

Reflection Upon 我看2014上海紧固件专业展暨汽车紧固件展 Fastener Expo Shanghai 2014

After visiting Fastener Expo Shanghai 2014, I've got a lot of ideas popping up in my head. I would like to ask a question to readers first: What do you think is the advantage of Taiwanese fastener industry? In China, there are at least 3 exhibitions dedicated to fasteners every year (e.g., Ningbo Fasteners, Parts, and Manufacturing Equipment Exhibition in March; Fastener Expo Shanghai in June; Fastener Expo Guangzhou in November). In Taiwan, however, there were only less than 10 fastener exhibitions over the past 10 years.

Taiwan exports USD3.9 billion worth of fasteners every year. Is this worth to be proud of? According to the statistics of Taiwan Industrial Fasteners Institute (TIFI), the total fastener export in 2004 amounted to 1.41 million tons, but the amount dropped to 1.38 million tons in 2013. Although the total value rose by nearly 60%, the total amount was equivalent to only 1/5 the total amount of China. In the past time, we were always proud of our stable material supply, superior technology & facilities, and outstanding output, but now facing the competition from China, India, Vietnam, Malaysia, and other countries in Southeast Asia, the once called "Kingdom of Fasteners- Taiwan" has been gradually dragged behind in terms of its export amount of fasteners in the world. I believe that "Rome was not built in one day." So, are Taiwanese companies or its government numb to this situation? The fact is that the companies have no alternatives but the government only wants to brag about its merits.

It is not news that many Taiwanese companies established their factories in China and Southeast Asia. According to a media report published in China, the fact that Chinese fastener industry has been growing fast in recent 20 years and that the level is greatly increased mainly results from the support of a large batch of manufacturing equipment and the relocation of factories from Taiwan over the past decade, which elevates the entire performance of Chinese fastener industry. Dear readers, the truth is there. The reforms in China never stop and it has a domestic market with strong demand for low/middle/high end products. As for Taiwan, it has remarkable strength in technology and manufacturing equipment. A famous saying goes, "The pupil surpasses the master." After China successfully learns and introduces experience from Taiwan, I see their eagerness to avoid from too much reliance on Taiwan and they have been going toward the development of products and technology with higher technological levels. Taiwan has its competitive edge but lacks the awareness against upcoming crises. Below are some of the points I'd like to share with you all.

Professional Media to Host Marketing

Fastener Expo Shanghai was organized by luosi.com. The Expo continues to be held every year since its 1st edition in 2011. Taiwan also has similar media that are excellent in marketing. For example, Fastener World Inc. is a media company with a diverse range of products. It has publications for fasteners and hardware distributed throughout the world. In April 2013, it even acted as the executive partner of Taiwan Fastener Trading Association (TFTA) to give the "International Fastener Show, Tainan, Taiwan (IFST), making it the most professional fastener



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看完2014上海紧固件暨汽车紧固件专业展，笔者感触良多，很想要问读者朋友一个简单的问题：你认为目前台湾螺帽螺丝业的优势在哪里？在中国大陆，每年至少有3场紧固件的展览（3月的宁波、6月的上海以及11月的广州），相较台湾过去10年举办螺丝展览的次数却不到10场。

台湾一年39亿美元的出口产值，值得骄傲吗？根据台湾螺委会的统计资料2004年台湾螺丝类产品总出口量为141万吨，到了2013台湾螺丝类产品总出口量为138万吨，等于出口总量倒退10年，虽然金额成长近60%，但是出口总量却只有中国大陆的五分之一。在过去我们台湾的螺丝一直引以为傲的是稳定的原料，优良的技术，设备和傲人的产量。曾几何时这个号称螺丝王国的台湾，面对中国大陆、印度、越南、马来等东南亚各国的竞争，螺丝外销量在世界的排名每况愈下。笔者相信冰冻三尺非一日之寒，罗马也不是一天所造成的。是业者无感吗？还是政府麻痹？其实是业者无奈，而官方只会宣扬政绩。

我国内许多业者到大陆及东南亚设厂已经不是新闻了，根据一份大陆发行的相关媒体报导指出：「大陆紧固件业近20年来能够发展如此迅速，且水准大幅提升，主要是靠台湾方面的制造设备以及近十多年来大批台湾同行企业落户大陆，更加速提升我大陆紧固件行业的总体水准。…」各位亲爱的读者朋友摆在眼前的叫做事实，我们在商言商，大陆改革开放的脚步从来就没有停止过，他们有很强的内需市场，对于低中高各个层次的产品需求都十分巨大，而台湾则有很强的技术与制造设备的底子，所谓青出于蓝更胜于蓝，在展览会场上是外行看热闹，内行看门道，大陆成功的复制台湾经验之后，我看到的是他们有急于摆脱台湾控制的强烈欲望，在巩固水准的同时已朝发展更高端产品与技术前进了。台湾不是没有竞争力而是缺乏危机意识。从这次上海紧固件展中我提出几个方向供各位先进思考：

由媒体主办行销更专业：

此展是由华人螺丝网所主办的，2011年起成功举办了上海紧固件暨汽车紧固件专业展，持续至今。同样的媒体行销在台湾当然也有很强的专业媒体，惠达杂志的多角化

medium in Taiwan. I think that there will be a trend for exhibitions held by media and associated companies. Taiwanese people should support each other and compete in a healthy way to increase the level of products. Companies must have an outlook to the world. Once they have the heart to learn, there will always be unexpected profit on the road.

Diversified Inspection Equipment

"One must have good tools in order to do a good job." China, the largest country of fastener export, has the complete range of inspection equipment for sure. In the Expo this time, I saw that the high-tech automatic inspection technology has replaced traditional manual sorting. In order to save labor cost and increase production efficiency, more and more Chinese factories adopt automatic image sorting machines that greatly increase the yield rates of products. One optical technology company showcased a precision optical image sorting machine with the differentiating ability of 0.1 um. In addition, an automatic eddy current image sorting machine that can inspect the compliance of sizes, appearances, materials, mixed materials & hardness in heat treatment with standards was also showcased. In terms of online monitoring systems, one company demonstrated an automatic operation system for online in-plant management with 100% qualification of products. The applications include controlling the feeding into heating furnaces by the computer of automatic warehouses and the feeding ways applied in electroplating plants. We've never expected such developments in China we're never expected before. The use of X-Ray coating thickness testers has been quite popular in Taiwan, but this time I found several innovative high-end testing technologies in Shanghai. For example, a series of X-Ray fluorescent spectrometers could analyze high precision coating layers and material compositions at the same time. On the other hand, a new-generation portable coating layer tester could help get quick access to data for coating thickness. The aforesaid are all perspectives which Taiwanese companies can take into account for future plans. In my viewpoint, automation and scientification will be the next trend in China.

Multiple Handbooks Available

In exhibitions held in Taiwan you may find it difficult to see stands selling handbooks, but the scenario in China is different. In the Expo, handbooks were categorized into two types: one is the commonly known standard books [e.g. DIN, IFI, JIS, ASTM, SAE...]; the other is publications with companies' advertisements, tech info, and news. It is widely known that placing advertisements is the quickest access to expanding business globally. As Chinese fastener industries are scattered in several provinces, dissemination of news and tech info has to rely on printed publications in addition to the Internet. All publications and standard books are even what every company would like to have at hand. If we take a look at the total fastener export of China in 2013 (6.8 million tons) compared to that of Taiwan (1.46 million tons, 1/4 the total amount of China), it tells why there are so many handbooks available in the market.

As I said previously, Taiwan is excellent in technology. It is not the right time to look down on Taiwan or compare between exports of Taiwan and China. Afflictions are sometimes blessings in disguise and vice versa. It depends on what one thinks of it. I once visited a fastener factory in Tainan (Taiwan), the factory director told me when I referred to the competitive edge of products, "70% of our products in this plant are customized. A customer ordering small-packaged products even asked us to manufacture shelves for them." Dear readers, Taiwan competing with China has to be aggressive in innovation to satisfy market demand, as requests from foreign customers to suppliers will only become more and more sophisticated and customization-centric. I believe that the management in Taiwanese fastener factories and their flexible strategy are key factors to consolidating the market and creating opportunities.

经营,除了发行世界各地的螺丝与五金工具等相关杂志之外更成功的结合业者共组协会并于2013年4月在台南举办了IFST国际螺丝暨机械展成为台湾最专业的紧固件行销媒体。我想由媒体结合业者来办展览应该是未来的方向和趋势,惟有互相支持,良性的竞争有助于产品的提升,业者应该要有世界观,只要抱着学习的心永远都会有意想不到的收获。

检测设备多样化:

工欲善其事必先利其器,做为全球紧固件的最大出口国,完整的检测设备是必要的,在这次的展览会场里面,我看到了未来的趋势是高科技全自动检测技术取代了传统人工筛选。为了节省人工成本和提高生产效率,大陆的工厂也纷纷大量采用全自动影像筛选机,大大的提高了产品的良率,有一间光学科技有限公司展出一款高精密度的光学影像筛选机,分辨率达0.1um。另外全自动涡电流影像筛选机,同时解决尺寸、外观、不同材质或热处理混料与热处理硬度是否符合标准。在线上监测系统的一部分,有业者推出无人化操作,厂内网路管理且产品合格率达百分百,可应用范围包括:热处理炉的进料方式是由自动仓储的电脑系统所控制,完全不需要人工操作,同样的也应用在电镀厂的进料方式也是由电脑来控制,我想这样的一个内容所带给我们的震撼,是前所未有的。在台湾x-ray电镀膜厚仪已经相当普遍,但是在这次上海的展览会场上我发现了不断创新的尖端测试技术,众多系列的x-ray萤光谱仪可以同时提供高精度镀层与精确材料成分分析,同时新一代手提式电镀层测厚仪即便在不同的工作场所都能够轻易快速取得膜厚数据。以上这些方向都是台湾业者可以开始思考的未来。我想在中国,自动化和科学化将会是一大大趋势。

工具书多元化:

在台湾的螺丝展场上你很难看见有摊位在贩售工具书,可是在大陆展场可不一样,这里可见的工具书可分成两类:一是规范类型的标准书大家耳熟能详的不外乎公制DIN与英制IFI Stand book当然还有其他标准规范如JIS、ASTM、SAE...,上面所介绍的〈紧固件大全〉与〈通用紧固件对照查询手册〉这两本书的内容就是把所有国际间通用的这些规范,简单扼要的节录其中比较常用的章节与数据表格给业者查询之用,所以叫〈大全〉与〈手册〉。

第二类工具书是广告与技术交流,或者是讯息传播的杂志类型工具书,大家都知道,打开国际市场最快的捷径就是广告,大陆紧固件业分布好几个省份,讯息传递与资讯流通除了网路之外,就必须用到实体书籍了,而实体杂志与规范标准大全又都是厂家必备的工具书。各位聪明的读者想想看,大陆紧固件一年单靠出口(还不算他们内销产量)就达680万吨(2013年),是台湾(2013年)146万吨的4.6倍,难怪工具书五花八门,什么都有什么也都不奇怪了。

我之前说过,台湾有很强的技术底子,现在不是唱衰台湾的时候也不是和大陆比出口量的时候了,塞翁失马,焉知非福;塞翁得马,也焉知非祸阿!那么是福是祸其实全在一念之间。我前些日子曾拜访过一间在台南的螺丝工厂,谈及该工厂产品竞争力的时候厂长告诉我:「目前我厂内出口的成品70%都客制化,不只是小盒包装,连货架客人都要我帮他量身订做一起出去。」亲爱的读者们,台湾面临中国大陆这个红海战场我们必须积极的发挥创意以满足市场的需求,因应国外客户对供应商的要求趋于客制化与复杂化,相信台湾螺丝厂的管理能力与灵活策略是未来能够稳固市场与创造蓝天的关键因素。 □