

Fastener Market

波兰扣件市场概况

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in Poland



Polish Economy

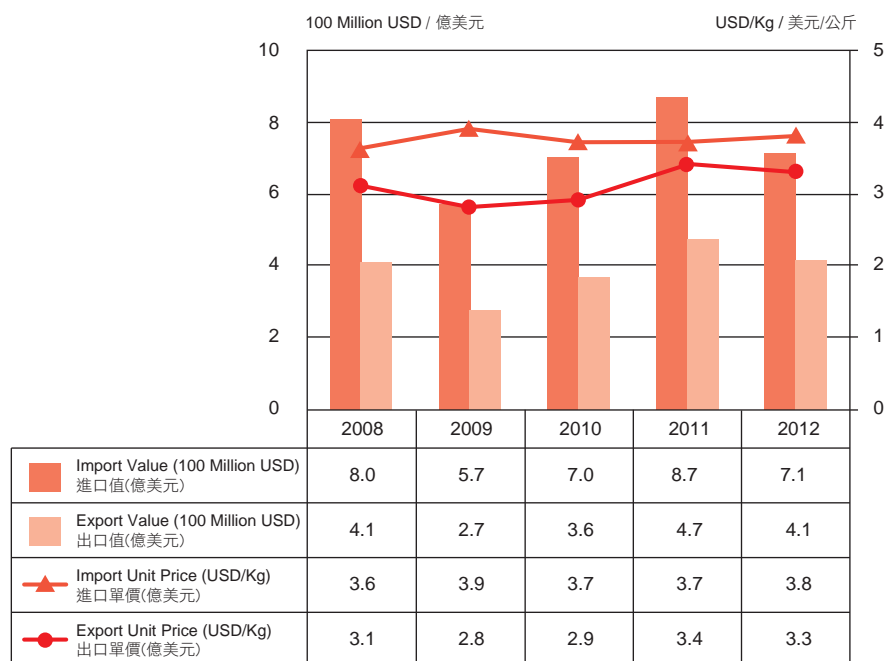
After the communist regime of Poland was down and a new democratic system came to replace it in 1989, Poland became one of the fastest growing countries in Eastern Europe. It joined the EU in 2004 and was the first Eastern European countries to become a member of the EU. Due to the substantial growth of its capital expense, increasing demand for labors, declining unemployment rate, which pushed the economic growth, though the global financial crisis burst out in 2009, Poland could still outperform the

Table 1. Polish Fastener Demand during 2011-2016(F) / 表一 2011-2016(F)年波兰扣件需求趋势
Unit: Million USD / 单位：百万美元

	2011	2012	2014 (F)	2016 (F)
Industrial Fastener Demand 工业扣件需求值	650	663	691	720

Source / 资料来源: Freedonia Group

Figure 1. Polish Fastener Import & Export in 2008-2012 / 图一 2008-2012年波兰扣件进出口概况



Source / 资料来源: Freedonia Group / compiled by ITIS project, MIRDC / 金属中心ITIS计画整理

一、波兰经济概述

波兰在1989年共产政权下台，民主政治体系上任后，发展成为东欧地区经济增长最快速的国家，并在2004年加入欧盟，成为八个东欧国家中最先加入的。由于资本支出大幅成长，劳动力需求增加，失业率降低，带动经济持续增长，即便在2009年全球金融风暴中，波兰在财政与货币政策实施、货币贬值、及家计单位消费增加支撑下，免于陷入衰退困境，表现傲视其他欧洲同侪国家。2010~2011年，在出口与家计单位消费双双反弹带动下，经济呈现活络荣景。

二、扣件市场概况

波兰扣件市场需求主要来自耐久财的生产及OEM相关扣件市场需求，不过，近2年来欧盟各国的紧缩政策，及疲弱不振的经济也使外资来源减少，导致设备无法进行更新从而限制了制造能量的扩张。2012年波兰扣件需求值为6.6亿美元，如【表一】所示。

由于波兰扣件产出相对较少，造成波兰仍需进口扣件以因应国内需求，如【图一】所示，2012年扣件进口值为7.1亿美元，主要进口国为德国、台湾、义大利及中国大陆，如【表二】所示，在出口方面，2012年扣件出口值为4.1亿美元，主要出口国为德国、比利时、瑞典及英国。

Table 2. Top 10 Fastener Import Origins & Export Destinations of Poland in 2012

表2 2012年波兰扣件前十大进出口国统计
Unit: Million USD, % / 单位: 百万美元, %

Rank / 排名	2012					
	Country 國別	Import Value 進口值	Percentage 佔有率	Country 國別	Export Value 出口值	Percentage 佔有率
1	Germany / 德國	240	33.3%	Germany/德國	145	15.7%
2	Taiwan / 台灣	81	11.3%	Belgium比利時	29	8.2%
3	Italy / 義大利	74	10.3%	Sweden瑞典	22	7.3%
4	China / 中國大陸	68	9.5%	UK英國	19	5.7%
5	Japan / 日本	32	4.5%	Czech捷克	19	4.4%
6	France / 法國	25	3.5%	Russia俄羅斯	19	4.4%
7	USA / 美國	23	3.3%	USA美國	17	4.1%
8	South Korea / 韓國	19	2.7%	France法國	17	3.8%
9	UK / 英國	13	1.9%	Norway挪威	12	3.8%
10	Spain / 西班牙	13	1.8%	Ukraine烏克蘭	12	3.6%
Total of Top 10 Countries 前十大合計		588	82.5%	Total of Top 10 Countries 前十大合計	310	75.8%
Total of All / 總計		713	100%	Total of All / 總計	408	100%

Source / 资料来源: ITIS project, MIRDC

other European countries and kept itself from the recession under the support of monetary policies, currency depreciation, and increasing household consumption. During 2010-2011, with the rebound of export and household consumption, its economy showed booming prospects.

Overview of Polish Fastener Market

The fastener demand in Poland mainly comes from OEMs and production of durable goods. However, due to the austerity policies of the EU in the most recent 2 years and a weak economy that caused the reduction in foreign investments, equipment could not be upgraded and the capacity was thus limited. The value of the fastener demand in Poland in 2012 was USD 0.66 billion (see **Table 1**).

As the production of fasteners in Poland is comparatively low, Poland has to import fasteners in response to the domestic demand. As shown in **Figure 1**, the value of fastener import in 2012 was USD 0.71 billion, with major import origins being China, Germany, Italy, and Taiwan. As shown in **Table 2**, the value of fastener export in 2012 was USD 0.41 billion, with major destined countries being Belgium, Germany, Sweden, and UK.

Most Polish fastener manufacturers are SMEs, which include Koelner, Marcopol, and Zaklad Produkcji Śrub Wieslaw Gawel. Some international corporations in Western Europe also have their fastener manufacturing factories in Poland, like Altenloh, Brinck & Company, Böllhoff, EJOT, Vossloh (Germany), etc. In addition, NIFCO (Japan), FinnvedenBulten (Sweden), and ITW(USA) also have factories in Poland.

波兰扣件生产商多是中小型公司,包括Koelner、Marcopol和Zaklad Produkcji Śrub Wieslaw Gawel。西欧国家的跨国企业也在波兰设有扣件生产据点,包括Altenloh、Brinck & Company、Bollhoff、EJOT和Vossloh (德国)等;另外NIFCO (日本)、FinnvedenBulten (瑞典)和ITW(美国)也都有设厂。

三、结语

由于欧盟区经济持续不振,导致耐久财、汽车等需求减缓,以及面对来自西欧国家的先进扣件产业和亚太地区的低成本制造商的激烈竞争,导致扣件的产出成长可能趋缓,预估波兰的扣件市场需求未来将以每年2%的幅度成长,至2016年国内市场需求约7.2亿美元。

台湾扣件出口以美、欧、日、加、中等国为主,波兰占台出口值比重约2%。由于全球经济持续疲弱,厂商积极开拓新兴市场,波兰便是其中之一;近年来台湾输波兰扣件数量呈现成长



Conclusions

Due to the continuous economic decline in the Euro zone, which caused the slowdown of the demand for durable goods and cars, and the fierce competition between advanced fastener industries in Western Europe and low-production-cost industries in Asia Pacific countries, the production of fasteners may decrease. It is estimated that the fastener demand in Poland will increase by 2% every year and will climb to USD 0.72 billion by 2016.

Fasteners of Taiwan are mainly exported to the U.S., Europe, Japan, Canada, and China. Poland represents 2% of Taiwan's fastener export. Considering the continuously weak economy around the world, Taiwanese companies are active in developing emerging markets, in which Poland is also included. The volume of fasteners exported from Taiwan to Poland has been increasing in recent years. It increased from 16 thousand tons in 2008 to 38 thousand tons in 2011 (a decrease of 35 thousand tons in 2012), making Taiwan the second largest import origin of Poland. However, the average unit price of fastener import to Poland is nearly USD4/Kg, while that from Taiwan to Poland is only USD2.3/Kg, showing that fasteners exported from Taiwan to Poland are generally low-to-medium level of products in bulk. Poland is a mature and industrialized country but its demand for fasteners must rely on import. Taiwanese companies should make the most use of their flexibility of customization and be proactive in entering the supply chain of Poland, in order to find the business opportunities in the market of top-level products. ■

趋势，从2008年的1.6万公吨成长至2011年的3.8万公吨(2012年衰退为3.5万公吨)，已成为波兰第二大进口国，不过波兰扣件进口平均单价将近4美元/公斤，而自台进口平均单价仅2.3美元/公斤，显见台湾输波兰产品仍以量大之中、低品级产品为主。波兰为工业相当发达的国家，其扣件需求仍须进口因应，未来国内厂商应发挥弹性客制化的优势，积极切入其产业供应链，以开拓高品级市场商机。 ■

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