Ⅲ 主要商品別貿易

1．食料品：輸出は魚介類が不振、輸入は穀物類の増加により６兆円台に

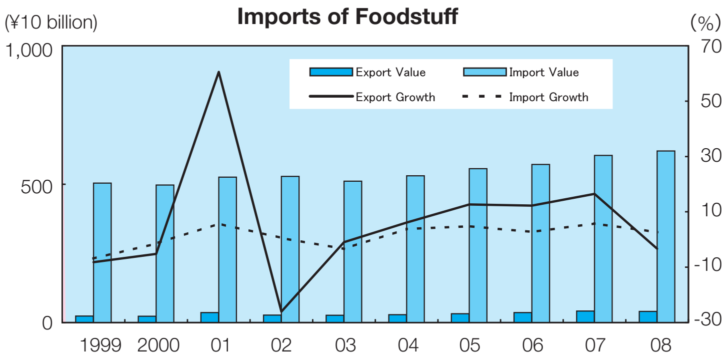
（輸出）

・輸出は、4割強を占める魚介類が1,700億円（前年比12%減）と2ケタ減となったことにより、4,000億円（同3%減）と6年ぶりに減少に転じた。価格は同2%高、数量は同5%減であった。米国、香港向けは微減にとどまったが、台湾、韓国、中国向けはいずれも減少した。

（輸入）

・輸入は、食品市況の高騰を受け、価格が前年比7%高、数量は同4%減となったことにより、6.2兆円（同3%増）と5年連続で増加した。穀物類は、穀物市況の高騰を背景に1.2兆円（同33%増）と07年同様3割増となり、07年実績を大幅に更新し1兆円の大台に乗せた。うち、中国からが340億円（同48%減）と半減したが、7割を占める米国8,600億円（同40%増）を筆頭に、カナダ1,100億円（同64%増）、オーストラリア1,000億円（同58%増）などからの増加が支えた。

・肉類は、小幅ながら07年に引き続き増加し、1.1兆円（同4%増）を記録した。価格は同3%高、数量は同1%増であった。うち、牛肉は4年ぶりに減少に転じ2,200億円（同8%減）となった。主力のオーストラリアからが1,700億円（同14%減）と3年連続の減少となったが、米国からは310億円（同43%増）と小規模ながら大幅増となった。鶏肉は、主力のブラジルから1,300億円（同71%増）と著増したことから、98年の1,200億円を上回り、1,300億円（同67%増）と過去最高額を更新した。豚肉は、4,300億円（同7%増）と引き続き堅調に推移した。4割強を占める米国から1,800億円（同23%増）と好調な伸びを示したのがこれを支えた。一方、魚介類は1.4兆円（同4%減）と4年連続で減少した。うち、えびは、主要な輸入先であるインドネシア、タイ、ベトナムなどから軒並み落ち込み、2,000億円（同13%減）となった。



Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

Ⅲ Trade by Major Products

1. Foodstuffs: Weak fish exports; imports reach ¥6 trillion on growth in cereals

Exports

Foodstuffs exports were off 3% year-on-year to ¥400.0 billion, posting the first decline in six years, largely because exports of Fish & Fish Preparations, which accounted for over 40% of the total, posted a double-digit decline, dropping 12% to ¥170.0 billion. Prices rose 2% while volume fell 5%. Exports to Taiwan, South Korea, and China fell while exports to the U.S. and Hong Kong posted minor decreases.

Imports

Foodstuffs imports rose 3% to ¥6.2 trillion, posting an increase for the fifth consecutive year, as volume dropped 4% while prices rose 7% with the steep price inflation in the foods market. Imports of Cereals & Cereal Preparations (which were up over 30% in 2007) rose 33% to ¥1.2 trillion reflecting the sharp rises in cereals prices, far surpassing the 2007 level and exceeding the ¥1 trillion mark. Imports of Foodstuffs from China dropped in half, declining 48% to ¥34.0 billion. The rise in Foodstuffs imports was supported by increases in imports from the U.S., which accounted for over 70% of the total (up 40% to ¥860.0 billion), and in imports from Canada (up 64% to ¥110.0 billion) and Australia (up 58% to ¥100.0 billion).

Imports of Meat & Meat Preparations rose for the second year, albeit slightly, moving up 4% to ¥1.1 trillion as volume rose 1% and prices increased 3%. In detail, imports of beef fell 8% to ¥220.0 billion, posting the first decline in four years. Imports from leading supplier Australia fell for the third consecutive year, dropping 14% to ¥170.0 billion. Conversely, imports from the U.S. rose 43% to ¥31.0 billion, which constituted a large percentage increase although the absolute scale remained small. Chicken imports rose 67% to a record high ¥130.0 billion, exceeding the previous record of ¥120.0 billion posted in 1998, largely because of the outstanding growth in imports from leading supplier Brazil, which rose 71% to ¥130.0 billion. Pork imports remained firm, rising 7% to ¥430.0 billion, supported by solid imports from the U.S., which rose 23% to ¥180.0 billion and accounted for over 40% of the total. Conversely, Fish & Fish Preparations imports dropped 4% to ¥1.4 trillion, posting a decline for the fourth consecutive year. In particular, imports of Shrimps, Prawns & Lobsters fell 13% to ¥200.0 billion with slumps across the board in imports from all the leading supplier countries such as Indonesia, Thailand, and Vietnam.

2．織物用糸・繊維製品、衣類・同付属品:輸入が6年ぶり減少へ

(輸出)

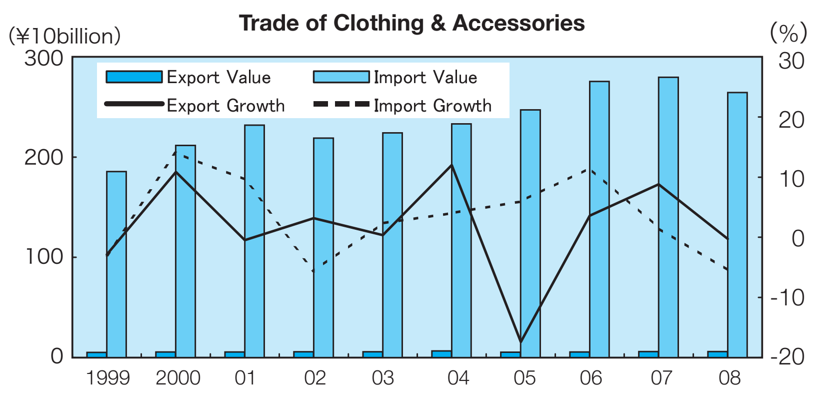
・織物用糸・繊維製品の輸出は、7,500億円（前年比9%減）と減少に転じた。価格は同3%安、数量は同6%減であった。アジア向けは5,600億円（同10%減）となり、6割弱を占める中国向けが3,100億円（同11%減）となったのをはじめ、香港向けも振るわず700億円（同18%減）と2ケタ減となった。米国、イタリア向けもそれぞれ530億円（同14%減）、140億円（同9%減）と減少した。また、衣類及び同付属品は、610億円とほぼ07年並みの水準となった。

(輸入)

・衣類及び同付属品の輸入は、2.6兆円（前年比6%減）と6年ぶりに減少に転じた。価格は同2%安、数量は同4%減であった。四半期別にみると、4四半期とも減少することとなり、押しなべて低調に推移した。主力のメリヤス編み及びクロセ編み衣類が1.2兆円（同4%減）と6年ぶりに減少に転じたのをはじめ、女子用及び乳幼児用衣類が引き続き振るわず6,400億円（同7%減）、加えて男子用衣類も5年ぶりに減少に転じ4,900億円（同8%減）となった。

・地域別にみると、9割を占めるアジアからは、主力の中国から2.2兆円（同5%減）と減少に転じ、2.4兆円（同5%減）となった。イタリアからも1,100億円（同15%減）と低調であった。

・織物用糸及び繊維製品の輸入は、7,100億円（同3%減）となり6年ぶりに減少に転じた。主力の中国からが4,000億円（同1%減）と10年ぶりに減少に転じたほか、インドネシア、台湾、韓国などからも振るわなかった。



Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

2. Textile Yarn & Fabrics and Clothing & Accessories: Imports post first decline in six years

Exports

Exports of Textile Yarn & Fabrics turned to a decline, contracting 9% year-on-year to ¥750.0 billion. Prices dropped 3% while volume was down 6%. Exports to Asia fell 10% to ¥560.0 billion. Exports to China, which accounted for a nearly 60% of exports to Asia, declined 11% to ¥310.0 billion. Exports to Hong Kong were weak, falling 18% to ¥70.0 billion. Exports to the U.S. dropped 14% to ¥53.0 billion and exports to Italy were down 9% to ¥14.0 billion. Meanwhile, exports of Clothing & Accessories held steady from the prior year at ¥61.0 billion.

Imports

Imports of Clothing & Accessories declined 6% to ¥2.6 trillion, posting their first decline in six years. Prices were down 2% and volume fell 4%. The quarterly data show a consistent decline, with year-on-year decreases every quarter. Imports of the leading item Clothing & Accessories—Knitted or Crocheted dropped 4% to ¥1.2 trillion, decreasing for the first time in six years. Imports of Women's, Girls' & Infants' Dresses & Suits remained dull, dropping 7% to ¥640.0 billion. Moreover, imports of Men's & Boy's Garments were down 8% to ¥490.0 billion, posting their first decline in five years.

By region, imports from Asia, which accounted for 90% of the total, dropped 5% to ¥2.4 trillion, with imports from leading supplier China off 5% to ¥2.2 trillion. Imports from Italy were also weak, down 15% to ¥110.0 billion.

Textile Yarn & Fabrics imports dropped 3% to ¥710.0 billion, also posting their first decline in six years. Imports from leading supplier China decreased for the first time in 10 years, slipping 1% to ¥400.0 billion. Imports from Indonesia, Taiwan, South Korea, and other suppliers were also weak.

Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

３．鉱物性燃料：上半期の原油高騰を背景に輸入が急増

・08年の原油市場は過去に例のない大いに荒れた相場となった。07年の初めに1バレル50ドル程度であった原油価格（WTI）は、08年に入って100ドルを超え、7月に147ドルを記録した。その後下降に転じ、12月には一時40ドルを割り込んだが、年末には50ドル程度に落ち着いた。上半期は需給の逼迫に投機資金の流入が原油価格急騰に拍車をかける一方、下半期は金融危機の影響による投機資金の引き上げに需要減が重なり、07年の年初レベルまで戻したといえよう。また、08年の日本の平均原油入着価格は103.4ドル（前年比50%高）と100ドルを超え、過去最高を大幅に更新した。

（輸出）

・輸出は、原油価格高騰の影響により1.9兆円（前年比83%増）となった。石油製品などのアジア向け1.3兆円（同115%増）が大半を占めており、うち中国向けは4,800億円（同130%増）であった。

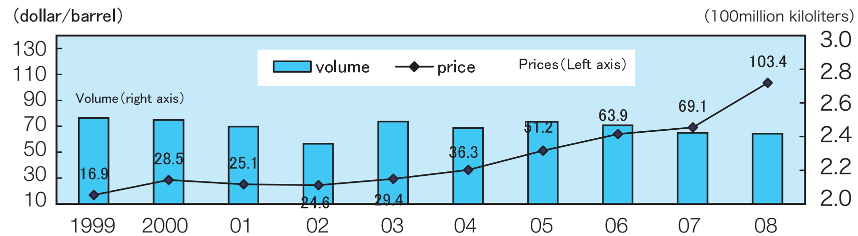
（輸入）

・輸入は、27.6兆円（前年比37%増）と大幅に増加したが、数量（同0.5%増）は微増にとどまっている。また、わが国輸入総額の35%を占め、07年よりシェアを7%拡大した。

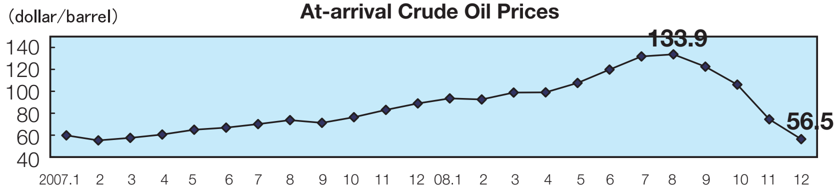
・品目別にみると、6割を占める原油及び粗油は、数量が2.4億KL（同1%増）と横ばいであったが、入着価格の上昇により16.3兆円（同32%増）と大幅に増加した。液化天然ガス（LNG）は6,900万トン（同4%増）、4.7兆円（同48%増）、石炭は1.9億トン（同3%増）、3.0兆円（同74%増）と数量、金額ともに増加した。一方、石油製品の揮発油は2,500万KL（同11%減）、1.7兆円（同9%増）、液化石油ガス（LPG）は1,400万トン（同1%減）、1.2兆円（同22%増）となり、いずれも金額が増加したものの、数量は減少した。

・国別では、サウジアラビア5.2兆円（同28%増）、UAE4.8兆円（同29%増）、オーストラリア3.0兆円（同63%増）、カタール2.7兆円（同38%増）、インドネシア2.0兆円（同35%増）の順で、上位5ヵ国が全体の64%を占めている。

At-arrival Crude Oil Prices and Volume of Imports



At-arrival Crude Oil Prices



Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

3. Mineral Fuels: Imports shoot up on first-half spike in crude oil prices

The fluctuations in crude oil market prices during 2008 were unprecedented. The per-barrel price of crude oil (WTI), which had been around $50 in early 2007, surpassed $100 in early 2008, reached a record high $147 in July, and subsequently plunged, dropping below $40 in at one point in December, but ended the year at around $50. During the first half, an influx of speculative funds under a tight supply-demand balance spurred a sharp hike in crude oil prices. During the second half, conversely, the pullout of speculative money under the financial crisis combined with a drop in demand to push crude oil prices back to the level prevailing in early 2007. The average per-barrel price of crude oil including cost, insurance, and freight (CIF) rose more than 50% in 2008 to post a record-high $103.40, far surpassing the previous record and exceeding the $100 level.

Exports

Mineral Fuels exports rose 83% year-on-year to ¥1.9 trillion, reflecting the sudden hike in crude oil prices. These were mostly exports of Petroleum Products to Asia, which moved up 115% to ¥1.3 trillion. Of those, exports to China grew 130% to ¥480.0 billion.

Imports

Mineral Fuels imports were up sharply, rising 37% to ¥27.6 trillion, but the volume increased only slightly, rising 0.5%. Mineral Fuels accounted for 35% of Japan's total import value in 2008, moving up seven percentage points from the 2007 level.

By product category, Petroleum, which accounted for 60% of the total, was flat on a volume basis (up 1% to 240 million kiloliters) but grew sharply in value terms as a result of higher CIF prices, rising 32% to ¥16.3 trillion. Both LNG imports and Coal imports posted value and volume increases. LNG was up 48% to ¥4.7 trillion (up 4% to 69 million tons), and Coal was up 74% to ¥3.0 trillion (up 3% to 190 million tons). Meanwhile imports of Petroleum Spirits and of LPG, which are both Petroleum Products, recorded value increases with volume declines. Petroleum Spirits were up 9% to ¥1.7 trillion (down 11% to 25 million kiloliters), while LPG was up 22% to ¥1.2 trillion (down 1% to 14 million tons).

By country, Mineral Fuels imports from the top five suppliers accounted for 64% of the total, as follows: imports from Saudi Arabia rose 28% to ¥5.2 trillion, imports from the UAE rose 29% to ¥4.8 trillion, imports from Australia rose 63% to ¥3.0 trillion, imports from Qatar rose 38% to ¥2.7 trillion, and imports from Indonesia rose 35% to ¥2.0 trillion.

４．木材：新設住宅着工が増加に転じるも木材輸入は2年連続の減少

・わが国の木材自給率は近年20%程度で推移しており、木材需要の大半を輸入に頼っている。そのような中、08年の新設住宅着工は07年の反動増から109.3万戸（前年比3%増）、床面積で9,077万㎡（同0.1%増）と2年ぶりに増加に転じたが、国産材へのシフトが進み木材の輸入は引き続き減少が続いた。

（輸入）

・輸入は、4,300億円（前年比25%減）となり、2年連続の減少となった。数量の伸びをみると、07年は4四半期とも増加で推移したが、08年第1四半期から減少に転じ、第4四半期には前年同期比32%減と大幅な減少を記録することとなり、通年では前年比17%減となった。

・3割を占める丸太は、570万㎥（同31%減）、1,300億円（同31%減）となった。7割を占める製材は2,800億円（同21%減）となった。

・地域別にみると、ロシアからの北洋材が、景気後退に伴う需要の減少に加え、ロシア国内の木材加工産業の振興を目的に09年から未加工品である丸太の関税引き上げが予定されていたことなどを背景に、国産材へのシフトが加速し、580億円（同48%減）と半減した。

・EUからの欧州材も、新設住宅着工の伸び悩みや円高による価格の低下を背景に、フィンランド、スウェーデン、オーストリアなどから大幅に減少し、790億円（同34%減）と減少した。

・アジアからの南洋材は、円高と丸太の需要低迷により、マレーシア、中国、インドネシアなどから大幅に減少し、710億円（同25%減）となった。

・米国からの米材は、米国の木材市況の低迷による生産体制の縮小、新設住宅着工の伸び悩みなどから、690億円（同13%減）となった。カナダからも1,100億円（同6%減）となった。

・NZ・チリ材は、ニュージーランドから150億円（同9%減）、チリから120億円（同1%減）となった。

Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

4. Wood: Imports decline for second year despite slight rise in new housing starts

Japan's wood self-sufficiency ratio has hovered around 20% in recent years, so the nation depends on imports for the majority of its wood demand. Against this backdrop, in 2008 Japan's wood imports continued to decline despite recoveries in new housing starts (which rose 3% year-on-year to 1.093 million units in reaction to the previous year's drop) and floor space (up 0.1% to 90.77 million square meters) as demand shifted toward domestic wood.

Imports

Wood imports dropped 25% to ¥430.0 billion, posting a decline for the second consecutive year. By volume, wood imports had posted increases in all four quarters of 2007 but began falling from the first quarter of 2008, and were down a steep 32% in the fourth quarter to post a volume decline of 17% for the full year.

Imports of Logs, which accounted for 30% of the total, were down 31% to ¥130.0 billion (down 31% to 5.7 million cubic meters). Imports of Lumber, which accounted for 70% of the total, fell 21% to ¥280.0 billion.

By region, imports of Wood from Russia dropped by half, declining 48% to ¥58.0 billion. In addition to the decline in demand from the economic recession, the imports fell as demand shifted toward domestic Japanese lumber prior to the scheduled increase from 2009 of the export tariff on Logs, which are unprocessed goods, designed to promote Russia's domestic lumber manufacturing industry.

Wood imports from the EU declined 34% to ¥79.0 billion with large decreases in imports from Finland, Sweden, Austria, and other countries as yen-denominated prices declined with the appreciation of the yen and new housing starts grew little.

Wood imports from Asia dropped 25% to ¥71.0 billion with large declines in imports from Malaysia, China, Indonesia, and other countries with the appreciation of the yen and the stagnant demand for Logs.

Wood imports from the U.S. fell 13% to ¥69.0 billion, with the contraction of the U.S. production capacity in the stagnant U.S. lumber market and the weak new housing starts in Japan. Imports from Canada declined 6% to ¥110.0 billion.

In other regions, imports from New Zealand were down 9% to ¥15.0 billion, and imports from Chile were down 1% to ¥12.0 billion.

5．化学製品：輸出は7年ぶり減少、輸入は9年連続で過去最高を更新

・輸出は円高により減少に転じたが、輸入は汎用品を中心に引き続き07年を上回った。

（輸出）

・輸出は、7.3兆円（前年比6%減）と7年ぶりに減少に転じた。価格は同1%安、数量は同5%減であった。

・品目別では、医薬品が3,800億円（同2%増）と増加したが、有機化合物は2.0兆円（同14%減）と2ケタ減を記録した。プラスチックは、ポリエチレンが小幅増となったが塩化ビニルの減少などにより、2.2兆円（同5%減）と小幅減となった。

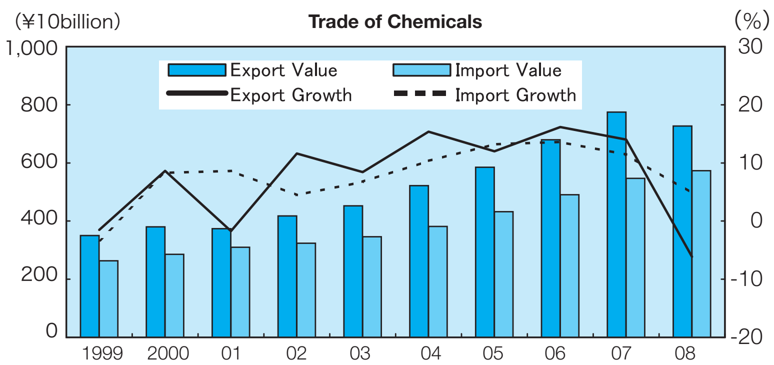
・地域別にみると、7割強を占めるアジア向けが、5.2兆円（同7%減）と07年より4,000億円近く減少した。また、3分の1近くを占める中国向けは、有機化合物が2割減となったことなどにより、1.6兆円（同10%減）と減少に転じた。韓国向けは1.3兆円（同3%減）と10年ぶりに減少に転じた。

（輸入）

・輸入は、5.7兆円（前年比5%増）と9年連続で過去最高を更新した。価格は同3%高、数量は同2%増であった。

・品目別にみると、有機化合物が1.5兆円（同4%増）、医薬品が1.1兆円（同6%増）となり、ともに1兆円の大台を持続した。プラスチックは7,400億円（同7%増）と15年連続の増加となった。

・地域別にみると、米国からは1.1兆円（同1%増）と横ばいとなったが、ドイツ、フランスなどからは堅調となり、それぞれ5,200億円（同4%増）、3,200億円（同2%増）となった。また、アジアからは2.0兆円（同11%増）と大台に乗った。そのうち中国から8,900億円（同11%増）と好調な伸びを示したのをはじめ、韓国3,300億円（同20%増）、台湾2,000億円（同16%増）、タイ1,700億円（同11%増）などが支えた。



Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

5. Chemicals: Exports drop for first time in seven years while imports post ninth consecutive record high

In 2008 Chemicals exports turned to decline due to the appreciation of the yen, while imports, especially of commodity chemicals, kept rising.

Exports

Chemicals exports fell 6% year-on-year to ¥7.3 trillion, posting a decline for the first time in seven years. Prices dropped 1% while volume contracted 5%.

By product category, although Medical Products rose 2% to ¥380.0 billion, Organic Chemicals posted a double-digit decline, falling 14% to ¥2.0 trillion. Exports of Plastic Materials were down 5% to ¥2.2 trillion. A slight rise in exports of Polyethylene was offset by declines in exports of Polyvinyl Preparations and other materials.

By region, exports to Asia, which accounted for over 70% of the total, fell 7% to ¥5.2 trillion, contracting nearly ¥400.0 billion from the prior year. Exports to China, which accounted for about one-third of the exports to Asia, turned to a decline, falling 10% to ¥1.6 trillion, with a drop of 20% in Organic Chemicals. Exports to South Korea fell for the first time in a decade, down 3% to ¥1.3 trillion.

Imports

Chemicals imports rose 5% to ¥5.7 trillion, posting a new record high for the ninth consecutive year. Prices moved up 3% while volume expanded 2%.

By product category, Organic Chemicals and Medical Products imports both remained above ¥1 trillion, with Organic Chemicals up 4% to 1.5 trillion and Medical Products up 6% to ¥1.1 trillion. Imports of Plastic Materials rose for the fifteenth consecutive year, moving up 7% to ¥740.0 billion.

By region, Chemicals imports from the U.S. held steady, rising 1% to ¥1.1 trillion. Imports from Germany and France remained firm, rising 4% to ¥520.0 billion and 2% to ¥320.0 billion, respectively. Imports from Asia rose 11% to reach the ¥2.0 trillion mark. In detail, imports from China posted a solid increase rising 11% to ¥890.0 billion, while imports from South Korea rose 20% to ¥330.0 billion, imports from Taiwan were up 16% to ¥200.0 billion, and imports from Thailand grew 11% to ¥170.0 billion.

6. 鉄鋼：輸出は新興国を中心に9年連続増加、輸入は1兆円の大台へ

・08年の世界の粗鋼生産量は13.1億トン（前年比2%減）、国内生産は1.2億トン（同1%減）となり、いずれも07年を下回った。

（輸出）

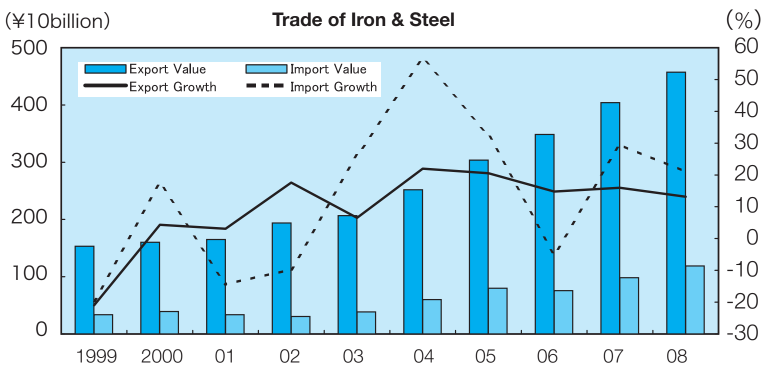
・輸出は、3,800万トン（前年比5%増）、金額で4.6兆円（同13%増）と2ケタの伸びが続き、9年連続の増加となった。しかし、第4四半期の伸びは前年同期比5%増と、第1四半期から第3四半期の累計（同16%増）と比較して大幅に鈍化した。

・地域別にみると、主力のアジア向けが3,200万トン（前年比6%増）、3.6兆円（同16%増）と好調を持続した。うち、中国向けが670万トン（同7%増）、8,600億円（同13%増）、韓国向けが930万トン（同15%増）、9,700億円（同15%増）と、それぞれ大幅に伸長した。また、タイ向け5,000億円（同27%増）や台湾向け3,500億円（同12%増）の増加も目立った。米国向けは、150万トン（同2%減）と数量の減少が続いたが、汎用品から高付加価値品にシフトしていることもあり、2,400億円（同6%増）と2年ぶりに増加に転じた。

（輸入）

・輸入は、数量が770万トン（前年比8%減）と2年ぶりに減少に転じたが、価格の上昇を背景に、1.2兆円（同21%増）と過去最高を記録した。四半期別にみると、第2四半期以降2ケタ増が続き増勢を強めた。

・地域別にみると、アジアからは、数量が減少し580万トン（同6%減）となったものの、金額は7,600億円（同19%増）と引き続き増加した。韓国、中国からもともに3,100億円（同7%増、39%増）となり、いずれも好調であった。



Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

6. Iron & Steel Products: Exports rise for ninth year centered on emerging economies; imports surpass ¥1 trillion

In 2008, both global and Japanese crude steel production declined from the previous year, with global production down 2% year-on-year to 1.31 billion tons and Japanese domestic production falling 1% to 0.12 billion tons.

Exports

Iron & Steel Products exports continued rising for the ninth consecutive year, moving up 13% to ¥4.6 trillion (up 5% to 38.0 million tons). However, fourth quarter exports were up just 5%, indicating a substantial slowing of export growth compared with the 16% total increase realized over the first three quarters.

By region, exports to the leading market Asia continued to be favorable, up 16% to ¥3.6 trillion (up 6% to 32.0 million tons). Exports to China and South Korea both posted large growth, with exports to China up 13% to ¥860.0 billion (up 7% to 6.7 million tons) and exports to South Korea up 15% to ¥970.0 billion (up 15% to 9.3 million tons). Exports to Thailand and Taiwan also rose markedly, with exports to Thailand rising 27% to ¥500.0 billion and those to Taiwan growing 12% to ¥350.0 billion. Exports to the U.S. continued to decline on a volume basis, slipping 2% to 1.5 million tons, but recovered on a value basis following last year's drop, rising 6% to ¥240.0 billion. This recovery was partially due to a shift from general-purpose to high-value-added products.

Imports

Iron & Steel Products imports rose 21% to a record high ¥1.2 trillion. This value increase resulted from price hikes, as import volume turned to a decline, contracting 8% to 7.7 million tons. The rise in value grew stronger as the year progressed, with double-digit growth from the second quarter forward.

By region, imports from Asia continued rising on a value basis, moving up 19% to ¥760.0 billion, although the volume fell 6% to 5.8 million tons. Imports from South Korea rose 7% to ¥310.0 billion and imports from China jumped 39%, also to ¥310.0 billion.

7．電算機類、電算機類の部分品：輸出は大幅減、輸入は引き続き低迷

（輸出）

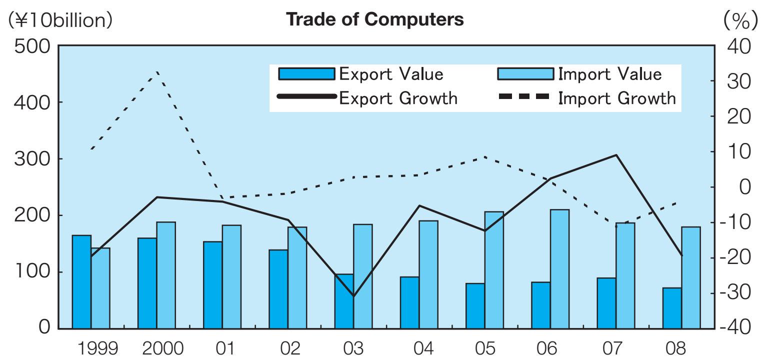
・電算機類の部分品は、1.7兆円（前年比10%減）と統計公表の05年以降初めて減少となった。米国向けが4,900億円（同7%減）と5,000億円割れとなったのをはじめ、中国向けは2,100億円（同14%減）と2ケタ減となった。オランダ向け4,400億円（同8%減）、シンガポール向け1,100億円（同9%減）、香港向け980億円（同8%減）なども減少に転じた。四半期別にみると、第4四半期が前年同期比20%減となり、第1四半期から第3四半期の累計（同6%減）と比較して、落ち込み幅が大きくなった。

・電算機類（含周辺機器）は、7,200億円（前年比19%減）と2ケタ台の大幅な減少となり、3年ぶりに減少に転じた。米国向け2,800億円（同21%減）の2割減をはじめ、オランダ向け1,000億円（同3%減）や香港向け440億円（同33%減）の減少が目立った。

（輸入）

・電算機類（含周辺機器）は、1.8兆円（前年比4%減）と4年連続の減少となった。主力の中国からは1.2兆円（同1%増）と横ばいとなったが、米国からは980億円（同21%減）と2ケタ減となった。タイ、シンガポールからも振るわず、1,100億円（同8%減）、860億円（同9%減）となった。四半期別にみると、第3四半期を除き減少で推移した。

・電算機類の部分品は、6,300億円（同20%減）と4年連続の減少となった。6割近くを占める中国からは3,600億円（同19%減）と2ケタ減、米国からは380億円（同31%減）となった。シンガポール、マレーシアなどからも、それぞれ340億円（同21%減）、320億円（同10%減）と減少幅が目立った。



Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

7. Computers & Units and Parts of Computers: Exports drop sharply while imports remain weak

Exports

Exports of Parts of Computers fell 10% year-on-year to ¥1.7 trillion, posting the first decline since statistics for this product category were first compiled in 2005. Exports to the U.S. were down 7% to ¥490.0 billion, falling below ¥500 billion for the first time. Exports to China recorded a double-digit decrease, dropping 14% to ¥210.0 billion. Exports to other countries also turned to declines, with exports to the Netherlands down 8% to ¥440.0 billion, exports to Singapore down 9% to ¥110.0 billion, and exports to Hong Kong down 8% to ¥98.0 billion. The fourth quarter exports were down 20%, showing a steeper drop compared with the 6% total decline over the first three quarters.

Computers & Units exports fell a sharp 19% to ¥720.0 billion, posting a double-digit drop and the first decline in three years. In particular, exports to the U.S. fell 21% to ¥280.0 billion, exports to the Netherlands were off 3% to ¥100.0 billion, and exports to Hong Kong were down 33% to ¥44.0 billion.

Imports

Computers & Units imports fell 4% to ¥1.8 trillion, posting a decline for the fourth consecutive year. Imports from leading supplier China held steady, rising 1% to ¥1.2 trillion. Imports from the U.S., however, posted a double-digit drop, falling 21% to ¥98.0 billion. Imports from Thailand and Singapore were weak, with imports from Thailand dropping 8% to ¥110.0 billion and imports from Singapore down 9% to ¥86.0 billion. Import declines were posted in all but the third quarter.

Imports of Parts of Computers fell 20% to ¥630.0 billion, declining for the fourth consecutive year. Imports from China, which accounted for nearly 60% of the total, were down 19% to ¥360.0 billion. Imports from the U.S. dropped 31% to ¥38.0 billion. Imports from both Singapore and Malaysia declined substantially, with imports from Singapore down 21% to ¥34.0 billion and imports from Malaysia down 10% to ¥32.0 billion.

8. 音響・映像機器：輸出入とも減少続く

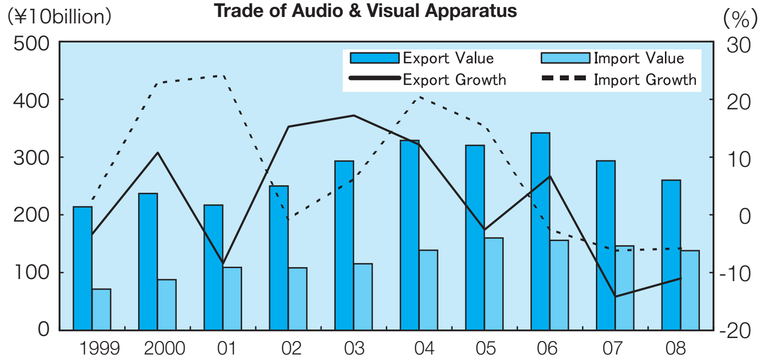
(輸出)

- 輸出は、中国、ロシア向けは増加したものの、米国、EU、中東向けが2ケタ減となり、全体では2.6兆円(前年比11%減)と2年連続の減少となった。
- 音響機器は、4四半期とも減少し、1.5億台(同3%減)、690億円(同18%減)と11年連続の減少となった。うち、5割を占めるラジオが260万台(同13%減)、280億円(同33%減)、3割を占めるアンプ·スピーカー·マイクが1.5億台(同3%減)、260億円(同11%増)となった。
- 映像機器は、下半期に減少に転じ、1.5兆円(同10%減)と4年連続の減少となった。9割近くを占める映像記録・再生機器(VTRやDVD機器類)は、アジア向けが増加したものの、米国、EU向けが金額で2ケタ減となり、4,400万台(同1%増)、1.3兆円(同7%減)となった。テレビは、北京五輪開催による薄型テレビなどの需要増により、650万台(同18%増)と数量が増加したが、単価の下落、低価格製品の割合上昇により、金額は4四半期とも減少で推移し、1,900億円(同25%減)と大きく減少した。
- 音響・映像機器の部分品は、中国向けが2ケタ増となったものの、EU、米国向けが減少し、1.0兆円(同12%減)と2年連続の減少となった。

(輸入)

- 輸入は、米国、アジアからを中心に第2四半期以降減少に転じた結果、1.4兆円(前年比6%減)と3年連続の減少となった。
- 4分の1を占める映像記録・再生機器は、第1四半期は大幅増となったが第2四半期以降減少に転じ、数量が2,500万台(同4%増)と増加する中、3,200億円(同7%減)となった。1割を占めるアンプ·スピーカー·マイクは、3.7億台(同13%減)、1,400億円(同8%減)となった。ラジオは、1,900万台(同4%減)、1,100億円(同6%減)となった。

Trade of Audio & Visual Apparatus



Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

8. Audio & Visual Apparatus: Exports and imports continue falling

Exports

Audio & Visual Apparatus exports fell by 11% year-on-year overall to ¥2.6 trillion, posting a decline for the second consecutive year. The total exports were pulled down by double-digit declines in exports to the U.S., the EU and the Middle East, despite increased exports to China and Russia.

Audio Apparatus exports contracted in all four quarters, moving down 18% to ¥69.0 billion (down 3% to 150 million units) and posting a decline for the 11th consecutive year. Exports of Radio Broadcast Receivers, which accounted for half of the total, were down 33% to ¥28.0 billion (down 13% to 2.6 million units). Exports of Amplifiers, Loudspeakers & Microphones, which accounted for 30% of the total, were down 11% to ¥26.0 billion (down 3% to 150 million units).

Visual Apparatus exports, which slowed from the second half, fell 10% to ¥1.5 trillion, posting a decline for the fourth consecutive year. Video Recording & Reproduction Apparatus (VTR and DVD equipment), which accounted for nearly 90% of the total, fell 7% to ¥1.3 trillion (rose 1% to 44 million units) as sales to Asia expanded while sales to the U.S. and EU posted double-digit declines on a value basis. Although TV Receiver exports increased on a volume basis rising 18% to 6.5 million units with the higher demand for flat-screen televisions accompanying the Beijing Olympics, export value was down sharply with declines in all four quarters, dropping 25% to ¥190.0 billion, because of reductions in unit prices and a larger proportion of low-priced models.

Exports of Parts of Audio & Visual Apparatus fell for the second consecutive year, dropping 12% to ¥1.0 trillion despite double-digit growth in exports to China because of declines in exports to the U.S. and EU.

Imports

Audio & Visual Apparatus imports fell 6% to ¥1.4 trillion, dropping for the third consecutive year, as imports especially from the U.S. and Asia turned to a decline from the second quarter.

Imports of Video Recording & Reproduction Apparatus, which accounted for one-fourth of the total, were up sharply in the first quarter, but turned to a decline from the second quarter. For the full year, the imports fell 7% to ¥320.0 billion while still rising on a volume basis (up 4% to 25 million units). Imports of Amplifiers, Loudspeakers & Microphones, which accounted for 10% of the total, were down 8% to ¥140.0 billion (down 13% to 370 million units). Imports of Radio Broadcast Receivers were down 6% to ¥110.0 billion (down 4% to 19 million units).

9．半導体等電子部品：輸出が7年ぶり減少

・世界半導体市場統計（WSTS、カリフォルニア州）による08年の半導体出荷（金額ベース）は、前年比2.5%増にとどまる見込みである。半導体を多く使用する携帯電話、パソコンなどの需要低迷、薄型テレビなどの家電製品、自動車の成長鈍化が大きく影響することとなった。

（輸出）

・輸出は、北京五輪開催による薄型テレビなどの需要拡大により好調に推移すると思われたが、期待したほどの伸びはみられず4.6兆円（前年比12%減）と7年ぶりに減少に転じた。数量の伸びをみると、07年は4四半期とも2ケタの伸びで推移したが、08年第1四半期以降は減速し、第4四半期に前年同期比26%減となった結果、通年では前年比1%減となった。

・品目別にみると、7割を占めるICは、数量が540億個（前年比2%増）と微増となる中、価格の下落により、金額は3.0兆円（同16%減）となった。2割を占める個別半導体は1.1兆円（同7%減）となった。

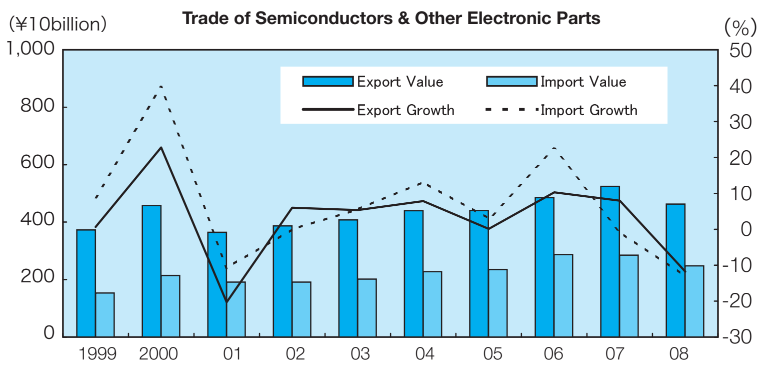
・地域別にみると、8割を占めるアジア向けは3.8兆円（同13%減）、うち中国向けも1.0兆円（同12%減）と2ケタ減となった。米国向けは3,300億円（同11%減）、EU向けは4,500億円（同2%減）となった。

（輸入）

・輸入は、2年連続の減少となり2.5兆円（前年比13%減）となった。数量の伸びをみると、07年は4四半期とも減少で推移したが、08年は4四半期とも高い伸びとなり、通年では同22%増となった。

・品目別にみると、9割弱を占めるICは、数量が160億個（同2%減）と微減となる中、価格の下落が続き、金額は2.1兆円（同15%減）と2ケタ減となった。トランジスター等も、最終製品の価格下落の圧力を受け、450億円（同22%減）と減少した。

・地域別にみると、8割弱を占めるアジアから1.9兆円（同14%減）、うちNIEsから1.3兆円（同13%減）、中国から2,600億円（同1%減）となった。



Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

9. Semiconductors Etc.: Exports post first decline in seven years

According to Word Semiconductor Trade Statistics (WSTS; California), global semiconductor shipments were expected to grow just 2.5% year-on-year (value basis) in 2008. During the year, the semiconductor market was severely affected by the slump in demand for mobile telephones, personal computers, and other devices that use many semiconductors, and by dull growth in motor vehicles, flat-screen televisions, and other household electronics.

Exports

Exports of Semiconductors Etc. were expected to perform favorably with a spike in demand for flat-screen televisions from the Beijing Olympics, but the growth was less than anticipated. As a result, exports dropped 12% to ¥4.6 trillion, posting their first decline in seven years. On a volume basis, the exports posted double-digit growth in all four quarters of 2007 but slowed from the first quarter of 2008 and were down 26% in the fourth quarter, to post a volume decline of 1% for the full year.

By product category, exports of ICs, which accounted for 70% of the total, declined 16% to ¥3.0 trillion on lower prices, despite a slight increase in volume (up 2% to 54 billion units). Exports of Transistors, Diodes, & Similar Semiconductor Devices, which accounted for 20% of the total, fell 7% to ¥1.1 trillion.

By region, exports to Asia, which accounted for 80% of the total, dropped 13% to ¥3.8 trillion, of which exports to China were down 12% to ¥1.0 trillion. Exports to the U.S. fell 11% to ¥330.0 billion, and exports to the EU were off 2% to ¥450.0 billion.

Imports

Imports of Semiconductors Etc. fell 13% to ¥2.5 trillion, declining for the second consecutive year. On a volume basis, the imports had declined in all four quarters of 2007 but posted high growth in all four quarters of 2008, and rose 22% for the full year.

By product category, imports of ICs, which accounted for nearly 90% of the total, were down 15% to ¥2.1 trillion. This decline mostly resulted from continued price reductions. In volume terms, ICs imports were only down marginally, dropping 2% to 16 billion units. Imports of Transistors fell 22% to ¥45.0 billion also under price reduction pressures for finished products.

By region, imports from Asia, which accounted for nearly 80% of the total, were down 14% to ¥1.9 trillion, of which imports from Asia NIEs fell 13% to ¥1.3 trillion and imports from China fell 1% to ¥260.0 billion.

10. 自動車: 輸出は主力の米国が振るわず8年ぶり減少

・米国自動車市場が下半期に大幅に落ち込む中で、アジア向けや中東向けなどの伸びも支えきれず、07年の過去最高から一転して減少することとなった。

(輸出)

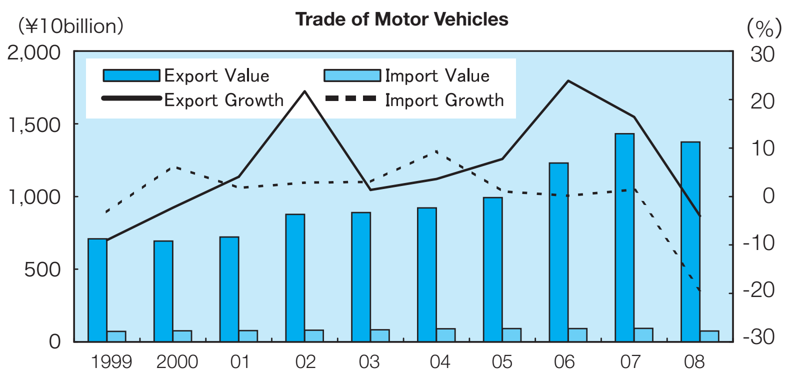
・輸出は、数量が830万台(前年比2%増)と微増となったが、大幅な円高による円換算額の目減りもあって、金額は13.7兆円(同4%減)と減少に転じた。乗用車は725万台(同1%増)、12.0兆円(同6%減)となり、8年ぶりに減少に転じた。一方、バス・トラックは、99万台(同9%増)、1.7兆円(同9%増)と7年連続で前年水準を上回った。

・地域別にみると、オイルマネーで潤う中東向けが、UAE4,800億円(同20%増)、サウジアラビア3,800億円 (同22%増) などを中心に、107万台 (同13%増)、1.8兆円 (同25%増) と大幅に増加した。ロシア向けも、中古車輸出が好調となったことなどから104万台(同27%増)、1.3兆円(同37%増)と顕著な伸びを記録した。アジア向けは、中国向けが4,200億円(同30%増)と3割増となったことが支え、1.3兆円(同10%増)と好調な伸びを示した。一方、米国向けは219万台(同9%減)、4.2兆円(同20%減)と4年ぶりに減少に転じ、EU向けも99万台(同9%減)、1.9兆円(同14%減)と2ケタ台の落ち込みを示した。

・一方、自動車の部分品は、米国向けの不振を主因に3.1兆円(同9%減)と9年ぶりに減少に転じた。

(輸入)

・輸入は、25万台(前年比15%減)と30万台を割り込み、9年ぶりに減少に転じ7,500億円(同19%減)となった。主力のドイツからが3,900億円(同13%減)と2ケタ減となったほか、南アフリカ共和国590億円(同38%減)、米国640億円(同5%減)などからも振るわなかった。



Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

10. Motor Vehicles: Exports fall for first time in eight years with weak sales to main U.S. market

Japan's Motor Vehicle exports turned to a decline in 2008, dropping from the record high posted the previous year. Increased exports to Asia and the Middle East could not compensate for the major slump in the U.S. automobile market from the second half.

Exports

Motor Vehicle exports turned to a decline, dropping 4% year-on-year to ¥13.7 trillion. While the exports rose slightly on a volume basis (up 2% to 8.30 million units), the yen-denominated value declined because of the large appreciation of the yen. Car exports were down 6% to ¥12.0 trillion (up 1% to 7.25 million units), posting their first decline in eight years. Bus & Truck exports were up 9% to ¥1.7 trillion (up 9% to 0.99 million units), rising for the seventh consecutive year.

By region, exports to the oil-rich Middle East rose sharply, expanding 25% to ¥1.8 trillion (up 13% to 1.07 million units), with exports to the UAE rising 20% to ¥480.0 billion and exports to Saudi Arabia up 22% to ¥380.0 billion. Exports to Russia shot up 37% to ¥1.3 trillion (up 27% to 1.04 million units) on strong exports of used vehicles. Exports to Asia grew 10% to ¥1.3 trillion, supported by vibrant growth in exports to China which rose 30% to ¥420.0 billion. Exports to the U.S. declined for the first time in four years, down 20% to ¥4.2 trillion (down 9% to 2.19 million units), and exports to the EU posted a double-digit decline, down 14% to ¥1.9 trillion (down 9% to 0.99 million units).

Exports of Parts of Motor Vehicles dropped for the first time in nine years, falling 9% to ¥3.1 trillion, primarily because of the slump in exports to the U.S.

Imports

Motor Vehicle imports recorded their first decline in nine years, down 19% to ¥750.0 billion. On a volume basis, imports fell below the 0.30 million units level, moving down 15% to 0.25 million units. Imports from leading supplier Germany fell 13% to ¥390.0 billion. Imports from other countries were also weak, with imports from South Africa down 38% to ¥59.0 billion and imports from the U.S. off 5% to ¥64.0 billion.

11. 船舶・航空機類：船舶は3年連続2ケタ増、航空機輸入は4年ぶり減少

(船舶輸出)

・船舶の輸出は、数量が1,800万総トン(前年比3%増)、731隻(前年751隻)となり、金額が2.0兆円(同14%増)と3年連続で2ケタ増となった。船種別にみると、貨物船が448隻(前年467隻)、1.2兆円(同8%増)、タンカーが213隻(前年210隻)、7,700億円(同27%増)であった。

・国別にみると、パナマ向けが287隻(前年284隻)、1.1兆円(同12%増)、シンガポール向けが58隻(前年38隻)、1,600億円(同80%増)、バハマ向けが24隻(前年21隻)、1,800億円(同31%増)と増加した。

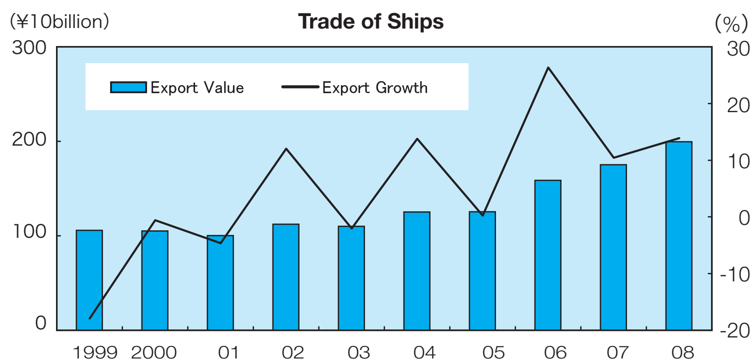
・一方、マレーシア向けが3隻(前年8隻)、260億円(同55%減)、ギリシャ向けが3隻(前年6隻)、130億円(同55%減)、リベリア向けが25隻(前年25隻)、1,200億円(同10%減)と減少した。

(航空機類輸入)

・航空機類の輸入は、5,900億円(前年比16%減)と4年ぶりに減少に転じた。これは、大型航空機の引き渡しスケジュールの遅延によるもので、大型航空機(自重15,000kg超)は、31機(前年31機)、3,700億円(同20%減)となった。

・国別にみると、9割を占める米国からが4,590機(前年5,384機)、5,300億円(同11%減)となり、うち大型航空機は30機(前年30機)、3,600億円(同12%減)であった。フランス、カナダからは、それぞれ180億円(同71%減)、63億円(同54%減)となり、ともに大幅に減少した。

・一方、イタリアからは69機(前年18機)、120億円(同180%増)となった。ブラジルからは、21機(同全増)、27億円となり、うち大型航空機が1機(同全増)、26億円であった。



Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

11. Ships and Aircraft: Ship exports up over 10% for third consecutive year; aircraft imports drop for first time in four years

Ship Exports

Ship exports rose 14% year-on-year to ¥2.0 trillion, posting a double-digit increase for the third year in a row. On a volume basis, the exports (731 vessels vs. 751 in 2007) rose 3% to 18.0 million gross tons. By type of ship, exports of Cargo Ships (448 vessels vs. 467 in 2007) rose 8% to ¥1.2 trillion, and exports of Tankers (213 vessels vs. 210 in 2007) rose 27% to ¥770.0 billion

By country, exports to Panama (287 vessels vs. 284 in 2007) rose 12% to ¥1.1 trillion, exports to Singapore (58 vessels vs. 38 in 2007) jumped 80% to ¥160.0 billion, and exports to the Bahamas (24 vessels vs. 21 in 2007) rose 31% to ¥180.0 billion.

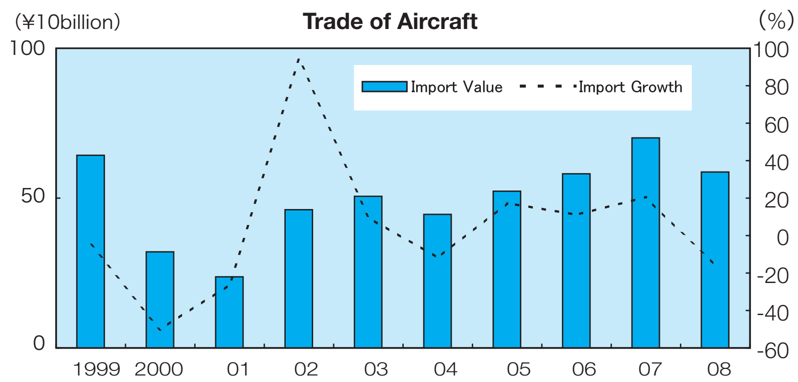
On the other hand, exports to Malaysia (3 vessels vs. 8 in 2007) fell 55% to ¥26.0 billion, exports to Greece (3 vessels vs. 6 in 2007) dropped 55% to ¥13.0 billion, and exports to Liberia (25 vessels vs. 25 in 2007) were down 10% to ¥120.0 billion.

Aircraft Imports

Aircraft imports fell 16% to ¥590.0 billion, contracting for the first time in four years. This was the result of delays in the delivery of Large Aircraft. Imports of Large Aircraft weighing over 15,000 kg (31 aircraft vs. 31 in 2007) declined 20% to ¥370.0 billion.

By country, imports from the U.S. (4,590 aircraft vs. 5,384 in 2007), which accounted for 90% of the total, decreased 11% to ¥530.0 billion, of which imports of Large Aircraft (30 aircraft vs. 30 in 2007) declined 12% to ¥360.0 billion. Imports from France and Canada were both down sharply, with imports from France down 71% to ¥18.0 billion and imports from Canada down 54% to ¥6.3 billion.

Conversely, imports from Italy (69 aircraft vs. 18 in 2007) shot up 180% to ¥12.0 billion. Imports from Brazil (21 aircraft versus 0 in 2007) totaled ¥2.7 billion, including 1 Large Aircraft (¥2.6 billion).



Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

12. 科学光学機器：輸出入とも減少幅が縮小

・科学光学機器は、07年に輸出入とも2ケタ減となったが、08年は減少が続いたものの、ともに減少幅は縮小した。

（輸出）

・輸出は、4年連続で減少し、2.0兆円（前年比3%減）となった。数量の伸びをみると、07年第3四半期から08年第3四半期まで高水準で推移したが、第4四半期に前年同期比24%減となった結果、通年では前年比9%増であった。

・品目別にみると、2割弱を占める計測機器類は3,600億円（同2%減）となった。1割弱を占める写真機用レンズは1,500億円（同5%減）となった。電子顕微鏡は4,515台（前年4,320台）、340億円（同25%減）となった。顕微鏡及び同部分品は300億円（同3%減）、めがねのわく及び柄は180億円（同0.1%減）となった。

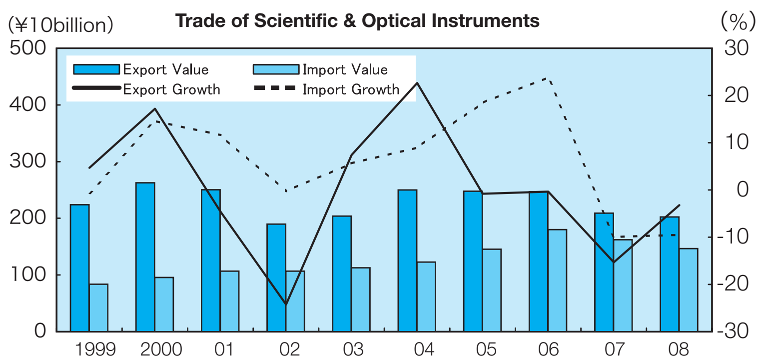
・地域別に見ると、6割を占めるアジア向けが1.2兆円（同5%減）と減少したものの、中国向けは4,800億円（同3%増）と微増となった。EU向けは3,600億円（同2%増）、米国向けは3,400億円（同3%減）と減少した。

（輸入）

・輸入は、2年連続で減少し、1.5兆円（前年比10%減）となった。数量の伸びをみると、07年は4四半期とも減少で推移したが、08年に入ってからも減少が続き、通年では同9%減であった。

・品目別にみると、2割弱を占める計測機器類は2,400億円（同15%減）となった。写真機及び同部分品は、130億円（同11%減）であった。

・地域別に見ると、4割を占めるアジアからは6,300億円（同11%減）、うち中国からは3,100億円（同1%増）と横ばいであった。米国からは4,100億円（同14%減）、EUからは3,100億円（同2%減）となった。



Source:Compiled from MOF's Trade Statistics on a Customs-cleared Basis

12. Scientific & Optical Instruments: Smaller declines in both exports and imports

Japan's imports and exports of Scientific & Optical Instruments both continued to decline in 2008, but the rates of decline contracted from the double-digit drops recorded in 2007.

Exports

Exports of Scientific & Optical Instruments fell 3% year-on-year to ¥2.0 trillion, posting a decline for the fourth consecutive year. On a volume basis, the imports rose at a fast pace from the third quarter of 2007 through the third quarter of 2008, but fell 24% in the fourth quarter to post a increase of 9% for the full year.

By product category, imports of Meters—Measuring & Scientific Instruments, which accounted for nearly 20% of the total, slipped 2% to ¥360.0 billion. Imports of Lenses for Cameras, which accounted for nearly 10% of the total, fell 5% to ¥150.0 billion. Imports of Microscopes—Electron & Proton (4,515 units vs. 4,320 in 2007) dropped 25% to ¥34.0 billion. Imports of Optical Microscopes & Parts Thereof were off 3% to ¥30.0 billion, and imports of Spectacle Frames & Handles slid 0.1% to ¥18.0 billion.

By region, while exports to Asia, which accounted for 60% of the total, were down slightly, dropping 5% to ¥1.2 trillion, exports to China rose slightly, up 3% to ¥480.0 billion. While exports to the EU rose 2% to ¥360.0 billion, exports to the U.S. dropped 3% to ¥340.0 billion.

Imports

Scientific & Optical Instruments imports contracted for the second consecutive year, dropping 10% to ¥1.5 trillion. On a volume basis, the imports were down in all four quarters of 2007, and continued falling in 2008, moving down 9% for the full year.

By product category, imports of Meters—Measuring & Scientific Instruments, which accounted for nearly 20% of the total, fell 15% to ¥240.0 billion. Imports of Cameras & Parts declined 11% to ¥13.0 billion.

By region, imports from Asia, which accounted for 40% of the total, fell 11% to ¥630.0 billion, of which imports from China slid 1% to ¥310.0 billion. Imports from the U.S. were down 14% to ¥410.0 billion, and imports from the EU were off 2% to ¥310.0 billion.