

# THAILAND FASTENER MARKET

## 泰国扣件市

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### Thailand's Imported Fasteners

**Table 1** below depicts the total steel imported fasteners (specified with code 7318) in Thailand during the months of January to June in years 2012 to 2014.

Table 1 / 表一

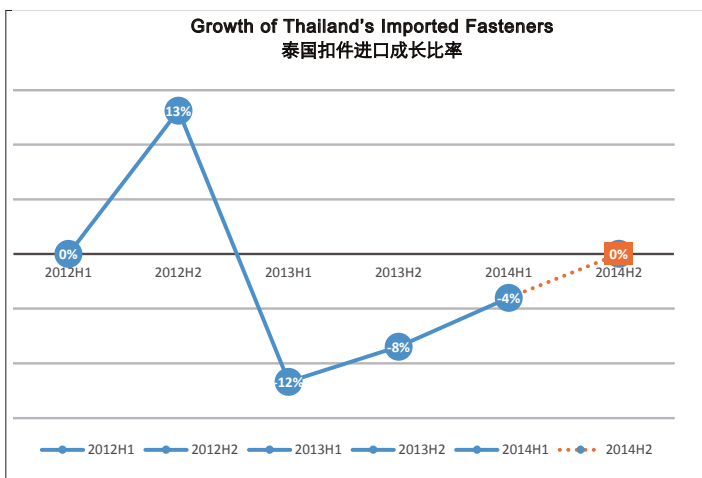
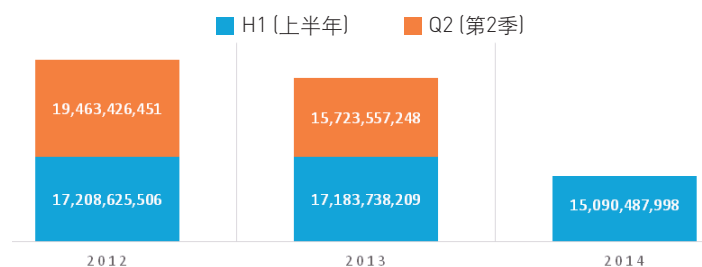
Imported Fasteners to Thailand (Code 7318) 泰国扣件进口总额 (海关编码7318)		
Year/年	Q1-Q2/上半年	Total/总额
2012	17,208,625,506 Thai Bahts/泰铢	36,672,051,957 Thai Bahts/泰铢
2013	17,183,738,209 Thai Bahts/泰铢	32,907,295,457 Thai Bahts/泰铢
2014	15,090,487,998 Thai Bahts/泰铢	-----

### Introduction

Thailand's economy shrank 0.6% year on year in January-March 2014. The contraction is the first since the last three months of 2011, when the country was hit by massive flooding. The National Economic and Social Development Board (NESDB) also slashed its growth outlook for 2014, forecasting 1.5%-2.5% expansion, down from a previous estimate of 3%-4%. Southeast Asia's second biggest economy remained without a fully functioning government, cramping state spending and investment in key infrastructure projects and prompting the NESDB to forecast reduction. The Thai economy in 2014 "is likely to grow at a slow pace as a result of the economic contraction in the first quarter" while the "political uncertainty" will also limit expansion, the Board said in a statement.

Professor Dr. Amorn Chandarasomboon on the current situation in Thailand believes, "This crisis is the greatest crisis our country has ever faced, but I am glad it happened. Without it, things would be even worse in the future. This crisis has made Thai people see the problem and try to solve it."

The fastener market statistics also prove this claim.



H1=上半年; H2=下半年

### 前言

泰国在2014年第一季的经济表现下滑了0.6%，这是该国自2011年第四季以来首度的萎缩，主因是当时发生大规模的水患。国家经济及社会发展委员会也大幅下修2014年的成长预测，将原先3%~4%的成长率改为1.5%~2.5%。这个东南亚第二大经济体无法维持健全的政府运作，使得政府在基础建设的支出与投资卡关，连带也使得成长预测跟着下调。该委员会在了一项声明中指出，除了「政治局势动荡」将局限经济成长之外，2014年泰国「由于受到第一季经济萎缩的影响，可能将处于低速成长的态势」。

Amorn Chandarasomboon博士评论泰国当今的局势，提到：「这是我国有史以来面临到的最大危机，但我仍庆幸它发生了，否则未来一切还可能变得更糟。此次危机使得泰国人民看见并解决此次问题。」扣件市场的统计数据也验证了他的论述。

### 泰国扣件进口

表一列举出2012至2014各年的上半年中泰国进口钢制扣件的总额(海关编码7318)。

虽然2012下半年与2013上半年之间扣件进口商的市场贸易额下滑了25%，当时他们仍设法克服了这个困境，因此数据显示当时成长率的下滑幅度减少，如此看来到了2014年成长率可能会回归至0%[参考左图]。简单来说，这代表泰国进口商将可进口总额150亿泰铢的扣件。

分析扣件进口统计数据后，可得知多数商品使用的钢制扣件(海关编码7318)分为两类。泰国扣件制造商可掌握国内市场，此外扣件进口商的市占率也降低了。泰国商业景气的下滑则从2012下半年开始持续至2014上半年为止。

借由分析泰国主要扣件贸易伙伴，可以得出泰国扣件进口量下滑的主因，以及各贸易伙伴的市占率。

Although fastener importers experienced 25% decline in their market value between H2 2012 and H1 2013, they were able to overcome their bad situations; hence, statistics show that the ratio of negative growth decreased and it seems that for the 2nd half of year 2014 it will be 0%. In a simple word, it means Thai importers will import 15 billion bahts of fasteners.

Analyzing the imported fastener statistics, steel fasteners (specified with Code 7318) used in the most goods can be concluded to two different parameters. Thailand's fastener producers could catch the domestic market and the importer market share has also decreased. Thailand's business situation has declined through the 2nd half of year 2012 to the 1st half of year 2014. We can find the exact reason for declining imported fasteners in Thailand through studying Thailand's main partners in this field and find out the percentage of their market share.

## Exporting Fasteners to Thailand

Japan as the biggest fasteners exporter to Thailand with over 50% of this market.

Year/年	2012		2013		2014	
Total Import Value 总进口额	21,809,727,461		18,629,001,672		7,757,093,626	
Market Share 市占率	59%		57%		51%	
Half- Year 半年度	H1	H2	H1	H2	H1	H2
Half Year Import Value 半年进口额	10,010,275,970	11,799,451,491	10,148,613,469	8,480,388,203	7,757,093,626	---
% of Export Fluctuation 出口波动率	---	18%	-14%	-16%	-9%	---

H1=上半年 H2=下半年

- Japanese fastener exporters have lost 8% of market share between year 2012-2014.
- Although Japanese traders' sales had grown during 2012, Thailand's crisis has caused decrease in their export values during 2013-2014.

China with 10% of Thailand's fastener market share is the 2nd biggest exporter to Thailand.

Year/年	2012		2013		2014	
Total Import Value 总进口额	3,877,234,671		3,250,091,547		1,615,296,741	
Market Share 市占率	11%		10%		11%	
Half- Year 半年度	H1	H2	H1	H2	H1	H2
Half Year Import Value 半年进口额	1,918,338,031	1,958,896,640	1,593,686,326	1,656,405,221	1,615,296,741	---
% of Export Fluctuation 出口波动率	0	2%	-19%	4%	-2%	---

H1=上半年 H2=下半年

- Chinese fastener exporters have kept their market share in Thailand during 2012-2014.
- It seems Chinese fastener exporters could overcome Thailand's crisis, because during the 2nd half-year of 2013 till 1st half year of 2014 their export value fluctuations were near to zero.

## 泰国的扣件进口贸易夥伴

日本是泰国最大的扣件进口伙伴，市占超过50%。

- 在2012到2014年间，日本扣件出口商市占率下跌了8%。
- 虽然日本扣件贸易商在2012年间的销售额获得成长，2013至2014年间发生的泰国危机又使得他们的出口总额下跌。

中国在泰国的市占率是10%，是泰国第二大进口伙伴。

- 2012至2014年间，中国扣件出口商在泰国的市占率一直维持一定的比率。
- 由于2013下半年至2014上半年间中国扣件出口商的出口波动率趋近0%，研判可望克服此次泰国危机。

台湾是泰国第三大扣件进口伙伴，市占率7%。

- 台湾与中国同样维持一定的市占率。
- 当泰国的经济危机发生时，台湾扣件出口商受到波及且无法控制情势。

Taiwan as the 3rd biggest fastener exporter to Thailand has 7% of their market share.

Year/年	2012		2013		2014	
Total Import Value 总进口额	2,398,350,382		2,417,391,154		1,108,039,215	
Market Share 市占率	7%		7%		7%	
Half- Year 半年度	H1	H2	H1	H2	H1	H2
Half Year Import Value 半年进口额	1,114,046,432	1,284,303,950	1,224,155,354	1,193,235,800	1,108,039,215	---
% of Export Fluctuation 出口波动率	0	15%	-5%	-3%	-7%	---

H1=上半年 H2=下半年

- Same as China, Taiwan has kept their market share at 7%.
- As soon as the crisis hit Thailand's economy, Taiwanese exporters had suffered and they couldn't control the situation.

Malaysia as the 4th main partner in the field of fasteners.

Year/年	2012		2013		2014	
Total Import Value 总进口额	1,913,159,129		2,393,567,003		1,065,620,243	
Market Share 市占率	5%		7%		7%	
Half- Year 半年度	H1	H2	H1	H2	H1	H2
Half Year Import Value 半年进口额	898,406,291	1,014,752,838	1,224,155,354	1,169,411,649	1,065,620,243	---
% of Export Fluctuation 出口波动率	0	13%	21%	-4%	-9%	---

H1=上半年 H2=下半年

a. Malaysian's market share has increased 2% in Thailand; however their export value shows 13% decrease after the half-year of 2013.

马来西亚是泰国第四大扣件伙伴

a. 马来西亚在泰国的市占率成长了2%，然而在2013年下半年之后，出口额下滑了13%。

Other countries could increase their market share in Thailand by 5% through 2012-2014.

Year/年	2012		2013		2014	
Total Import Value 总进口额	6,673,580,314		6,217,244,081		3,544,438,173	
Market Share 市占率	18%		19%		23%	
Half- Year 半年度	H1	H2	H1	H2	H1	H2
Half Year Import Value 半年进口额	3,267,547,203	3,406,033,111	3,086,755,775	3,130,488,306	3,544,438,173	---
% of Export Fluctuation 出口波动率	0	4%	-9%	1%	13%	---

H1=上半年 H2=下半年

a. These countries also could increase their value of exported fasteners after the crisis in the first half-year of 2013.

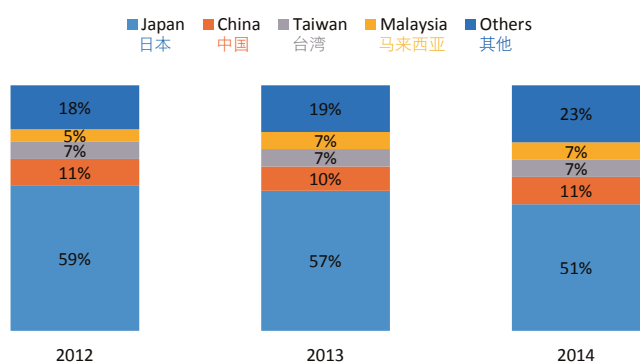
2012至2014年间，其他国家在泰国的市占率增加了5%。

a. 在2013上半年的泰国危机之后，其扣件出口额也出现增长。

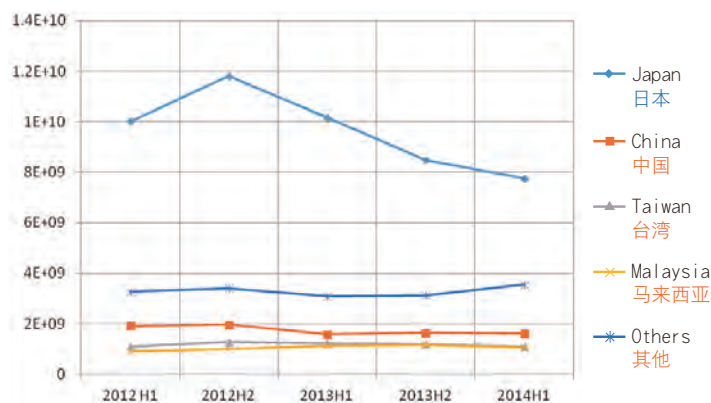
The following graph is an overlook of Thailand's partners in the fastener field.

### Thailand's partner market share of imported fasteners

泰国贸易伙伴的进口扣件市占率



Imported Fastener Value by Country



H1= 上半年 H2: 下半年

## Conclusion

Although all Thailand's partners increased their values of imported fasteners through 2012, Thailand's crisis affected their business especially foreign trade since 2013.

Thai importers could control the negative growth rate but the growth is negative yet.

It seems if the situation stays stable in 2014, the fastener market in Thailand will have a positive growth rate in the 2nd half-year of 2015. □

## 结论

虽然至2012年为止，泰国所有扣件贸易伙伴的扣件进口额皆出现增长，但自2013年起，泰国的危机却影响了他们，尤其是在海外贸易方面。泰国进口商虽可多少控制成长下滑，但最终成长率仍是负值。若泰国的局势在2014年可维持稳定，2015下半年泰国扣件市场将可望出现正成长。 □