

## 东盟加三对台湾扣件业的影响

# The ASEAN+3 Influence to Taiwanese Fastener Industry

by Behrooz Lotfian

"Taiwan is the Fastener Kingdom" is not an overstatement. In 2014, there were importers from more than 150 countries purchasing fasteners from Taiwan. Many of the fasteners used in your houses may possibly be supplied from Taiwan.

In the impression at the old time, "Made in Taiwan" might stand for cheapness and low quality. But in the last 10 years, Taiwanese fastener industry has put a lot of efforts in R&D and quality improvement. The bad name has become a history. Taiwanese fastener manufacturers have developed very effective supply systems including material, tooling, heat treatment, surface treatment, production equipment, professional trading companies, etc. Fasteners from Taiwan speak for the quality themselves.

If you still have the old-time impression at the old time about Taiwanese fastener industry, very possibly you have just missed a reliable trading partner. Fasteners from Taiwan have possessed love of buyers from all over the world with high quality, strict delivery, reasonable price and the manufacturers' innovations.

## Fastener Industries in Taiwan and ASEAN+3

### Japan

Japan is Taiwan's 2<sup>nd</sup> largest trading partner, while Taiwan is the 5<sup>th</sup> largest for Japan. On the other hand because of Japanese hi-tech industries, it is not farfetched that Japan is the main fastener supplier of Taiwanese factories and 2<sup>nd</sup> area that imports Taiwanese fasteners in ASEAN region plus.

Japan /日本 (Unit: 1,000 USD) (单位: 1,000美元)	2010	2011	2012	2013	2014
Fasteners Exported to Taiwan 出口扣件至台湾	63,921	81,276	78,361	69,008	71,362
Fasteners Imported from Taiwan 从台湾进口扣件	161,680	207,443	207,673	227,817	212,004

**要** 说「台湾是扣件王国」并不为过。2014年，有来自150多国的进口商向台湾购买扣件产品。许多使用于您住的房屋中的扣件也非常可能来自台湾。

在以前的印象中，「台湾制造」或许代表廉价和低品质。但在过去10年，台湾扣件产业尽了很大的努力加强研发和品质改善。前面所说的坏名声老早成为过去式。台湾扣件制造商已经开发出多套有效的原料、治具、热处理、表面处理、生产设备供应系统并拥有许多专业的贸易公司。来自台湾的扣件高品质不在话下。

如果你对台湾扣件产业的印象仍停留在旧时代，非常有可能会错过与可靠贸易伙伴合作的机会。来自台湾的扣件在全球各地已经有许多爱好者，不只有高品质、准确交期、合理价格、以及制造商丰富的创新能力。

## 台湾和东盟加三的扣件贸易关系

### 日本

日本是台湾的第二大贸易伙伴，而台湾是日本第五大贸易伙伴。另一方面，因为日本有众多高科技产业，因此不难理解为何日本是台湾工厂主要的扣件来源以及在东盟区域内台湾扣件的第二大进口国。

日本的扣件进口并不完全跟随世界整体的发展趋势(2013年数据显示日本扣件进口呈现增长但在2014年突然下降7%)。发生此矛盾的主因是因为2013至2014年间日本经济发展状况不佳。2014年日本的国内生产总值成长率为-1.3%。

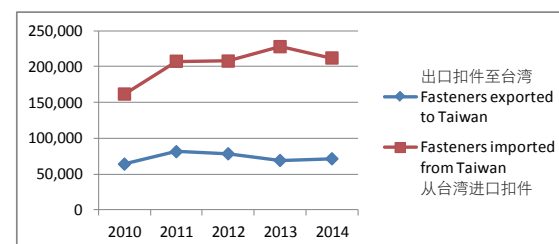


Fig.1 Fastener Trade Between Taiwan and Japan  
图1 台湾与日本的扣件贸易

ASEAN / 东盟 (Unit: 1,000 USD) (单位: 1,000 美元)	2010	2011	2012	2013	2014
Fasteners Exported to Taiwan 出口扣件至台湾	9,534	12,335	14,580	13,489	12,977
Fasteners Imported from Taiwan 从台湾进口扣件	228,730	254,401	217,260	213,405	218,269

China / 中国 (Unit: 1,000 USD) (单位: 1,000 美元)	2010	2011	2012	2013	2014
Fastener Exported to Taiwan 出口扣件至台湾	3,914	5,165	5,204	5,850	7,040
Fasteners Imported from Taiwan 从台湾进口扣件	112,361	109,974	101,876	111,926	122,776

The fasteners exported to Japan did not follow the world trend completely (2013 showed that fasteners exported to Japan increased and suddenly dropped 7% in 2014!). The main reason for this contradiction was due to the bad economic situation in Japan during 2013-2014. Japan's GDP growth rate was -1.3 in 2014.

## ASEAN

ASEAN is the 2<sup>nd</sup> largest export market for Taiwan.

Taiwanese companies' investment in ASEAN has integrated ASEAN into the supply chains of Taiwanese businesses since 2011. It has also underpinned the movement of goods between and within Taiwanese businesses located in ASEAN and Taiwan. As a result, the main categories of Taiwan-ASEAN trade are in the same sectors where Taiwanese investment in ASEAN is located. For instance, Taiwan's main exports and imports from/to ASEANs are of electrical machinery and equipment.

Therefore, the reason for zero growth in fastener business between Taiwan-ASEAN can be explained because fastener investors moved to the other industries.

## China

Business ties between Taiwan and China have improved to their best level in six decades since 2008. Investment in China has also grown substantially since 2008 and Taiwan's accumulated investment in China was valued at over US\$58 billion as of July 2013. Most of the investment is in the manufacturing sector such as electronic parts and components (20%) and computer electronics and optical manufacturing (14%). In the fastener industry, the story is the same, most fastener producers have at least one factory of their own in China, and most of these Chinese fastener producers import equipment from Taiwan. In a simple word, Chinese fastener companies owe Taiwanese companies.

The above graphs also confirm positive growth rates between Taiwan and China in the fastener industry.

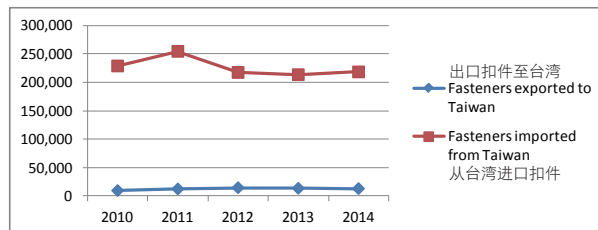


Fig.2 Fastener Trade Between Taiwan and ASEAN  
图2. 台湾与东盟的扣件贸易

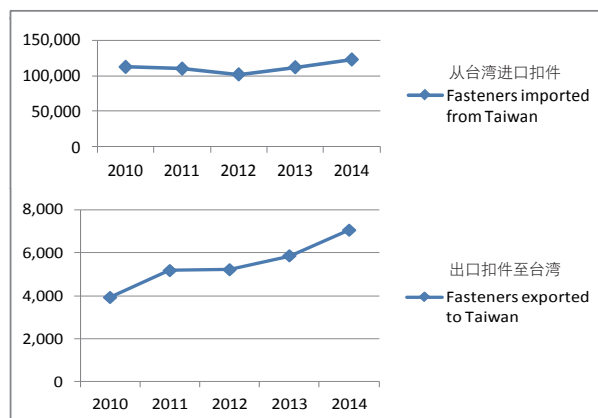


Fig.3 Fastener Trade Between Taiwan and China  
图3. 台湾与中国的扣件贸易

## 东盟

东盟是台湾第二大出口市场。

台湾厂商在东盟地区的投资自2011年开始已经将东盟整合进台湾业务的供应链中。这也巩固了在东盟台湾厂商以及台湾当地厂商彼此之间产品的流动互通。因此「台湾-东盟」双边贸易主要的类别与目前台湾在东盟地区投资的类别是相同的。举例来说，台湾主要出口至东盟或自东盟进口的产品品项为电子机械和设备。

因此台湾与东盟之间目前在扣件贸易上因相互抵销所产生的零成长就有合理解释，因为扣件投资者将重点转移至其他产业。

## 中国

中台双边的商业紧密关系从2008年开始已改善至60年来的最佳水准。从2008年起对中国的投资活动已经大幅成长且台湾对中国的投资到2013年7月为止总值达到580亿美元。在制造业领域的投资项目主要是电子类零部件(20%)及电子光学制造(14%)。在扣件产业，状况也是类似的，多数扣件制造商在中国至少都有一间自己的工厂，且多数中国扣件制造商从台湾进口机械。简单来说，中国扣件厂商或多或少要感谢台湾厂商对其的贡献。

上列图表验证台湾中国两边扣件产业的正向成长趋势。

S. Korea /南韩 (Unit: 1,000 USD) (单位: 1,000 美元)	2010	2011	2012	2013	2014
Fasteners Exported to Taiwan 出口扣件至台湾	3,527	4,962	2,847	3,839	3,851
Fasteners Imported from Taiwan 从台湾进口扣件	17,314	24,877	22,657	20,510	28,074
World /全球 (Unit: 1,000 USD) (单位: 1,000 美元)	2010	2011	2012	2013	2014
Fasteners Exported to Taiwan 出口扣件至台湾	124,296	144,689	143,415	138,163	143,703
Fasteners Imported from Taiwan 从台湾进口扣件	3,054,911	3,792,356	3,582,020	3,659,608	4,046,332

## South Korea

From the 1950s to the 1980s, Taiwan and South Korea were on the front line of the Cold War, and their urgent need for military equipment forced them to develop their manufacturing industries. The cold war situation was over between two countries and currently, South Korea is Taiwan's 5th largest trade partner, while Taiwan is South Korea's 9<sup>th</sup> largest trade partner.

The fastener businesses between these two countries are also growing up rapidly (a 40% growth in fasteners Taiwan exported to South Korea during 2014!).

Nowadays, South Korea's fastener enterprises have come to Taiwan to study how local businesses have succeeded in mainland China, and to learn from Taiwanese how to expand their businesses in the mainland.

## Last Word

If we suppose that 80% of fasteners produced in Taiwan are for export, then the business of fasteners in Taiwan will be worth USD 5 billion. On the other hand, Taiwan's GDP is more than USD 517 billion. Therefore, fasteners represent 1% of Taiwan's total GDP portion.

According to statistics, the global market for Industrial fasteners in 2014 was worth about USD 70 billion, in which Taiwan represented more than 7% of the total share. Although the share of Taiwan's fasteners is not quite huge in the global fastener market, Taiwan can still position itself as the cradle of fasteners in the world, while its quality and reasonable prices also support this position. Therefore, it is no surprise that Taiwan will have a considerable growth in the global fastener business in the future.

The following table and graphs show the trend of fasteners exported to / imported from Taiwan during 2010 to 2014.

After studying the graphs, the question asked may be:

"Why do statistics show negative growth during 2012-2013, whereas, in this article Taiwanese fastener industry is said to continue to be growing yearly?"

Negative growth in Taiwan's exported/imported fasteners was due to the world economic crisis in the same period. ■

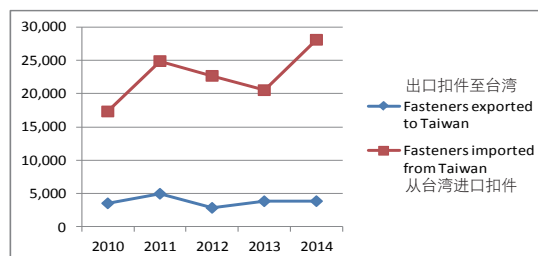


Fig.4 Fastener Trade Between Taiwan and Korea  
图4. 台湾与南韩的扣件贸易

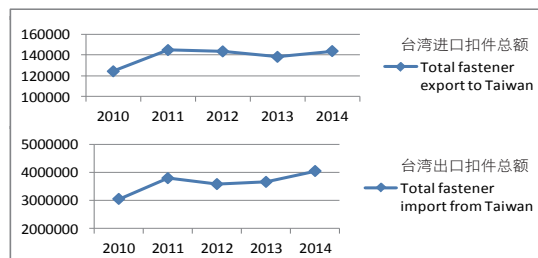


Fig.5 Fastener Trade Between Taiwan and World  
图5. 台湾与全球的扣件贸易

## 南韩

从1950至1980年代,台湾和南韩都各自处于属于自身的冷战前线,且对军事设备的迫切需求促使他们发展制造产业。双方的冷战处境已经过去,目前南韩是台湾第5大贸易伙伴,而台湾是南韩第9大贸易伙伴。

两边的扣件生意往来也在快速增长中(2014年台湾出口至南韩的扣件总值成长了40%)。

时至今日,南韩的扣件产业纷纷前往台湾取经,借以学习台湾本土的企业如何在中国当地发迹扩展的经验。

## 结语

如果我们假设台湾生产的扣件产品有八成都是外销,那么台湾的扣件总产值将达50亿美元。另一方面,台湾的国内生产总值目前已超越5,170亿美元。因此,扣件类占台湾国内生产总值约1%。

根据相关统计,2014年全球工业市场总值约700亿美元,台湾在这占了总份额7%以上。虽然在全球扣件市场上台湾扣件不算十分庞大,台湾仍可以其扣件摇篮之姿在全球占一席之地并以高品质和合理价格取得市场定位。因此,预期在不久的将来台湾在全球扣件贸易上仍会呈现可观的成长表现。

上列图表显示2010至2014年台湾扣件进出口趋势。

在观察上列图表后,可能会产生一项疑问:「统计数据显示2012至2013年台湾扣件进出口呈现负成长趋势,为什么本文其他段落又说台湾扣件产业将每年持续保持增长呢?」

我们合理判断台湾扣件进出口的负成长现象是因为那时全球经济危机影响所致。■