

米中科学技術戦と北東アジア地域の半導体産業・貿易への影響における政治分析

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【要約】

本論では、米中の科学技術戦とそれが北東アジア地域の半導体 (semiconductor) 産業・貿易にもたらす影響を、米中関係の変化から分析する。本研究により、次のことが見出された。1、香港と中国は依然世界最大の半導体輸出市場であり、それに台湾・韓国・日本が次ぐ。2、東南アジアは、世界の半導体業者にとって、サプライチェーンの多元化と地政学的脅威の軽減のために投資を行う新たな生産基地となっている。3、北東アジア市場は、依然世界の半導体製品輸入市場をリードしており、日本・韓国・台湾・香港の半導体輸入額は最近3年間で2ケタの高度成長を維持している。4、アメリカの中国における半導体製品貿易に占める比重は明らかに低下し、日本にも似たような趨勢が現れているが、台湾と韓国の半導体製品は中国にとって重要性が増している。したがって、日本の支持を固め、台湾と韓国を自陣営に引き入れることが、アメリカの将来の対中科学技術戦における重要な戦略となる。

キーワード：米中関係、北東アジア地域、半導体、米中科学技術戦

美中科技戰與其對東北亞區域半導體 產業貿易影響的政治分析

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【摘要】

本文從美中關係變化分析美中科技戰，以及其對東北亞區域半導體 (semiconductor) 產業貿易的影響。研究發現：1. 香港與中國仍是全球最大的半導體產品出口市場，其次為台灣、韓國與日本。2. 東南亞成爲全球半導體業者投資的新生產基地，以實現供應鏈多元化及減輕地緣政治威脅。3. 東北亞市場仍主宰全球半導體產品進口市場，且日本、韓國、台灣與香港的半導體進口金額近三年均維持兩位數高成長。4. 美國在中國半導體產品貿易中比重明顯下降，而日本在中國半導體產品貿易中的比重也出現類似趨勢，但台灣與韓國半導體產品對中國的重要性增加。因此，未來鞏固日本支持並吸引台灣與韓國加入其陣營將成爲美國對中科技戰的重要策略。

關鍵字：美中關係、東北亞區域、半導體、美中科技戰

The Political Analysis of US-China Tech War and its Impact on the Semiconductor Industry Trade in Northeast Asia

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【Abstract】

This article examines the changes in US-China relations and analyzes the impact of the US-China tech war on the semiconductor industry trade in Northeast Asia. The study reveals the following key findings: 1. Hong Kong and China remain the world's largest exporters of semiconductor products, followed by Taiwan, South Korea, and Japan. 2. Southeast Asia has become a new investment hub for global semiconductor companies, aiming to achieve supply chain diversification and reduce geopolitical risks. 3. Northeast Asia continues to dominate the global semiconductor import market, with Japan, South Korea, Taiwan, and Hong Kong experiencing significant double-digit growth in semiconductor imports over the past three years. 4. The US-China tech war has led to a notable decline in the proportion of China's semiconductor trade with the US, and a similar trend is observed in China's trade with Japan. However, Taiwan and South Korea have gained importance as China's trading partners in the semiconductor industry. As a result, the US seeks to consolidate Japan's support and attract Taiwan and South Korea to its alliance, forming a crucial strategy in future tech wars with China.

Keywords: the United States-China relationship, the Northeast Asian region, semiconductors, the US-China tech war

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