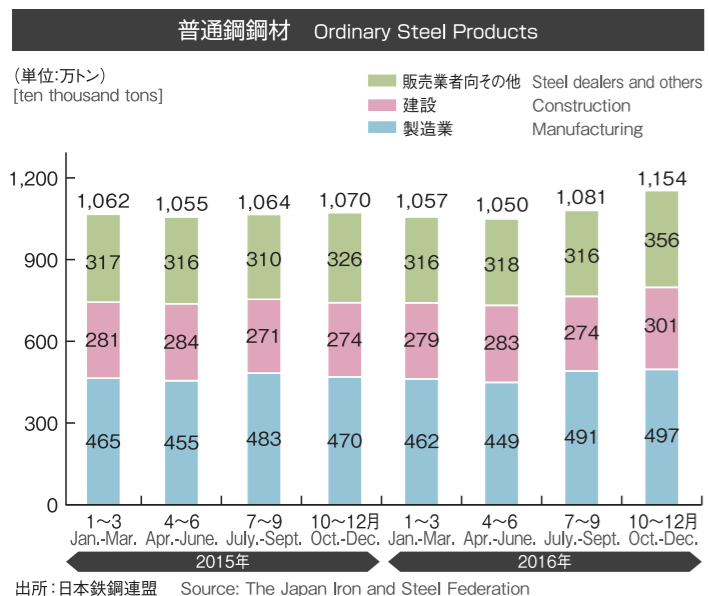
国内需要

2016年の国内向け鋼材受注量(普通鋼+特殊鋼)は前年比1.8%増の5,519万トンと3年ぶりに増加した。このうち普通鋼鋼材の受注量は前年比2.1%増の4,342万トンと3年ぶりに増加した。

普通鋼鋼材受注量を用途別にみると、建設向け受注は2.5%増の1,138万トンと3年ぶりに増加した。人手不足、建築コスト上昇による着工の遅れなどから非住宅建築が前半を中心に停滞したものの、政府の経済対策や熊本地震復旧工事などにより公共工事が堅調に推移した。一方、製造業向け受注も前年比1.4%増の1,899万トンと2年ぶりに増加した。造船が海運市況低迷により停滞したものの、自動車は国内への生産拠点の移管や新型車投入効果などから増加し、産業機械や電気機械も国内外の設備投資需要の緩やかな回復を受けて増加した。

特殊鋼鋼材受注量は、前年比0.4%増の1,177万トンと2年ぶりに増加した。海外生産向け部品輸出の増加、新型車投入効果による普通・小型乗用車生産の回復により、需要の多くを占める自動車向けが増加したほか、産業機械も設備投資需要の持ち直しを受けて増加した。

国内向け鋼材受注量の推移 Domestic Orders for Steel Products



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			
	2015 数量 Volume	2016 数量 Volume	構成比(%) Share (%)	2016/2015(%) Change
土木用 Civil engineering	218	232	5.3	6.2
建築用 Building and construction	649	652	15.0	0.4
その他の建設用 Other construction	242	254	5.9	5.1
建設用計 Total construction	1,109	1,138	26.2	2.5
産業機械用 Industrial machinery and equipment	144	151	3.5	4.5
電気機械用 Electrical machinery and equipment	150	151	3.5	0.6
家庭用・業務用機器用 Home and office appliances	42	41	0.9	▲3.3
船舶用 Shipbuilding and marine equipment	402	402	9.3	0.0
自動車用 Automobiles	857	864	19.9	0.8
容器用 Containers	95	97	2.2	1.6
次工程用 For further processing	146	157	3.6	7.9
その他 Others	35	35	0.8	1.0
製造業用計 Total manufacturing	1,873	1,899	43.7	1.4
販売業者向その他 Steel dealers and others	1,269	1,306	30.1	2.9
合計 Total	4,251	4,342	100.0	2.1

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

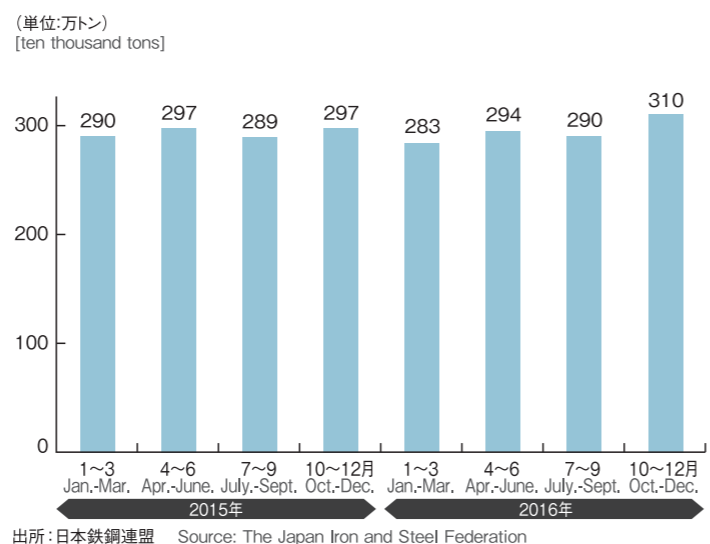
Domestic demand

Steel orders in Japan for ordinary and special steel increased 1.8% to 55.19 million tons in 2016, up for the first time in three years. Ordinary steel orders, which also increased for the first time in three years, were up 2.1% to 43.42 million tons.

Ordinary steel orders increased 2.5% to 11.38 million tons in the construction sector, the first increase in three years. Construction activity was sluggish in the first half of 2016, mainly for non-residential projects, because of a labor shortage and the rising cost of construction. But government economic stimulus measures, rebuilding work following the April 2016 Kumamoto Earthquake and other factors kept public works spending firm. In the manufacturing sector, steel orders were up for the first time in two years, increasing 1.4% to 18.99 million tons. Steel orders from shipbuilders were soft because of the weak marine transport market. But there was growth in automotive orders as automakers moved production back to Japan and introduced new models. Orders from manufacturers of industrial and electrical machinery were also higher as demand associated with capital expenditures increased slowly in Japan and overseas.

Orders in Japan for special steel increased for the first time in two years, climbing 0.4% to 11.77 million tons. In the automotive sector, which accounts for a large share of special steel demand, demand was higher because of growth in the production of components used by overseas factories and a recovery in output of ordinary and compact vehicles due to new model launches. Industrial machinery special steel orders also increased due to a recovery in capital expenditures.

特殊鋼鋼材 Special Steel Products



特殊鋼鋼材の鋼種別受注量 Domestic Orders for Special Steel Products by Kinds of Steel

部門 Classification	特殊鋼鋼材 Special steel products			
	2015 数量 Volume	2016 数量 Volume	構成比(%) Share (%)	2016/2015(%) Change
産業機械用 Industrial machinery and equipment	137	145	12.3	5.6
自動車用 Automobiles	414	431	36.6	4.3
次工程用 For further processing	389	377	32.1	▲3.1
その他 Others	55	53	4.5	▲4.3
製造業用計 Total manufacturing	995	1,007	85.5	1.1
販売業者向その他 Steel dealers and others	137	132	11.2	▲4.1
合計 Total	1,173	1,177	100.0	0.4

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

鋼材需給

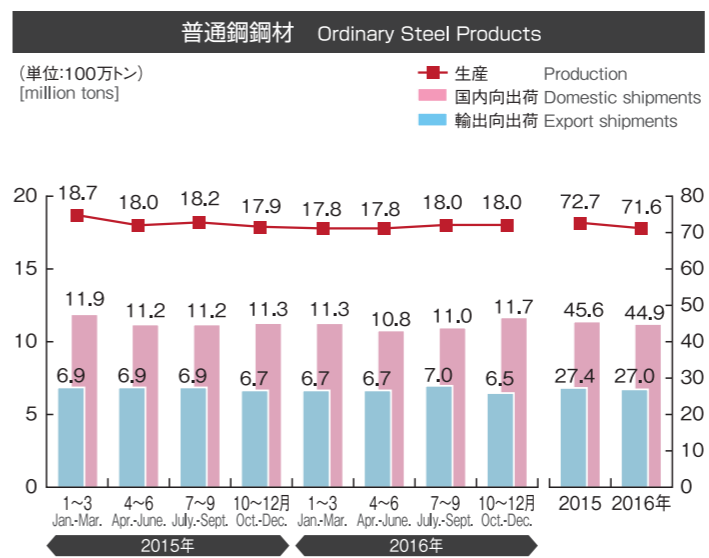
2016年の普通鋼鋼材需給をみると、国内向け出荷は、年末にかけて回復の動きがみられたものの、建設工場の遅れなどで前半に停滞したことから、通年では前年比1.7%減の4,485万トンと2年連続で減少した。輸出向け出荷は、中国の輸出増による世界的な需給緩和の影響から前半を中心に減少し、通年では前年比1.5%減の2,700万トンと2年ぶりに減少した。

この間、16年12月末の国内向け在庫は548万トンと前年同月末から24万トン減少し、国内在庫率も146.8%と前年同月末から14.6ポイント低下した。

一方、2016年の特殊鋼鋼材の国内向け出荷は前年比1.1%減の1,169万トンと2年連続で減少した。輸出向け出荷については、同7.1%増の619万トンと2年ぶりに増加した。

こうしたなか、普通鋼鋼材の最終鋼材生産は前年比1.6%減の7,159万トンと2年連続で減少した。また、特殊鋼鋼材の最終鋼材生産は同3.1%増の1,823万トンと2年ぶりに増加した。

普通鋼鋼材、特殊鋼鋼材需給の推移 Supply and Demand of Ordinary Steel Products and Special Steel Products



出所: 経済産業省 Source: Ministry of Economy, Trade and Industry

普通鋼鋼材の品種別受注量 Domestic Orders for Ordinary Steel Products by Commodity

品種 Products	2015	2016	2016/2015(%) Change
鋼矢板 Sheet pilings	61	75	22.6
形鋼 Steel shapes	671	644	▲3.9
棒鋼 Steel bars	755	763	1.1
線材 Steel wire rods	204	217	6.4
厚中板 Heavy and medium plates	980	997	1.8
熱延薄板類 Hot-rolled sheets	2,156	2,197	1.9
冷延薄板類 Cold-rolled sheets	795	821	3.2
亜鉛めっき鋼板 Galvanized sheets	977	991	1.5
その他の表面処理鋼板 Other surface-treated and coated sheets	332	358	7.6
鋼管 Steel pipes and tubes	329	331	0.6
普通鋼鋼材計 Total	6,930	7,047	1.7

出所: 日本鉄鋼連盟 注: 輸出手向けを含む。普通鋼鋼材計は鋼材製造用を除いたベース。 Source: The Japan Iron and Steel Federation Note: Includes products for export. Total excludes steels for the production of steel products.

Steel Supply and Demand

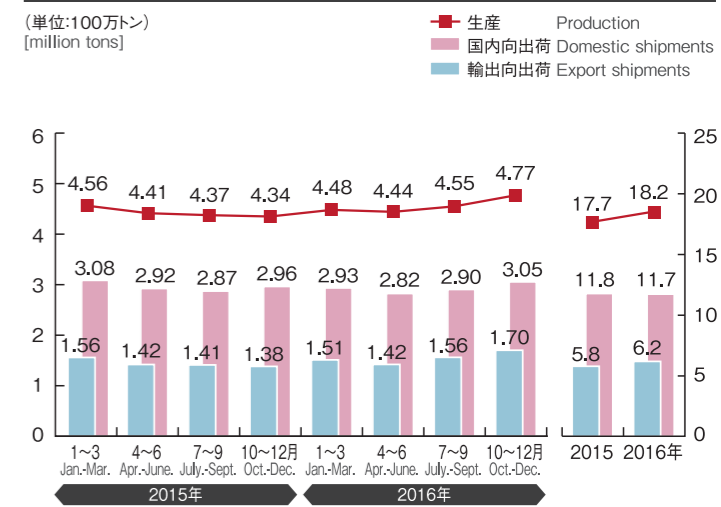
In 2016, ordinary steel product shipments in Japan decreased for the second consecutive year, falling 1.7% to 44.85 million tons. Shipments started recovering late in the year but were sluggish during the first half mainly because of delays in the start of construction projects. Export shipments decreased for the first time in two years, declining 1.5% to 27.00 million tons. Shipments were down mainly in the first half in response to a global oversupply of steel caused by growth in China's exports.

The domestic inventory-shipment ratio was 146.8% at the end of 2016, down 14.6 percentage points from one year earlier as inventories for sale in Japan decreased 240,000 tons to 5.48 million tons during 2016.

Domestic shipments of special steel products decreased 1.1% to 11.69 million tons in 2016, falling for the second consecutive year. Export shipments increased for the first time in two years, up 7.1% to 6.19 million tons.

The production of finished ordinary steel products decreased 1.6% to 71.59 million tons, falling for the second consecutive year. Production of finished special steel products was higher for the first time in two years, up 3.1% to 18.23 million tons.

特殊鋼鋼材 Special Steel Products



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

特殊鋼鋼材の鋼種別受注量 Domestic Orders for Special Steel Products by Kinds of Steel

品種 Products	2015	2016	2016/2015(%) Change
工具鋼 Tool steels	27	28	0.8
機械構造用炭素鋼 Carbon steel for machine structure	551	543	▲1.5
構造用合金鋼 Alloy steel for structure	348	367	5.7
ばね鋼 Spring steel	37	33	▲8.4
軸受鋼 Bearing steel	99	96	▲2.7
ステンレス鋼 Stainless steel	230	237	3.0
高抗張力鋼 High-tensile-strength steel	400	473	18.4
その他 Others	135	140	3.6
合計 Total	1,827	1,918	5.0

出所: 日本鉄鋼連盟 注: 輸出手向けを含む。 Source: The Japan Iron and Steel Federation Note: Includes products for export.