



渣打香港中小企領先營商指數

Standard Chartered Hong Kong SME Leading Business Index

調查結果發布會

Result Announcement

2019年第二季度
2019Q2



背景

Background

- 【渣打香港中小企領先營商指數】季度調查，由香港生產力促進局獨立執行，渣打銀行（香港）有限公司全力贊助
- The “Standard Chartered Hong Kong SME Leading Business Index”, independently implemented by Hong Kong Productivity Council and sponsored by Standard Chartered Bank (Hong Kong) Limited

調查目的
Objective of Survey

- 剖析本地中小企對近期營商環境的展望與分析
- To help Hong Kong enterprises understand the overall business environment

- 探討企業對粵港澳大灣區規劃的看法
- To explore SMEs' views towards the planning in Greater Bay Area



本季重點

Key Point in this Quarter



2019年度第二季的綜合營商指數為 **46.0**，較首季回升 **5.6**

2019 Q2 Overall Index increases to 5.6, reading at 46.0



升幅為過去 **3** 年來最高

The increase is the highest in the past 3 years



顯示中小企的營商信心正逐步回穩

To show recovering confidence in the business environment for SMEs





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調查結果

Results



2019 年第二季重點指數 Key Indices in 2019 Q2

綜合營商指數
Overall Index

46.0



三大行業指數
Key Industry Sub-Indices



40.4

製造業
Manufacturing



44.2

進出口貿易及批發業
Import/Export Trade & Wholesale



38.7

零售業
Retail

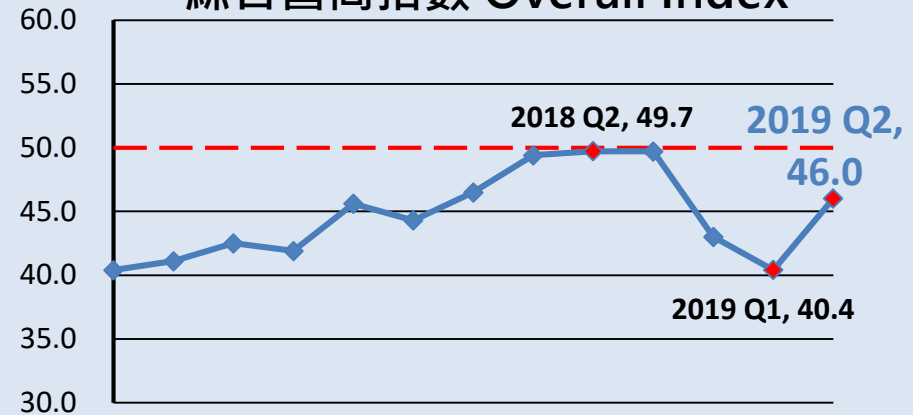
	2015 Q1	2015 Q2	2015 Q3	2015 Q4	2016 Q1	2016 Q2	2016 Q3	2016 Q4	2017 Q1	2017 Q2	2017 Q3	2017 Q4	2018 Q1	2018 Q2	2018 Q3	2018 Q4	2019 Q1	2019 Q2
綜合營商指數 Overall Index	50.1	49.0	49.6	44.4	42.8	40.4	41.1	42.5	41.9	45.6	44.3	46.5	49.4	49.7	49.7	43.0	40.4	46.0

綜合營商指數與分項指數

Overall Index & Component Sub-Indices

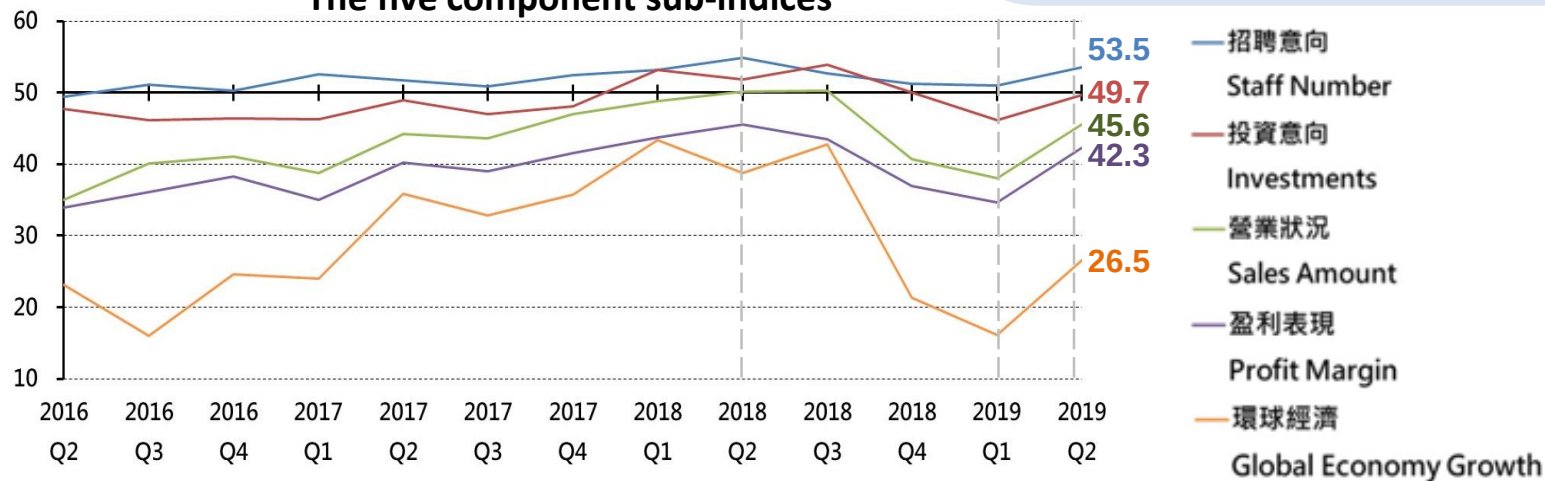
- 分項指數錄得全線上升
- 其中「招聘意向」(53.5)維持正面水平
- All sub-indices increased simultaneously
- “Staff Number” sub-index (53.5) maintained at positive level

綜合營商指數 Overall Index



分項指數表現

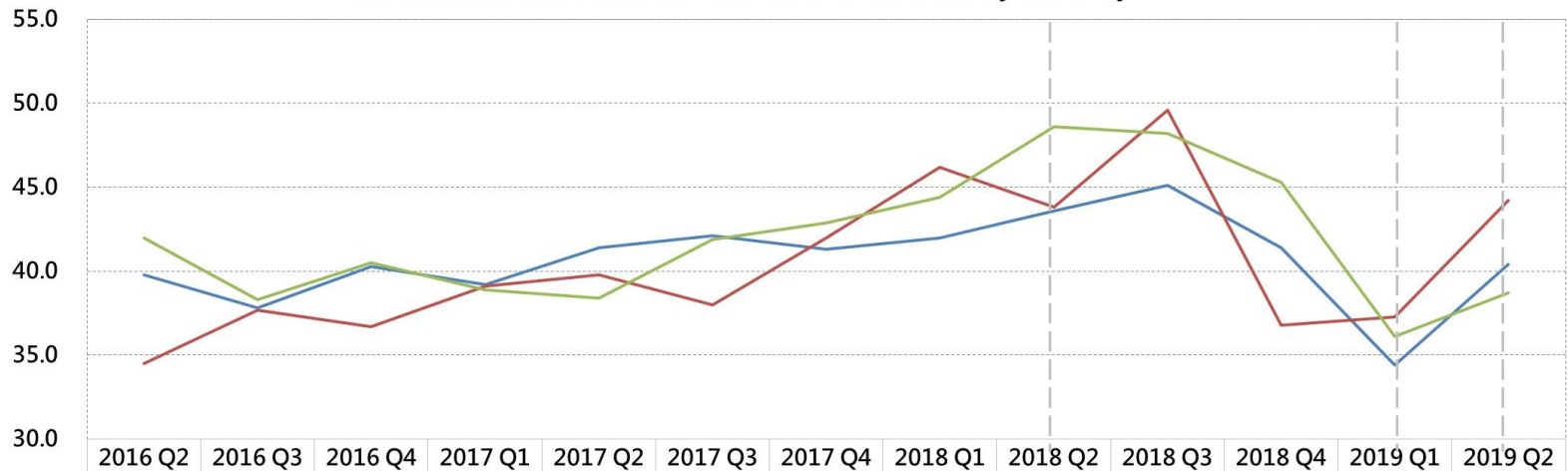
The five component sub-indices



行業分類指數

Index by Industry

行業分類指數表現 Standard Chartered SME Index by Industry



	2016 Q2	2016 Q3	2016 Q4	2017 Q1	2017 Q2	2017 Q3	2017 Q4	2018 Q1	2018 Q2	2018 Q3	2018 Q4	2019 Q1	2019 Q2
製造業分類指數 Manufacturing	39.8	37.8	40.3	39.2	41.4	42.1	41.3	42.0	43.6	45.1	41.4	34.4	40.4
進出口貿易及批發業分類指數 Import/Export Trade and Wholesale	34.5	37.7	36.7	39.1	39.8	38.0	42.0	46.2	43.8	49.6	36.8	37.3	44.2
零售業分類指數 Retail	42.0	38.3	40.5	38.9	38.4	41.9	42.9	44.4	48.6	48.2	45.3	36.1	38.7



- 對比上季，三大行業分類指數均上升
- The sub-indices for the three major industries increased simultaneously when compared to last quarter

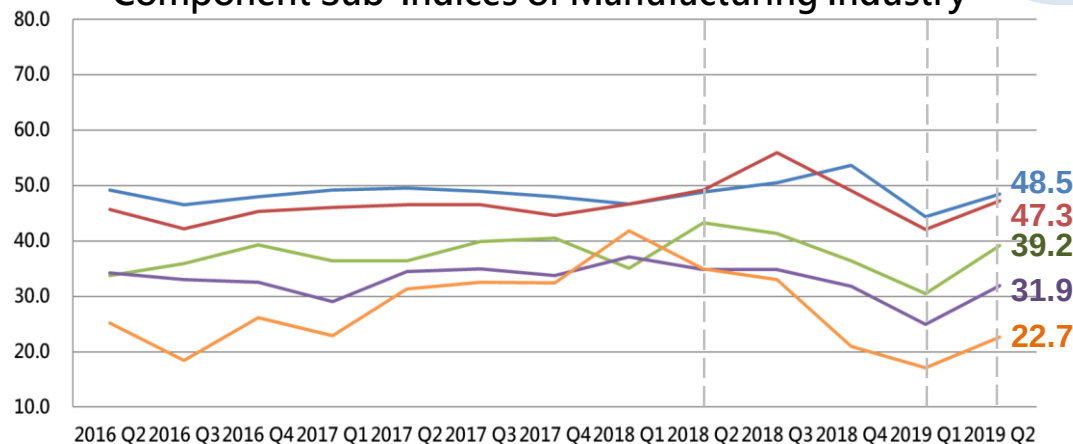
製造業

Manufacturing

- 行業指數較上季升6.0至**40.4**
- 與上年同期(43.6)比較則跌3.2
- 對比上季，**所有分項指數均上升**
- Industry sub-index increased 6.0 to **40.4**
- Dropped 3.2 when compared to same period of last year (43.6)
- All sub-indices increased** simultaneously when compared to last quarter

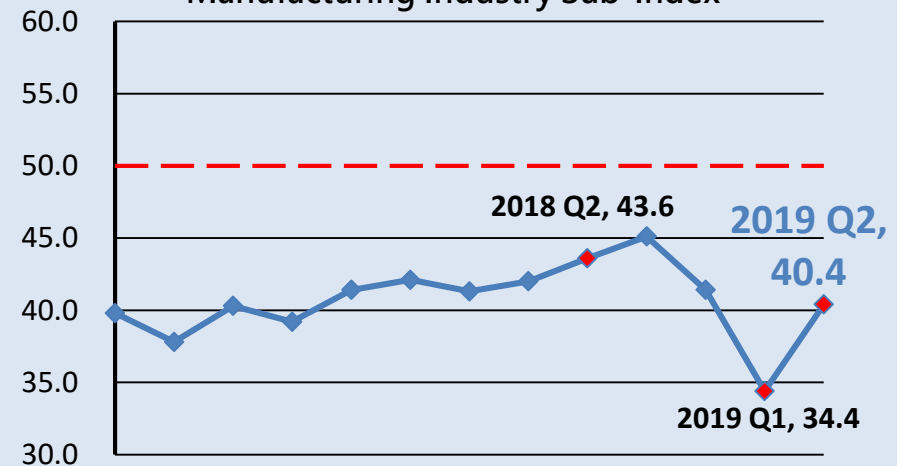
製造業分項指數表現

Component Sub-Indices of Manufacturing Industry



製造業分類指數

Manufacturing Industry Sub-Index



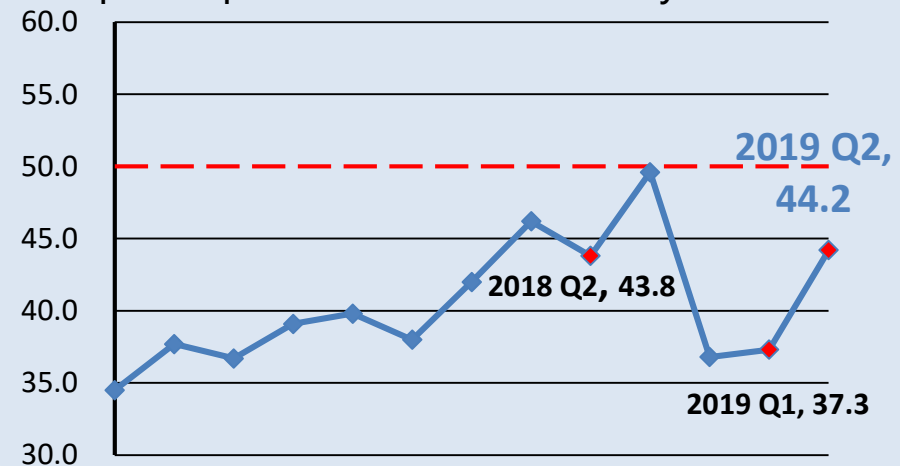
進出口貿易及批發業

Import, Export & Wholesale

- 行業指數較上季升6.9至**44.2**
- 與上年同期(43.8) 比較亦微升0.4
- 「**招聘意向**」(53.0) 更重回**正面**水平
- Industry sub-index increased 6.9 to **44.2**
- Also slightly improved by 0.4 when compared to same period of last year (43.8)
- “**Staff Number**” sub-index (53.0) returned to positive level

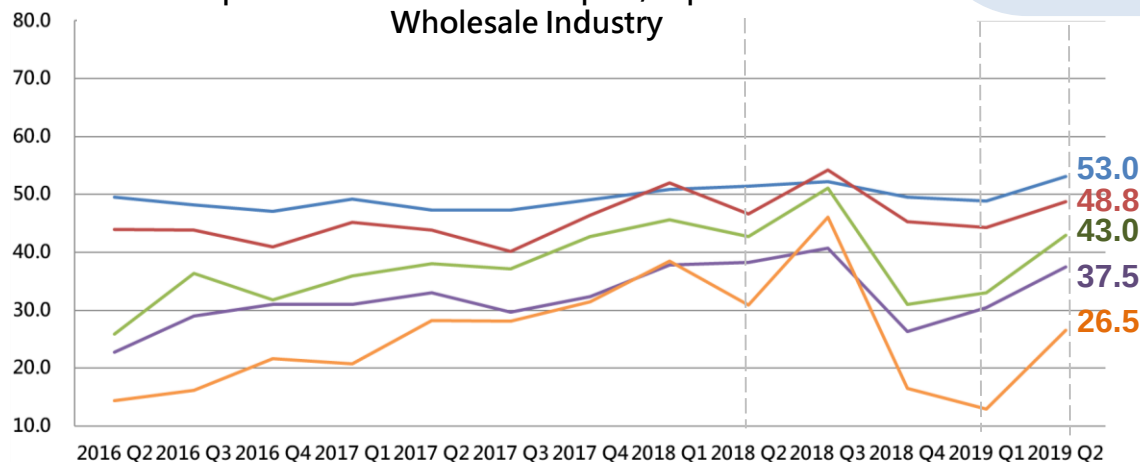
進出口貿易及批發業分類指數

Import/ Export and Wholesales Industry Sub-Index



進出口貿易及批發業分項指數表現

Component Sub-Indices of Import/Export Trade and Wholesale Industry



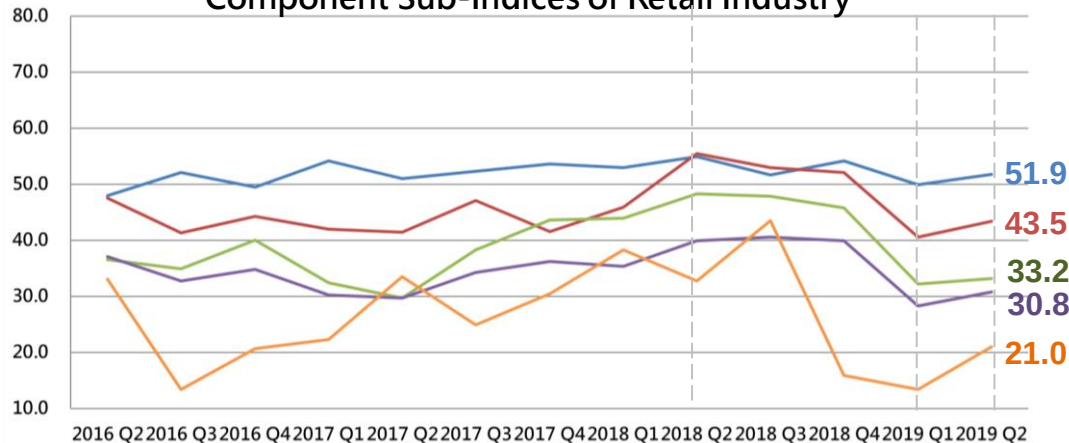
- 招聘意向
- Staff Number
- 投資意向
- Investments
- 營業狀況
- Sales Amount
- 盈利表現
- Profit Margin
- 環球經濟
- Global Economy Growth

零售業

Retail

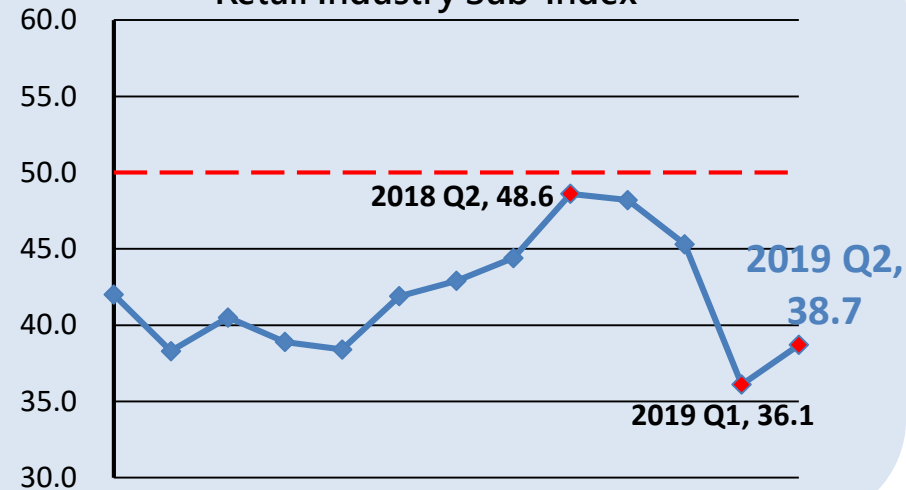
- 行業指數較上季升2.6至**38.7**
- 與上年同期(48.6) 比較則大跌9.9
- 對比上季，所有分項指數均上升；
但與**上年同期**相比，則**全線下跌**
- Industry sub-index increased 2.6 to **38.7**
- Dropped significantly by 9.9 when compared to same period of last year (48.6)
- All sub-indices increased simultaneously in this quarter but **dropped simultaneously when compared to same period of last year**

零售業分項指數表現
Component Sub-Indices of Retail Industry



零售業分類指數

Retail Industry Sub-Index



- 招聘意向
Staff Number
- 投資意向
Investments
- 營業狀況
Sales Amount
- 盈利表現
Profit Margin
- 環球經濟
Global Economy Growth



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Standard Chartered Hong Kong SME Leading Business Index

調查專題

Featured Topic



中小企對粵港澳大灣區規劃的看法 (一)

SMEs' Views towards the Greater Bay Area (GBA) Planning (1)



中小企預期大灣區規劃將會令香港國際地位優勢加強/不變，其中預期加強的有45%

SMEs expect that due to the GBA planning, **Hong Kong's international status will be strengthened/unchanged**, with 45% expect “strengthened”



中小企對粵港澳大灣區規劃的看法 (二)

SMEs' Views towards the Greater Bay Area (GBA) Planning (2)

預期貴公司或所在行業會否受惠於大灣區規劃？(會/可能會)

Will your company / corresponding industry benefit from the GBA planning? (Yes/Maybe)

資訊及通訊

Information and Communications

52%

金融及保險

Finance and Insurance

42%

地產

Real Estate

42%

專業服務

Professional and
Business Services

37%

住宿及膳食服務

Accommodation and
Food Services

36%

製造

Manufacturing

34%

零售

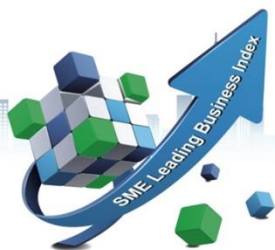
Retail

31%

進出口貿易及批發

Import/Export/
Wholesale

25%



中小企對粵港澳大灣區規劃的看法 (三)

SMEs' Views towards the Greater Bay Area (GBA) Planning (3)

28%

中小企會/可能會參考大灣區規劃制定公司發展方案
SMEs will/may refer to the GBA planning to formulate the company's development plan

26%

中小企會/可能會就大灣區規劃加快數碼轉型的進程
SMEs will/may speed up digital transformation in response to the GBA planning



本季重點

Key Point in this Quarter

生產力局建議中小企可：
HKPC recommends SMEs should：



抓緊大灣區的發展機遇
Grasp GBA's development opportunity



利用 BUD 專項基金或其他資源
Leverage BUD Fund or other available resources



開拓國內或東盟市場
Tap into Mainland China or ASEAN markets



加強數碼化，建立品牌
Adopt digitalisation, transform from OEM to OBM





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專家點評

Expert's Analysis



報告下載

Report Download

【渣打香港中小企領先營商指數】調查報告，可於SME One網站下載：

“Standard Chartered Hong Kong SME Leading Business Index” Report can be downloaded from SME One website:



www.smeone.org



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Result Background



指數介紹

Introduction



擴散指數

Diffusion Index



指數值高於**50.0**時，表示中小企對該項營商環境因素持正面態度

An index above 50.0 indicates **optimistic** business sentiment among SMEs



指數值為**50.0**時，表示中小企對該項營商環境因素持中立態度

A reading at 50.0 indicates **neutral** business sentiment among SMEs



指數低於**50.0**時，則表示中小企看淡該項營商環境因素

An index below 50.0 indicates **pessimistic** business sentiment among SMEs



調查方法

Methodology

調查方式

- 電話訪問
Telephone Interview
- 參考相關行業在香港的中小企數目進行分層抽樣
The sample is stratified by referencing to the number of SMEs in relevant sectors
- 本次於2019年3月進行
This survey was conducted in March 2019
- 訪問了813家本港中小企業的管理層
Management of 813 SMEs were interviewed

涵蓋行業

- 1) 製造業
Manufacturing
- 2) 進出口貿易及批發
Import/Export Trade and Wholesale
- 3) 零售業
Retail
- 4) 住宿及膳食服務
Accommodation and Catering Services
- 5) 資訊和通訊
Information and Communications
- 6) 金融及保險業
Finance and Insurance
- 7) 專業和其他商業服務
Professional and Business Services
- 8) 地產業
Real Estate



免責聲明

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