

Fastener Trade Between and ASEAN Region



欧盟与东南亚国协贸易概况

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European Union and ASEAN Relationship

Asia's emerging economies are recovering rapidly from the global financial crisis and the automotive market is recovering with them. Low cost vehicles are driving the growth of the automotive industry (as main market of fastener) in countries such as Indonesia and Thailand, offering immense opportunities for global players in these markets. Thailand, Philippines, Indonesia, and Malaysia are expected to be some of the highest growing markets for the automotive sector due to various provisions of AFTA (ASEAN Free Trade Area). From a long-term perspective, cheap financing and price discounts, rising income levels, and infrastructure development will drive growth in the majority of the ASEAN automotive market. ASEAN has a combined GDP of some USD 3.7 trillion, the fifth largest in the world with a market of about 670 million people; on the other hand EU has a combined GDP of some USD 19.8 trillion, the second largest in the world with a market of about 331 million people.

Based on "The economic impact of the EU – Singapore Free Trade Agreement, September 2013", About 90% of future world economic growth is predicted to be generated outside Europe for the foreseeable future. At a time of weak economic growth and essential fiscal consolidation in Europe, it is imperative that the EU actively tap into external sources of growth, i.e. find external demand when internal demand is weak. The economies of Southeast Asia are expected to grow at between 5.5% and 6% over the coming years and are priority markets for EU exporters. Demand in the region for products 'made in Europe' is underpinned by the increasing purchasing power of a rapidly growing middle class. With €191 billion of trade in goods in 2012 and €51 billion services in 2011, the Association of South East Asian Nations (ASEAN) is today the EU's third largest trading partner outside Europe, after the US and China, but well ahead of other trade partners like the Mercosur group (€123 billion), India (€98 billion), Canada and South Korea (€89 billion each). On 16 December 2012, the EU and Singapore announced the conclusion of negotiations on an EU-Singapore Free Trade Agreement (EUSFTA). It is the EU's first FTA with an ASEAN member. Trade in goods between the EU and Singapore was €52 billion in 2012 and services trade was €28 billion in 2011, making Singapore by far the EU's most important trade and investment partner in Southeast Asia.

欧盟与东南亚国协关系

亚洲新兴经济体正快速从全球财政危机中复苏，汽车业市场也跟上复苏脚步。低成本车辆推升某些国家(如：印尼和泰国)汽车产业的成长，提供全球市场买家更多商机。受东南亚国协自由贸易区条款约束，泰国、菲律宾、印尼和马来西亚预计将成为汽车领域成长最快速的市场。长期来看，低价融资和价格折扣、收入水平上升和基础设施建设发展将会刺激东南亚国协主要汽车市场的成长。东南亚国协国内生产毛额约3.7兆美元，人口数6亿7,000万，名列全球第5大市场。另一方面，欧盟国内生产毛额约19.8兆，人口数3亿3,100万，名列全球第2大市场。

根据2013年9月欧盟与新加坡签定的自由贸易协议所产生的经济影响，未来全球经济成长约90%会自欧洲境外产生。在欧洲经济成长衰弱和巩固关键财政的时刻，欧盟一定要主动开拓外部成长来源。也就是说，当内部需求不强时，要寻求外部需求。接续几年，东南亚经济体预计有5.5%至6%的成长，且将是欧盟出口商的优先市场。该区域对欧洲制造产品的需求受到中产阶级快速成长、购买力增加所支撑。以2012年货品交易量1,910亿欧元及2011年服务量为510亿欧元的规模，东南亚国协今日俨然成为欧盟第3大经贸伙伴，紧跟美国和中国之后，不过依旧领先其他贸易伙伴，如南方共同市场(1,230亿欧元)、印度(980亿欧元)、加拿大(890亿欧元)和南韩(890亿欧元)。2012年12月16日，欧盟和新加坡宣布欧盟新加坡自由贸易协议(EUSFTA)完成签署。这是欧盟首次与东南亚国协成员签定的自由贸易协议。2012年欧盟新加坡的货品贸易达520亿欧元，2011年服务贸易则为280亿欧元，让新加坡成为欧盟在东南亚最重要的贸易投资伙伴。

Years/年度	Import (1,000 Euro)/进口 (千欧元)			Export (1,000 Euro)/出口 (千欧元)		
	2010	2011	2012	2010	2011	2012
Total/总计	6,009,568.130	7,136,480.480	6,922,971.720	6,277,273.280	7,424,045.680	7,189,768.630
ASEAN Market 东南亚国协	€ 428,881.190	€ 547,605.080	€ 404,864.650	€ 82,740.660	€ 94,344.330	€ 114,855.420
ASEAN Market Share 东南亚国协市占率	7.14%	7.67%	5.85%	1.32%	1.27%	1.60%

Indicators / 指标	Import Value(1,000 Euro) / 进口值(千欧元)			出口值(千欧元) / Export Value(1,000 Euro)		
	2010	2011	2012	2010	2011	2012
Years / 年度						
Indonesia / 印尼	27,943.680	58,179.220	34,926.610	7,787.400	9,281.000	€12,246.460
Thailand / 泰国	47,131.100	117,784.300	103,251.110	14,069.040	18,759.830	€ 29,084.880
Malaysia / 马来西亚	179,375.310	148,732.700	92,890.440	11,383.540	16,664.250	€ 16,608.990
Singapore / 新加坡	8,475.770	9,234.790	7,765.370	40,409.840	39,776.670	€ 46,090.450
Philippines / 菲律宾	83,273.020	87,992.260	41,781.820	3,158.680	3,353.650	€ 6,082.350
Vietnam / 越南	75,002.680	120,647.660	123,631.000	5,545.850	6,118.020	€ 4,290.760
Myanmar / 缅甸	0.000	0.000	0.040	39.030	96.770	€ 191.500
Brunei / 汶莱	0.000	0.020	2.050	228.990	179.260	€ 127.620
Cambodia / 柬埔寨	7,679.630	5,034.130	614.130	25.710	€ 44.840	€ 28.460
Laos / 寮国	0.000	0.000	2.080	92.580	€ 70.040	€ 103.950

Import Value (1,000 Euro) 进口值(千欧元) 2012	
Vietnam / 越南	123,631.000
Thailand / 泰国	103,251.110
Malaysia / 马来西亚	92,890.440
Philippines / 菲律宾	41,781.820
Indonesia / 印尼	34,926.610
Singapore / 新加坡	7,765.370
Cambodia / 柬埔寨	614.130
Laos / 寮国	2.080
Brunei Darussalam / 汶莱	2.050
Myanmar / 缅甸	0.040
Total (1,000 Euro) / 总计(千欧元)	404,864.650

Export Value (1,000 Euro) 出口值(千欧元) 2012	
Singapore / 新加坡	46,090.450
Thailand / 泰国	29,084.880
Malaysia / 马来西亚	16,608.990
Indonesia / 印尼	12,246.460
Philippines / 菲律宾	6,082.350
Vietnam / 越南	4,290.760
Myanmar / 缅甸	191.500
Brunei Darussalam / 汶莱	127.620
Laos / 寮国	103.950
Cambodia / 柬埔寨	28.460
Total (1,000 Euro) / 总计(千欧元)	114,855.420

东南亚国协国家

上表显示欧盟和东南亚国协双边扣件进出口总额，该统计显示欧盟出口扣件至东南亚国协呈现上升趋势，2010至2011年增加14.0%且在2011至2012年间增加21.7%。另一方面，来自东南亚国协的进口并没有显现特别明显的趋势。虽然2010至2011年间进口已经上升27.7%，其在2011至2012年间却突然骤降35.2%。

左表更显示出欧盟与东南亚国协扣件贸易逆差达5倍。根据下方图表显示：

欧盟扣件出口至新加坡达40%，泰国达25%，马来西亚达15%，分别为前三名。

欧盟从东南亚国协进口扣件，越南为欧盟该区最大扣件供应来源，占比31%；泰国则占25%，马来西亚占比23%，名列二、三名。

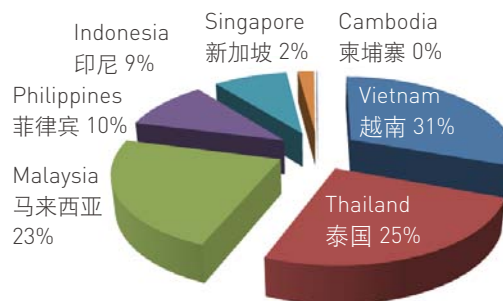


图1. 2012年欧盟自东南亚国协进口扣件

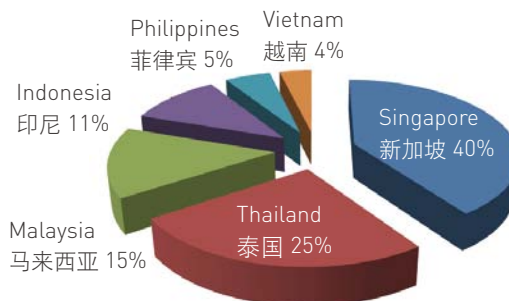


图2. 2012年欧盟扣件出口东南亚国协

结论

根据欧盟执委会统计，2010年至2012年东南亚国协产品在出口至欧盟市占率中已经下滑1.5%，这对该区域扣件制造商或许是个警讯。相关研究需要其他报告再进行深入探讨。

ASEAN Countries

Above tables show the total value of Import and Export of fastener between EU and ASEAN countries.

The statistics show that trend of EU export to ASEAN region is ascending. Export increased 14.0% in years 2010 to 2011. It had increased 21.7% between years 2011 to 2012. On the other hand, the import from ASEAN region doesn't show a specific trend. Although import had increased about 27.7% in years 2010-2011, it has dropped suddenly 35.2% during 2011-2012!

EU fastener import from ASEAN is approximately 5 times higher than their fastener export to this region.

Based on the above tables and following charts, 40% of EU fastener export were dispatched to Singapore, and Thailand with 25% and Malaysia with 15% are ranked in second and third place.

In the import from ASEAN region, Vietnam with 31% is the biggest EU supplier in the fasteners' field, Thailand with 25% of EU market share and Malaysia with 23% of this market share are ranked in the 2nd and 3rd place.

Conclusion

Based on European Commission statistics, ASEAN market share in export to EU has decreased about 1.5% between 2010 and 2012. It can be an alarm for the fastener manufacturers in this region and study about the reasons need another article.