



Fastener Industry in Germany

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德国扣件产业分析

European Industrial Fasteners

Europe is among the largest manufacturing regions in the world and therefore it is also one of the largest markets for fasteners in the world. The six leading importing countries in Europe offer good opportunities for Developing Country (DC) exporters. So far they mainly source fasteners from five DCs, which are China, India, Turkey, Vietnam and Malaysia. Two important trends that dominate the market are the demand for application-specific products and price competition. This offers two strategic directions which can be chosen by fastener producers from DCs: supply relatively standard fasteners to EU importers in high volumes at low prices, or develop and specialize in customized manufacturing.

EU imports of fasteners peaked in 2011 and reached €10.6 billion in 2013. Average annual growth in 2009-2013 was 12%; however this was partly due to the weak reference year 2009. The DC share in EU imports peaked in 2011, reaching 13% in 2013 and is forecast to be stable in the coming years. Most imports which are about 64% of all imports originate from intra-EU sources. The leading importer is Germany, followed by France, UK, Austria, the Netherlands and Italy. They are the six focus countries which represented almost 62% of EU imports in 2013. In terms of DC imports, Germany is leading, ahead of Italy, UK, France and the Netherlands. The import of fasteners is expected to show a small growth in the next few years, in the range of 0-2%.

Industrial Fastener Market in Germany

Germany's path to prosperity over the past decade has focused on the development of new technologies and its ability to drive innovation leveraging a highly skilled workforce that demands higher labour rates, resulting in economic benefits for the nation's economy, its citizens and companies operating in the market. Although EU's five largest economies encountered sluggish growth, Germany is expected to grow with the annual rate of 1.4%. Besides, there is no question that Germany is a leader in its ability to innovate and develop a skilled workforce that is enabled by strong infrastructure, quality healthcare and other factors that contribute to a nation's ability to compete globally.

In the business world, Germany is known as a powerhouse manufacturer of high-quality, higher-end goods. Germany is the number one producer in virtually every industry in the EU. It is well-known for its output of machinery, cars and electronics. The largest market segment for fasteners is the automotive industry, followed at some distance by a range of other industries: household equipment, electronic equipment, furniture, machine building, steel construction and general construction (house and office building).

欧洲工业用扣件

欧洲是世界最大制造国之一，也是世界最大的扣件市场之一。欧洲的六大进口国给予发展中国家的出口商相当好的机会，目前它们主要来自五个发展中国家进口扣件：中国、印度、土耳其、越南、马来西亚。特定用途产品之需求以及价格竞争构成了主导欧洲市场的两个重要趋势，这提供发展中国家两种策略方向，其一是以大量且低价之方式供应标准扣件给欧盟进口商；其二是发展并专精于客制化产制。

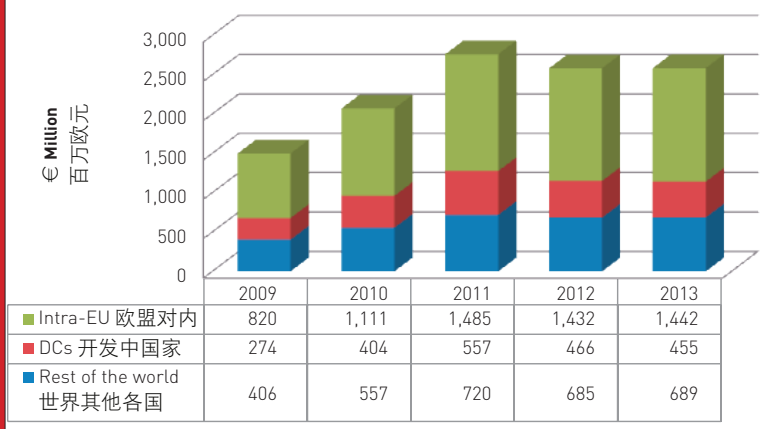
欧盟扣件进口额在2011年达到巅峰，到了2013年则落在106亿欧元。2009至2013年间的年成长率为12%，这有一部份是受到2009年(基础年度)表现疲弱之影响。发展中国家占欧盟进口量之比例在2011年达到巅峰，到了2013年则落在13%的占有率，预计在未来数年内该比率将持稳。绝大多数的进口额(约占总进口额的64%)来自欧盟成员国，其中最大宗的进口国是德国，其次是法国、英国、奥地利、荷兰、意大利，这六个主要国在2013年构成62%的欧盟扣件进口额。德国自发展中国家进口的扣件额占最大宗，超越了意大利、英国、法国和荷兰。预计未来几年内，扣件进口额将微幅成长，成长率将落在0%-2%的区段内。

德国的工业扣件市场

德国在过去数十年间迈向繁荣的过程中，专注于发展新科技，并借由高工资雇用高技术员工推动创新能力，最终为德国经济、市民以及当地企业带来利益。虽然欧盟五大经济国适逢成长萧条，业界仍预期德国保有1.4%的年成长率。此外，无疑德国在创新与培养高技术员工方面是个中翘楚，这是因为德国拥有强大基础建设，高品质医疗保健，以及其他能带出德国国际竞争力的因素。

在商业界，世界皆知德国是产制高端高品质产品方面的巨头，它不论在欧盟的任何产业中都是位居第一的制造国，且在机械、汽车与电子产品的输出方面更是远近驰名。德国扣件市场下最大的需求来源是汽车产业，汽车业的扣件需求量以一定的差距领先其他产业，包括家用设备、电子设备、家具、机械制造、钢材建设、公共建设(例如居家与办公建设)。

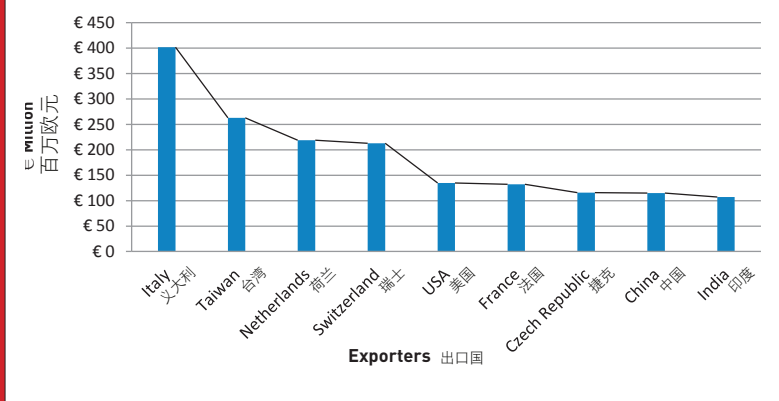
Tab.1 Fastener Import Values of Germany 德国扣件进口值



表一、2009-2013年德国扣件进口值统计

The chart above shows that German imports of fasteners peaked in 2011 and reached €2.76 billion in 2013. It exhibits that intra-EU trade represents a large share of German imports; however, the following chart illustrates that Taiwan is by far the largest supplier in the category 'Rest of the world', followed by USA. In the past decade Taiwan was the main beneficiary of the anti-dumping tariffs put in place for imports from China.

Tab.2 Fastener Import Values in 2013 of Germany 德国2013扣件进口值



表二、2013年德国主要扣件进口国表现

Get Your Products in German Market

As mentioned earlier, Germany is recognized for its output of machinery, cars and electronics. Other EU countries have their own specific market profile as well. For instance, key manufacturing sectors in the UK include aerospace, automotive, defence equipment, electronics, machinery and equipment. All in all, it is important for fasteners manufacturers and traders who are interested in selling and promoting their products in EU market to focus on related market segments. Specialisation in any of those segments may give exporters a competitive advantage, as there is an increasing demand for customised solutions. EU importers in general and Germany in specific prefer specialised suppliers who are able to offer customer support and joint engineering in specific market segments. That is,

表一显示德国扣件进口量在2011年达到高峰，到了2013年落在27.6亿欧元，也显示德国扣件进口量大多来自其与欧盟成员国之间的贸易。表二则显示目前在「其他国家」的类别中台湾是欧盟扣件的最大供应国，其次是美国。过去十年间，欧盟对中国扣件课征反倾销税，台湾则是此欧盟政策下最主要的受惠国。

前进德国市场

如前述，德国在机械、汽车与电子产品输出方面相当驰名，当然其他欧盟成员国也有各自的市场利润。例如，英国的主要制造产业包括航太、汽车、国防设备、电子、机械设备。总的来说，对有意在欧洲市场宣传与销售产品的扣件制造商与贸易商来说，重要的是将销售专注于相关的市场区块。专精于任何一个相关区块将会为出口商带来竞争优势，因为当地市场对客制化产品方案的需求越来越大。一般的欧盟进口商以及(特别是)德国偏好专业化的供应商，这些供应商能提供客户支援，且对于特定的市场区块愿意共同研发产品。换句话说，对于能根据终端客户需求提供高端扣件客制生产的制造商与出口商来说，这代表了更大的商机。

之前已详述过，主导扣件需求的决定性因素是终端用户产业的消费活动，例如德国的汽车与电子业。另一个决定性因素是顾客的消费活动。这种需求是受到经济成长所刺激。德国国民生产毛额(GDP)在未来数年内预期将持续成长。很明显地，这是该国需求与进口量将持续成长的基础与证明。

暨欧盟领先国的真实薪资成本起伏一段时间后，未来数年内多数欧盟国家的薪资预期将会缓慢增加，此增加的态势在德国与法国尤其明显。此发展可能会促使德国将扣件生产委外给低薪资国。

出口商面临的挑战是汇率的波动，因为这会使预付成本的预算分拨更加困难。这可能会随同欧元影响扣件进口的利润，因为许多全球采购的零件都是用美金支付费用。由于欧元与美金汇率将不会超过0.80，工程零件进口的定价水平将不会改变太多。这也表示进口产品比起当地生产的水平或多或少会维持一样。预期中相对汇率的相对稳定有助于出口商和贸易商更有效地运用策略进入德国市场。

最后同样重要的是定价策略和设定出口价。毫无疑问地，思索市场可以忍受的价格和牢记产品价格比非常重要。它应该与竞争者的

there are greater opportunities for those producers and exporters who are able to supply advanced fasteners by offering customised manufacturing based on the need of end-users.

As clearly stated, the major determinant of fasteners demand is spending activity in the end-user industries, such as automotive or electronics in Germany, and also spending activity among consumers. In turn, this demand is stimulated by economic growth. In Germany, GDP is expected to show continued growth year on year in the years to come. Evidently, it is a profound basis for continuous demand and import growth in the coming years.

After a period of stable or declining real wage costs in the leading countries in EU, wages in most countries are expected to increase slowly in the coming years. The upward trend is mostly visible in Germany and France. This development can be a driver for outsourcing of fasteners production to countries with lower wages.

The challenge that exporters face is the fluctuations in exchange rates which can make it some difficulties to budget up-front costs. This may effect the profitability of fasteners imports which is influenced by the €:US\$, as many engineered parts sourced globally are paid in US\$. As the €:US\$ exchange rate is not forecast to go beyond 0.80, the price level of engineered parts imports will not change a lot. It also means that the level playing field of imports versus local production remains more or less the same. The expected relative stability of the relevant exchange rates helps exporters and traders to strategically plan entrance to the German market more effectively.

Last but not least is the pricing strategy and establishing an export price. With no doubt it is important to consider the price that market will bear and keep in mind the quality-price ratio of the products. It should be in line with competitor prices. Pricing is a mix of knowing the domestic costs and calculating costs that will be incurred in delivering and supporting the activities in German market.

Although pricing is one of the most important strategy to enter into the new market, don't put all your effort and work to bit the cheapest price in the market but to be known as customised manufacturing.

价格一致。定价是同时综合国内成本和计算运送至德国市场可能产生的运送和相关行为成本而产生。

虽然定价是进入新兴市场最重要的策略之一，但可别把所有筹码都压在提供市场最便宜价格上，而忽略客制化生产这部分。

Sources : 资料来源 :

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