

Players of Fastener Making Machines in the World

全球扣件机械 主要生产国概况

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全球扣件机械市场规模

统计显示扣件机械市场规模在2014年达到155亿美元，且在2015年会出现4~5%的负成长来到147亿美元。市场价值在2012年达到最高点，但最让人感兴趣的是2011年的市场价值在1年内就成长了34%！（详见下列图表）

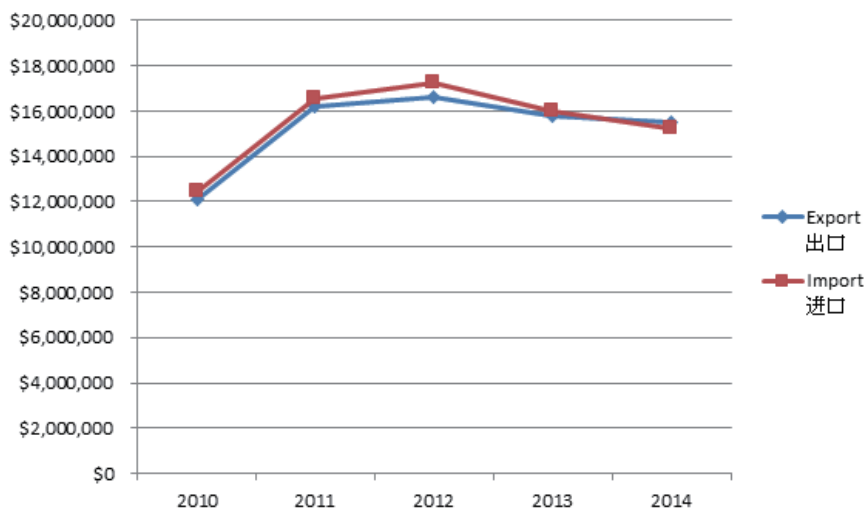
2011年发生了什么事？

2011年汽车代工制造是扣件最大的市场，一份针对汽车产业的研究清楚显示了扣件机械产业的大幅成长，且我们也能解释接下来几年的负成长。

2010年汽车产业总值成长了25.6%，这意味投资相关产业可以让企业主取得高获利，而扣件业就是其中之一。2015年许多企业在扣件领域取得一席之地，因此，扣件机械业务也飞快成长。汽车产业成长在2011~2014年间回到3-5%的正常水准，意味这些扣件工厂只能支撑在这样的水平，因此扣件工厂新设立比率转成负向，造成扣件机械产业的负成长率。

2015年第1至2季汽车产业的成长为0.5%，预计会对扣件机械市场造成4~5%的衰退。

图表1. 扣件机械市场规模 Fig 1. Market Scale of Fastener Machinery



World 全球	2010	2011	2012	2013	2014
Export Value 出口值	\$ 12,084,688	\$ 16,204,568	\$ 16,621,988	\$ 15,808,229	\$ 15,505,902
Growth Rate 成长率	-	34.1%	2.6%	-4.9%	-1.9%
Import Value 进口值	\$ 12,425,328	\$ 16,560,198	\$ 17,225,684	\$ 15,967,649	\$ 15,200,734
Growth Rate 成长率	-	33.3%	4.0%	-7.3%	-4.8%

Size of the Global Fastener Making Machines Market

The statistics show that the value of fastener making machines business was 15.5 billion USD in 2014 and it will experience a negative growth of around 4-5% in 2015 to 14.7 billion USD.

The business value peaked in 2012, but the interesting point is that in 2011 the business grew 34% within just a year!

What Happened in 2011?

In 2011, original equipment manufacturing of motor vehicles was the largest market for fasteners. A study in the motor vehicles industry cleared up the substantial growth in the fastener making machines industry, and also we can explain the negative growth for the next years.

In 2010 the value of the motor vehicles industry grew 25.6%, which means investing in related industries can make a lot of profit for business owners and one of the related industries are the fastener industry. In 2015 many companies had their presence in the fastener field, and therefore, fastener making machine business also grew sharply. The growth in motor vehicle business went back to a normal rate of 3-5%



during 2011-2014, which means these fastener factories could support the rate, and therefore the rate of setting up new fastener companies became negative and its results caused the negative rate in the fastener making machines business.

Motor vehicle industries' growth in the 1st and 2nd quarters of 2015 was 0.5%, which is predicted to cause a negative growth of around 4-5% in the fastener making machine business.

Who are the Main Players in the Fastener Making Machine Industry?

China-China with 1.45 billion USD export as the 4th largest exporter and 2.44 billion USD import as the largest importer was the biggest market for this business.

China's export in this field showed positive growth during 2011-2014, but on the other hand, China's import had negative rate in the same period. The internal growth of this industry in China could be concluded by these statistics (in simple word, the growth of the industry has led to increased exports and decreased imports). Chinese machine producers could increase their market share around 3.3% in the world during 2011-2014 and they could reduce their dependence on global production more than 5% in the same period.

下表清楚说明该领域的主要出口国和进口国。

The following tables clear up the exporter and importer countries in this field.

Exporters 出口国	2010	2011	2012	2013	2014
Germany 德国	\$2,400,000	\$3,321,864	\$3,436,056	\$3,162,945	\$2,991,248
Italy 义大利	\$1,604,932	\$2,141,755	\$2,032,721	\$1,937,418	\$1,985,152
Japan 日本	\$1,394,863	\$2,390,994	\$2,501,300	\$2,071,801	\$1,959,872
China 中国	\$747,557	\$978,033	\$1,108,583	\$1,205,145	\$1,446,798
USA 美国	\$972,209	\$1,240,523	\$1,188,166	\$1,128,682	\$1,065,438

Importers 进口国	2010	2011	2012	2013	2014
China 中国	\$2,418,388	\$3,523,013	\$3,113,546	\$2,717,636	\$2,437,265
USA 美国	\$718,780	\$1,111,666	\$1,430,077	\$1,434,382	\$1,478,134
Mexico 墨西哥	\$447,067	\$605,845	\$633,933	\$858,168	\$849,214
Thailand 泰国	\$535,816	\$781,771	\$1,224,112	\$972,724	\$830,425
Russia 俄罗斯	\$465,087	\$601,417	\$734,165	\$721,682	\$701,621

China 中国	2010	2011	2012	2013	2014
Export Value 出口值	\$747,557	\$978,033	\$1,108,583	\$1,205,145	\$1,446,798
Growth Rate 成长率	-	30.8%	13.3%	8.7%	20.1%
% of the Market Share 全球市占比	6.2%	6.0%	6.7%	7.6%	9.3%
Import Value 进口值	\$2,418,388	\$3,523,013	\$3,113,546	\$2,717,636	\$2,437,265
Growth Rate 成长率	-	45.7%	-11.6%	-12.7%	-10.3%
% of the Market Share 全球市占比	19.5%	21.3%	18.1%	17.0%	16.0%

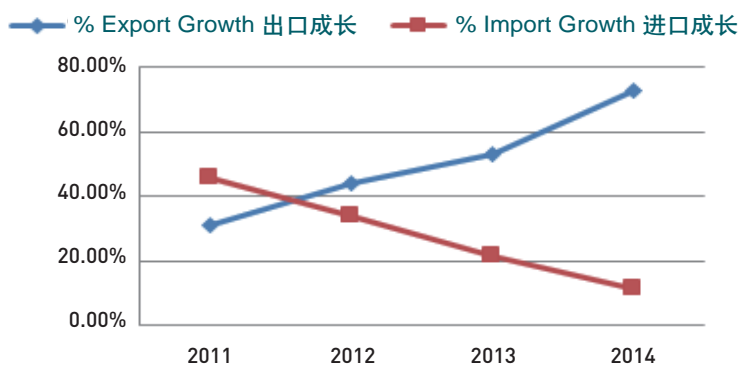
谁是扣件机械产业的主要竞争者？

中国

中国2014年出口值约为14.5亿美元，是该年度第4大出口国。同年进口值约24.4亿美元，是该领域最大的进口国。

中国在该领域的出口在2011~2014年呈现正成长，另一方面，同期中国的进口则出现负成长。中国该产业的内部成长可以用这些数据来做总结(简单来说，产业的成长导致出口增加及进口减少)。中国机械制造商在2010~2014年间市占率增加约3.3% 且同期对全球产品的依赖度减少了5%以上。

基准年2010 Base Year



Germany

Germany was not one of the top 5 importers, but it was the largest exporter in the world in this field. Its export value was around 3 billion USD.

Although Germany's growth rate of export dropped during 2011-2015, it still supplied around 20% of the world's need for fastener making machines through 2010-2014!

USA

The USA with 1.07 billion USD was ranked the 5th top exporter and its import was around 1.48 billion USD, making it the 2nd largest importer in the world.

U.S. fastener making machine producers lost 0.8% of their global market from 2011 through 2014; on the other hand, the market got 3% bigger for overseas producers. The negative trend in their export value

and the positive trend in their import value also prove this claim.

Italy/Japan

Italy with 1.99 billion USD was ranked the 2nd largest exporter in the world. Although in 2012 it lost 1% of global market but it compensated 0.6% of it in 2014.

Japan was ranked the 3rd largest exporter in the world in the field of fastener making machines and its export value was around 1.96 billion USD.

The competition between Italy and Japan for getting the 2nd place among the top exporters is very interesting, Japanese machine producers outran Italian producers in 2011, and in 2012 Japan's share in the global market became 3% bigger than Italy's through better machines with higher prices, making Italy withdraw from the 2nd place.

Germany 德国	2010	2011	2012	2013	2014
Export Value 出口值	\$2,400,000	\$3,321,864	\$3,436,056	\$3,162,945	\$2,991,248
Growth Rate 增长率	-	38.4%	3.4%	-7.9%	-5.4%
% of the Market Share 全球市占比	19.9%	20.5%	20.7%	20.0%	19.3%

USA 美国	2010	2011	2012	2013	2014
Export Value 出口值	\$972,209	\$1,240,523	\$1,188,166	\$1,128,682	\$1,065,438
Growth Rate 增长率	-	27.6%	-4.2%	-5.0%	-5.6%
% of the Market Share 全球市占比	8.0%	7.7%	7.1%	7.1%	6.9%
Import Value 进口值	\$718,780	\$1,111,666	\$1,430,077	\$1,434,382	\$1,478,134
Growth Rate 增长率	-	54.7%	28.6%	0.3%	3.1%
% of the Market Share 全球市占比	5.8%	6.7%	8.3%	9.0%	9.7%

Italy 意大利	2010	2011	2012	2013	2014
Export Value 出口值	\$1,604,932	\$2,141,755	\$2,032,721	\$1,937,418	\$1,985,152
Growth Rate 增长率	-	33.4%	-5.1%	-4.7%	2.5%
% of the Market Share 全球市占比	13.3%	13.2%	12.2%	12.3%	12.8%

德国

德国虽不是前5大进口国之一，但却是该产业最大的出口国。其出口值约30亿美元。

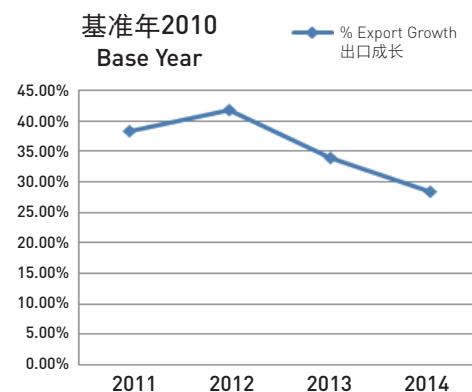
虽然德国的出口成长率在2011-2015年出现下降，其在2010~2014年间仍占全球扣件机械需求的约20%。

美国

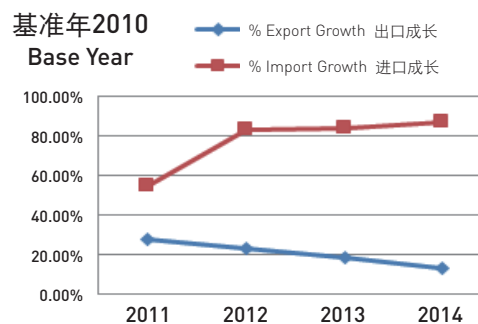
美国2014年出口值约为10.7亿美元，名列第5大出口国，进口值约为14.8亿美元，名列全球第2大进口国。

美国扣件机械制造商在2011~2014年间全球市占比下降了0.8%。另一方面，对海外制造商来说，市场则增加了3%。美国出口值的下降和进口值的增加也证明了这论点。

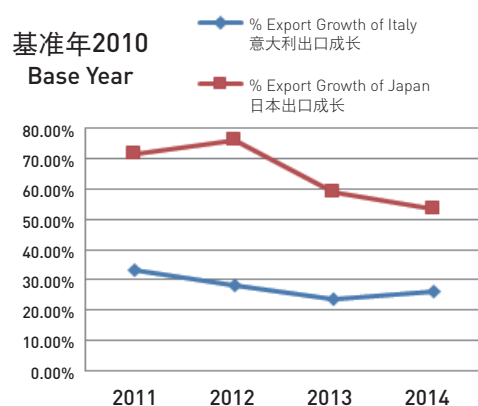
Germany 德国



USA 美国



Italy/Japan 意大利/日本



义大利 / 日本

义大利2014年出口值为19.9亿美元，是全球第2大出口国。虽然2012年其在全球市占比下降1%，但2014年则比2012年又增加了0.6%。

日本在扣件机械领域名列第3大出口国，其2014年出口值约为19.6亿美元。

义日两国在前几大出口国间争取第2位的竞争令人相当感兴趣。日本机械制造商出口值在2011年超越义大利制造商，并在2012年的全球市占比因为机械品质好且价格高的因素比义大利的市占比还多出3%，使义大利让出第2位的宝座。

墨西哥 / 泰国 / 俄罗斯

墨西哥2014年名列第3大出口国，出口值达到8.5亿美元。泰国名列第4大出口国，出口值为8.3亿美元，俄罗斯则名列第5大出口国，出口值为7亿美元，彼此互为竞争对手。

统计显示泰国对扣件机械可能是个好市场。如果其在2012~2013年间没有经历内部的政治动荡，可能可以名列全球第3大市场。

根据墨西哥和俄罗斯所显示的市占率，他们也在持续地(虽然很慢)扩大自身市场。

结语及台湾的状况

统计显示台湾也在前几大出口国之列。其在全球名列第6大扣件机械出口国，2014年出口值为8.425亿美元。不过台湾对机械制造商来说可能不会是个绝佳市场，因为这类机械类型只有0.4%的比例是由台湾扣件制造厂商所购买。

统计显示虽然台湾的市占率维持一定比率，但其在2011~2014年间的市值是下滑的。

若台湾想要在此领域取得成长，建议采取「重点策略」，这又代表什么？

台湾扣件机械制造商制造许多产品。有一些生产简易便宜的机械，另外有些则生产高技术精密机械。因此若买家想要买高技术精密机械，一般来说倾向选择德义等西方国家。另一方面，若买家想买的是简易便宜的机械，一般来说则倾向找中国厂商。或者，如果厂

Japan日本	2010	2011	2012	2013	2014
Export Value 出口值	\$1,394,863	\$2,390,994	\$2,501,300	\$2,071,801	\$1,959,872
Growth Rate 成长率	-	71.4%	4.6%	-17.2%	-5.4%
% of the Market Share 全球市占比	11.5%	14.8%	15.0%	13.1%	12.6%

Importers 进口国	2010	2011	2012	2013	2014
Mexico 墨西哥	\$447,067	\$605,845	\$633,933	\$858,168	\$849,214
Growth Rate 成长率	-	35.5%	4.6%	35.4%	-1.0%
% of the Market Share 全球市占比	3.6%	3.7%	3.7%	5.4%	5.6%
Thailand 泰国	\$535,816	\$781,771	\$1,224,112	\$972,724	\$830,425
Growth Rate 成长率	-	45.9%	56.6%	-20.5%	-14.6%
% of the Market Share 全球市占比	4.3%	4.7%	7.1%	6.1%	5.5%
Russia 俄罗斯	\$465,087	\$601,417	\$734,165	\$721,682	\$701,621
Growth Rate 成长率	-	29.3%	22.1%	-1.7%	-2.8%
% of the Market Share 全球市占比	3.7%	3.6%	4.3%	4.5%	4.6%

Mexico/ Thailand /Russia

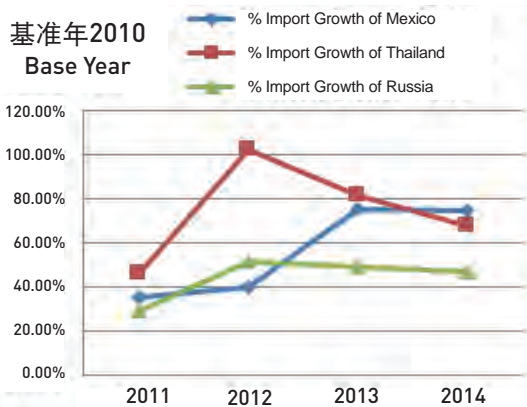
Mexico as the 3rd largest importer with a 850 million USD market value, Thailand as the 4th largest importer with a 830 million USD market value, and Russia as the 5th largest importer with a 700 million USD market values are competitors to each other.

Statistics show that Thailand could be a good market and it could be ranked the 3rd largest market in the world if they did not suffer the internal political problems during 2012-2013.

Based on the market shares of Mexico and Russia, they were able to continuously (though slowly) expand their market.

Last Word and Taiwan's Situation

Statistics show that Taiwan was in the top exporters list and it was the 6th largest exporter of fastener machines in the world with an 842.5 million USD export value. However, Taiwan might not be a good market for fastener machine producers, as only 0.4% of this type of machines were purchased by Taiwanese fastener producers.



Statistics show that although Taiwan kept the percentage of its market share, its market value dropped from 2011 to 2014.

If Taiwan wants to grow in this section, choosing a “focus strategy” is highly recommended. What does it mean?

Taiwanese fastener making machine producers manufacture a wide range of products. Some of them produce cheap and simple machines and some others are producers of high-tech and precision machines. So when

buyers want to buy high-tech and precision machines, normally they will choose companies from Western countries such as Germany or Italy. On the other hand, if buyers want to buy cheap machines, they normally will choose companies from China! Or, if buyers want to buy machines that are neither too precise nor too expensive, they will choose Japanese manufacturers.

So, if Taiwanese producers choose the focus strategy, they also will label themselves with an adjective and this label will help buyers choose Taiwanese companies easier. □

Taiwan 台湾	2010	2011	2012	2013	2014
Export Value 出口值	\$786,665	\$916,432	\$894,308	\$870,364	\$842,488
Growth Rate 成长率	-	16.5%	-2.4%	-2.7%	-3.2%
% of the Market Share 全球市占比	6.5%	5.7%	5.4%	5.5%	5.4%
Import Value 进口值	63,278	78,378	64,803	51,918	63,067
Growth Rate 成长率	-	23.9%	-17.3%	-19.9%	21.5%
% of the Market Share 全球市占比	0.51%	0.47%	0.38%	0.33%	0.41%

商想要找技术不要过高但也不太便宜的产品，则会选择日本制造商。

因此，若台湾制造商选择重点策略，就可以替自身塑造出某种特定的形象标签，这也有助买家更容易会选择台湾厂商进行采购。

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