

Statistics and Analysis of Brazilian Fastener Import Origins in 2014

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Brazilian Ministry of Development, Industry, and Foreign Trade (MDIC) released in the beginning of 2015 the full-year report of Brazilian goods trade for 2014. Statistics of fasteners within HS code 7318 reveal that the primary fastener import origins of Brazil were China, EU, Taiwan, Japan, NAFTA (USA/Canada/Mexico), South Korea, Switzerland, Thailand, Turkey, Philippines, and Australia. The total fastener import value from these 11 origins in 2014 reached US\$ 450,385,034, down 10.50% from US\$ 503,273,047 in 2013. If calculated by weight, the total fastener import volume from these origins dropped by 12.73% from 93,892,817 KG in 2013 to 81,938,987 KG in 2014 (See table on p144). Considering the statistics as a whole, except for the positive growth in certain fastener items imported from Taiwan, Turkey, Philippines, and Australia, all the other data reveal a slip both in value and weight.

Brazil imported fasteners mainly from China, the EU, Taiwan, Japan, NAFTA, and South Korea. In terms of import volume, up to 96.7% of Brazil's fastener imports in 2014 were from these countries/regions, which even climbed to 97.2% in 2013. Such a result reveals high dependence of Brazil on these countries for its fastener demand.

China (Incl. Hong Kong and Macau)

In 2014, Brazil imported 22,195,233 KG of iron and steel screws, bolts, and pins (HS Code 73181500) from China, a 20.85% decline from 2013's 28,041,093 KG. If calculated by value, the figure dropped by 20.17% from US\$ 83,563,705 in 2013 to US\$ 66,709,616 in 2014. China drags other countries behind by Brazil's fastener import volume. However, China usually produces standard parts and its technical level of fastener production is not as high as in Europe, USA, or Japan. Hence, if calculated by value, the EU is the no. 1 origin of Brazil's fastener import.

The EU

US\$ 153,165,466 of iron and steel screws, bolts, and pins (HS Code 73181500) were imported from the EU to Brazil in 2014, which shows a 14.16% decline from US\$ 178,435,638 in the corresponding period in 2013. However, this result still greatly outpaced the records of other countries. If calculated by weight, the volume Brazil imported from the EU during 2013-2014 was close to that of Brazil imported from China in the same period.

Taiwan

Taiwan ranked the 3rd place in Brazil's fastener import origins, and fasteners exported from Taiwan to Brazil were mainly iron and steel drilling screws (HS Code 73181400), iron and steel screws, bolts, and pins (HS Code 73181500), and iron and steel nuts (HS Code 73181600). In 2014, Brazil

巴西主要扣件进口来源统计及分析

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巴西外贸、产业暨发展部(MDIC)2015年初公布2014年巴西各类产品交易概况统计。针对海关编码7318的扣件项目调查显示,巴西主要扣件进口来源以中国、欧盟、台湾、日本、北美自由贸易区(美国、加拿大和墨西哥)、南韩、瑞士、泰国、土耳其、菲律宾及澳大利亚为大宗。上述11大进口来源在2014年的进口总额达到450,385,034美元,比2013年的503,273,047美元下滑10.50%。若以重量来计算,上述进口来源在2014年的进口总量达到81,938,987公斤,比2013年的93,892,817公斤下滑12.73%(见144页)。整体来看,除了台湾、土耳其、菲律宾和澳大利亚在特定产品品项显示正向发展外,其余扣件项目不管在进口值和进口重量上大多呈现下滑趋势。

巴西主要扣件进口来源以中国、欧盟、台湾、日本、北美自由贸易区和南韩为主。以重量来看,巴西在2014年有96.7%的扣件都来自这些国家或区域。若以2013年的数据来看,更高达97.2%。显示巴西在扣件需求上,对这些国家区域的倚赖程度相当高。

中国大陆(含港澳)

2014年巴西自中国大陆(含港澳)共进口22,195,233公斤的钢铁螺丝、螺栓和销(海关编码73181500)比2013年的28,041,093公斤下降20.85%。以金额算,则从2013年的83,563,705美元下降20.17%来到66,709,616美元。中国大陆在重量上将其他国家抛诸脑后,但由于生产扣件多为一般件,技术水平不如欧美日等已开发国家厂商高,因此若以金额来看,欧盟在巴西进口扣件上仍独占鳌头。

imported 14,363,442 KG (a drop from 14,866,540 KG in 2013) of these three items from Taiwan. If calculated by value, in 2014 Brazil imported US\$ 44,824,671 of fasteners from Taiwan, a slight increase over 2013. Notably there was a surge in the import value of iron and steel nuts (+40.93%) as well as a small amount of increase in weight (+8.25%), which might resulted from Taiwanese nut manufacturers' eagerness to increase the added value of products in recent years or might have been influenced by Brazil's growing demand for automotive nuts. (According to a report from OICA, registrations and sales of new vehicles in Brazil during 2005 and 2012 continued to rise and the sales in Brazil these years outpaced those of other Latin American countries).

欧盟

巴西2014年自欧盟区进口153,165,466美元的钢铁螺丝、螺栓和销(海关编码73181500),与2013年同期纪录178,435,638美元衰退14.16%,但仍大幅超越其他国家。若以重量来看,巴西在2013年和2014年自欧盟和中国大陆进口的扣件重量则相当接近。

台湾

台湾在巴西扣件进口来源居于第三位,主要品项为钢铁自攻螺丝(海关编码73181400)、钢铁螺丝、螺栓和销(海关编码73181500)和钢铁螺帽(海关编码73181600)。2014年这三种品项进口至巴西的重量达14,363,442公斤(与2013年的14,866,540公斤相比同样呈现下降趋势)。若以金额计算,2014年巴西自台湾进口44,824,671美元,比2013年同期略为上升。值得注意的是,巴西自台湾进口的钢铁螺帽若以进口额来看大幅上升40.93%,以重量来看也小幅上升8.25%,这可能与近年来台湾螺帽厂商积极寻求产品高值化的趋势有关,也可能受到巴西近几年对汽车螺帽需求增加影响(根据国际汽车制造商协会统计报告显示,巴西新车销售和挂牌率自2005~2012年期间持续上升,销售量居中南美洲国家之冠。)

日本

巴西主要自日本进口钢铁螺丝、螺栓和销(海关编码73181500)和钢铁螺帽(海关编码73181600)。2014年共进口6,695,881公斤钢铁螺丝、螺栓和销(以金额算达50,144,033美元)和2,003,023公斤钢铁螺帽(以金额算达20,830,736美元)。出口至巴西规模约为台湾的3/5。与2013年同期

Japan

Fasteners Brazil imported from Japan were mainly iron and steel screws, bolts, and pins (within HS Code 73181500) and iron and steel nuts (HS Code 73181600). 6,695,881 KG of iron and steel screws, bolts, and pins (in US\$ 50,144,033) and 2,003,023 KG of iron and steel nuts (in US\$ 20,830,736) were imported from Japan to Brazil in 2014. The scale of Japan's fastener exports to Brazil was roughly 3/5 of Taiwan's fastener exports to the same destination. Compared with the corresponding period of 2013, the range of decline in both the value and weight Japan exported to Brazil was 8.68-14.97%, quite similar to the situations of the EU and South Korea.



NAFTA

NAFTA is composed of USA, Canada, and Mexico. In 2014, Brazil imported 7,756,608 KG of iron and steel screws, bolts, and pins (HS Code 73181500) from this region, a minor drop of 1.90% from 2013's 7,907,008 KG. However, if calculated by value, in the same year Brazil imported US\$ 74,591,801 of fasteners from that region, up 2.35% from the same period of 2013. The figures for Brazil's fastener imports from this region were close to those of Japan ranked the 4th place.

South Korea

In terms of the value or weight for Brazil's fastener imports from South Korea, it shows a long way for South Korea to compete with other countries or regions in the lead. Nevertheless, it still defeated Switzerland, Thailand, Turkey, Philippines, and Australia by substantial margins. Brazil imported 4,220,020 KG of iron and steel screws, bolts, and pins (HS Code 73181500) from South Korea in 2014, slipping 13.30% from 4,867,119 KG of 2013. If calculated by value, it dropped by 10.96% from US\$ 22,065,368 in 2013 to US\$ 19,646,795 in 2014. The volume Brazil imported from South Korea was about 4 times that figure from Switzerland and was 3 times more if calculated by value.

Switzerland

Switzerland is not a member of the EU. A great number of leading fastener manufacturers and distributors have settled in that country. The value and weight for Brazil's fastener imports from Switzerland were quite similar to those from Thailand. In 2014, Brazil imported 1,069,056 KG of iron and steel screws, bolts, and pins (HS Code 73181500) from Switzerland, down 16.84% over the year 2013. If calculated by value, the import from this country reached US\$7,786,594, down 10.34% from the same period of 2013.

Thailand

Fastener production in Thailand mostly focuses on standard parts, which basically do not have high added value. In 2014, Brazil imported 1,034,309 KG of iron and steel screws, bolts, and pins (HS Code 73181500) from Thailand, a slight growth over the year 2013 (+2.8%). If calculated by value, the year-on-year ratio would be minus 11.26%.

Turkey

Brazil mainly imported iron and steel screws, bolts, and pins (HS Code 73181500) and iron and steel washers (HS Code 73182200) from Turkey. The total weight of fasteners exported from Turkey to Brazil amounted to roughly 1/3 of that volume exported from Switzerland or Thailand. Although the total value or weight of Brazil's fastener imports from Turkey in 2014 represented only a small proportion among the other competitors, there was still a 30-40% increase in value and weight.

Recap

According to Brazilian Fastener Association, approximately 300 fastener companies are located in the state of São Paulo and most of them operate on a rather small business scale. As a result, most of the fastener demands in the country have to be satisfied via imports from large fastener manufacturing heartlands such as China, the EU, Taiwan, etc. Although there seems to be a great demand for fasteners in the country, Brazil's fastener procurements from other countries in 2014 were in recessions. Such an outcome might be relevant to the stringent regulations Brazilian government put into force in recent years. The market scale of Brazil in Latin America definitely cannot be neglected. Provided that fastener manufacturers try to fully understand regulations and establish smooth cooperative networks with local importers/exporter, it won't be difficult for them to tap into the country.

相比,日本不管在进口额与重量方面下滑约8.68~14.97%。下滑幅度与欧盟和南韩差不多。

北美自由贸易区

该区由美国、加拿大和墨西哥组成。2014年巴西自该区进口7,756,608公斤钢铁螺丝、螺栓和销(海关编码73181500),基本上与2013年同期的7,907,008公斤只小幅下降1.90%。不过若以金额计算,2014年巴西自该区进口74,591,801美元,比2013年同期却上升2.35%。巴西自该区进口的扣件产品在金额和重量上与排名第四位的日本相当接近。

南韩

南韩在巴西扣件进口金额或重量上虽然与前述国家和地区仍有一段差距,但若与瑞士、泰国、土耳其、菲律宾或澳大利亚相较则呈现大幅领先地位。2014年巴西自南韩进口4,220,020公斤钢铁螺丝、螺栓和销(海关编码73181500),比2013年同期的4,867,119公斤下滑13.30%。以金额算,则从2013年的22,065,368美元下滑10.96%至19,646,795美元。进口重量约为瑞士的4倍,若以金额算则为瑞士的3倍。

瑞士

瑞士虽然非欧盟成员国,却有许多具市场领导地位的扣件制造商和批发商设点。巴西自瑞士进口的扣件金额和重量与泰国相当类似。2014年巴西自瑞士进口1,069,056公斤钢铁螺丝、螺栓和销(海关编码73181500),比2013年同期下滑16.84%。以金额计算,2014共进口7,786,594美元,比2013年同期下滑10.34%。

泰国

泰国在产品品项上同样以标准品为主,产品高值化程度不高。2014年巴西自泰国进口1,034,309公斤钢铁螺丝、螺栓和销(海关编码73181500),比2013年略为上升2.8%。尽管如此,若以金额计算,年比大幅下滑11.26%。

土耳其

巴西主要自土耳其进口钢铁螺丝、螺栓和销(海关编码73181500)和钢铁垫片(海关编码73182200)。出口至巴西的重量约为瑞士或泰国的1/3。巴西2014年自土耳其进口钢铁螺丝、螺栓和销的部分,尽管量不多,但在金额和重量上都大幅提升约30~40%。

结论

据巴西扣件协会资料显示,巴西螺丝生产重镇圣保罗仅有约300多家螺丝相关厂商,扣件产业规模较小,因此多数扣件需求仍须仰赖中国、欧盟、台湾等扣件生产国。尽管扣件需求庞大,但从巴西扣件采购金额和重量上在2014年多数呈现萎缩现象来看,应该与近几年巴西政府对产品输入巴西的法规日趋严格有关。但若以市场规模来看,巴西在中南美洲的领导地位仍不可小觑,对于扣件生产商来说,只要充分了解和熟悉法规并与当地进出口商建立良好的合作关系,打入该国市场并非难事。

2014巴西主要扣件进口来源

Brazilian Fastener Import from Primary Origins in 2014

Rank 排名 (2014 进口量)	Country/ Region 国家/区域	HS Code 海关编 码	Description 品项	2014年		2013年		YoY Ratio (2014/2013) 前年比	
				Value (US\$ FOB) 进口值(美元 离岸价)	Weight (KG) 进口重量 (公斤)	Value (US\$ FOB) 进口值 美元离岸价)	Weight (KG) 进口重量 (公斤)	% in Value 以金额算	% in KG 以公斤算
1	China (Incl. Hong Kong and Macau 中国大陆 (含港澳)	73181500	Iron and steel screws, bolts, pins 钢铁螺丝、螺栓及销	66,709,616	22,195,233	83,563,705	28,041,093	-20.17	-20.85
2	EU 欧盟	73181500	Iron and steel screws, bolts, pins 钢铁螺丝、螺栓及销	153,165,466	22,159,175	178,435,638	25,781,381	-14.16	-14.05
3	Taiwan 台湾	73181400	Iron and steel drilling screws 钢铁自钻螺丝	11,425,474	5,005,627	13,325,261	5,801,772	-14.26	-13.72
		73181500	Iron and steel screws, bolts, pins 钢铁螺丝、螺栓及销	20,573,487	6,814,876	20,613,967	6,715,586	-0.20	1.48
		73181600	Iron and steel nuts 钢铁螺帽	12,825,710	2,542,939	9,100,571	2,349,182	40.93	8.25
4	Japan 日本	73181500	Iron and steel screws, bolts, pins 钢铁螺丝、螺栓及销	50,144,033	6,695,881	58,283,079	7,450,960	-13.96	-10.13
		73181600	Iron and steel nuts 钢铁螺帽	20,830,736	2,003,023	22,811,099	2,355,570	-8.68	-14.97
5	NAFTA (USA, Canada, Mexico) 北美自由贸易区 (美/加/墨)	73181500	Iron and steel screws, bolts, pins 钢铁螺丝、螺栓及销	74,591,801	7,756,608	72,880,501	7,907,008	2.35	-1.90
6	South Korea 南韩	73181500	Iron and steel screws, bolts, pins 钢铁螺丝、螺栓及销	19,646,795	4,220,020	22,065,368	4,867,119	-10.96	-13.30
7	Switzerland 瑞士	73181500	Iron and steel screws, bolts, pins 钢铁螺丝、螺栓及销	7,786,594	1,069,056	8,684,872	1,285,604	-10.34	-16.84
8	Thailand 泰国	73181500	Iron and steel screws, bolts, pins 钢铁螺丝、螺栓及销	7,645,993	1,034,309	8,615,736	1,006,161	-11.26	2.80
9	Turkey 土耳其	73181500	Iron and steel screws, bolts, pins 钢铁螺丝、螺栓及销	1,912,739	319,946	1,356,048	241,389	41.05	32.54
		73182200	Iron and steel washers 钢铁垫圈	2,476,751	44,690	2,975,322	45,474	-16.76	-1.72
10	Philippines 菲律宾	73181500	Iron and steel screws, bolts, pins 钢铁螺丝、螺栓及销	308,266	72,690	242,419	25,424	27.16	185.91
11	Australia 澳大利亚	73181500	Iron and steel screws, bolts, pins 钢铁螺丝、螺栓及销	341,573	4,914	319,461	19,094	6.92	-74.26
Total 总计				450,385,034	81,938,987	503,273,047	93,892,817	-10.50	-12.73