

## 1-1. 2022年度の国内生産規模

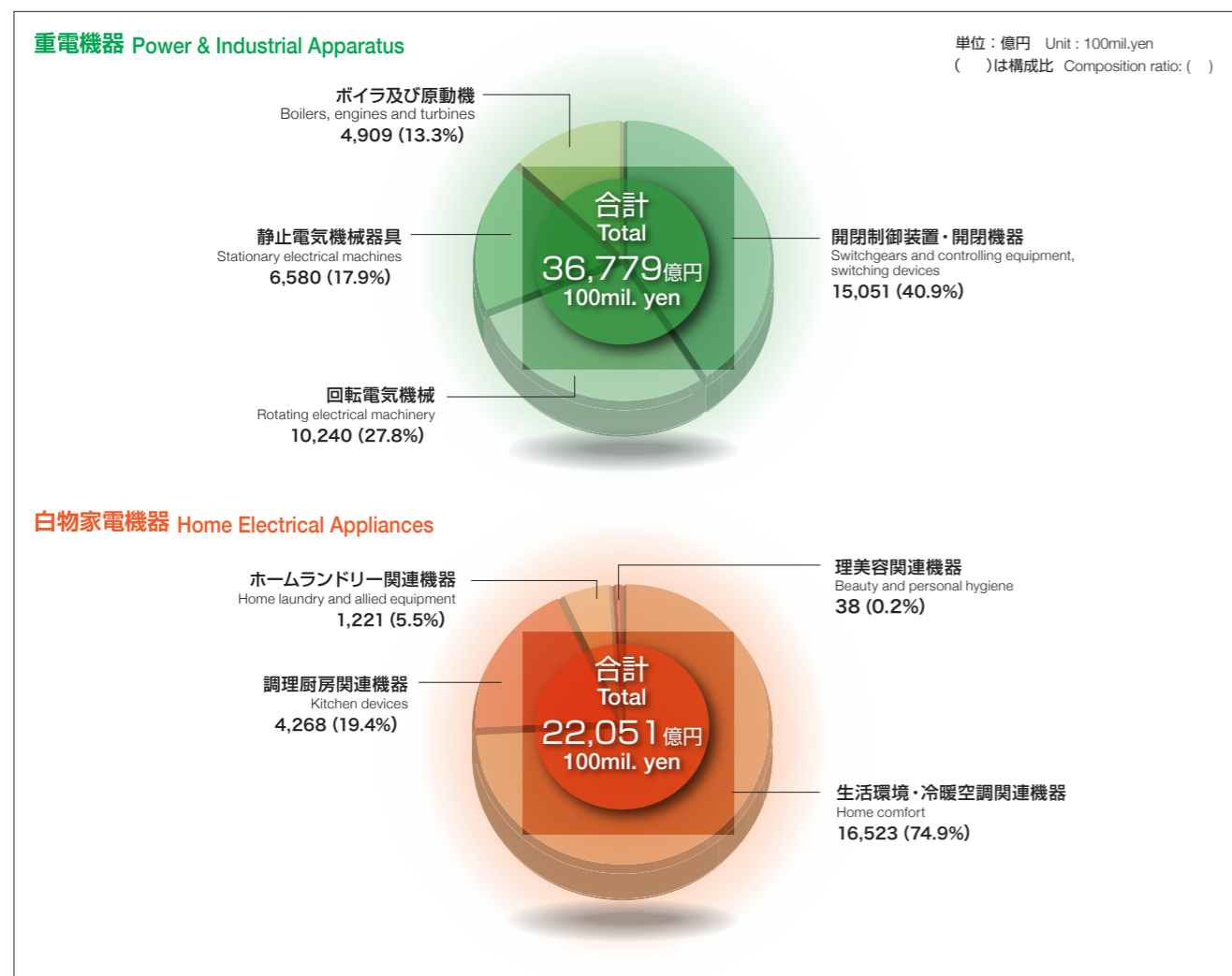
2022年度の世界経済は、需要と供給の両面でコロナ危機から回復傾向をたどってきましたが、高インフレと金融引き締めで景気の回復ペースが鈍化しました。わが国経済は、物価高や海外経済減速が下押し要因となるも、個人消費や企業収益など内需主導での回復が続きました。このような中、2022年度の重電・白物家電機器を合わせた電気機器の国内生産は、5兆8,830億円、前年度比109.4%となりました。うち重電機器は3兆6,779億円、前年度比106.0%、家電機器は2兆2,051億円、前年度比115.6%となりました。

## 1-2. 2023年度の国内生産見通し

2023年度の世界経済は、前年度から引き続き減速しています。中国経済はゼロコロナ政策解除により持ち直しているものの、米欧経済が物価高や金融引き締めの影響から減速しています。わが国経済は、海外経済減速等の下押し要因はあるものの、経済活動の正常化を背景に内需を中心に緩やかに回復すると見込まれています。重電分野では、サプライチェーンの混乱による部材不足は解消に向かっており、前年度と同様に中国、米国等の半導体、電子部品産業向けの設備投資が期待され、その他の産業分野の設備投資も国内、海外共に緩やかに回復に向かうと見ておりますが、発電用原動機（ボイラ・タービン）にて前年度に大型案件が集中した反動があり、重電機器の生産は3兆5,556億円、前年度比96.7%と前年度をやや下回る見通しです。白物家電分野は、前年度をやや下回る程度と見通しており、白物家電機器の国内生産は、2兆1,025億円、前年度比95.3%となる見通しです。このような中、2023年度の重電・白物家電機器を合わせた電気機器の国内生産は、5兆6,581億円、前年度比96.2%となる見通しです。

## 2022年度重電機器及び白物家電機器の国内生産額

Trend of improvement rate of energy consumption per unit at manufacturing process



出所：経済産業省 生産動態統計(2023年5月現在の公表値) Source: Current survey of industrial production, METI (as of May, 2023)

## Production Trends of Electrical Machinery in Japan

## 1-1. Production size in Japan in FY 2022

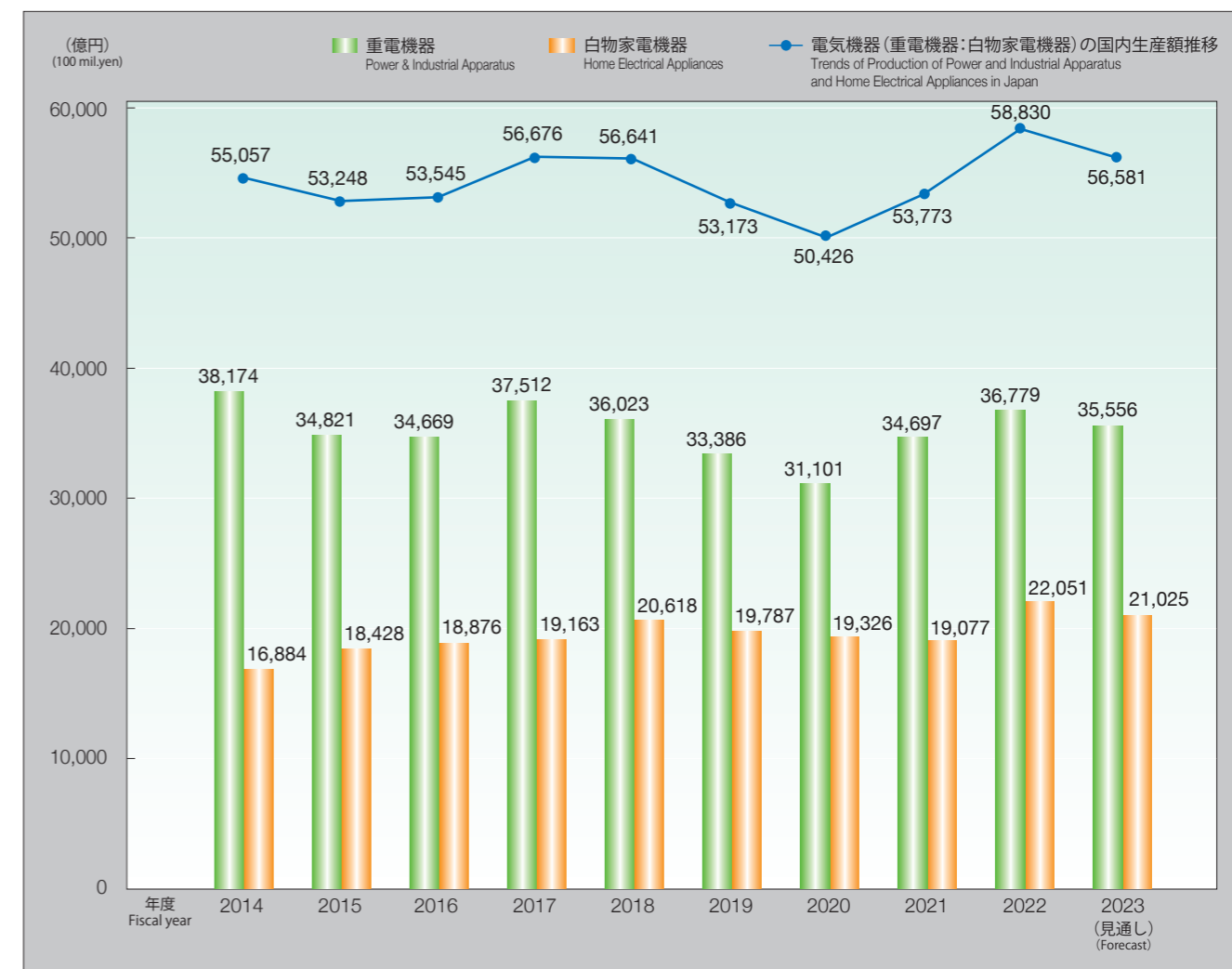
The world economy in FY 2022 passed in a recovering trend both in supply and demand from the COVID-19 impact, but the recovering pace relaxed under high inflation and tightened financial policies. The Japanese economy maintained its recovering trend owing to its domestic demand led by personal consumption and corporate earnings despite downward pressure due to high prices and a slowdown in overseas economies. Under such circumstances, the production of power & industrial apparatus and home electrical appliances in Japan in FY 2022 amounted to 5,883.0 billion yen, 109.4% of that of the previous year. The production of power & industrial apparatus ended in 3,677.9 billion yen, 106.0% of that of the previous year, while the production of home electrical appliances increased to 2,205.1 billion yen, 115.6% of that of the previous year.

## 1-2. Outlook of the production size in Japan for FY 2023

The world economy in FY 2023 is slowing down continuing from the previous year. The Chinese economy is recovering owing to cancellation of its zero-Corona policy, but the European and US economy is slowing down due to high prices and financial tightening. The Japanese economy is foreseen to recover gradually led by domestic consumption under normalizing economic activities despite downward pressure from a slowing down of overseas economies and other factors. In the field of power & industrial apparatus, insufficient supply of material due to uncertainties in the supply chain is being resolved, capital investment in the semi-conductors and electronic parts industry is anticipated to increase in China, US and other countries, as was last year, and capital investment in other industrial sectors is also foreseen to recover gradually in Japan and other countries. But the annual production of power & industrial apparatus in Japan is expected to slightly decrease to 3,555.6 billion yen, 96.7% of that of the previous year, due to a reaction to the concentration of large projects in the previous year in boilers and turbines for power generation. In the home electrical appliance field, the total production will be slightly less than the level of the previous year, i.e., 2,102.5 billion yen, 95.3% of that of the previous year. The total production in Japan in the fields of power & industrial apparatus and home electrical appliances in FY 2023 will be 5,658.1 billion yen, 96.2% of that of the previous year.

## 電気機器の国内生産額の推移

Trend of production of Power &amp; Industrial Apparatus and Home Electrical Appliances in Japan



出所：経済産業省 生産動態統計(2023年5月現在の公表値) Source: Current survey of industrial production, METI (as of May, 2023)