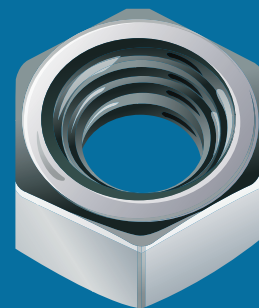


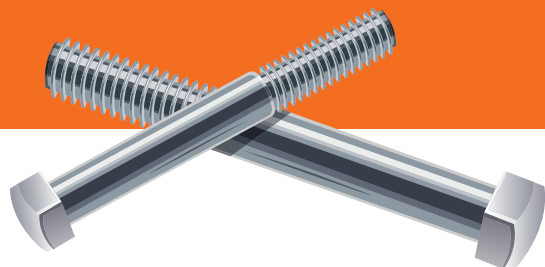
# Taiwan

## Production and Sales of Fastener Industry

### in H1 2013



## 上半年扣件产业概况



## 台湾

by Techn Huang, MIRDC  
Data courtesy of TIER, compiled by ITIS project of MIRDC

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图表资料来源 / 台经院海关进出口资料库

**虽**然上半年扣件输入欧盟数量持续衰退，但输入俄、日、美均成长，上半年出口量仍较 2012 年同期成长 2%；不过，由于近年来国际钢价持续下探，扣件业接单价格下滑，导致整体出口值较 2012 年同期衰退 3%。

### 2013 年上半年扣件产销概况

2013 年第二季台湾扣件出口值为 290 亿元新台币，较去年同期衰退 1.1%，如【表一】所示；在进口方面，第二季进口值 10 亿元新台币，较去年同期衰退 17.5%。在出口平均单价方面，第二季出口平均单价 78.5 元 / 公斤，较去年同期衰退 3.2%，如【图一】所示。

据统计，2013 上半年台湾扣件产值为 596 亿元，出口值为 555 亿元，较 2012 年同期衰退 3%，国内市场需求为 63 亿元，进口值为 21 亿元，较 2012 年同期衰退 6%；另外在出口平均单价方面，上半年出口平均单价为 78 元 / 公斤，较 2012 年同期衰退达 5%。

In the 1st half of 2013, fastener export from Taiwan to the EU continued to decline, but the export to Russia, Japan, and the U.S. all exhibited growth. The total export amount of Taiwan in the 1st half of 2013 was 2% higher than that of the same period of 2012. However, as the recent steel prices around the world keep declining and the price for order acceptances in the fastener industry also shows a downslide, the total export value was 3% lower than that of the same period of 2012.

### Fastener Production & Sales in H1 2013

In Q2 2013, the export value of Taiwan fastener was down 1.1% to NTD 29 billion over the same period last year. As shown in **Table 1**, the import value in Q2 was down 17.5% to NTD 1 billion over the same period. The average export unit price in Q2 was down 3.2% to NTD 78.5/kg (see **Fig. 1**).

According to the statistics, the production value of Taiwanese fasteners in the 1st half of 2013 reached NTD 59.6 billion and the export value was NTD 55.5 billion, down 3% over the same period of 2012. The domestic demand of Taiwan was NTD 6.3 billion and the import value was 2.1 billion, down 6% over the same period of 2012. On the other hand, the average export unit price in the 1st half of 2013 was NTD 87/kg, down 5% over the same period of 2012.

In terms of the export from Taiwan, the top 5 countries with the greatest export values in the 1st half of 2013 were the U.S. (38%), Germany (9%), Japan (6%), the Netherlands (5%), and UK (4%). The highest average unit price was the export to Japan, reaching NTD 90.7/kg, while the average unit prices for the other 4 countries were within NTD 72-81/kg. As for the import to Taiwan, the top 5 countries with the greatest import values were Japan (49%), the U.S. (13%), China (9%), Germany (6%), and Philippines (3%).

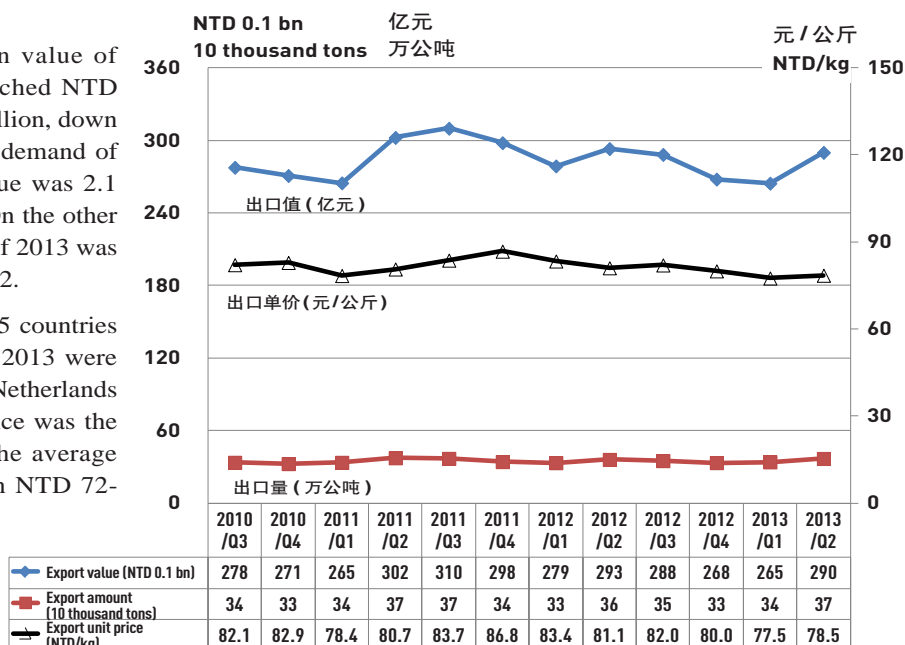


Fig. 1 Fastener Export of Taiwan During 2010 Q3-2013 Q2  
图一 2010Q3~2013Q2 台湾扣件出口分析

**Table 1. Supply and Demand of Taiwan Fastener Industry During 2011-2013(F) (in NTD 0.1bn)**  
表一 2011~2013(F) 年台湾扣件产业市场供需概况 (单位: 亿元新台币)

|                                  | 2011      | 2012      | 2013 Q2   |                                | 2013 H1 上半年              |                                | 2013 年 (F)               |                                |
|----------------------------------|-----------|-----------|-----------|--------------------------------|--------------------------|--------------------------------|--------------------------|--------------------------------|
|                                  | Value / 值 | Value / 值 | Value / 值 | Same Period Ratio (%)<br>同期比 % | Value / 值<br>(or amount) | Same Period Ratio (%)<br>同期比 % | Value / 值<br>(or amount) | Same Period Ratio (%)<br>同期比 % |
| Production / 生产                  | 1,287     | 1,213     | 312       | -1%                            | 596                      | -3%                            | 1,229                    | 1%                             |
| Import / 进口                      | 45        | 46        | 10        | -18%                           | 21                       | -6%                            | 43                       | -6%                            |
| Export / 出口                      | 1,175     | 1,28      | 290       | -1%                            | 555                      | -3%                            | 1,143                    | 1%                             |
| Domestic Demand<br>国内市场需求        | 157       | 131       | 31        | -7%                            | 63                       | -4%                            | 129                      | -2%                            |
| Import Dependence (%)<br>进口依存度 % | 29%       | 35%       | 31%       | --                             | 34%                      | --                             | 33%                      | --                             |
| Export Ratio (%)<br>出口比例 %       | 91%       | 93%       | 93%       | --                             | 93%                      | --                             | 93%                      | --                             |

## Major Markets for Export

Due to the significant decrease of demand in the emerging economies, the continuous decline of the Euro zone, and the slow recovery of the U.S., the global economic growth still stays at a weak level. IMF stated in its report for global economic outlooks released in July that the global economic growth rate in 2013 would be 3.1% (0.2% lower than the initial forecast in April). For those advanced economies, the economic growth rate would be 1.2%, while for China, the economic growth rate would be 7.8%.

In the U.S., supported by growing consumption and investment in both residence/non-residence houses, the Purchasing Manager Index (PMI) for manufacturing in June was back to 50.9 points, demonstrating the continuous but not too much strong recovery of U.S. economy. The market for U.S. fastener import is so far stable. In the 1st half of 2013, Taiwan exported about 286 thousand tons of fasteners to the U.S., up 2% from the same period of 2012.

Compared to U.S. recovery, the economy in the EU continues to show recessional conditions like the tightening of financial policies, bad credits, high unemployment rate, tax increase, and so on. In the 1st half of 2013, Taiwan exported 217 thousand tons of fasteners to 27 countries of the EU, down 7% from the same period of 2012.

## Updates of Industrial Issues

**a. Steel Prices Continue to Decline and the Price for Wire Rods from China Steel Corporation (CSC) Remains Stable in September-** Since 2012, the steel prices around the world have been decreasing. The price of wire rods from CSC touched the bottom line during January 2013 through February 2013 and returned to NTD 700/ton for the 1st adjustment and climbed again to NTD 818/ton during March 2013 through June 2013. However, as there was no great demand in Q2, causing the increase of inventory, the wire price of CSC for July-August was substantially decreased by NTD 1,363/ton, while the price for September keeps flat.

上半年出口值前 5 大国为美 (38%)、德 (9%)、日 (6%)、荷 (5%)、英 (4%)，前五大国中以出口至日本平均单价 90.7 元 / 公斤为最高，其余四国则在 72~81 元 / 公斤之间。前五大进口值国家为日 (49%)、美 (13%)、中国大陆 (9%)、德 (6%)、菲 (3%)。

## 主要出口市场概况

由于主要新兴市场经济体的需求明显减弱，加上欧元区持续衰退，以及美国复苏缓慢，全球经济成长仍处在疲弱水准，国际货币基金 (IMF) 7 月份发布世界经济展望报告中指出，2013 年全球经济成长率为 3.1% (较 4 月预测时下修 0.2%)，其中先进经济体今年经济成长率为 1.2%，中国大陆经济成长率为 7.8%。

主要出口市场美国方面，在消费支出、住宅及非住宅固定投资均成长支撑下，加上 6 月份制造业采购经理人指数 (PMI) 回至 50.9 点，显示美国经济持续复苏，唯复苏力道不强，目前美国扣件进口市场仍处平稳状况。上半年台湾输美扣件约 28.6 万公吨，较 2012 年同期成长 2%。

相对于美国的复苏，欧元区经济则是持续衰退，包括持续紧缩的财政政策、信贷状况严峻、高失业率及赋税增加等。上半年台湾输欧盟 (27 国) 扣件为 21.7 万公吨，较 2012 年同期衰退 7%。

## 产业议题概述

**1. 钢价持续下滑，中钢 9 月份棒线维持平盘：**国际钢价自 2012 年开始呈现下滑趋势，2013 年上半年中钢棒线盘价在 1~2 月触底后，3~6 月分 2 次调升价格 (818 元 / 公吨、700 元 / 公吨)，不过由于第二季旺季不旺，导致库存增加，7~8 月中钢盘价大幅调降 1,363 元 / 公吨，9 月份则为平盘。

The Bureau sincerely appeals to Taiwanese companies for not re-exporting illegally, which may result in the EU's investigation on tariff circumvention and cause impacts on the development of the entire industry.

The Bureau will not only make administrative discipline actions against the companies involved, but also will hand over the case to the Investigation Bureau for further penalty.

国贸局慎重呼吁台湾厂商切勿进行非法转口贸易，除涉及违法外，并可能引起欧盟反规避调查，严重影响整个产业的发展，国贸局除对可能涉案之厂商逕行处分外，并已移送法务部调查局查处。

**2. 欧盟对中国大陆碳钢制扣件发布反倾销措施即将到期公告：**欧盟委员会于5月28日C148号文件中公告，对原产于中国大陆的钢铁制扣件的反倾销措施即将于2014年2月1日正式到期，欧盟厂商须于到期日3个月前的时间内，向欧盟委员会提交复审申请，而且必须包含足够的证据表明措施到期后将可能导致倾销和损害的继续或复发。本案2009年1月欧盟裁定反倾销税率为77.5%与85%，经WTO判定欧盟违反国际贸易法规范后，2012年10月欧盟调降税率为54.1%与74.1%；相关被课徵反倾销税之碳钢扣件产品，2007年欧盟自中国大陆进口高达63.3万吨（进口平均单价1.3美元/公斤），在2009年相关碳钢扣件产品被课徵最高达85%反倾销税后，至2012年欧盟自中国大陆进口仅剩1.9万吨（进口平均单价达4.3美元/公斤），如【图二】所示。

**3. 国贸局严格执行国货产证发放：**国贸局为避免厂商进口中国大陆货品后再出口，以规避进口国对中国大陆货品课徵反倾销税，倘经查获非属台湾产制之外货，使用台湾核发之国货产证出口，其原产地填载不实部份，贸易局将依贸易法第28条规定，处以3~30万元罚款或停止其1~12个月进出口货品。国贸局慎重呼吁台湾厂商切勿进行非法转口贸易，除涉及违法外，也可能引起欧盟反规避调查，严重影响整个产业的发展，国贸局除对可能涉案之厂商逕行处分外，并已移送法务部调查局查处。

### b. Notice of Upcoming Expiry of EU's Antidumping Measure Against Chinese Carbon Steel Fasteners-

According to the notice of European Commission, the antidumping measure against Chinese carbon steel fasteners will expire on February 1, 2014. Companies in the EU can submit their applications for a sunset review 3 months before the date of expiry. The antidumping duties were initially 77.5% and 85% according to the determination the EU made in January 2009. After WTO determined that the EU's decision violated its trade rules, the EU then reduced the duties to 54.1% and 74.1% in October 2012. In 2007, the EU imported 633 thousand tons of carbon steel fasteners (with the average unit price reaching US\$ 1.3/kg), on which the antidumping duties were imposed. When these products concerned were subject to the antidumping duties up to 85% after 2009, the total import of these products of the EU from China slumped to only 19 thousand tons in 2012 (with the average unit price reaching US\$ 4.3/kg). See Fig 2.

### c. Strict Control on the Issuance of Certificate of Origin (CO) from Bureau of Foreign Trade (Taiwan)-

In order to prevent companies from re-exporting products originated from China to circumvent the antidumping duties the destined countries levy on, the Bureau will fine the violators for NTD 30 thousand to 300 thousand or stop them from importing and exporting products for 1-12 months, under the regulations of trade laws of Taiwan (Article 28), if companies are found to report exported products as made-in-Taiwan, which are in fact made in China. The Bureau sincerely appeals to Taiwanese companies for not re-exporting illegally, which may result in the EU's investigation on tariff circumvention and cause impacts on the development of the entire industry. The Bureau will not only make administrative discipline actions against the companies involved, but also will hand over the case to the Investigation Bureau for further penalty.

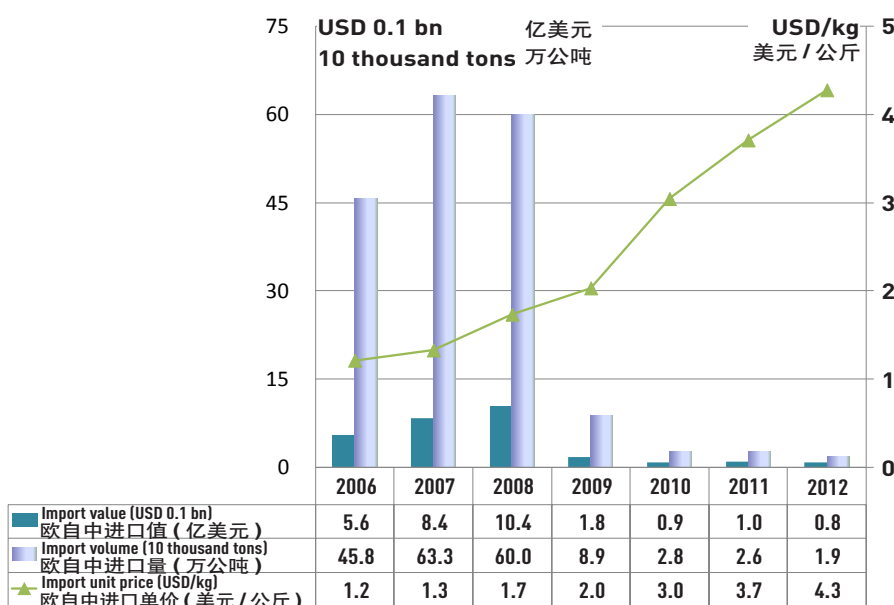


Fig 2. Fastener Import of the EU from China During 2006-2012  
图二 2006~2012年欧盟自中国大陆进口之相关扣件产品概况

**d. China Considers Increasing Tax Refund Rate for Fastener Export to 13%-** The tax refund rate for fastener export in China has been reduced from 13% to 5% since July 2007 and has never been changed up to this date. As many Chinese products are subject to the antidumping duties imposed by other countries and the domestic economy does not perform as well as expected, both increasing the operational costs of companies, China Machinery Industry Federation (CMIF) has submitted their request for increasing the tax refund rate for fastener export from 5% to 13%.

**e. The EU's Implementation of CPR-** Since July 2013, the EU has replaced CPD for building products with the new CPR.

### Conclusions

Although the fastener export from Taiwan to the EU in the 1st half of 2013 was down 15 thousand tons from the same period last year, the export to Russia was, by contrast, up 14 thousand tons, followed by 11 thousand tons to the U.S. and Japan respectively. The total export volume in the 1st half of 2013 was up 2% from the same period last year. Nevertheless, the export value dropped by 3% over the same period last year. In the 2nd half of 2013, the economy in Japan is expected to turn well while the fastener export of Taiwan will keep stable to reach an annual export value of NTD 114.3 billion (up 1% from 2012), as emerging countries like China face a slowdown of their economic growth and the Euro zone continues to get stuck in the recessional conditions, even though there is a rather stable economic recovery in the U.S.

**4. 中国大陆拟调升扣件出口退税至 13%：**中国大陆扣件行业出口退税率自 2007 年 7 月 1 日起从 13% 下调至 5% 以后至今未变，由于产品被多国课徵反倾销税，加上国内景气不如预期，以及企业生产经营的各项成本不断攀升，中国机械工业联合会已向主管部门提出将扣件产业出口退税率从目前的 5% 调回至 13% 的建议。

**5. 欧盟实施新建筑产品法规 CPR：**欧盟自七月起强制实施新建筑产品法规 CPR，以取代旧的建筑产品指令 CPD。

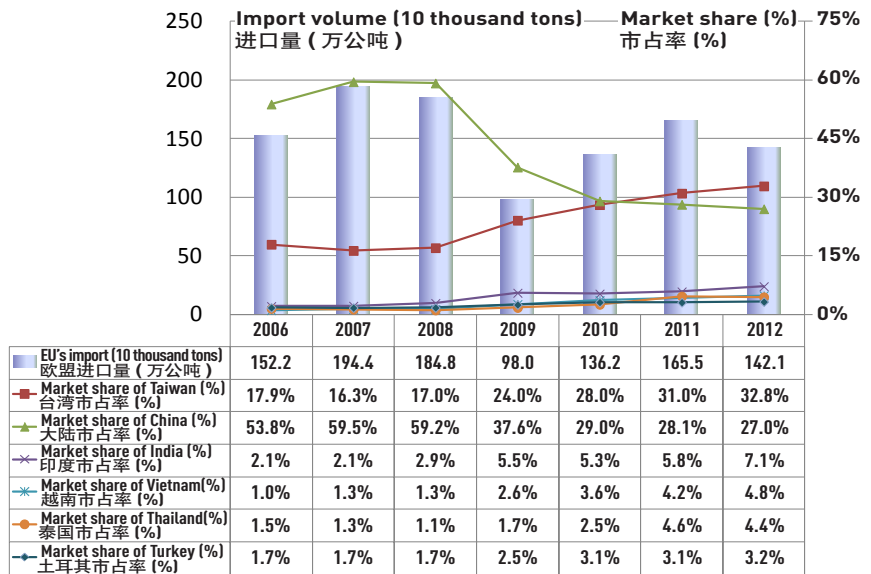


Fig. 3 Market Shares of Countries Exporting Fasteners to the EU During 2006-2012  
图三 2006~2012 年欧盟扣件进口市场各国市占率

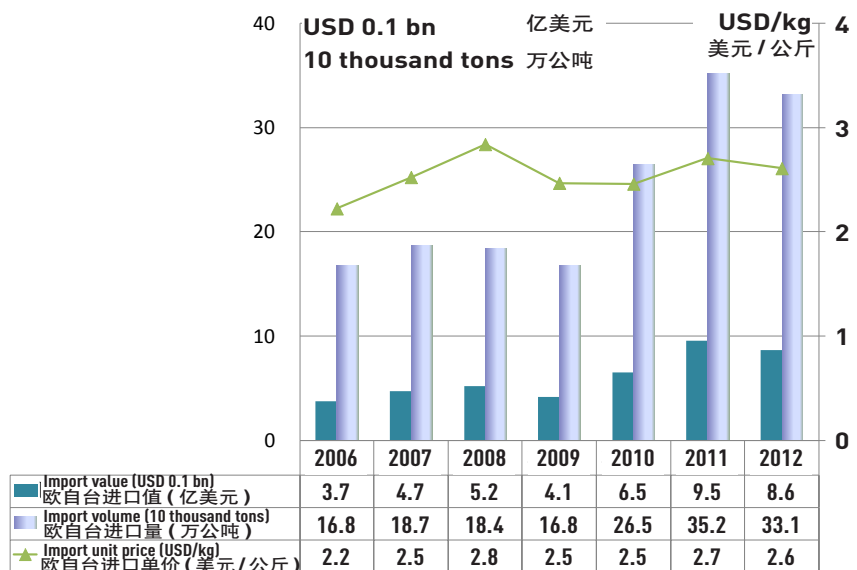


Fig. 4 Fastener Import from Taiwan to the EU During 2006-2012  
图四 2006~2012 年欧盟自台湾进口之相关扣件产品概况



上半年虽然输欧盟较去年同期减少 1.5 万吨，但在输俄罗斯较去年同期增加 1.4 万吨，以及输美、日增加 1.1 万吨下，上半年出口量仍较去年同期成长 2%。

不过，出口值则在钢价下滑、厂商接单价格不佳下，反较去年同期衰退 3%。展望下半年，由于中国大陆等新兴国家经济成长逐步放缓，欧元区仍深陷衰退之中，仅美国经济复苏较为稳健，日本经济下半年也可望走强，下半年台湾扣件出口仍将维持平稳，预估 2013 年全年出口值约 1,143 亿元，较 2012 年成长 1%。

而在欧盟对中国大陆碳钢制扣件反倾销措施即将到期方面，2012 年欧盟整体扣件进口量约 142 万吨，近两年台湾已跃居为欧盟最大进口国，占欧盟进口量比率高达三成以上，中国大陆降为第二，如【图三】所示；而在中国大陆被课徵反倾销税产品方面，2012 年欧盟自台进口高达 33 万吨，如【图四】所示，较 2008 年成长高达八成，因此欧盟是否续课中国大陆反倾销税以及税率的高低，对台湾产业影响重大。

反倾销贸易战牵涉到国与国之间产业的生存竞争，透过协商来解决贸易上的摩擦亦是手段之一。如太阳能板产品，欧盟是中国大陆最大的太阳能板出口地区，但中国大陆厂商挟其低成本优势，使欧盟太阳能板厂商无法与之竞争而倒闭，因此欧盟除在 6 月向中国大陆徵收临时反倾销税（税率 11.8%）外，也预备将反倾销税率提高至 47.6%。不过，中国大陆政府也积极进行政治斡旋，除对欧盟 28 国展开游说外，中国大陆商务部也提出对欧盟葡萄酒进行反倾销及反补贴调查。在经过 1 个多月协商后，欧、中已就倾销诉讼达成和解，由中国大陆太阳能板产业提高产品在欧盟国家的销售价格并限制销售数量（定价定量），以维持在欧盟市场贸易的公平性，让原本剑拔弩张的贸易战得以「友好」收场。

不论明年欧盟对中国大陆碳钢制扣件反倾销措施谈判结果如何，业界都应先积极进行卡位战，强化与欧盟 OEM 厂商或通路商之间的服务关系，为未来中国大陆扣件产品可能的价格竞争做准备。另外，在替中国大陆产品转口贸易方面，目前台湾已成为欧盟扣件最大进口国，且马来西亚已因为替中国大陆产品进行转口贸易而被欧盟课徵高达 85% 的反倾销税，业界应自律，以免因小失大。

**业界都应先积极进行卡位战，强化与欧盟 OEM 厂商或通路商之间的服务关系。**

**The industry should be active in gaining more market shares in the EU as well as strengthening the service to OEMs and distributors in the EU.**

Before the upcoming expiry of the antidumping measure launched by the EU against Chinese carbon steel fasteners, the total fastener import of the EU in 2012 was about 1.42 million tons and Taiwan has been the largest fastener import origin of the EU for the most recent 2 years, which represents over 30% of the total fastener import of the EU (China goes back to the 2nd place), as shown in Fig 3. In terms of the Chinese products involved in the antidumping measure, the EU imported nearly 0.33 million tons of similar products from Taiwan in 2012, which was 80% higher than the record in 2008 (see Fig. 4). As a result, whether the EU will extend the antidumping measure against China or adjust the duty rates causes great impacts on Taiwanese industries.

The antidumping disputes are related to the industrial development of every country and negotiation is one of the solutions to appease the disputes. Take solar panels for example, the EU is the major region for Chinese solar panel export. As Chinese manufacturers have the advantage of low costs, many other European manufacturers were forced to close the factories due to the inability to compete with them. As a result, the EU imposed a provisional antidumping duty of 11.8% on China this June and considered increasing the duty to 47.6% later. However, Chinese government was also active in its political mediation to 28 member countries of the EU and simultaneously retaliated the EU with the antidumping and anti-subsidy investigations on wines. After over 1 month of negotiation, the compromise has been made between the EU and China. The agreement includes the increase of selling prices and the control on quantity of products of Chinese solar panels in the EU for maintaining the fair trade, which somewhat stopped the resentment of both parties with a “friendly” end.

Whatever the result of the antidumping measure the EU launched against China will be, the industry should be active in gaining more market shares in the EU as well as strengthening the service to OEMs and distributors in the EU in face of the possible challenges from Chinese fasteners. On the other hand, Taiwan has been the largest import origin of the EU, so all Taiwanese companies should avoid crossing the red line (e.g., Malaysian companies face up to 85% of antidumping tax because they helped Chinese companies circumvent the duties.) and do not help China re-export products for tax circumvention.