

## 全鉄鋼輸出は4,123万トン、前年比5.0%減と2年ぶりの減少、全鉄鋼輸入量は830万トンと2年連続の増加

Exports were 41.23 million tons, down 5.0% from 2010 and the first decline in two years. Imports increased for the second consecutive year, climbing to 8.30 million tons

2011年の全鉄鋼輸出は前年比5.0%減の4,123万トンと2年ぶりに減少したものの、2010年の4,340万トンに次ぐ過去2番目の水準となった。アジア向け輸出を中心に、年前半は高水準で推移したが、年後半には円高の進行、タイ洪水の影響などにより減少基調が鮮明となった。最大輸出先は韓国(885万トン)で、以下、中国(690万トン)、タイ(462万トン)、台湾(353万トン)の順となった。

このうち、普通鋼鋼材は前年比6.6%減と2年ぶりの減少となった。その内訳をみると、最大の輸出品種である熱延薄板・鋼帯が前年比4.7%減少した他、厚中板、冷延鋼板類、亜鉛めっき鋼板など、ほとんどの品種で減少となった。

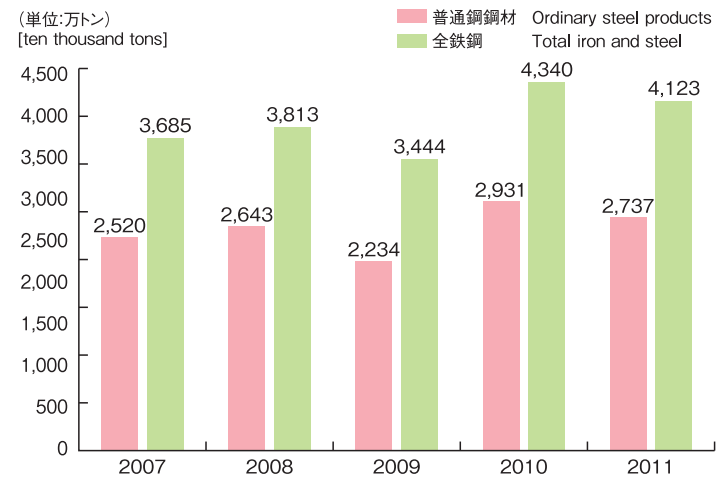
2011年の全鉄鋼輸入は前年比15.1%増の830万トンと2年連続で増加した。うち、普通鋼鋼材は円高を背景に22.4%増の448万トンと2年連続の増加となった。普通鋼鋼材の内訳をみると、最大の輸入品種である熱延薄板・鋼帯が前年比13.3%増加した他、厚中板、冷延鋼板類、亜鉛めっき鋼板、線材など、ほとんどの品種で増加した。普通鋼鋼材の最大の仕入先は韓国(295万トン)で、以下、台湾(82万トン)、中国(64万トン)の順となり、この3カ国で輸入量全体の98.3%を占めた。

Total iron and steel exports in 2011 decreased 5.0% to 41.23 million tons, the first decline in two years. But this was still the second-highest level ever after the record-high of 43.40 million tons in 2010. Exports were high in the year's first half, primarily to Asia. There was a clear downturn in exports in the second half due to the yen's increasing strength, flooding in Thailand and other factors. South Korea was the largest buyer of exported steel from Japan (8.85 million tons) followed by China (6.90 million tons), Thailand (4.62 million tons) and Taiwan (3.53 million tons).

Exports of ordinary steel products in 2011 were 6.6% lower than in 2010, the first decline in two years. One reason was a 4.7% decrease in exports of hot-rolled sheets and coils, the largest category of exports. Furthermore, exports were lower for heavy and medium plates, cold-rolled sheets and coils, galvanized sheets and almost all other categories of ordinary steel products.

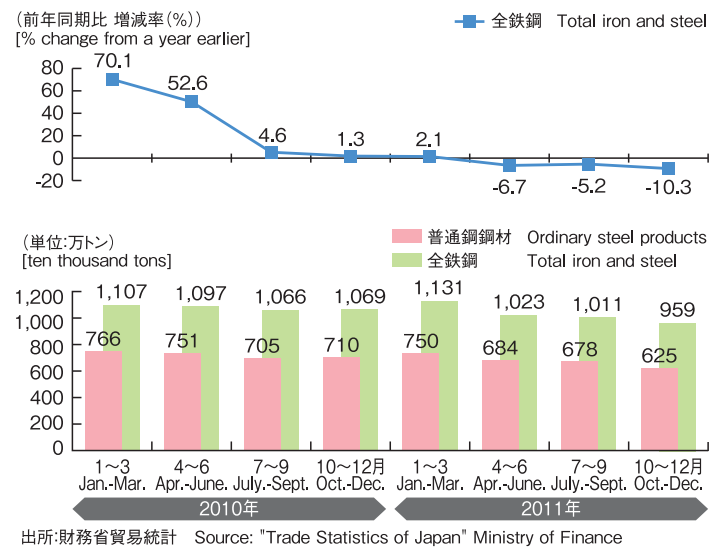
Total iron and steel imports increased 15.1% to 8.30 million tons, rising for the second consecutive year. Imports of ordinary steel products were up 22.4% partly because of the yen's strength, the second consecutive annual increase. Imports of hot-rolled sheets and coils, the largest category, increased 13.3%. Imports were also higher for heavy and medium plates, cold-rolled sheets and coils, galvanized sheets, wire rods and most other categories. South Korea is the largest exporter to Japan (2.95 million tons), followed by Taiwan (820,000 tons) and China (640,000 tons). Collectively, these three countries accounted for 98.3% of Japan's imports of ordinary steel products in 2011.

### ● 鉄鋼輸出量の推移 Japanese Steel Exports



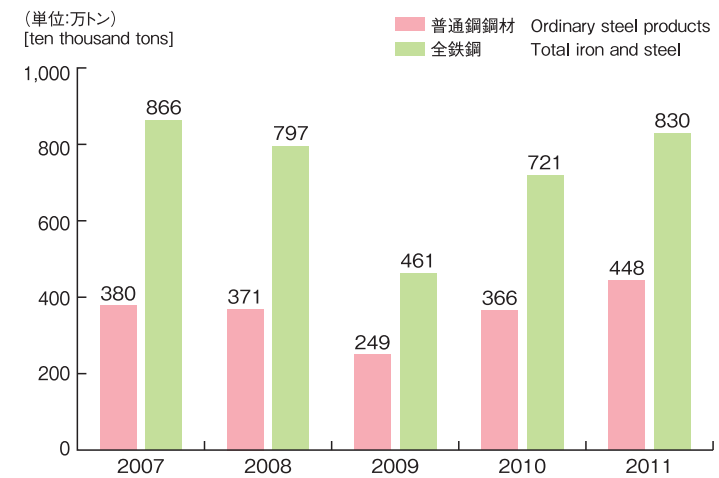
出所:財務省貿易統計 Source: "Trade Statistics of Japan" Ministry of Finance

### ● 鉄鋼輸出量の推移(四半期別) Japanese Steel Exports (Quarterly Basis)



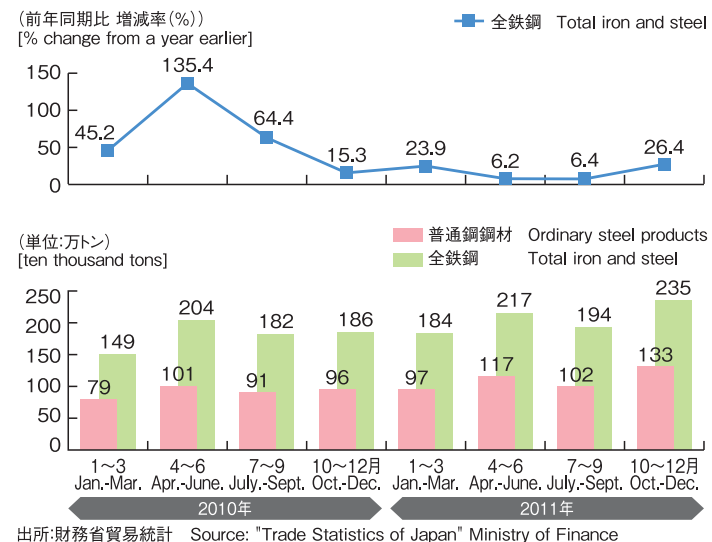
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### ● 鉄鋼輸入量の推移 Japanese Steel Imports



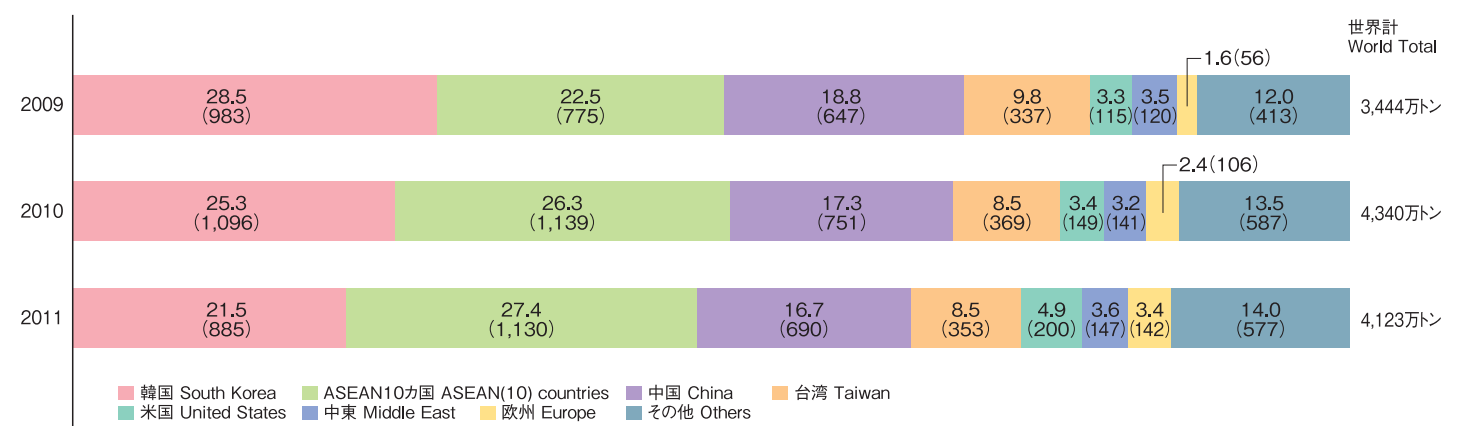
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### ● 鉄鋼輸入量の推移(四半期別) Japanese Steel Imports (Quarterly Basis)



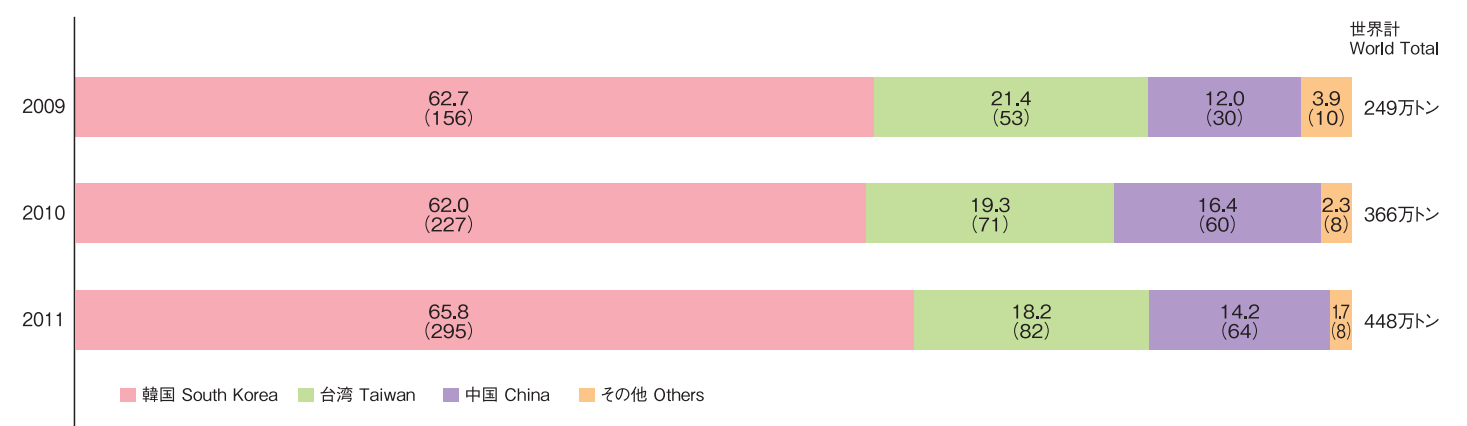
出所:財務省貿易統計 Source: "Trade Statistics of Japan" Ministry of Finance

### ● 全鉄鋼輸出量の仕向先別構成比推移 Total Iron and Steel Exports by Destination



出所:財務省貿易統計 Source: "Trade Statistics of Japan" Ministry of Finance

### ● 普通鋼鋼材輸入量の仕入先別構成比推移 Ordinary Steel Product Imports from Major Suppliers



出所:財務省貿易統計 Source: "Trade Statistics of Japan" Ministry of Finance

### ● 鉄鋼品種別輸出実績 Iron and Steel Exports by Type of Steel

品種別 Products	2009	2010	2011	
			構成比(%) Share (%)	前年比増減(%) Change (%)
鉄鉄 Pig iron	591	34	53	0.1
鋼塊・鋼半製品 Steel ingots and semi-finished steel	5,843	5,229	5,162	12.5
普通鋼鋼材 Ordinary steel products	2,148	2,714	2,457	6.0
条鋼類 Long products	383	558	584	1.4
軌条 Rails	935	1,182	986	2.4
形鋼(含鋼矢板) Steel shapes and sheet piling	453	465	346	0.8
棒鋼 Steel bars	377	509	542	1.3
線材 Steel wire rods	18,920	24,890	23,265	56.4
鋼板類 Flat-rolled product	3,561	3,815	3,685	8.9
厚中板 Heavy and medium plates	7,252	9,213	8,784	21.3
熱延薄板・鋼帯 Hot-rolled sheets and coils	2,870	4,097	3,796	9.2
冷延鋼板類 Cold-rolled sheets and coils	707	926	969	2.4
電気鋼板 Electrical sheets	531	603	605	1.5
ブリキ Tinplate	3,582	5,632	4,935	12.0
亜鉛めっき鋼板 Galvanized sheets	416	603	492	1.2
その他表面処理鋼板 Other surface-treated and coated sheets	1,274	1,704	1,650	4.0
鋼管 Tubular products	22,341	29,308	27,372	66.4
計 Total	4,824	7,782	7,710	18.7
特殊鋼鋼材 Special steel products	512	719	672	1.6
二次製品 Secondary products	330	324	265	0.6
その他 Others	34,441	43,395	41,234	100.0
合計 Total	33,357	44,842	49,600	-
総額(100万ドル) Value (US\$ million)				10.6

出所:財務省貿易統計 注:その他はフェロアロイ、鋳鉄管、合わせ鋼材などの計。 Source: "Trade Statistics of Japan" Ministry of Finance Note: "Others" include ferroalloys, cast-iron pipes and clad steel.

### ● 鉄鋼品種別輸入実績 Iron and Steel Imports by Type of Steel

品種別 Products	2009	2010	2011	
			構成比(%) Share (%)	前年比増減(%) Change (%)
鉄鉄 Pig iron	293	580	564	6.8
鋼塊・鋼半製品 Steel ingots and semi-finished steel	48	98	224	2.7
普通鋼鋼材 Ordinary steel products	344	384	446	5.4
条鋼類 Long products	7	3	4	0.0
軌条 Rails	81	83	121	1.5
形鋼(含鋼矢板) Steel shapes and sheet piling	15	27	31	0.4
棒鋼 Steel bars	241	271	291	3.5
線材 Steel wire rods	2,064	3,171	3,892	46.9
鋼板類 Flat-rolled product	135	234	469	5.7
厚中板 Heavy and medium plates	1,023	1,569	1,776	21.4
熱延薄板・鋼帯 Hot-rolled sheets and coils	583	822	913	11.0
冷延鋼板類 Cold-rolled sheets and coils	14	24	43	0.5
電気鋼板 Electrical sheets	8	16	17	0.2
ブリキ Tinplate	257	426	568	6.8
亜鉛めっき鋼板 Galvanized sheets	44	80	105	1.3
その他表面処理鋼板 Other surface-treated and coated sheets	87	108	145	1.8
鋼管 Tubular products	2,495	3,664	4,483	54.0
計 Total	181	293	400	4.8
特殊鋼鋼材 Special steel products	512	640	748	9.0
二次製品 Secondary products	1,082	1,934	1,880	22.7
その他 Others	4,612	7,208	8,299	100.0
合計 Total	5,828	9,224	12,480	-
総額(100万ドル) Value (US\$ million)				35.3

出所:財務省貿易統計 注:その他はフェロアロイ、鋳鉄管、合わせ鋼材などの計。 Source: "Trade Statistics of Japan" Ministry of Finance Note: "Others" include ferroalloys, cast-iron pipes and clad steel.