

比利時 不織布防疫物資市場與 投資商機

2021.02.05

Doris Wu

法蘭德斯區政府外貿投資局·台北商務代表

FLANDERS INVESTMENT & TRADE



Flanders
State of the Art

1. 比利時與自治行政區
2. 不織布防疫物資市場現狀
3. 比利時為歐盟市場門戶
4. 投資商機

1. Belgium
2. The Market
3. Why?
4. How?



FLANDERS INVESTMENT & TRADE

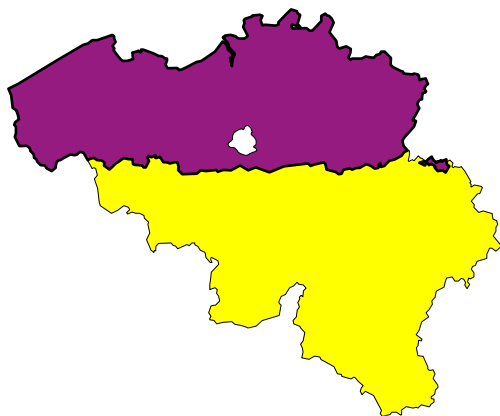


比利時印象





比利時行政結構: 聯邦政府 (Federal State)



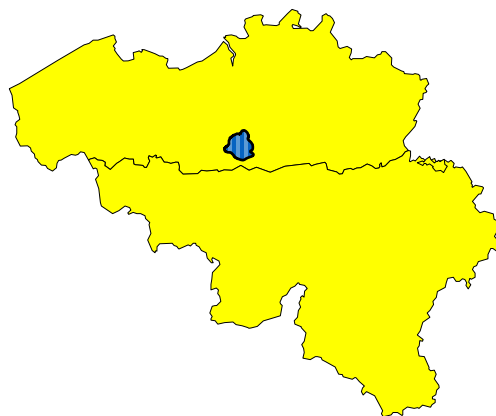
Flanders Region

(6/7/8 of Belgium)

法蘭德斯大區(荷蘭語)

佔總人口58%

佔總出口額83.1%

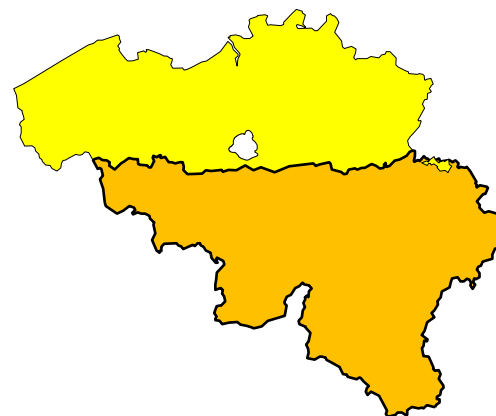


Brussels Capital

布魯塞爾大區(雙語)

佔總人口10%

佔總出口額2,3%



Walloon Region

瓦隆大區(法語)

佔總人口32%

佔總出口額14.6%

比利時多元文化與雙語



1. 比利時與自治行政區
2. 不織布防疫物資市場現狀
3. 比利時為歐盟市場門戶
4. 投資商機

1. Belgium
2. The Market
3. Why?
4. How?



FLANDERS INVESTMENT & TRADE



市場供需現況：法規

- **主管單位:** AFMPS (FAMHP: Federal Agency of Medicines and Health Products), Minister of Social Affairs and Public Health

<https://www.famhp.be/en>

比利時聯邦政府醫藥暨健康照護產品署

- 物資短缺時: 放寬條例“Alternative Test Protocol (ATP)” for surgical masks/comfort masks (但仍符合EN 14683 standard)
 - 物資已穩定: ATP 於 2021/02/01截止 (市面上銷售不符歐盟法規的口罩得銷售至2022/08/01 或已上市商品標示的有效期), 即日起新銷售Medical devices (FFP2/FFP3 masks) 得符合歐盟法規
- **一般口罩銷售通路:** Pharmacies (荷文Apotheek) 藥局, para-pharmacies 藥妝店, supermarkets 超市, and other actors (網路電商平台)。政府透過比利時郵政 (Bpost) 送達企業與民宅



市場供需現況： 驗證機構

- 比利時紡織塑化研究發展中心

www.centexbel.be

- R & D
- Testing
- Knowledge transfer
- Certifications
- Pilot platform
- Circular economy
- New business model



市場供需現況: 在地生產 創新與品質

University of Antwerp: 比利時疫情緊急時唯一生產專業FFP2/FFP2 Masks者

- Partners: Flanders Make (法蘭德斯工業自動製造研發中心), UZA (安特衛普大學附設醫院), Antwerp Design Factory, the Design Sciences Hub, Province of Antwerp, Carrefour, Cartamundi.
- Topics include Industry 4.0 , circular design, healthcare technology and social innovation
- Emergency Production Line for FFP2 & FFP3 masks: first delivery of 20,000 pieces in May, 2020.
- 10人生產線每20秒產出一FFP2口罩
- <https://www.uantwerpen.be/en/projects/mouthmasks/production-face-masks>

Spin-off company: Medimundi 公司



市場供需現況: 在地生產 創新與品質

1. Van Heurck and ECA: 年產近二億 Surgical Masks (含)

- Van Heurck: 工作服、制服製造商
- ECA: 車用內裝零配件



2. Ontex Group: 新增產線, 年產 8 千萬口罩

全球前五大個人衛生用品製造商

3. 紡織業全力投入生產公共場合個人使用

製造商名單: Creamoda 比利時流行紡織品公會



3. Eurofilters (www.catallisti.be): meltblown system for nonwovens

- 善用法蘭德斯政府轉型獎勵補助

Flemish Strategic Transformation Support Grant



CATALISTI



市場供需現況: 在地生產 創新與品質

- LIEBAERT: Eco Fabric, NanoStitch Fabrics, NANOSTITCH®
- Machine washable and reusable masks
- Filtration test EN ISO 16890-2 (2016) to have Filter efficiency at 3 Micron of 97%



市場供需現況: 在地生產 創新與品質

- **Materialise: 3D Printing/Additive Mfging**
- 以3D列印技術自動化製造Materialise Mask Fitter
- 可重複使用 使用方便
- 使進口但不合格的KN95增加防護防漏, 口罩仍可安全戴用



市場供需現況: 在地生產 創新與品質

- **Weimat Group: CNC machining, Mold-injection**
每週 60 萬 durable, reusable, sustainable LeanMask



MED Model: ATP Certified
(with FFP2 filters)

市場供需現況: 在地生產 創新與品質

- 歐洲主要PPE製造出口國之一
- 在地生產：先進紡織、衛生用品業
- 原料充裕：高端石化業與歐洲最大石化港
- 紡織和塑膠加工業機械設備製造商貿易協會 Symatex
- 生產自動化 Flanders Make
- 善用法蘭德斯政府轉型獎勵補助

- 比利時紡織業：年營業額約43億歐元(1500億台幣), 600家企業聘僱19,300名員工，90%是少於50名的小型公司
 - 工業用高科技紡織品（佔比國紡織業年營業額的42%）
 - 室內裝飾紡織品（41%）
 - 服裝紡織品（11%）: 比、法、德、義、荷、波為歐洲主要PPE供應國
 - Textile Finishing（4%）和 紗線Yarn生產（2%）。

Source: Fedustria (www.fedustria.be)

比利時紡織，木材和家具工業聯合會2019 key figures



比利時進口量 (單位: 公斤)

CN63079092 拋棄式手術用不織布物品

- single-use drapes used during surgical procedures made up of nonwovens

Source: National Bank of Belgium, processed by trade intelligence unit at Flanders investment and Trade

Data 2020: available until Oct.

Rank	Country	2018 Kg	2019 Kg	2020 Kg	% share in	% change	% change
					2020	2018 - 2019	2019 - 2020
	Totaal	1.290.004	1.096.833	685.481	100%	-14,97%	-37,50%
1	China	331.148	275.992	251.016	36,62%	-16,66%	-9,05%
2	USA	352.205	269.592	139.749	20,39%	-23,46%	-48,16%
3	France	44.27	141.67	56.505	8,24%	+220,01%	-60,12%
4	Czech Rep.	50.079	56.453	39.326	5,74%	+12,73%	-30,34%
5	Vietnam	44.152	46.705	37.006	5,40%	+5,78%	-20,77%
6	Saudi Arabia	7.404	62.73	34.132	4,98%	+747,20%	-45,59%
7	Netherlands	47.653	58.94	25.631	3,74%	+23,69%	-56,51%
8	Germany	22.052	27.599	22.284	3,25%	+25,15%	-19,26%
9	Thailand	155.144	92.155	20.781	3,03%	-40,60%	-77,45%
10	Japan	180.399	19.73	18.63	2,72%	-89,06%	-5,58%
11	United Kingdom	18.065	21.719	11.478	1,67%	+20,23%	-47,15%
12	Austria			8.713	1,27%		

比利時進口值 (單位: 千歐元)

CN63079092 拋棄式手術用不織布物品

- single-use drapes used during surgical procedures made up of nonwovens

Source: National Bank of Belgium, processed by trade intelligence unit at Flanders investment and Trade
Data 2020: available until Oct.

Rank	Country	2018 1000€	2019 1000€	2020 1000€	% share in	% change	% change
					2020	2018 - 2019	2019 - 2020
	Totaal	16.967	13.362	16.397	100%	-21,25%	+22,71%
1	China	2.46	2.269	7.716	47,06%	-7,74%	+239,98%
2	USA	4.585	4.375	2.417	14,74%	-4,58%	-44,75%
3	France	259	248	959	5,85%	-4,41%	+287,38%
4	Germany	705	1.001	909	5,54%	+42,12%	-9,22%
5	Japan	2.966	641	816	4,98%	-78,38%	+27,27%
6	Netherlands	695	589	712	4,34%	-15,13%	+20,79%
7	Saudi Arabia	82	1.084	601	3,67%	+1226,39%	-44,52%
8	Thailand	1.598	1.045	490	2,99%	-34,58%	-53,10%
9	Austria			473	2,89%		
10	UK	2.543	1.016	463	2,83%	-60,05%	-54,39%
11	Vietnam	276	296	208	1,27%	+7,10%	-29,61%
12	Czech Republic	285	359	201	1,22%	+25,78%	-44,06%

比利時進口量 (單位: 公斤)

CN56031110 - nonwovens, coated or covered, nes, of man-made filaments Poly(vinyl alcohol) non-wovens, weighing <= 25 g/m² 不織布原料

Source: National Bank of Belgium, processed by trade intelligence unit at Flanders investment and Trade
Data 2020: available until Oct.

Rank	Country	2018	2019	2020	% share in 2020	% change 2018 - 2019	% change 2019 - 2020
	Totaal	104875.24Kg	486580.42Kg	142623.05Kg	100%	+363.96%	-70.69%
1	United States	4,700	90,011	44,486	31.19%	+1815.12%	-50.58%
2	France	12,140	244	19,634	13.77%	-97.99%	+7937.60%
3	China	19,497	6,407	17,512	12.28%	-67.14%	+173.32%
4	Argentina		360,993	16,864	11.82%		-95.33%
5	Germany	6,062	11,736	14,723	10.32%	+93.61%	+25.45%
6	Ukraine	45	90	11,543	8.09%	+99.25%	+12665.59%
7	Netherlands	22,536	16,193	6,646	4.66%	-28.15%	-58.96%
8	Israel			6,010	4.21%		
9	Ukraine			5,177	3.63%		
10	Poland			12	0.01%		

比利時進口值 (單位: 千歐元)

CN56031110 - nonwovens, coated or covered, nes, of man-made filaments, weighing ≤ 25 g/m² 不織布原料

Source: National Bank of Belgium, processed by trade intelligence unit at Flanders investment and Trade
Data 2020: available until Oct.

Rank	Country	2018	2019	2020	% share 2020	% change 18 - 19	% change 19 - 2020
	Totaal	503	1,221	743	100%	+142.66%	-39.11%
1	USA	42	271	187	25.18%	+546.40%	-30.84%
2	China	106	30	145	19.50%	-71.69%	+382.19%
3	France	100	3	141	18.92%	-96.75%	+4236.50%
4	Germany	62	66	73	9.85%	+6.32%	+11.24%
5	Israel			63	8.43%		
6	UK	1	2	62	8.34%	+101.64%	+2639.29%
7	Argentina		751	35	4.72%		-95.32%
8	Netherlands	121	93	26	3.44%	-23.20%	-72.46%
9	Ukraine			9	1.26%		
10	Poland			1	0.20%		

比利時出口量 (單位: 公斤)

CN63079092 拋棄式手術用不織布物品

- single-use drapes used during surgical procedures made up of nonwovens

Source: National Bank of Belgium, processed by trade intelligence unit at Flanders investment and Trade

Data 2020: available until Oct.

Rank	Country	2018 kg	2019 kg	2020 kg	% share 2020	% change	% change
						18 - 19	19 - 2020
	Totaal	4.030.405	4.806.320	3.553.694	100%	+19,25%	-26,06%
1	Czech Rep.	2.900.139	3.596.819	2.584.098	72,72%	+24,02%	-28,16%
2	France	257.58	324.105	231.51	6,51%	+25,83%	-28,57%
3	Ireland	158.761	198.901	201.981	5,68%	+25,28%	+1,55%
4	Germany	196.496	228.018	189.917	5,34%	+16,04%	-16,71%
5	Thailand	81.535	78.483	73.201	2,06%	-3,74%	-6,73%
6	UK	203.282	157.161	73.033	2,06%	-22,69%	-53,53%
7	Poland	96.032	91.79	69.415	1,95%	-4,42%	-24,38%
8	Netherlands	54.04	49.65	40.035	1,13%	-8,12%	-19,37%
9	Italy	12.679	10.356	16.279	0,46%	-18,32%	+57,19%
10	Portugal	10.534	11.726	10.392	0,29%	+11,31%	-11,38%
11	Slovenia	8.935	10.428	8.079	0,23%	+16,71%	-22,52%
12	Malaysia	4.811	6.216	6.841	0,19%	+29,21%	+10,05%
13	Austria	8.317	3.76	5.944	0,17%	-54,80%	+58,10%
14	Switzerland	154	284	4.398	0,12%	+84,25%	+1449,65%
15	Spain	4.475	3.65	4.303	0,12%	-18,43%	+17,89%

比利時出口值 (單位: 1,000€)

CN63079092 拋棄式手術用不織布物品

- single-use drapes used during surgical procedures made up of nonwovens

Source: National Bank of Belgium, processed by trade intelligence unit at Flanders investment and Trade

Data 2020: available until Oct.

Rank	Country	2018	2019	2020	% share in 2020	% change 2018 - 2019	% change 2019 - 2020
	Totaal	19,732	22,046	21,982	100%	+11.72%	-0.29%
1	Czech Republic	11,677	14,213	12,725	57.89%	+21.72%	-10.47%
2	Germany	1,293	1,462	1,896	8.62%	+13.06%	+29.64%
3	France	1,195	1,156	1,803	8.20%	-3.29%	+55.94%
4	Ireland	1,470	1,450	1,566	7.12%	-1.35%	+7.94%
5	UK	1,360	1,094	678	3.08%	-19.59%	-38.04%
6	Poland	702	672	625	2.85%	-4.35%	-6.92%
7	Netherlands	472	404	496	2.26%	-14.23%	+22.60%
8	Thailand	405	416	429	1.95%	+2.73%	+3.15%
9	Portugal	339	376	412	1.87%	+10.87%	+9.54%
10	Italy	125	101	252	1.15%	-19.02%	+149.87%
11	China		1	110	0.50%		+10882.75%
12	Slovenia	91	84	109	0.49%	-7.10%	+28.80%
13	Austria	100	59	101	0.46%	-40.83%	+70.54%
14	Switzerland	2	6	96	0.44%	+254.89%	+1374.31%
15	Sweden	92	52	81	0.37%	-43.35%	+55.89%

European Commission Access2Market

<https://trade.ec.europa.eu/access-to-markets/en/content>

Access2Markets

[Home](#) [Goods](#) [Services](#) [Investment](#) [Markets](#) [Toolbox](#) [Contact](#)

[My Trade Assistant](#)

My Trade Assistant

Including **ROSA** Rules of Origin Self-Assessment

[How to use this form](#)

[Disclaimer](#)

Product name or HS code

Country of origin

Country of destination

63079092

Taiwan

Belgium

[Search](#) >

Showing search results for 6307.90.92 from Taiwan to Belgium

Product successfully identified

Results for product code 6307.90.92 from Taiwan to Belgium

Tariffs

Taxes

Import requirements [v](#)

Trade flow statistics

How to read the results

Tariffs

latest update: 30 January 2021

[How to read the results](#)

Origin/

Tariff

Conditions

Footnote

EU law

Measure type

ERGA OMNES

6.30%

[R2658/87](#)

Third country duty

3. WHY BELGIUM?

3.1 貼近市場 便捷運輸

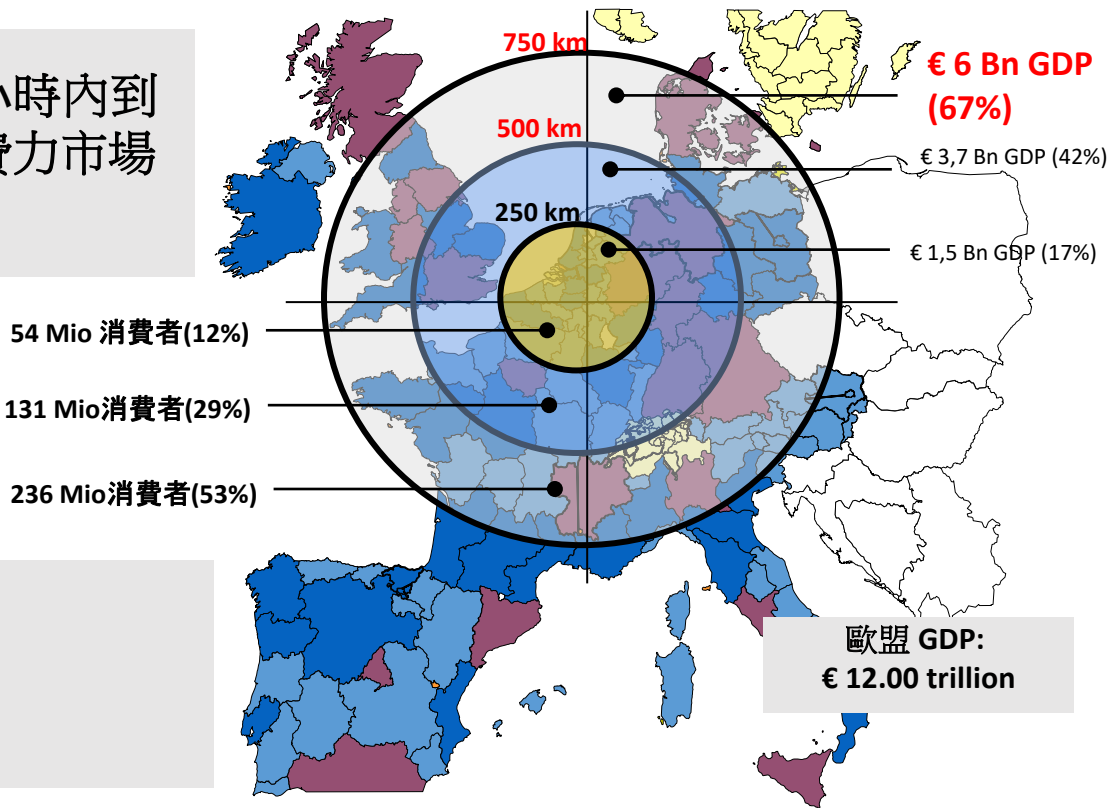
3.2 海空港與石化醫藥物流業先進

3.3 低租金環境與獎勵措施

3.4 人才多語且高生產力

3.1 歐洲戰略性中心位置

可以在24小時內到達黃金消費力市場

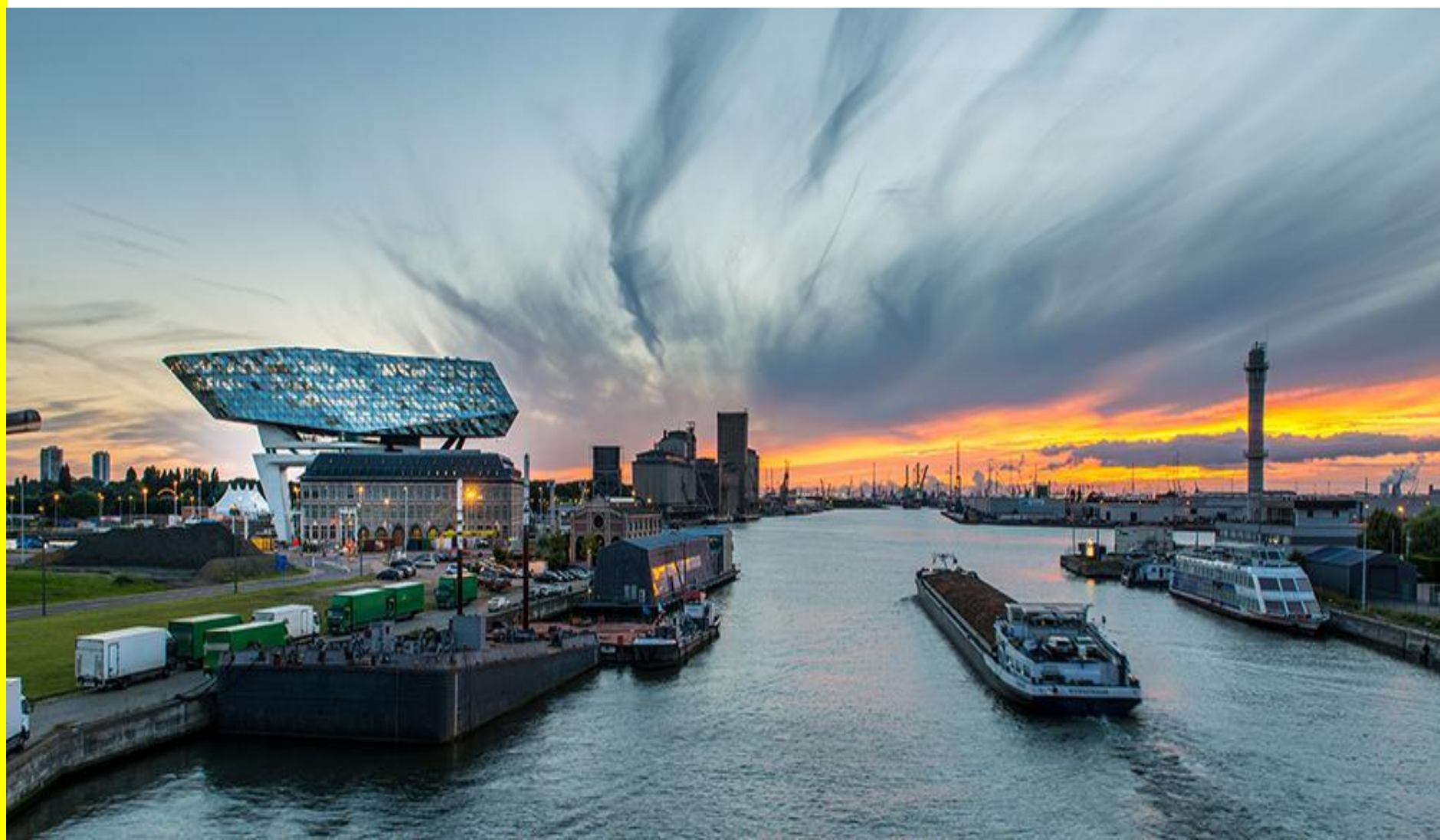


歐盟總人口數:
4億9千萬

歐盟 GDP:
€ 12.00 trillion



安特衛普港：歐洲最大化學聚落與原料提供



Gateway to Europe

Connection between sea - and airports

海港和空港的联系



Gateway to a huge e-consumer market

Belgium is surrounded by the biggest e-commerce markets

Western
Europe
=
82 % of the
EU turnover

英

UK 197 billion €

德

DE 86 billion €

法

FR 82 billion €

西

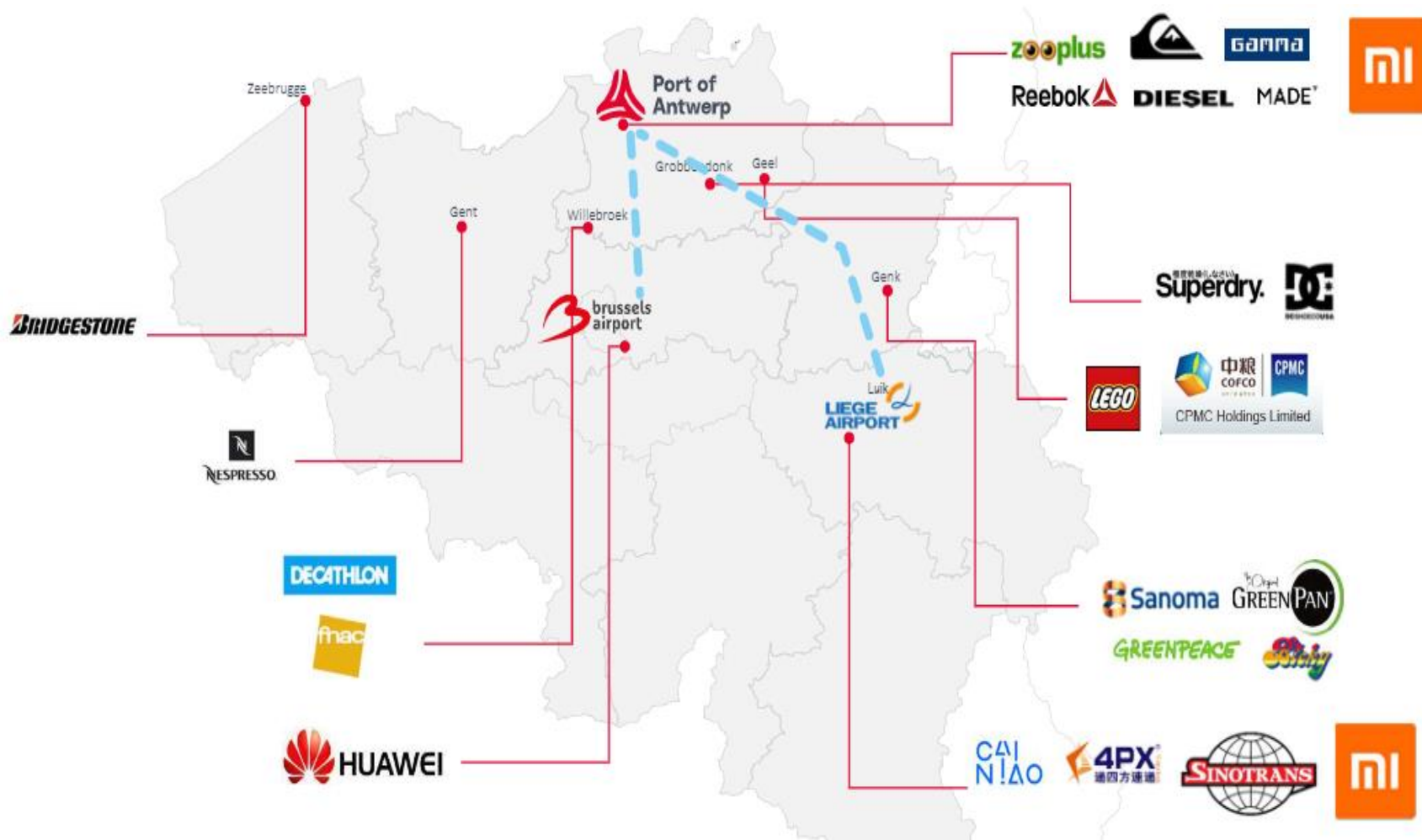
ES 28 billion €

荷

NL 24 billion €



比利時大型電商



FLANDERS INVESTMENT & TRADE

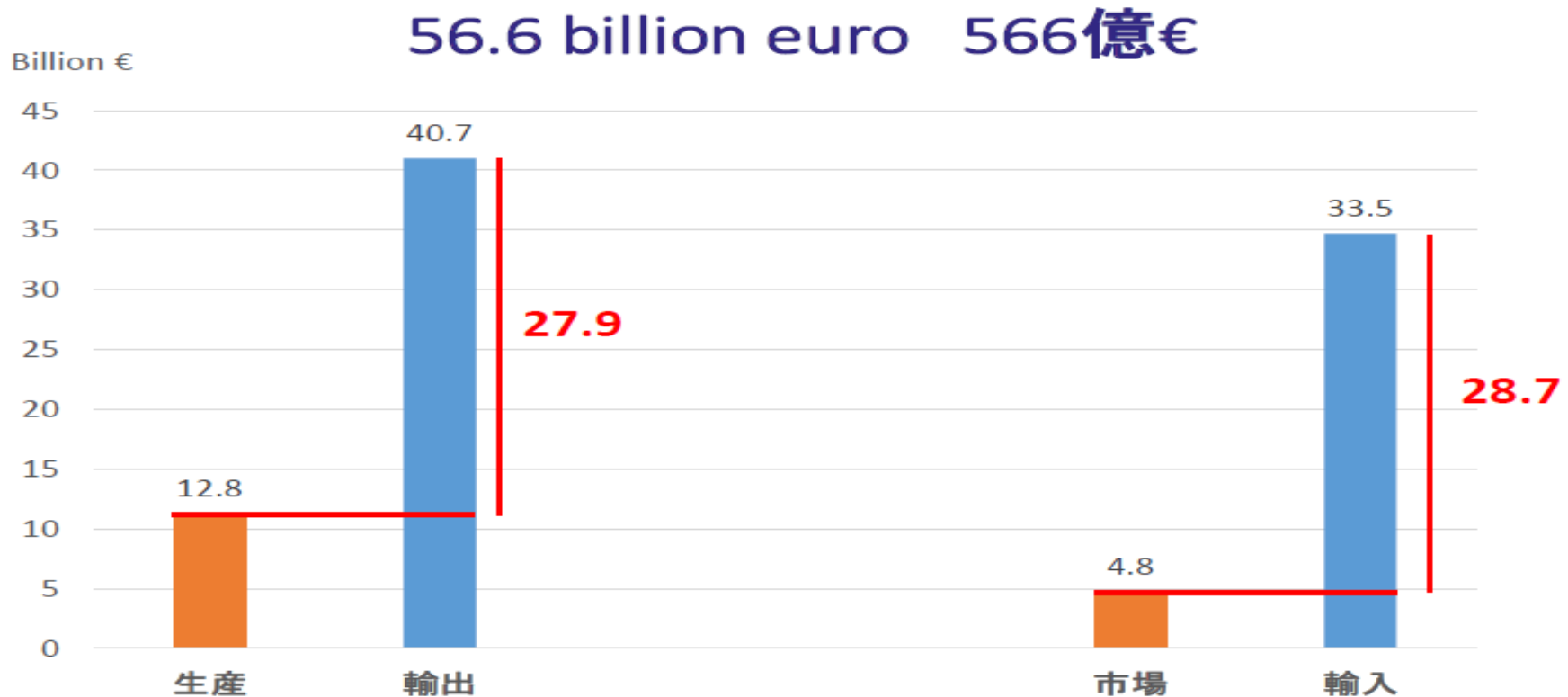


比利時：歐洲生醫藥品物流中心

- 第八大生產國： 12.8billion euro vs 第二大出口國： 40.7billion euro
 - 第十大市場規模： 4.8billion euro vs 第二大進口國： 33.5billion euro
- Source: 2016 figures from EFPIA key data 2018)

(2019出口已增至49.8 billion euro/進口42.6billion euro)

- 布魯塞爾機場：專業生技醫藥空港 全球IATA CEIV 冷鏈運輸機場與訓練中心

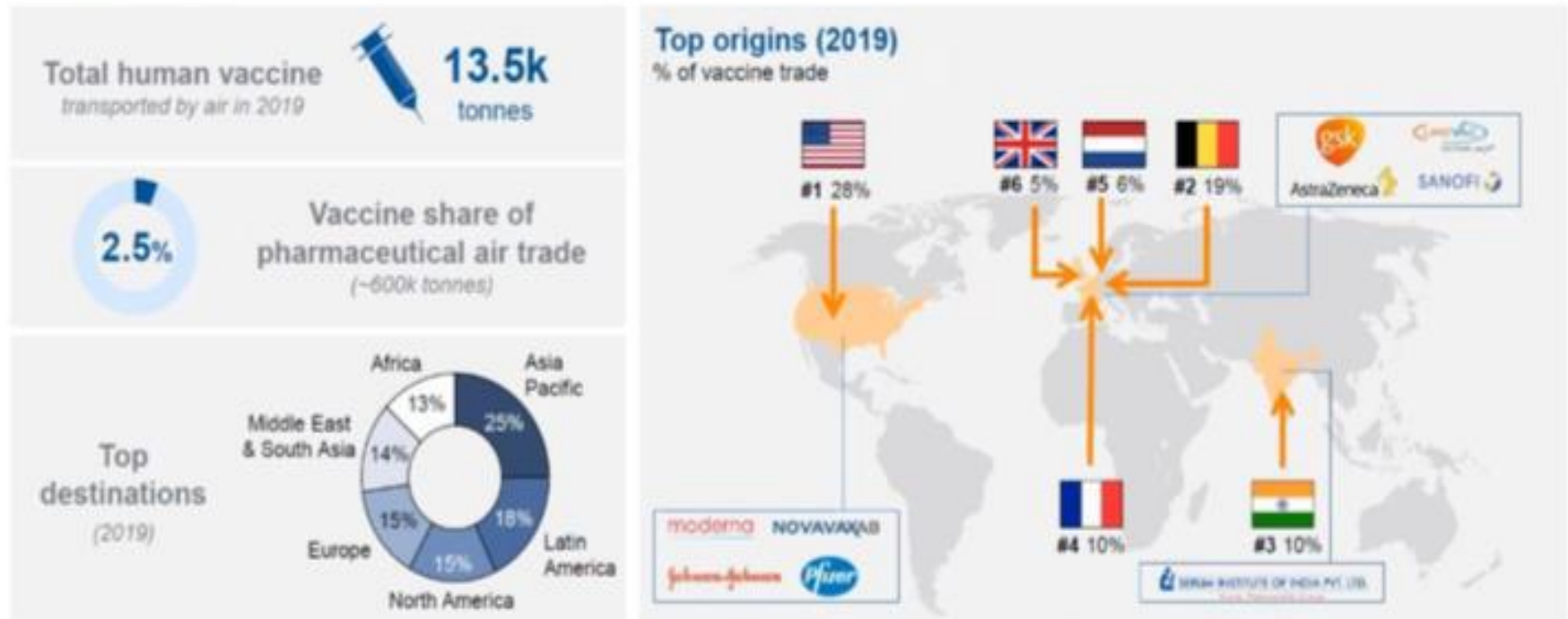


全球第二：人用疫苗出口國

In 2019, vaccines for humans accounted for 13.5k tonnes of air freight

PRELIMINARY
September update

Six countries (USA, Belgium, India, France, Netherlands and UK) account for ~80% of total air exports of human vaccine

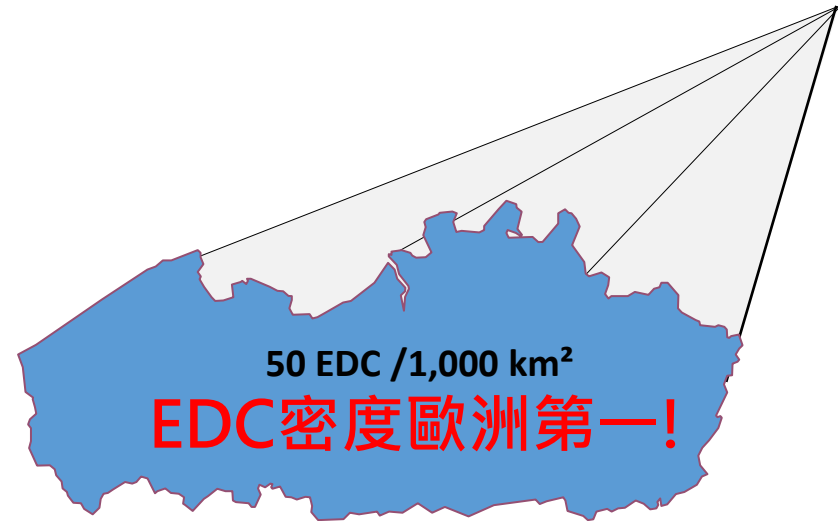


Africa, Latin America and Asia Pacific have relied most on air freight for vaccine distribution

Highest concentration of EDC's

法蘭德斯區: 歐洲密度最高的泛歐物流配銷中心

- **Nike** 耐吉
- **Procter & Gamble** 寶僑
- **Scania**
- **Samsonite** 新秀麗
- **Black & Decker** 百得工具
- **Duracell** 金頂電池
- **Sara Lee**
- **Hyundai** 現代汽車
- **Decathlon** 迪卡儂
- **Honda** 本田
- **Mazda** 馬自達
- **Toyota** 豐田
- **Becton Dickinson**
- **Volvo** 富豪汽車
- **Pfizer** 輝瑞
- **Bose**



許多國際大企業確認在法蘭德斯發展泛歐物流的優勢，法蘭德斯區內已成立了700 多家泛歐配銷中心 (EDC)，將其貨物從法蘭德斯拓運往四個以上歐洲國家

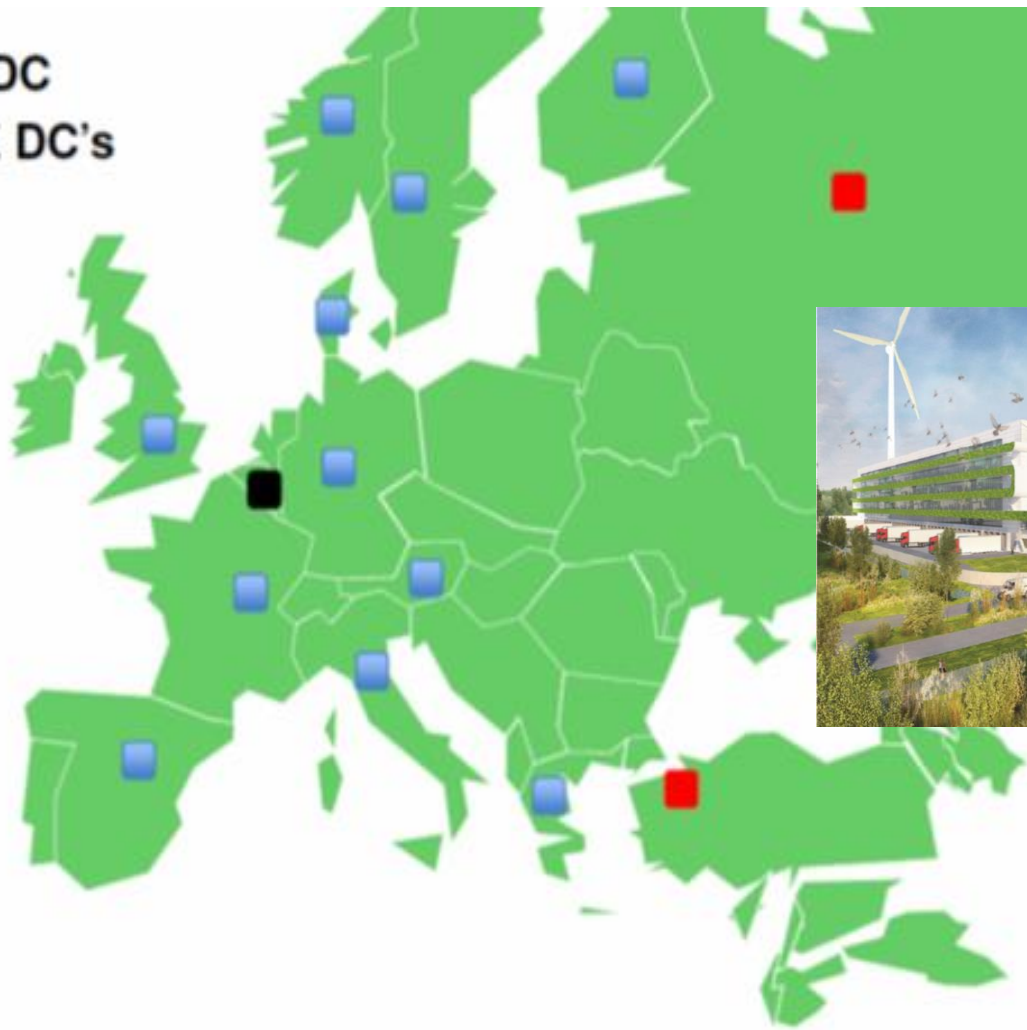
Zooming in on Nike

Building the supply chain
of the future in Flanders



Example 1 Nike: From 32 country warehouses to 1 sigle EDC

■ CENTRAL DC
■ SATELLITE DC's



Example 2



- 丙烯酸(Acrylic acid)和超吸附聚合物 (superabsorbent polymers) 的生產製造商，作尿布、衛生棉、成人失禁產品等的新研發原料
High-end chemicals (superabsorbent polymers): raw materials for diapers, sanitary napkins, adult incontinence products, etc.
- 2018年5月，日本Shokubai公司選擇在Flanders設廠製造，成為該公司在日本以外最大的工廠。投資總額達3.5億歐元，創造了70個新的就業機會。
- Shokubai選擇安特衛普作為新的擴張基地，以滿足不斷增長的市場。強調比利時法蘭德斯的優勢：
 1. 安特衛普為化學群聚重地
 2. 確保高端化學原料的研發與供應
 3. 商業中心的地位



A favorable tax regime

优惠的税制



M T W T F S S

						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

3.3 Tax Incentives

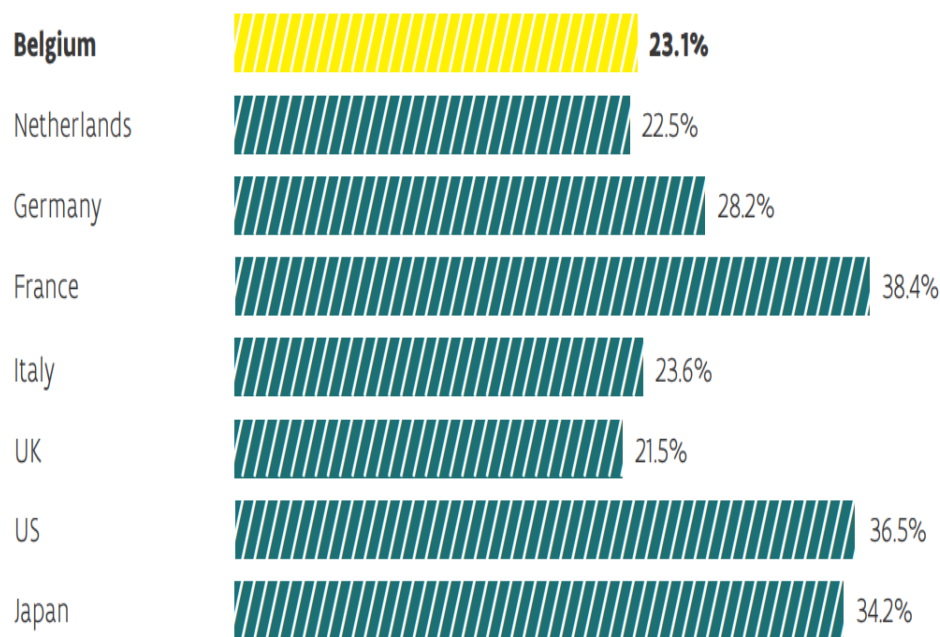
公司稅 稅制改革

	LE 大型企業	SME 中小企業
Year 年	Rate 稅率	Rate 稅率
2018	29,58%	20,40% *
2020	25%	20% *

- Conditional + for part of taxable income < € 100,000
- SME = < 250 employees & €50 mio turnover worldwide

Nominal vs. effective tax rate

It's a country's or region's effective tax rate – and not the nominal rate – that drives investment decisions. In that respect, the average spread between nominal and effective tax rate in Belgium is among the widest across the EU (according to ZEW, the Center for European Economic Research in Mannheim, Germany). As the nominal corporate tax rate is being lowered in the coming years, this should also result in an even lower effective corporate tax for multinational enterprises in Belgium and Flanders as a region.



Comparing average corporate tax rates (ZEW, figures for 2017)

3.3 聘僱獎勵 社會福利支出減免



	每一季減免	期限	條件
結構性減免	462.60 €	聘僱期間	所有私人企業
1 st recruitment	社會福利支出由政府給付	終身	第一位受雇職員
2 nd ~6 th recruitment	1,550 € ~ + 400 €	5 quarters 4 quarters 4 quarters	2 nd ~6 th employee
Older – Young/Unskilled – Unemployed	400 €- 1,500 €	Limited period or complete period of employment	Employee >= 54 years old or <26 years old

聘僱獎勵 社會福利支出減免



	Gross salary	Employer's social contributions (SSCs)				
		Month 1-15	Month 16-27	Month 28-39	Month 40-...	
第一名雇員	1st employee	€ 3,500	€ 0 (lifelong exemption from social security contributions)			
第二名雇員	2nd employee	€ 3,500	€ 358.33 (10.2%)	€ 525 (15%)	€ 725 (20.7%)	€ 875 (25%)
第三名雇員	3rd employee	€ 3,500	€ 525 (15%)		€ 725 (20.7%)	€ 875 (25%)
第四名雇員	4th employee	€ 3,500	€ 525 (15%)		€ 725 (20.7%)	€ 875 (25%)
第五名雇員	5th employee	€ 3,500	€ 525 (15%)		€ 725 (20.7%)	€ 875 (25%)
第六名雇員	6th employee	€ 3,500	€ 525 (15%)		€ 725 (20.7%)	€ 875 (25%)

4. HOW?

Scenario 1

Market intelligence & rep. office

蒐集商情和代表處

Scenario 2

Storage of stock of goods

貨物存放

Scenario 3

Value-Added logistics & Services

增值服務與物流

Scenario 4

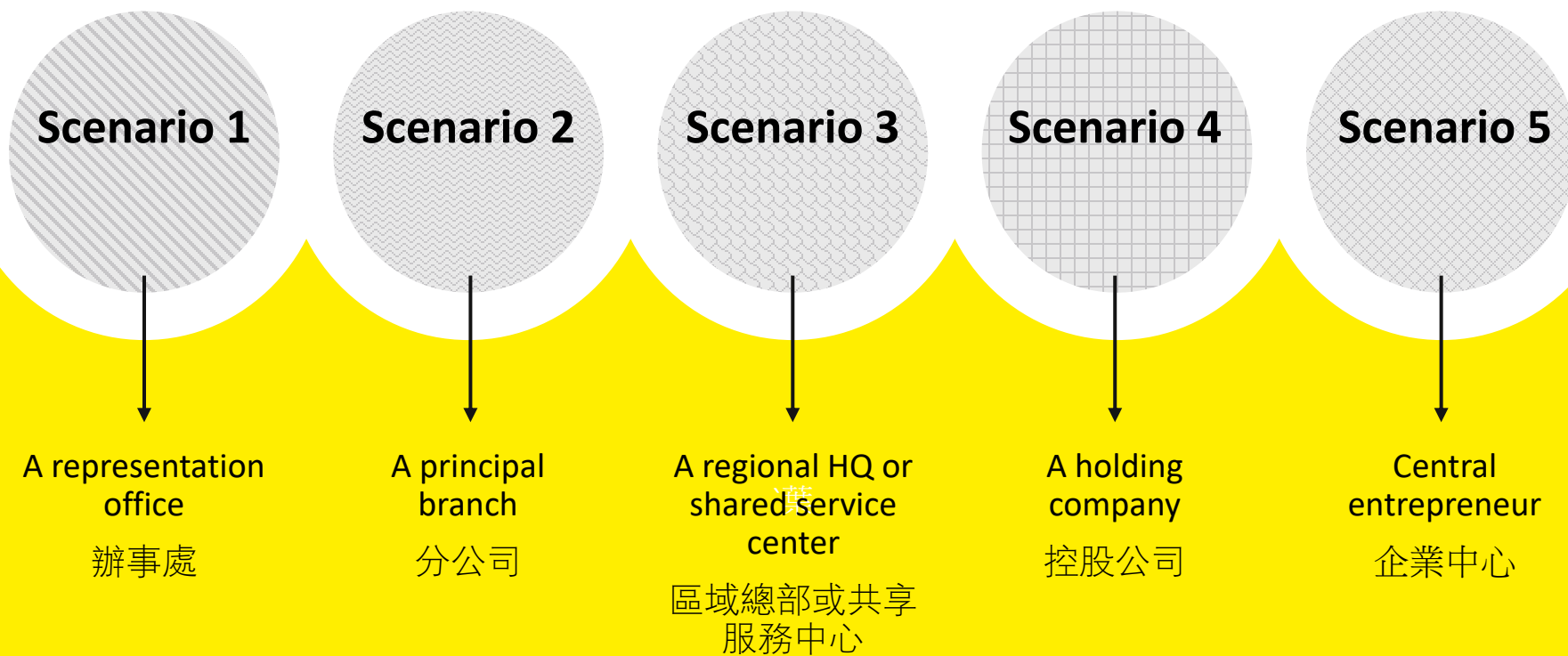
European Distribution Center & regional warehouses

歐洲配送中心和地區倉庫

Scenario 5

Fully fledged European hub: Holding, Regional HQ & Treasury

歐洲總部、財務與控股中心



在法蘭德斯設立公司？ 輕而易舉！

在法蘭德斯設立公司僅需4天



FLANDERS INVESTMENT & TRADE



DORIS WU
DORIS.WU@FITAGENCY.COM
TAIPEI@FITAGENCY.COM
WWW.INVESTINFLANDERS.COM

比利時台北辦事處 法蘭德斯經貿組
台北市民生東路三段131號6樓601室
TEL: 886-2-2547 3318



Flanders
State of the Art

