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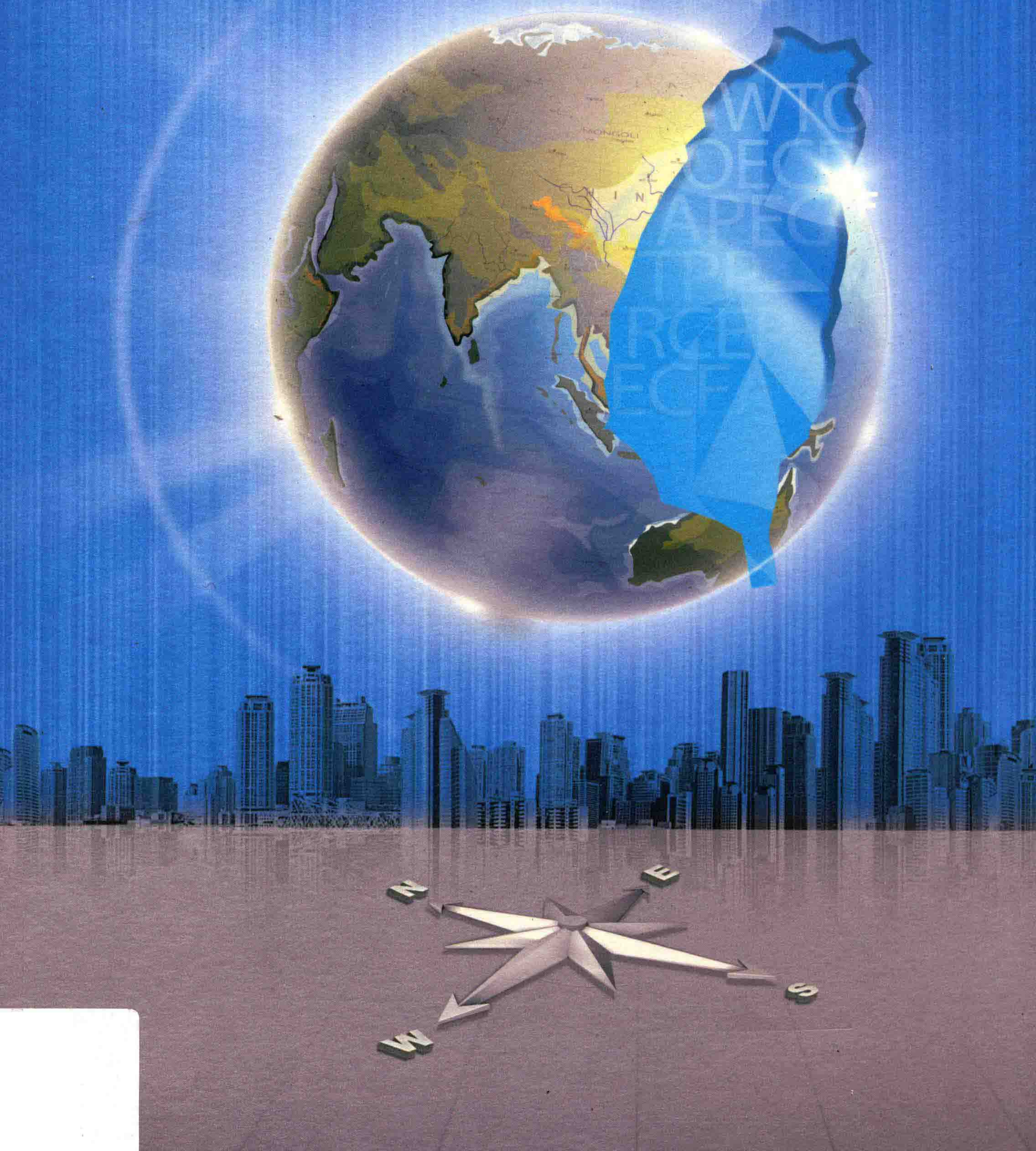
2015-2016

THE DEVELOPMENT OF INTERNATIONAL TRADE IN THE REPUBLIC OF CHINA (TAIWAN)

中華民國 國際貿易發展概況



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序言 Preface

我國係以出口為導向的海島型經濟體，出口為我國經濟成長的重要支柱。近年來我國出口成長率有減緩現象，除受全球性不景氣因素衝擊外，亦受到我國出口產品及地區集中、加入區域經濟整合進度相對緩慢等影響。2014 年出口額 3137.0 億美元，雖創史上新高，惟僅成長 2.7%；2015 年全球出口貿易普遍疲弱，美國、日本、韓國等主要國家出口多較上年同期衰減，1-10 月我國出口亦下滑 9.6%。

為促進出口市場與產品多元化，貿易局兼顧歐美日市場、新興市場及中國大陸三大市場，依據不同市場特性，擬具適地化出口拓銷策略，以建構廠商出口能量。特別因應 2015 年出口下滑，除強化既有作法外，將再針對我主要出口衰退市場、衰退且拓銷可著力產品及出口潛力產品，持續加碼拓銷措施，並加強積極性融資協助及出口貸款。

由於「跨太平洋夥伴協定（TPP）」及「區域全面經濟夥伴協定（RCEP）」成員為我國主要市場及投資地區，為加速推動參與區域經濟整合，融入全球經貿體系，2014 年政府在完成總盤點工作後，各部會刻正檢視、歸納進一步處理的問題，並研議產業因應調整方案，對外也赴訪主要 TPP 及 RCEP 成員國，以及運用 APEC 及雙邊場域，爭取支持我加入；另為強化與我國主要貿易夥伴，如美國、歐盟、日本之雙邊經貿合作交流，透過「堆積木」的方式，為洽簽自由貿易協定奠定基礎；為協助業者拓展中國大陸市場，政府將積極推動貨品貿易及爭端解決等 ECFA 後續協議協商，並辦理各項溝通工作，爭取國會及各界支持。

展望未來，貿易局已擬定貿易路徑圖，將持續推動下列工作主軸：（一）提升經貿關係：1. 參與多邊貿易談判；2. 推動區域經濟整合或經濟合作協定，以推動加入 TPP 與 RCEP 為主要工作；3. 促進與主要貿易夥伴雙邊經貿合作關係，包括透過雙邊經貿對話機制，解決我商面臨之貿易障礙，積極與重要貿易夥伴洽簽自由貿易協定，加速完成兩岸經濟合作協議之後續協商。（二）強化貿易推廣：以拉進來、走出去、聚網絡、補能量、塑形象等具體作法，以持續強化我對外貿易活力，再創經貿高峰。

由於國際貿易情勢變化快速，為使各界瞭解我國貿易政策，以及國內外經貿發展最新情勢，特編印「中華民國國際貿易發展概況」，並登錄上網（網址：http://www.trade.gov.tw），藉供參考。本概況內容如有未盡周延之處，尚祈各界不吝指正。

經濟部國際貿易局
局長 楊吟妮 謹誌
2015 年 11 月

As an island with an export oriented economy, exportation is the backbone of Taiwan's economic growth. The reasons for the slump in exports from Taiwan in recent years have been attributed primarily to the impact of the worldwide recession, the over concentration of Taiwan's exported goods in given areas, and the relatively slow progress of regional economic integration. In 2014, Taiwan's total export value amounted to US$313.75 billion. Although this was a record high, the growth rate was only 2.7%. In 2015, global export trade was generally weak with exports from the US, Japan, Korea and other important exporting countries diminishing compared to a year earlier. Taiwan's exportation dropped 9.6% from January to October, 2015.

In order to promote export markets and product diversification, the Bureau of Foreign Trade (BOFT) has been taking into consideration the three main economic markets (i.e. the western and Japan markets, the emerging markets, and the Mainland China market) and, based on their different market characteristics, drafting appropriate export expansion strategies and building the export capacity of Taiwanese manufacturers. In particular response to the 2015 plunge in exports, Taiwan is not only enhancing existing practices but also continuing marked-up expansion measures by re-targeting Taiwan's major export markets that declined, focusing on those products that may decline or expand as well as potential products for export, and strengthening its initiative on financing assistance and export loans.

As the TPP and RCEP members are Taiwan's main market and investment areas, Taiwan is accelerating its impetus to participate in regional economic integration and merge with the global economic and trade system. Since the government completed its overall stocktaking work in 2014, each ministry has been reviewing and deducing issues for further treatment and will deliberate on the responses from industries toward adjustment programs. Overseas visits to TPP and RCEP members will be made, and APEC and bilateral relations will be utilized to gain support for Taiwan's inclusion. Moreover, to strengthen bilateral trade cooperation and interaction between Taiwan and its main trading partners (e.g. the U.S., EU, and Japan), the principal way is the "building block" approach in order to establish a foundation for signing free trade agreements. To assist the expansion of Taiwanese companies into the Mainland China market, the government will actively promote consultations on ECFA follow-up agreements for trade in goods and dispute settlement, as well as conduct all communication work so as to gain Cabinet and community support.

Looking to the future, the BOFT has already formulated a trade road map and will continue to undertake the following tasks: First, to upgrade economic and trade relations by 1) participating in multilateral trade talks; 2) promoting favorable conditions that enable Taiwan to engage in regional economic integration or economic cooperation agreements that will promote the primary task of joining the TPP and RCEP; and 3) promoting all bilateral economic and trade relations with our main trading partners, such as taking advantage of bilateral economic and trade dialogue mechanisms, resolving trade barriers we face, signing FTAs with our main trading partners, and accelerating completion of follow-up consultations to ECFA. Second, to enhance trade expansion by "pulling in" foreign companies to Taiwan for procurement, "going out" to attend trade exhibitions abroad, "gathering networks" to set up business centers for deployment, "supplementing capacity" to improve personnel, funding and information, and "shaping image" to upgrade Taiwan's industrial image and brand awareness, thereby creating economic and trade pinnacles anew.

In view of the rapidly changing international trade environment, the BOFT has compiled this handbook for the public to keep abreast of Taiwan's trade policies and latest economic developments. It is also available on line for your reference at http://www.trade.gov.tw. We welcome any comments or suggestions you may have.

Enjoy reading.

Yang Jen-ni

Director General, Bureau of Foreign Trade
Ministry of Economic Affairs
November 2015

外貿情勢回顧
Foreign Trade in Retrospect

一、國際經濟情勢

2014 年全球經濟總體延續 2013 年的緩慢復甦型態，經濟成長普遍低於預期，並且各經濟體的成長力道分歧加劇。根據環球透視機構 (Global Insight, GI) 2015 年 10 月 15 日的資料顯示，2014 年全球經濟成長率為 2.7%，與 2013 年的 2.5% 相比並無明顯提升，維持持平狀態。主因為居全球成長動力來源的新興市場表現不如過往，致使整體經濟成長趨緩，即使先進國家如美國及歐元區經濟擺脫衰退，但因其占全球 GDP 之比重已下降，僅能抵銷新興經濟體減速的不利影響，無法進一步拉抬經濟增速。另貿易方面，受國際油價及原物料自 2014 年 6 月以後大幅降低，2014 年全球出進口僅分別成長 1.1% 及 1.0%。

I. Reflecting on Foreign Trade

In 2014, the overall global economy continued to recover slowly based on 2013 patterns. The economic growth was generally lower than expected, while differences in the growth efficacy of economies intensified. According to Global Insight data published on October 15, 2015, the global economic growth of 2.7% in 2014 compared with the 2.5% in 2013 showed no significant increase and the situation remained flat. Given that emerging markets are the main source of growth momentum in the world, their underperformance, compared to the past, caused the slowdown in overall economic growth and the sluggishness of advanced countries such as the U.S. and the euro zone economy to break out of recession. However, because the proportion of global GDP has declined, only to be offset by the adverse effects of the slowdown in emerging economies, economic growth cannot be further lifted. Regarding trade, international oil prices and raw materials have significantly decreased since June 2014 causing global exports and imports to grow only 1.1% and 1.0%, respectively, in 2014.

Looking ahead to 2015, the global economy is expected to remain stable under the impetus of the economic recovery in advanced countries. Of these

表1　2013-2015年世界主要經濟體實質GDP及全球貿易成長率
Table 1　Real GDP and trade growth of the world's major economies in 2013-2015

單位：%
unit：%

項目 Countries (or Areas)	2013 年	2014 年	2015 年
實質 GDP 成長率 Real GDP growth (2005 = 100)			
全世界 Global	2.5	2.7	2.5
美國 United States	1.5	2.4	2.5
歐盟 European Union	0.3	1.4	1.9
亞太區（不含日本）Asia-Pacific Excluding Japan	6.0	6.0	5.4
中華民國 R.O.C.（Taiwan）	2.2	3.8	1.9
中國大陸 Mainland China	7.7	7.3	6.5
日本 Japan	1.5	-0.1	0.5
新興市場 Emerging markets	4.9	4.4	3.6
貿易成長率 World—Merchandise trade growth			
出口 Export	2.0	1.1	-11.4
進口 Import	1.7	1.0	-11.4

資料來源 Sources：Global Insight Inc., World Overview, Oct.15, 2015

展望2015年，全球經濟在先進國家經濟復甦帶動下，可望維持穩定。其中，歐盟與日本成長力道明顯優於上年，美國經濟續呈復甦，中國大陸經濟則明顯放緩。惟強勢美元可能造成主要貨幣競相貶值，加劇全球外匯市場波動，另新興經濟體先後產生不確定性因素疑慮下，致成長幅度均較2014年趨緩，GI預期2015全球經濟成長率僅為2.5%，另出、進口將分別衰退11.4%及11.4%。

二、我國貿易表現

2014年我國對外貿易總額為5,877.1億美元，較2013年成長2.2%，其中出口3,137.0億美元，成長2.7%，進口2,740.2億美元，成長1.5%，出超為396.7億美元，成長11.6%。觀察我國2014年各月出、進口情況，其中出口僅2月與12月分別負成長5.4%與2.9%；而進口成長部分各月漲跌互見，為造成整年進口呈現微幅成長的主因。

展望2015年，預期全球經濟復甦力道仍嫌薄弱，且我主力出口產品如電子、面板、資訊通信及石化等產品，因國際市場競爭仍劇，約制我出口增勢。2015年8月行政院主計總處預估2015年我國出、進口分別下滑7.10%、12.76%，顯示我國貿易表現已受一定程度影響。

countries, the growth efficacy of the EU and Japan is certain to surpass that of last year, the economy of the US will continue to recover, while there will clearly be a slowdown in Mainland China. However, a strong dollar could cause competitive devaluations of major currencies and exacerbate volatility in global foreign exchange markets. In addition, a succession of doubts generated by uncertainty in the emerging economies could cause a downturn in growth compared to 2014. GI projects the global economy to grow 2.5% in 2015, while exports and imports will decline by 11.4% and 11.4%, respectively.

II. Taiwan's Trade Performance

In 2014, Taiwan's total foreign trade amounted to US$587.71 billion, an increase of 2.2% over the previous year. Of this, exports accounted for US$313.70 billion, increasing 2.7%, and imports comprised US$274.02 billion, up by 1.5%, representing an overall surplus of US$39.67 billion for a growth of 11.6% over the previous year. When examining 2014 trade performance, the months of February and December registered the worst performances with growth rates of -5.4% and -2.9%, respectively. Import growth showed both increases and decreases, resulting in a slight upswing of imports.

Looking to 2015, we expect a weak rebound in the global economy, while growth of Taiwan's main exports, such as electronics, panels, information and communication products, and petrochemical goods, will be constrained due to fierce competition in the international market. According to Directorate-General of Budget, Accounting, and Statistics (DGBAS) forecasts released in August 2015, Taiwan's exports and imports in 2015 will decline 7.10% and 12.76%, respectively, meaning that its overall trade performance will continue to be affected.

三、主要出口貨品

2014 年我國主要出口貨品中，第 1 大項為電子產品，出口達 999.6 億美元，較 2013 年成長 13.4%，占出口比重 31.9%；第 2 大項基本金屬及其製品為 289.5 億美元，增加 4.8%，占出口比重 9.2%；第 3 大項為塑橡膠製品，出口 241.0 億美元，減少 2.8%，占出口比重 7.7%; 第 4 大項為化學品，出口 216.6 億美元，成長 1.8%，占出口比重 6.9%；機械出口 208.8 億美元，成長 5.7%，比重 6.7%，為我第五大出口產品（見圖 1）。整體而言，我出口主要係受惠於智慧型手機與新興穿戴產品需求增強，引發相關零組件採購增加，帶動電子產品出口亮麗表現。

2014 年我國第 1 大進口貨品為礦產品，進口金額為 693.0 億美元，

III. Major Exports

Among Taiwan's major export goods in 2014, electronic products, being the largest category, accounted for 31.9% of the total exports at US$99.96 billion for an increase of 13.4% over the previous year. Basic metals and articles thereof ranked second, accounting for 9.2% of the total, and increased 4.8% at US$28.95 billion. Ranking third were plastics and rubber and articles thereof, which decreased by 2.8% to US$24.10 billion and accounted for 7.7% of the total. Chemical products ranked fourth, increasing by 1.8% with a total value of US$21.66 billion and accounting for 6.9% of the total. The fifth, machinery, increased by 5.7% at US$20.88 billion and accounted for 6.7% of total exports (see Figure 1). Overall, the performance of our major exports benefitted from the gradual global economic recovery and also from the increase in demand of smart phones and wearable devices. All of these caused an increase in demand of parts and components, subsequently affecting our exports in a positive way.

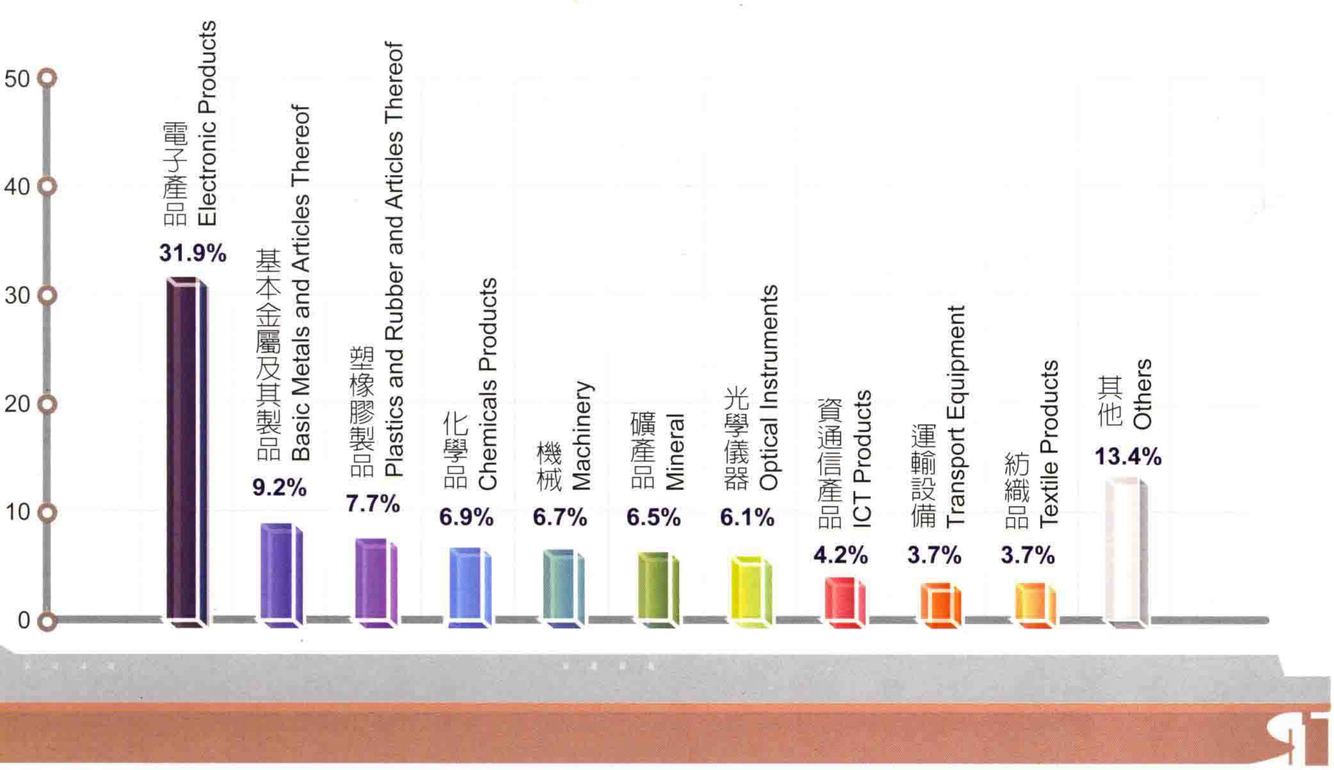

圖1　2014年我國主要出口產品結構
Figure 1　Major Exports of Taiwan in 2014

資料來源：財政部關務署
Sources: Customs Administration, Ministry of Finance

四、主要進口貨品

2014 年我國第 1 大進口貨品為礦產品，進口金額為 693.0 億美元，下滑 5.3%，占進口比重 25.3%；第 2 大項為電子產品，進口 434.2 億美元，較上年成長 6.5%，占進口比重 15.8%，第 3 大項為化學品，進口 300.0 億美元，減少 1.8%，占進口比重 10.9%；第 4 大項為基本金屬及其製品，進口 228.2 億美元，成長 5.0%，占進口比重 8.3%；第 5 大為機械，進口值為 220.6 億美元，下滑 4.4%，占進口比重 8.0%。綜觀 2014 年我國進口表現，較 2013 年微幅成長 1.5%，資本設備及消費品進口分別成長 3.3% 及 8.6%，顯示國內投資活動及國內消費動向尚屬穩健。（見圖 2）

IV. Major Imports

In 2014, minerals were Taiwan's top import, which actually decreased by 5.3% to US$69.30 billion compared to the previous year and accounted for 25.3% of the total imports. The second largest were electronic products, which increased by 6.5% to US$43.42 billion and accounted for 15.8% of the total. Chemicals ranked third, decreasing by 1.8% to US$30 billion and accounting for 10.9% of the total. Basic metals and articles thereof were the fourth largest, increasing by 5% to US$22.82 billion and accounting for 8.3% of the total. Machinery ranked fifth, declining by 4.4% to US$22.06 billion and accounting for 8% of the total. Overall, Taiwan's major imports in 2014 grew 1.5% for a slight increase over 2013. Fortunately, capital equipment and consumer products grew steadily, which shows that our domestic investment activity and economic direction are moving forward. (see Figure 2)

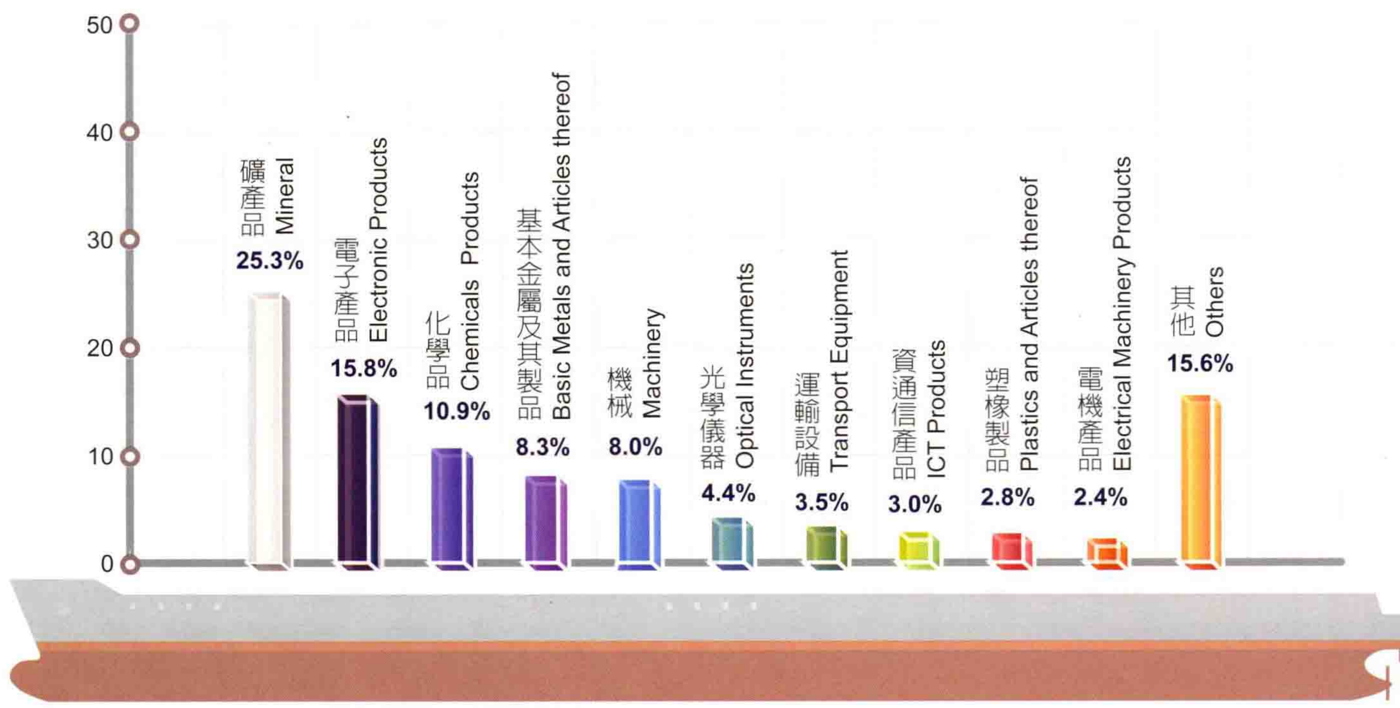

圖2　2014 年我國主要進口產品結構
Figure 2　Major Imports of Taiwan in 2014

資料來源：財政部關務署
Sources: Customs Administration, Ministry of Finance

五、主要貿易夥伴

我國主要貿易夥伴為中國大陸（含香港）、東南亞國協（10 國）、美國、日本及歐盟（28 國），這五大貿易夥伴合計占我國出口總額達八成四，占進口總額超過六成四。2014 年受中國大陸經濟成長減緩、實施進口替代政策等因素影響，我對中國大陸（含香港）出口表現，僅較 2013 年成長 2.8%，占出口比重 39.7%，中國大陸為我國第一大出口市場及最大貿易順差來源；對東協出口增加 1.3%；對美國出口擴增 7.1% 表現最佳；對日本出口成長 3.5%；對歐盟出口增加 4.9%。在進口方面，2014 年我國第一大進口來源為中國大陸（含香港），較上年大幅成長 12.4%，占我進口比重 18.1%；日本為我國第二大進口來源，較上年減少 3.4%，占進口比重 15.2%；另自東協、美國及歐盟進口分別成長 4.6%、8.8% 及 2.4%（見表 2）。

V. Major Trading Partners

Taiwan's top 2014 trading partners, were Mainland China (including Hong Kong), ASEAN (10 members), the US, Japan, and the EU (28 members). Together these 5 trading partners accounted for more than 84% of our exports and over 64% of our imports. In 2014, due to the economic slowdown in Mainland China and the implementation of its import substitution policy, Taiwan's exports to Mainland China (including Hong Kong) were impacted, growing only 2.8% over 2013 and accounting for 39.7% of the total. Mainland China remained Taiwan's largest export and import market and largest source of trade surplus; at the same time, Taiwan's exports increased 1.3% to ASEAN; expanded 7.1% to the US, grew 3.5% to Japan and rose 4.9% to the EU.

In 2014, the largest source of imports for Taiwan was Mainland China (including Hong Kong), showing a surge of 12.4% over the previous year and accounting for 18.1% of the total imports. Japan was second, decreasing by 3.4% and accounting for 15.2% of the total, followed by ASEAN, the US and EU, with growth rates of 4.6%, 8.8% and 2.4%, respectively. (see Table 2)

表2　2014年我國與主要貿易夥伴之貿易統計
Table 2　Trade with Major Trading Partners in 2014

單位：十億美元；%
Units: US$ billions; %

	金額 Amounts				占我國貿易總額 / 出口 / 進口比重（%）Share of Taiwan's Total Trade/Exports/Imports			增減比率（%）Percentage of Increase / Decrease			
	總額 Total	出口 Exports	進口 Imports	出（入）超 Trade Surplus (Deficit)	總額 Total	出口 Exports	進口 Imports	總額 Total	出口 Exports	進口 Imports	出（入）超 Trade Surplus (Deficit)
貿易總額 Total	587.7	313.7	274.0	39.7	100.0	100.0	100.0	2.2	2.7	1.5	11.6
中國大陸（含香港）Mainland China (including Hong Kong)	174.4	124.7	49.7	74.9	29.7	39.7	18.1	5.4	2.8	12.4	-2.7
東南亞國協（10 國）ASEAN (10 members)	93.6	59.5	34.1	25.4	15.9	19.0	12.4	2.5	1.3	4.6	-2.9
美國 US	62.3	34.9	27.4	7.4	10.6	11.1	10.0	7.8	7.1	8.8	1.1
日本 Japan	61.6	19.9	41.7	-21.8	10.5	6.3	15.2	-1.3	3.5	-3.4	-9.0
歐盟（28 國）EU (28 members)	50.9	26.5	24.4	2.1	8.7	8.4	8.9	3.7	4.9	2.4	48.4

註 Notes：
1. 本表數字含復出進口　The figures in this table include re-exports and re-imports.
2. 各項即期統計資料詳請參見貿易局網站　For the latest statistics, please access the BOFT website at http://www.trade.gov.tw

資料來源：財政部關務署
Sources: Customs Administration, Ministry of Finance

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