

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

Results

2021年第一季度

Q1 2021



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

Survey Objectives

- 剖析本地中小企對近期營商環境的信心
- To analyse Hong Kong SMEs' confidence in the recent business environment
- 探討中小企於新發展格局中的市場機遇
- To explore SMEs' market opportunities amid the new development pattern



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本季重點

Key Points of this Quarter



32.4

第一季綜合營商指數因本地第四波疫情爆發走軟，較上季的37.5錄得5.1跌幅。
Q1 Overall Index softened amid the fourth wave of epidemic in Hong Kong, down 5.1 compared to 37.5 of Q4 2020.



50+

「社會及個人服務業」、「金融及保險業」及「資訊及通訊業」的「招聘意向」分項指數錄得中性水平50以上。
“Recruitment Sentiment” of “Social & Personal Services”, “Financing & Insurance” and “Information & Communications” industries stood above 50.



34%

中小企表示有意或已發展內地市場，然而有46%表示聽過但不了解中國內地的「雙循環」政策。
of SMEs interested in or have been entering Mainland market, while 46% have heard but without much understanding of Mainland China’s “Dual Circulation” policy.

2021年第一季綜合營商指數

Overall Index in Q1 2021

Q1
2021

32.4

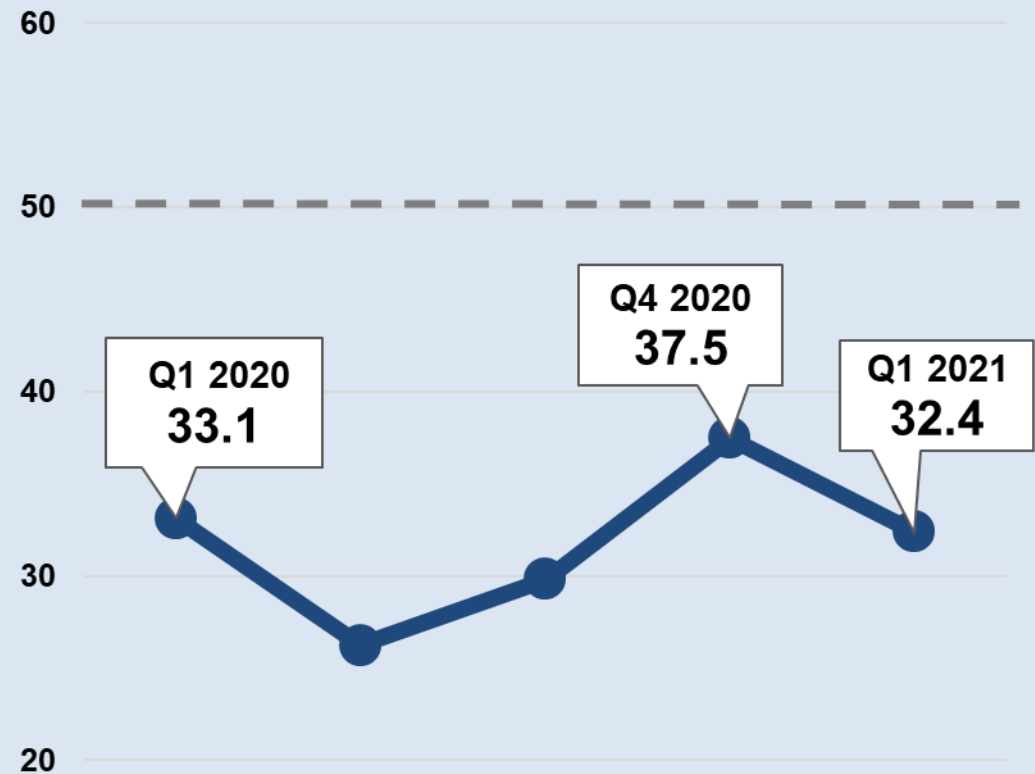


5.1

按季下跌
Quarterly decreased



綜合營商指數
Overall Index



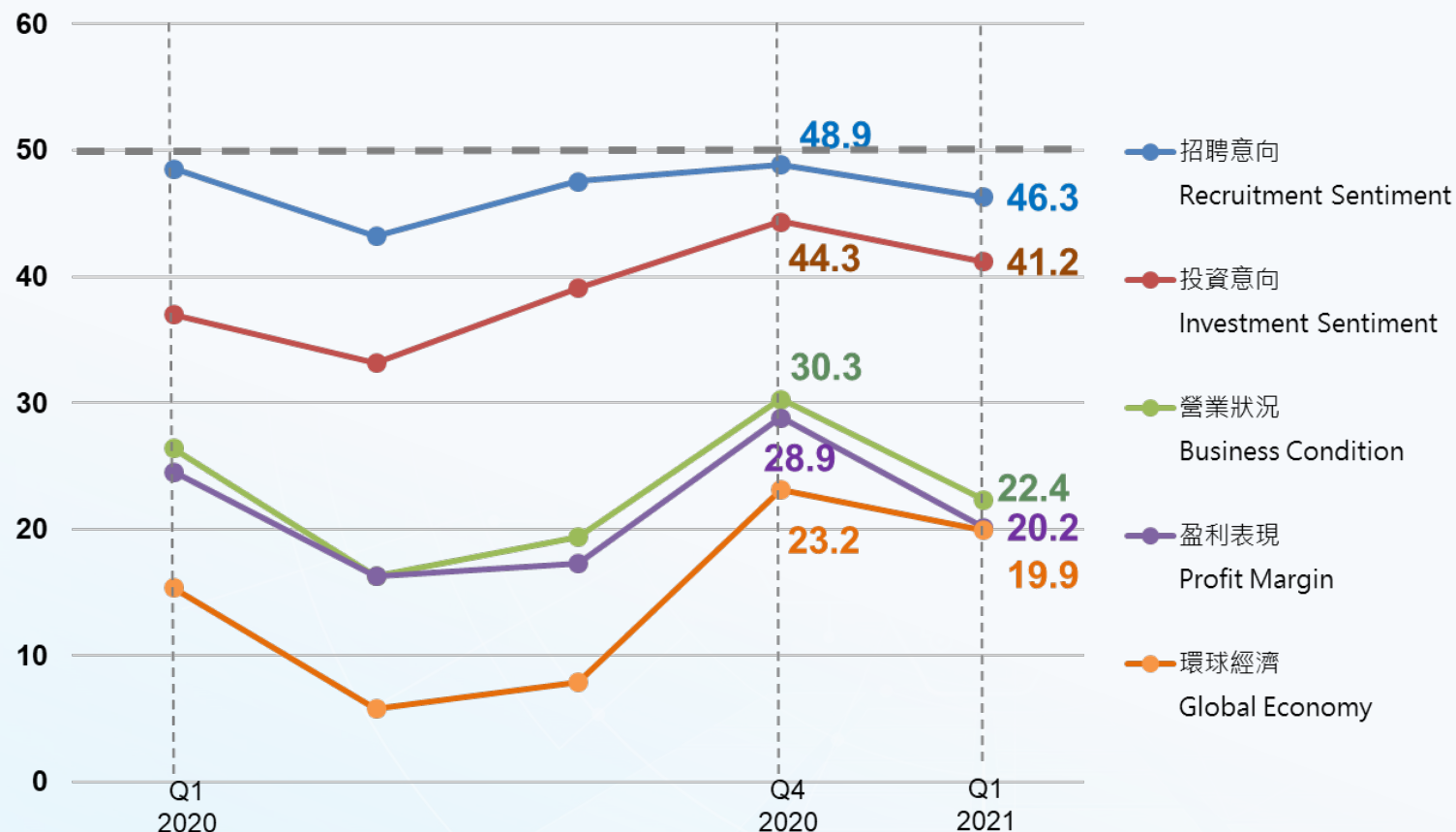
五大分項指數

Five Component Sub-Indices of Overall Index

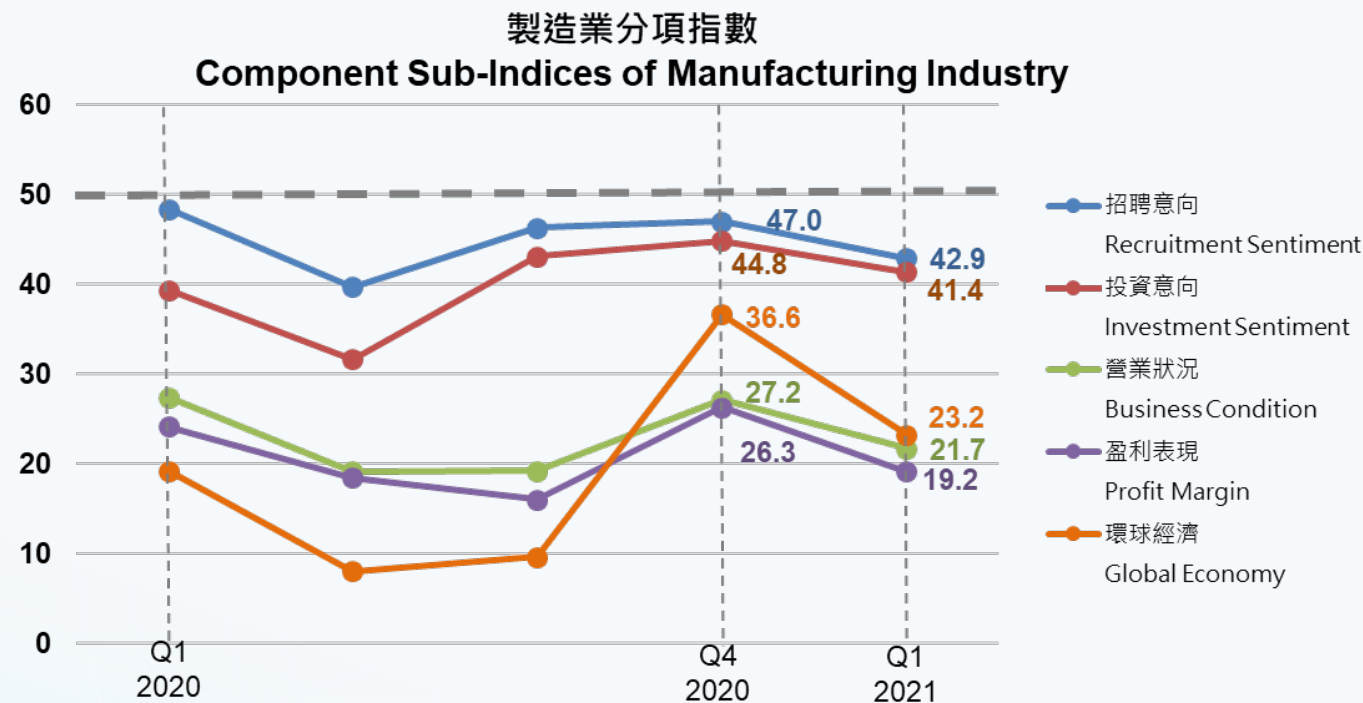
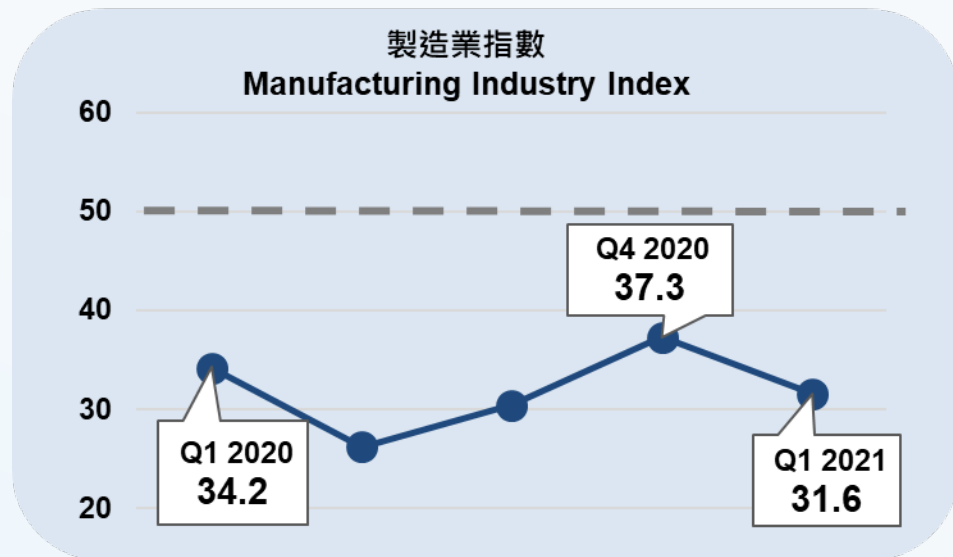
- 五大分項指數全線下跌
- 「盈利表現」及「營業狀況」錄得最明顯跌幅
- All five component sub-indices went down simultaneously
- “Profit Margin” and “Business Condition” recorded the most significant drop



綜合營商指數中的五大分項指數
Five Component Sub-Indices of Overall Index



製造業 Manufacturing

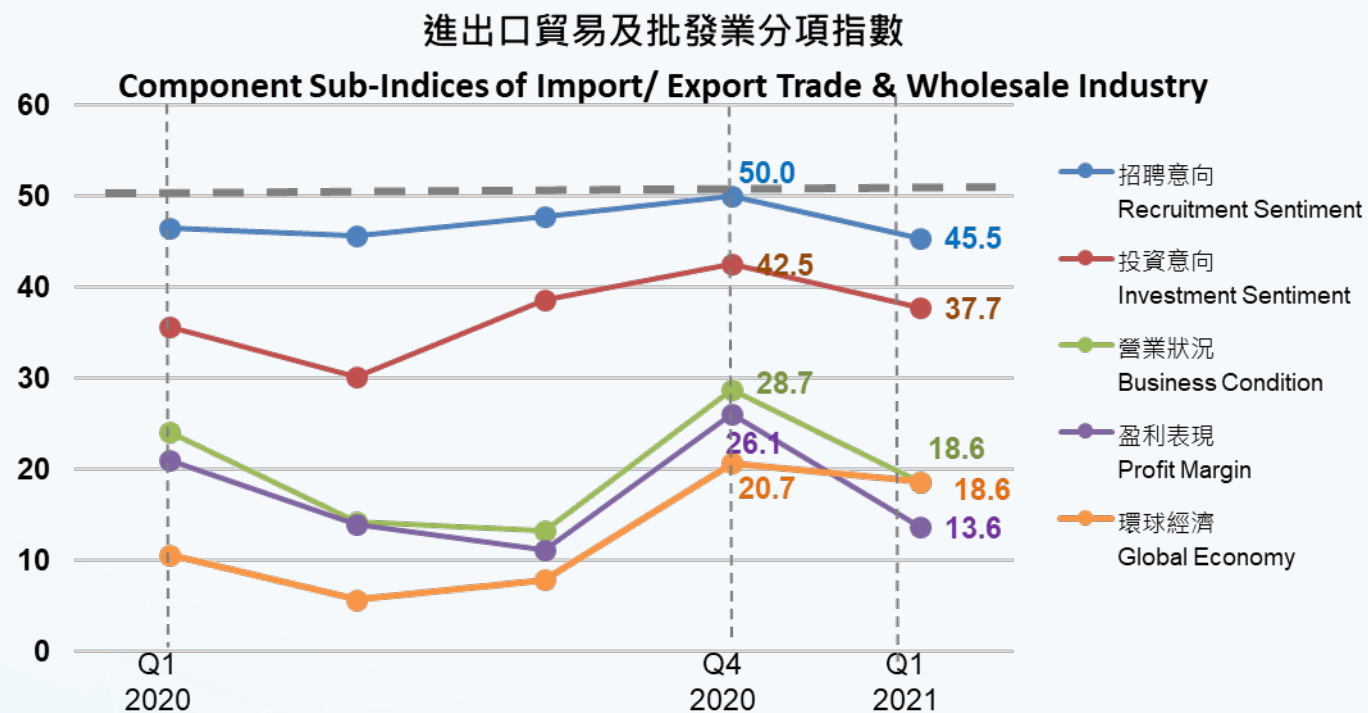
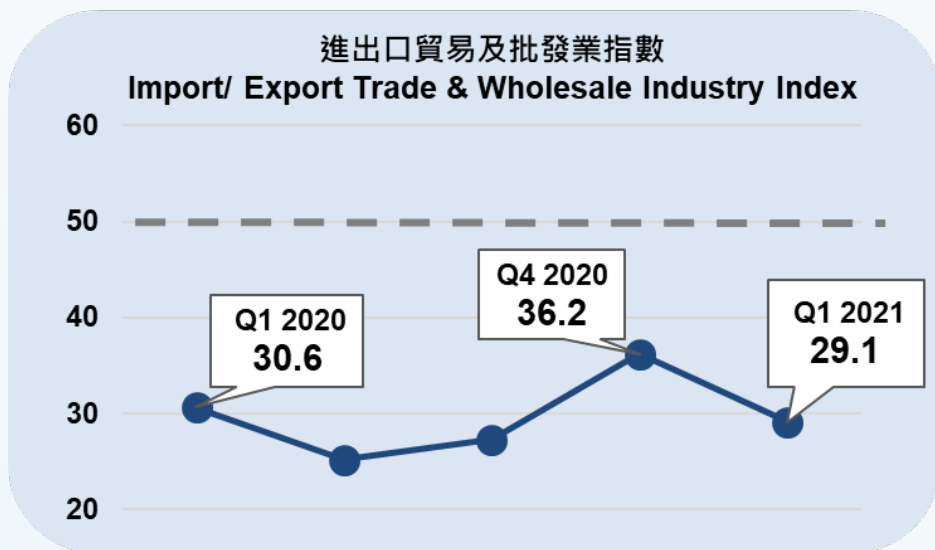


- 行業指數較上季下跌 5.7 至 31.6
- 對比上季，各個分項指數均見下跌，當中最明顯為「環球經濟」，下跌13.4至23.2
- Industry index decreased by 5.7 to 31.6
- As compared to last quarter, all sub-indices showed downtrend especially “Global Economy” which decreased by 13.4 to 23.2



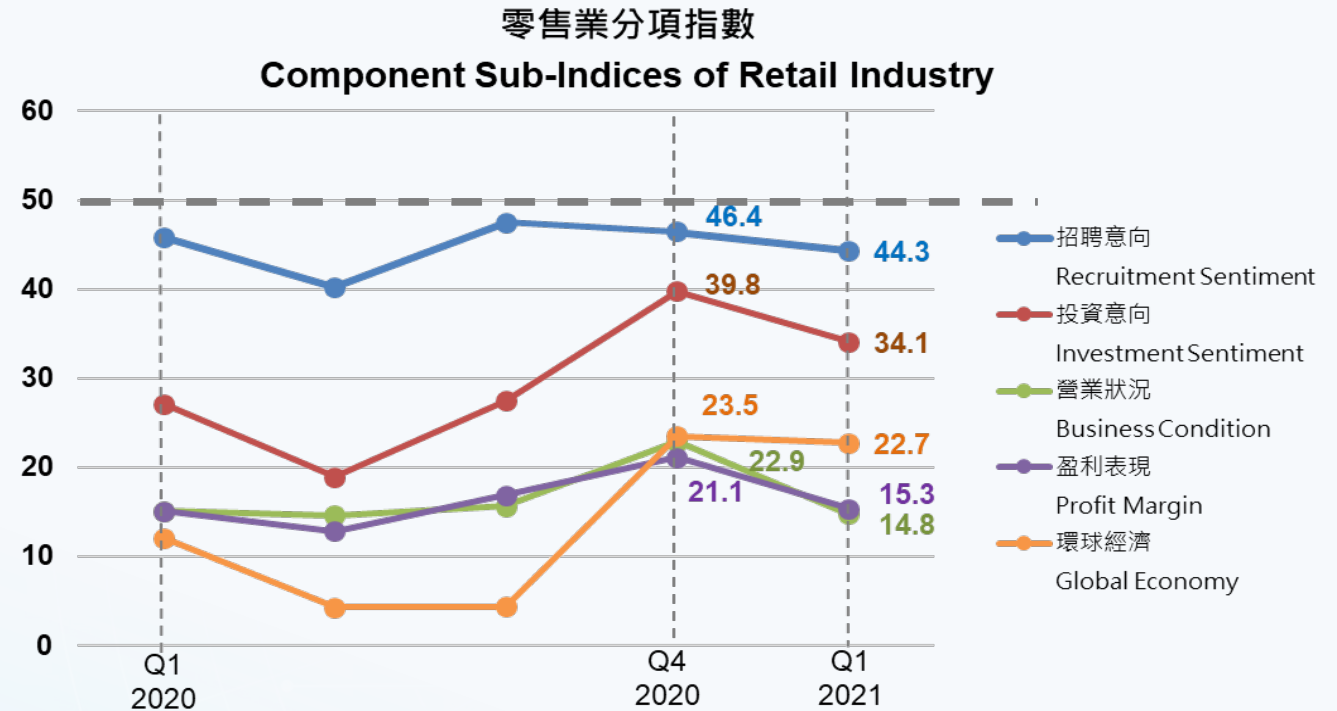
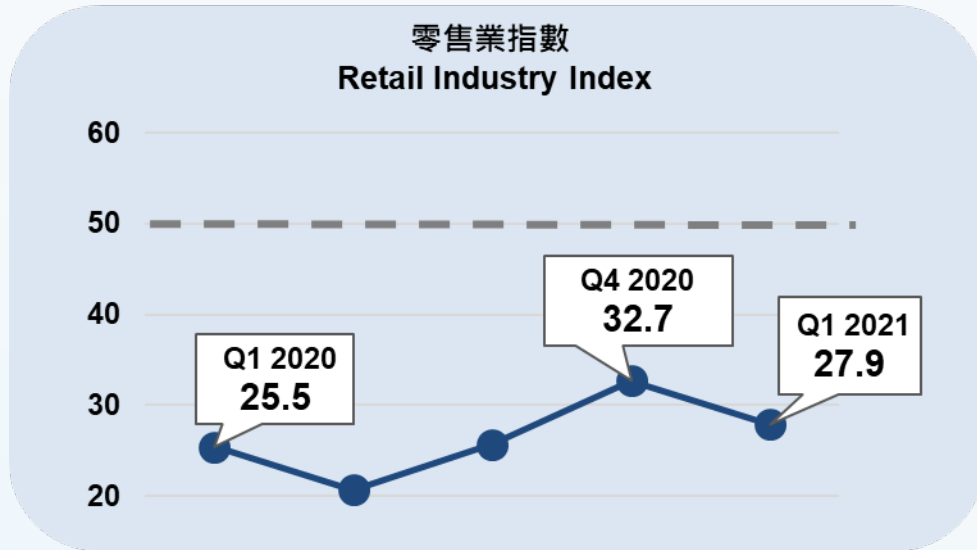
進出口貿易及批發業

Import / Export Trade & Wholesale



- 行業指數較上季下跌 7.1 至 29.1
- 對比上季，所有分項指數均下跌，當中「盈利表現」分項指數表現最弱
- Industry index decreased by 7.1 to 29.1
- As compared to last quarter, all component sub-indices recorded a downturn, among which “Profit Margin” sub-index is the weakest

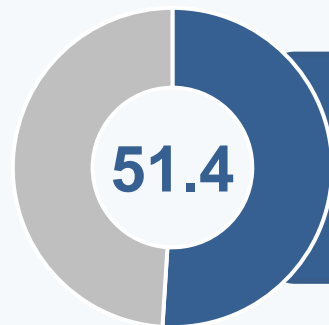
零售業 Retail



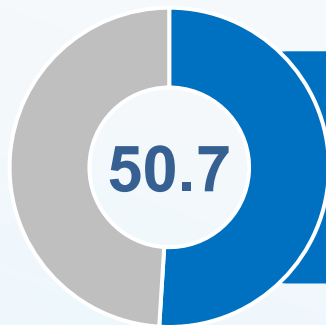
- 行業指數較上季下跌 4.8 至 27.9，所有分項指數均錄得下跌
- 對比上季，「營業狀況」及「盈利表現」分項指數表現最差
- Industry index decreased by 4.8 to 27.9, with all component sub-indices recorded a decline
- Compared to last quarter, “Business Condition” and “Profit Margin” performed the worst

「招聘意向」分項指數高於50中性水平的行業

Industries Achieved above 50 in “Recruitment Sentiment” Component Sub-Index



社會及個人服務業
Social and Personal Services



金融及保險業
Financing and Insurance



資訊及通訊業
Information and Communications



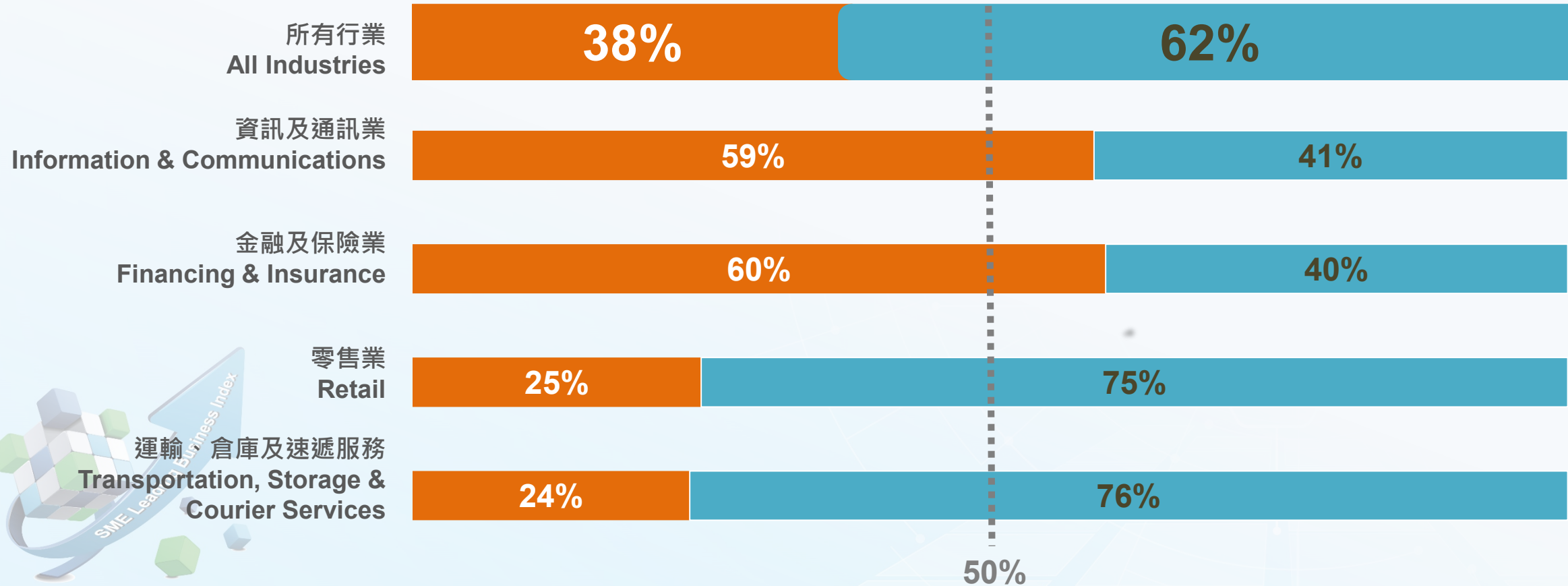
市場展望

Market Observations

中小企預期下一季營業額的變化

SMEs' expectation towards change of turnover in next quarter

■ 不變或上升 Unchange or Increase ■ 下跌 Decrease



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調查專題

Featured Topic

中小企於新發展格局中的市場機遇

SMEs' Market Opportunities amid the New Development Pattern

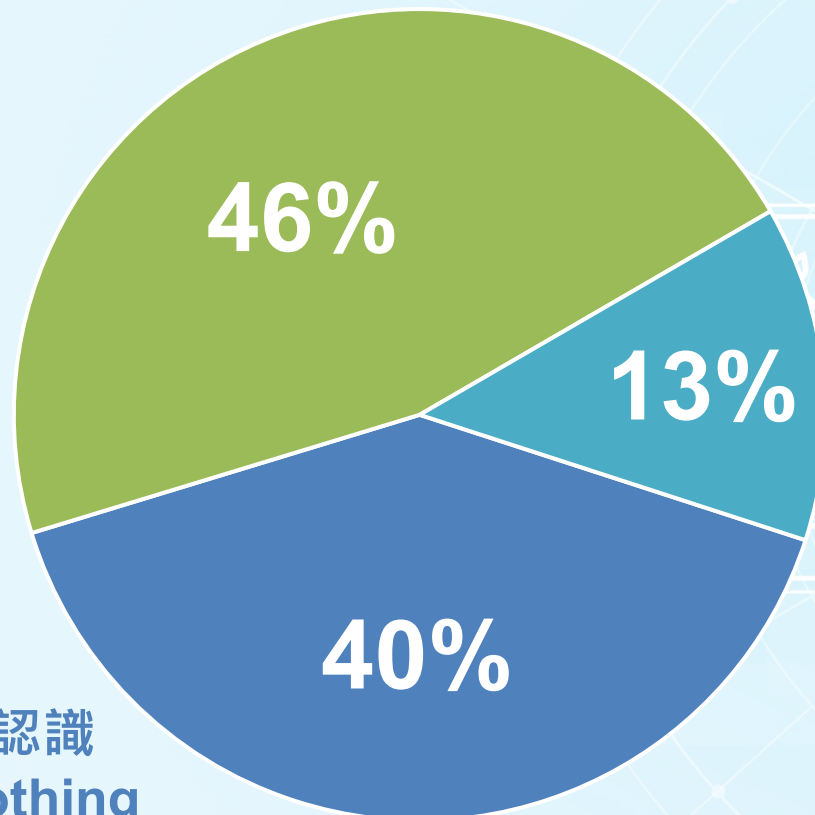


中小企對「雙循環」國策的認識

SMEs' Understanding on "Dual Circulation" Policy

聽過但不了解
Have heard but
without much
understanding

完全不認識
Know nothing



了解
Familiar with

註：由於四捨五入的關係，百分比相加後未必等如 100%。
Note: Percentage may not add up to 100% due to rounding.



中小企對「雙循環」國策的認識

SMEs' Understanding on "Dual Circulation" Policy

較多對政策表示認識的行業

Sectors have relatively more understandings on policy

71%

資訊及通訊業
Information and Communications

67%

運輸、倉庫及速遞服務業
Transportation, Storage
and Courier Services

69%

金融及保險業
Financing and Insurance

65%

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

68%

製造業
Manufacturing



中小企認為要把握「雙循環」政策機遇的主要取決因素

Major Considerations for SMEs to Seize Opportunities from “Dual Circulation” Policy

1

客戶需求的
差異
Differences in
customer
needs

2

制度和文化的
差異
Differences in
system and
culture

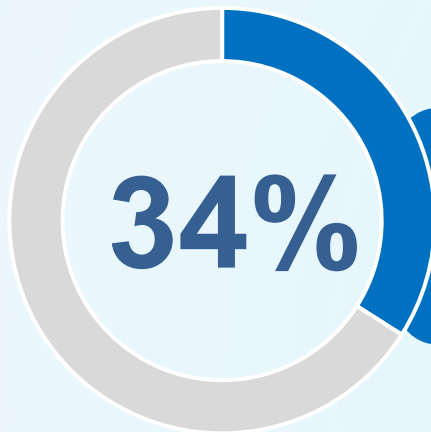
3

成本變化
Change of
cost



中小企拓展內地市場的情況

SMEs are Seizing Business Opportunities in the Mainland Market



有意或已經發展內地市場
Interested in or have been entering Mainland market

首三個有意或已經發展內地市場的行業：

Top 3 Industries that interested in or have been entering Mainland market:

製造業
Manufacturing

55%

運輸、倉庫及速遞服務業
Transportation, Storage
and Courier Services

49%

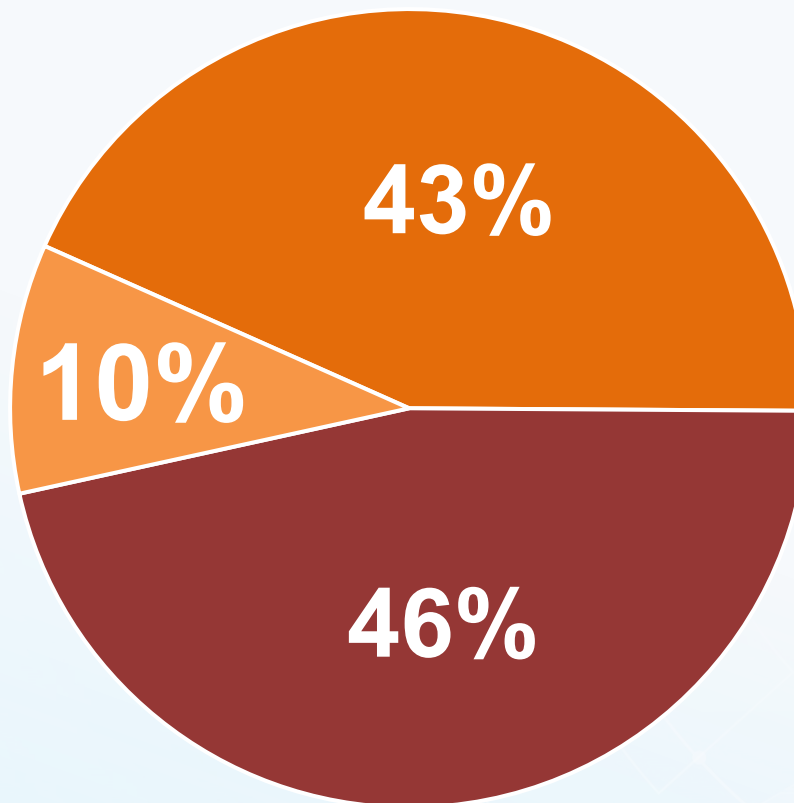
進出口貿易及批發業
Import / Export Trade
and Wholesale

45%

中小企對RCEP協定的認識

SMEs' Understanding on RCEP Agreement

了解
Familiar with



聽過但不了解
Have heard but
without much
understanding

完全不知道
Know nothing



註：由於四捨五入的關係，百分比相加後未必等如 100%。
Note: Percentage may not add up to 100% due to rounding.

中小企對於RCEP協定的看法

SMEs' View towards RCEP Agreement

預期為生意營運帶來正面的影響
Expected positive impacts to business operation

提高區內服務
貿易開放

Enhancement of
liberalisation on
trade in services

消除關稅
障礙

Removal of
tariff barrier

增加擴大貿易
往來的可能性
Increasing the
possibility of
trade expansion

採用負面清單
模式

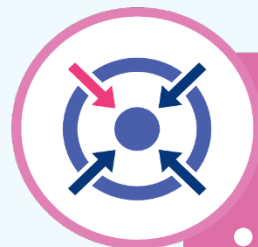
Adoption of
negative list
management mode





洞悉市場 Understanding the Markets

- 粵港澳大灣區生產力大講堂及考察團
GBA Seminars and Study Missions
- 東盟製造業發展指南
Guide to ASEAN - Opportunities and Limitations in Manufacturing



全方位服務 Multi-Pronged Services

- 生產力局深圳創新及技術中心暨大灣區辦事處
HKPC Shenzhen Innovation and Technology Centre and Greater Bay Area Office
- 廠房布局設計及生產力提升
Plant Layout Design and Productivity Enhancement
- 當地環保法規
Local Environment Regulations Compliance Advisory
- 產品測試及合規
Product Testing & Compliance
- 香港及內地政府資助基金
HK and the Mainland Govt Funding Schemes
- 中小企支援組「填form攻略」
SME ReachOut on "Form Filling Tips"



以新科技創新經濟 - 生產力局建議

To Drive Hong Kong's economy with New Technologies – HKPC's Insight



新經濟下本地具發展前景的行業 Industries with Promising Development under New Economy

- 食品與飲品 Food and Beverage
- 中醫藥及保健品 Chinese medicine & health products
- 高增值精密加工零部件
High Value-Added Precision Processing Parts



轉型 · 創新 Transformation & Innovation

- 智能生產技術
Smart Production Technologies
- 「工業4.0」、「企業4.0」方案
Industry 4.0 & Enterprise 4.0
- 科技商品化平台
R&D Commercialisation Platform – TechDive



拓展未來人才 FutureSkills Talent Development

- 生產力學院課程 HKPC Academy Courses
- 知創空間Inno Space



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專家點評

Expert's Analysis



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報告下載

Report Download

【渣打香港中小企領先營商指數】調查報告，可於生產力局網站下載：

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

<https://u.hkpc.org/scbi-hk>



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調查背景

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 2020 年 12 月進行
This survey was conducted in December 2020
- 訪問了 814 間本港中小企業的管理層
Management of 814 SMEs were interviewed

涵蓋行業

1. 製造業 Manufacturing
2. 建造業 Construction
3. 進出口貿易及批發業 Import / Export Trade and Wholesale
4. 零售業 Retail
5. 運輸、倉庫及速遞服務業 Transportation, Storage and Courier Services
6. 住宿及膳食服務業 Accommodation and Food Services
7. 資訊及通訊業 Information and Communications
8. 金融及保險業 Financing and Insurance
9. 專業及商用服務業 Professional and Business Services
10. 地產業 Real Estate
11. 社會及個人服務業 Social and Personal Services



免責聲明

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