

中國必須拓展進口緩和貿易順差

美國以美元是世界貨幣的地位，濫印鈔票進口各國的貨物、狂發國債，支撐龐大的軍事及福利的政府開支、金融大鱷更利用升息降息的匯率潮汐，大肆收割各國的金融資產，重創各國的經濟。英國、俄國、泰國、馬來西亞、韓國、墨西哥、阿根廷等都曾經是受害國。引起許多國家的怨恨。

中國則以強大的工業製造能力，製造大量的，各式各樣的，物美價廉的產品和各國貿易。世界190個國家，中國是140個國家的最大貿易國，其中只有廿多個國家地區以出口大量能源，礦石，糧食等大宗原料及電子零組件，如中國台灣、澳洲、巴西、沙特、印尼、智利、伊拉克等，維持對華貿易的順差國。其他120多個國家都是逆差國。近年來日本、韓國的對華貿易都轉變成逆差國。2022年全球前七大貿易順差國，中國的順差8,776億美元，遙遙領先、俄羅斯3,323億、沙特2,213億、挪威1,643億、澳洲1,231億、卡塔爾968億、德國853億。中國獨攬全世界30%的貿易順差，情況愈來愈傾向中國。

在重商主義的思維下，貿易順差累集金銀愈多愈好。但是中國強大的工業製造能力，不僅僅是成為貿易順差大國，更厲害的是強大的工業製造能力摧毀了世界原來的生產體系。一旦中國決定生產一種產品，不但能以性價優勢在貿易上奪得市場，而且迅速的摧毀了多數對手的產業，形成壟佔地位。2022年中國的家電產品共佔全球總銷售66%、中國的再生能源產業，光伏和風力設備佔全球總銷售的90%和60%、中國2023年的新三樣，電

◎戚嘉麟

動汽車，汽車電池，光伏發電，平均的全球佔比80%以上。單項產品小如原子筆尖的鋼珠，打火機，甚至韓國泡菜。大如挖隧道的盾構機，重型大型起重機。許多產品幾乎除了中國，別無分店。單項產業如2023年中國造船業承接了世界67%的新船訂單，打垮韓國日本。中國汽車業成為世界最大的汽車生產國及出口國，打垮日本德國。中國的大疆無人機產業佔全球總銷售的70%。中國的手機，電腦，洗衣機，冰箱，空調，攝像機，音響設備等等，共佔全球總銷售30%，掌握全球最高份額。中國的核能發電機組，民用航空大飛機C919，AI機器人等項目都在急起直追。即使被認為是中國弱項的軟體及服務業，中國的抖音成為印度（2億用戶）及美國（1.7億用戶）額的最大社交平台，超越Meta，X等美國本土霸王。中國的拼多多（Temu）希音(Shein)成為美國最大網購平台，超越Amazon，eBay等美國傳統霸王。

所以在國際貿易上，中國給人的印象不僅是最大的貿易順差國，而是以中國無所不能的世界工廠地位，不斷摧毀一項項先進國家（主要是G7）原先擁有的工業明珠產品，名為打破先進國家的壟斷暴利，事實上也搶奪了他們的就業鏈及優渥的生活水準，明顯的造成生活水準的東升西降現象。這恐怕是目前歐美反華民粹盛行的主要原因之一。所以美國財政部長葉倫(Yellen)說，中國綠能工業產能過剩的外溢效果，破壞了世界綠能

產業的秩序。中國電動汽車已經攻佔歐洲市場的25%，響叮噠的特斯拉(Tesla)老闆馬斯克(Elon Musk)也說，若不是汽車的貿易限制及保護，世界的汽車工業都將被中國消滅。雖然這是歐美競爭失敗後的酸話，中國也要注意這些酸話背後，中國趕盡殺絕，不為別人留下生路，會帶來長遠的不良影響。

如今中美經貿科技競爭給中，美國節節敗退，僅剩下芯片產業，人工智能，量子計算，中美兩國在伯仲之間，美國已經使出歇斯底里的手段制裁中國封鎖中國，但是曙光在中國這一邊。難怪美國學國上下兩黨合作反華，反中幾乎成為美國的最大產業。美國以貨幣金融囊括全球，中國以工業製造囊括世界，這都會引起不良的反應。

我們都有過去國家貧窮，外匯短缺的經驗，對於目前中國的國際收支帳戶經常保持外匯存底3.26萬億美元，美國國債7,696億美元，黃金儲備2,257公噸(約值1,676億美元)，十分滿意。但是外匯存底需要管理，尤其面對美國制裁中國的程度愈來愈狠，未必是愈多愈好。過去美國曾經沒收過阿富汗存放在美國境內銀行的外匯存底70億美元，已經凍結俄羅斯存放在比利時的外匯存底3,000億美元，並且要沒收其利息，支援烏克蘭作戰。因為存放在國外外行的外匯存底可能被沒收凍結，美國國債可能不認帳，或者凍結一天付不出本息。所以中國持有的外匯存底以及美國國債並不是絕對安全的，需要維持適當的數量。

對外貿易順差過多，出口商拿到



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推進中美相互瞭解合作 促成海峽兩岸和平統一 倡導和諧平等多元世界

的是人民幣，會造成國內人民幣供應增加，造成通貨膨脹，物價上漲的壓力。出口超過進口過多，表示國民辛苦的勞動付出，資源輸出，沒有得到相應的進口外國物資來享受。屯積過多的貿易順差外匯，而不用於再投資，也表示不能善用貿易的利得。反之，貿易逆差使得人民幣隨之流出，擴大境外的流通使用，有利於人民幣國際化。

中國必然意識到貿易順差的不利，所以在2013年推出一帶一路計劃，除了是外交的戰略、釋出基建工程的過剩產能、也帶有以低利的建設貸款，釋放過多的外匯存底的意味。中國在2018年11月舉辦了首屆中國國際進口博覽會，2023年11月的第六屆進口博覽會，130多個國家的3000多家企業參展，規模宏大。這是世界罕見的進口博覽會，旨在促銷各國的商品進口，同時實行稅收優惠政策。首屆中國國際供應促進博覽會，2023年11月，同步在北京開幕，以後一年一次。首屆鏈博會有來自國內外的政要、專家學者、企業負責人，以及515家中外企業參展，以共創未來為主題，鞏固外國的供應鏈參與中國強大的製造工業，互相合作、實踐人類命運共同體的理念。與會期間共簽署合作協議、意

向協議200多項，涉及金額達1,500多億美元。這兩次的大型博覽會都顯示了中國要拓展進口的決心。

雖然中國在貨物貿易享有巨大的順差，但是2023年，中國服務貿易逆差高達2,294億美元。國際旅行、出國留學、金融保險、國際運輸是服務貿易的主要逆差項目。即便如此，上周習近平主席在第17屆博覽論壇上宣布中國將進一步對世界開放，尤其是金融業，將可以獨資進入中國市場。中國的金融保險業長期受到保護，其產品和服務和歐美有較大的差距。希望開放以後的競爭足以提升中國金融保險業的水準，將來能提供國人較多活潑的投資管道，譬如提供跨國或國內的共同基金，信託基金，投資公司等產品，豐富國人的財富資產，而不僅限於國人最喜愛的房地產。

種種跡象看來，中國未來會拓展進口緩和貿易順差，希望鼓勵低端製造鏈移向東南亞國家，如越南、孟加拉、馬來西亞、墨西哥各國，讓大家都有生路。為了拉抬國內金融業的水準，寧願開放外商競爭中國市場，讓外商來賺錢，大家都有發展。如此中國走上更開放更自信的強大國家。

中國汽車產業的憂患

2023年全球汽車生產量8,900萬輛，中國生產3,016萬輛，佔34%，是世界第一大汽車生產國。同年中國出口為526萬輛，超過日本出口的442萬輛，也成為世界第一大汽車出口國，這樣的說法有許多誤導。中國汽車生產及出口的數量是指從中國境內生產及出口的汽車，其中一半是外國公司在華所生產及出口的汽車。所以中國汽車產業真正的實力可能只有媒體報導的50%，中國生產了1,500萬輛左右，只出口了250萬輛左右。

此外日本的豐田、本田、日產、德國的大眾，在中國及世界各國設廠，他們生產的汽車及銷售，都歸入各在地國的統計，和德國、日本無關。若是以外國汽車公司自己的產量統計，2023年世界前五大汽車公司：德國大眾，日本豐田，荷蘭Stellantis，美國福特，德國奔馳。其生產銷售都超過中國最大的比亞迪。譬如2023年豐田全球產量1,123萬輛，德國大眾925萬輛，比亞迪只有303萬輛。所以中國汽車產業的實力是不是世界第一，可能有誤導。

目前只有中國的電動汽車確實具備技術優勢，領先世界。2023年全球銷售約1,400萬輛電動汽車，其

◎成吉康

中在中國境內製造的高達約960萬輛，國產的約480萬輛。可見中國以製造電動汽車見長，傳統燃油汽車仍是歐美、日本、韓國的天下。

中國電動汽車有200多家公司，名列前茅的有比亞迪、上汽、蔚來、廣汽、理想、吉利、小鵬、長安、長城等，小米也加入競爭，內捲劇烈。除了比亞迪，其他公司都在戰略虧損的階段。惡性競爭，形成資源浪費，並且在國際上自相削價，利潤超薄，影響未來電動汽車產業的健康發展。譬如比亞迪的銷售超過特斯拉(Tesla)，但是利潤卻低於特斯拉。希望中國電動汽車公司能夠合作兼併淘汰，減少到5家最強的公司，維持合理售價，才能賺得高利，希望未來比亞迪能成為類似大疆的品牌，雄霸世界。

電動汽車的結構是汽車電池，車身結構，馬達電控，智能駕駛。中國目前獨佔鰲頭的是汽車電池，寧德時代的麒麟電池及比亞迪的刀片電池，續航力、充電快、效能高、重量輕、價格低、安全可靠、保護環境，都遙遙領先。因為車用電池的研發尚在初始階段，競爭最為劇烈。汽車電池佔電動汽車成本的

40%，任何新的突破都可能翻轉電動汽車的競爭態勢。譬如如鈉電池、高鎳電池、鈦酸鋰電池、固態電池等等，加州矽谷的尖端能源公司NDB，正在研發核能電池，可持續使用50年。各國都在競相研發，中國當前電池的優勢不可久恃。其他車身結構，馬達電控，智能駕駛，中國都在第一梯隊，但並不遙遙領先。

美德日韓雄霸世界汽車產業數十年，關乎其就業人口及國計民生，面對來勢洶洶的中國汽車，除了正面的研發競爭，必然渾身解數使出各種陰暗技倆，打擊中國的電動汽車產業。當年歐美國家挾其清潔能源，環境保護產業的優勢，以碳中和、零排放、碳交易等等的方式，阻礙發展中國家走向工業化。想不到中國這十年來在太陽能發電、風力發電等清潔能源領域快速發展，供應全球95%及70%的市場，獨佔鰲頭。電動汽車更是異軍突起，擠壓歐美及日本的汽車產業。現在歐美國家試圖脫離新的競爭，漸漸淡化清潔能源，延緩環境保護。譬如放寬對傳統燃油汽車的製造期限，將停止年限定於2030年延長到2035，甚至2040年、停止國民購買電動汽車的鼓勵補貼、不鼓勵充

電樁的普遍設立、繼續使用石油，天然氣，煤碳能源等等，目的在延長其傳統燃油汽車的優勢，扼制電動汽車的快速普及。

美國更積極的公然排斥中國汽車及汽車電池、即使中國在墨西哥建廠，產品也要增加100%的關稅、福特汽車與寧德時代的合作建廠計劃，被美國政府阻止、歐洲正在進行反補貼調查，藉故加徵中國汽車關稅、日本則停止購買電動汽車的貼補。中國汽車未來出口歐美日韓的阻力方興未艾。

鋰電池目前是汽車電池的主流，世界鋰礦的分佈集中在玻利維亞，智利，阿根廷，澳洲。中國鋰資源量僅佔全球7%，卻是鋰金屬的最大消費國。因為澳洲的鋰礦生產處於世界領先地位，所以中國需要進口大量的鋰礦石，主要依靠澳洲。目前美國聯合日本、韓國，計劃在澳洲設廠提煉鋰礦，企圖扼制澳洲的鋰礦石出口中國，同時澳洲也禁止中國在澳洲有關鋰礦的投資。中美鋰礦的爭奪也在非洲及南美洲展開。目前中國在津巴布韋(Zimbabwe)、剛果(Congo-Kinshasa)都收購了鋰礦的產權。在玻利維亞、阿根廷和智利，中國公司簽署了不少鋰礦的投資協議。中國掌握的鋰礦目前居於優勢，但將來與電動汽車有關的稀有金屬都會有激烈競爭及變動，足以阻擾中國掌握的礦產資源。譬如2020年

印尼全面禁止鎳礦出口，影響了中國在印尼蘇拉威西島(Sulawesi)上投資建設的鎳礦開發計劃。

有的外國汽車，譬如德國大眾，因為車身結構，馬達電控，智能駕駛等領域，足以媲美中國，所以投資1,800億美元，決定採用寧德時代先進的麒麟電池，以及中國生產的汽車零件，在中國生產電動汽車，決戰中國市場。日本的本田和日產汽車最近簽約聯合研製電動汽車，未來的競爭不可小覷。

中國是煤碳、石油、天然氣儲藏量匱乏的國家，傳統能源大量依賴進口，是國家能源安全的嚴重缺陷。所以中國戮力發展清潔能源(水力、核能，風力，光伏)，全面推廣電動汽車(避免使用燃油)勢在必行，具有遠大的能源戰略意義。由於中國電動汽車市場廣大，2023年銷售900萬。支持了電動汽車產業需要的市場規模以及經濟規模，促成了中國電動汽車物美價廉，輾壓歐美日韓等傳統的汽車大國，引來陰謀破壞，政治干預，事出必然。中國的電動汽車產業前途滿佈荊棘，但是全球電動汽車的滲透率必然繼續提升，市場規模隨之擴大，足夠中國電動汽車產業馳騁競爭。

Three Axes of the United States Anti-China Policy – 'Facing Ban's Door Like a Clueless Donkey'

It took less than 250 years for the United States to become a great independent country from a colony. Its war of independence was short and smooth owing to good luck, the right timing, and being far from a power struggle. In the early years, most of the immigrants to North America were the Anglo-Saxons, and a small number of immigrants from the European continent. The native Indians of North America were driven westward by new settlers and killed. The eighteenth century coincided with the struggle for hegemony and mutual destruction among European powers and the rise of the ideology of democracy and liberalism. The immigrants in North America were dissatisfied with the high taxes imposed by their mother country Great Britain. They took advantage of the competition among Britain, France, Spain, and other countries for hegemony and colonial interests, and launched a revolution for independence. After the founding of the country, they continued to expand and expand. The native Indians were exterminated and reduced to vassal groups, and a federal state (the U.S.) was established, which expanded from thirteen states in 1776 to fifty states today.

There were two world wars in the twentieth century. The U.S. almost completely stayed out of the First World War (7/28/1914-11/11/1918) until near the end of the last year. It can be said that it won without any damage. During the Second World War (1939-1945), the U.S. made war profits from an advantageous position, far away from the Eurasian theaters. It did not join the war until Japan attacked Pearl Harbor (12/7/1941). The battlefield was far away from the American mainland, so after the war, the U.S. became the world's strongest economy capable of assisting the ruined world to recover and become the world's most powerful country. After WW II, Russia was also a victorious country and it promoted communism and created the Soviet Union to absorb Northeastern European states and post-war East Germany. The U.S. occupied West Germany, Japan, and the Philippines, thus forming two major confrontational blocs, the East and the West.

In the East-West confrontation, the U.S. established a world grand strategy of anti-communist alliance to fight against the communist countries led by the Soviet Union. The U.S. cleverly took advantage of China's need to revitalize its economy, opened to China, and launched an all-out effort to isolate and suppress the Soviet economic system, which eventually led to its collapse in 1991 and the disintegration of the Soviet Union. As a result, the U.S. became the single largest hegemon in the world. However, the basic global strategy of the U.S. since WW II has always been to maintain its hegemony, not allowing other countries to surpass the U.S. in competition. This can be seen clearly when the U.S. launched suppression against the European Union and Japan when their economic growth approached that of the U.S. economy. Therefore, after the collapse of the Soviet Union and as China grew rapidly in economic strength, the U.S. began to pay attention to China's rise and targeted China into the ranks of hostile communist countries. However, due to the Muslim-Islamic terrorist group's attack on the U.S. homeland (9/11/2001) incident, the U.S. had to focus on the 'war on terrorism' which led to the Iraq War and Middle East entanglement, thereby delaying its anti-China action.

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Dr. Wordman, Bilingual Columnist, US-ChinaForum.org

The strategy of the U.S. to counter Russia and China began after WW II. In Europe, it established NATO to contain Russia, and in Asia, it united with its allies (Japan, South Korea, Philippines, etc.) to contain China. The U.S.'s anti-China policy over the years can be described as 'Three Axes'. In the following, the author will explain these three axes, analyze their effectiveness, and make predictions.

The First Axis: Island Chain Containment
After the victory in WW II, the U.S. occupied Japan and cultivated a government system for the defeated nation, and then got involved in the Korean War, which threatened China's security and fear, and eventually, the Sino-US Korean War ended with the division of North and South Korea in a truce but no peace treaty. The U.S. maintained the strategy of allying with Japan and South Korea to fight against the Soviet Union and communist countries, including China. The U.S. joined forces with European nations to organize the NATO alliance to contain the Soviet Union, but in Asia, the U.S. planned to form an island chain from South Korea, Japan, Ryukyu, Taiwan, the Philippines to Singapore to contain China. In this island chain strategy, there is uncertainty about Taiwan's reunification with Mainland China. Therefore, the U.S. has always been unwilling to give up influence in Taiwan and deliberately blur Taiwan's status to suit its island chain strategy. However, China's policy of keeping a low profile induced the U.S. to focus its attention on the Middle East, giving China time to develop and eventually rise to become the world's second-largest economy and the world's largest manufacturer and trader. At the same time, to resist the U.S.'s island chain containment, China has rapidly developed its navy and rocket force to resist island chain threats. Nowadays, the U.S.'s island chain deterrent force must retreat to the second island chain, namely the Guam and Hawaii defense lines. Judging from the current strength and progress of China's navy and air force, the U.S.'s first island chain containment strategy can be said to have hit a steel wall (Ban's door, an Ax master's door), producing no effect at all.

The Second Axis: Democracy, Freedom, and Human Rights
When the U.S. became independent, it was at the time of the enlightenment of democratic liberalism, and its forefathers indeed wrote democratic freedoms into the Constitution. But since the U.S. became a powerful nation, it has implemented a two-sided policy, that is, it says one thing on the surface, but does another. The former is glossy and propagated through its controlled media. The latter is all based on self-centered interests, often unjust to others. Profit always comes first. Therefore, democracy, freedom, and human rights have become tools of American political diplomacy. In terms of safeguarding the interests of ethnic minorities, the U.S. has no justice for its domestic Indians. It uses the banner of democracy, freedom, and human rights to subvert political power and incite revolution. Its purpose is to remove the regime that is inconsistent with the U.S. interest, rather than for the welfare of the people. Therefore, the regimes

supported by the United States are all pro-American. The U.S. has used the banner of democracy, freedom, and human rights to instigate China's Tibet and Xinjiang for many years. However, under the Chinese government's efforts to get rid of poverty and create opportunities for citizens to have a better life, people's livelihood in Tibet and Xinjiang has improved far better than elsewhere in the Muslim world or India. This has been gradually known to all the world. Hence, the second ax of the U.S. has also hit the 'Ban's door', and there is nothing that can be done.

The Third Axis: New Eight-Power Allied Forces
The U.S. participated in the Eight-Nation Alliance's invasion of China and gained benefits. In both world wars, the U.S. had always joined the winning side alliance. Since WW II, the U.S. has also formed military alliances with many countries to maintain its hegemonic leadership position and used the alliance for proxy wars. It used the NATO alliance to encourage Ukraine to join NATO to resist Russia, which led to the current Russia-Ukraine war. In Asia, the U.S. wants to create a New Eight-Nation Alliance (the U.S., Britain, Canada, Australia, Japan, South Korea, the Philippines, and India) to suppress China. It not only threatens China with military force, but also wants to ally to impose sanctions on China in terms of economy (trade and investment), science, and technology. The most obvious effort is in the semiconductor industry where chip manufacturing technology is prohibited from exporting to China. Through subsidies, the U.S. intends to consolidate high-level chip manufacturing in the U.S. However, China's economy has grown in size and its technological foundation has become strong (A recent survey shows that China leads in 7 out of 10 advanced technologies, the U.S. leads only in three with China being next behind.). Many countries are dependent on the Chinese market and their mutual trade. Therefore, this third ax, coercing alliance to disengage with China is also like showing off tricks in front of a skilled master, exhibiting nothing but awkwardness.

Based on the above analysis, China should be able to cope with the current tension between the U.S. and China no matter how treacherous the future would be. However, the Chinese people have never been wary, and they would always rather avoid a war than initiate one. On the other hand, the Americans are accustomed to winning, if not winnable then join the opposing party. Therefore, the U.S. and China competition may not lead to a disastrous ending. The current situation will test China's diplomatic skills. China has many neighboring countries. South Korea, Japan, and the Philippines have all aligned with the U.S. India is presently increasing its troops on the Tibetan border. Although the Chinese People's Liberation Army is competent and not afraid of the threats, but Sun Tzu's Art of War says that war should be the last option. Today, we need to strategize, devote ourselves to diplomacy, and turn conflicts into friendship. Sun Tzu said, the best is to win with strategy, the second best is to win through diplomacy, and the last is to win by military force. The Chinese citizens should cheer their leaders, like Xi Jinping and Wang Yi, to charter a peaceful path.