



渣打香港中小企領先營商指數

Standard Chartered Hong Kong SME Leading Business Index



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年第二季度

Q2 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
- 探討中小企就2021-22財政預算案的部署
- To look into SMEs' planning in response to 2021-22 Budget



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2021年第二季度
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本季重點

Key Points of this Quarter



42.2

第二季綜合營商指數由32.4上升至42.2，環球經濟帶動主要升幅
Q2 Overall Index increased from 32.4 to 42.2, with Global Economy leading the surge



最多中小企表示會增加投資於「資訊科技系統」、「研究及開發項目」以及「產品及市場推廣」
Most SMEs indicated to increase investment in “Information Technology”, “R&D” and “Product & Marketing Promotion”



49%

中小企表示已經或有意申請財政預算案中提及的政府貸款 / 資助計劃
SMEs have applied or interested in applying Government's loan / funding schemes mentioned in the Budget

2021年第二季綜合營商指數

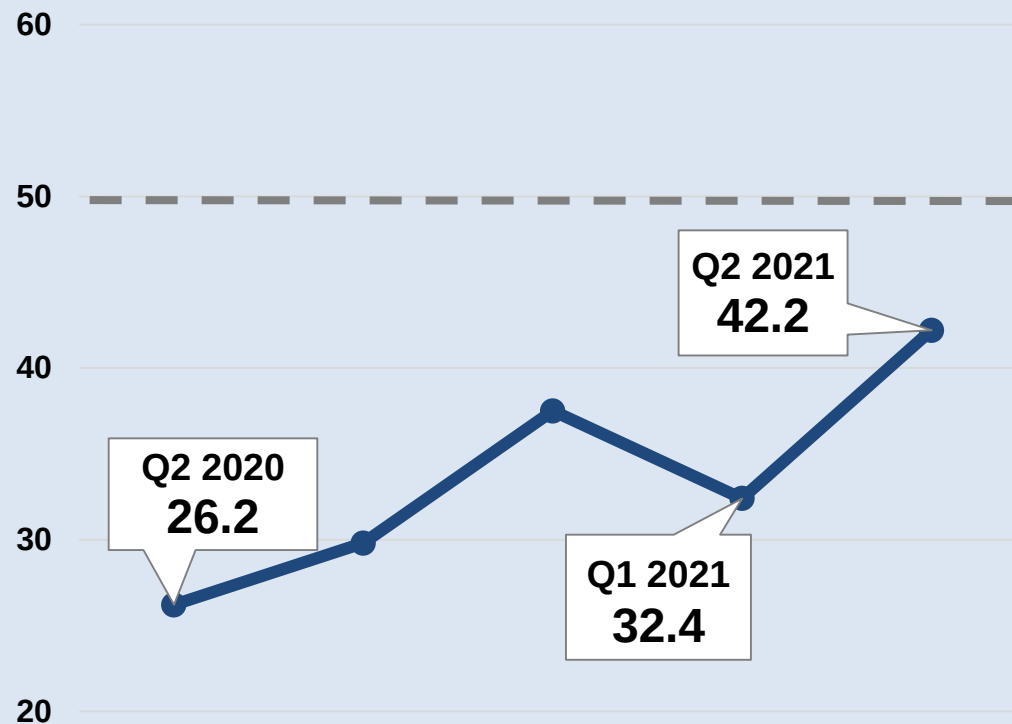
Overall Index in Q2 2021

42.2

按季上升
Quarter-over-quarter
increase



綜合營商指數
Overall Index



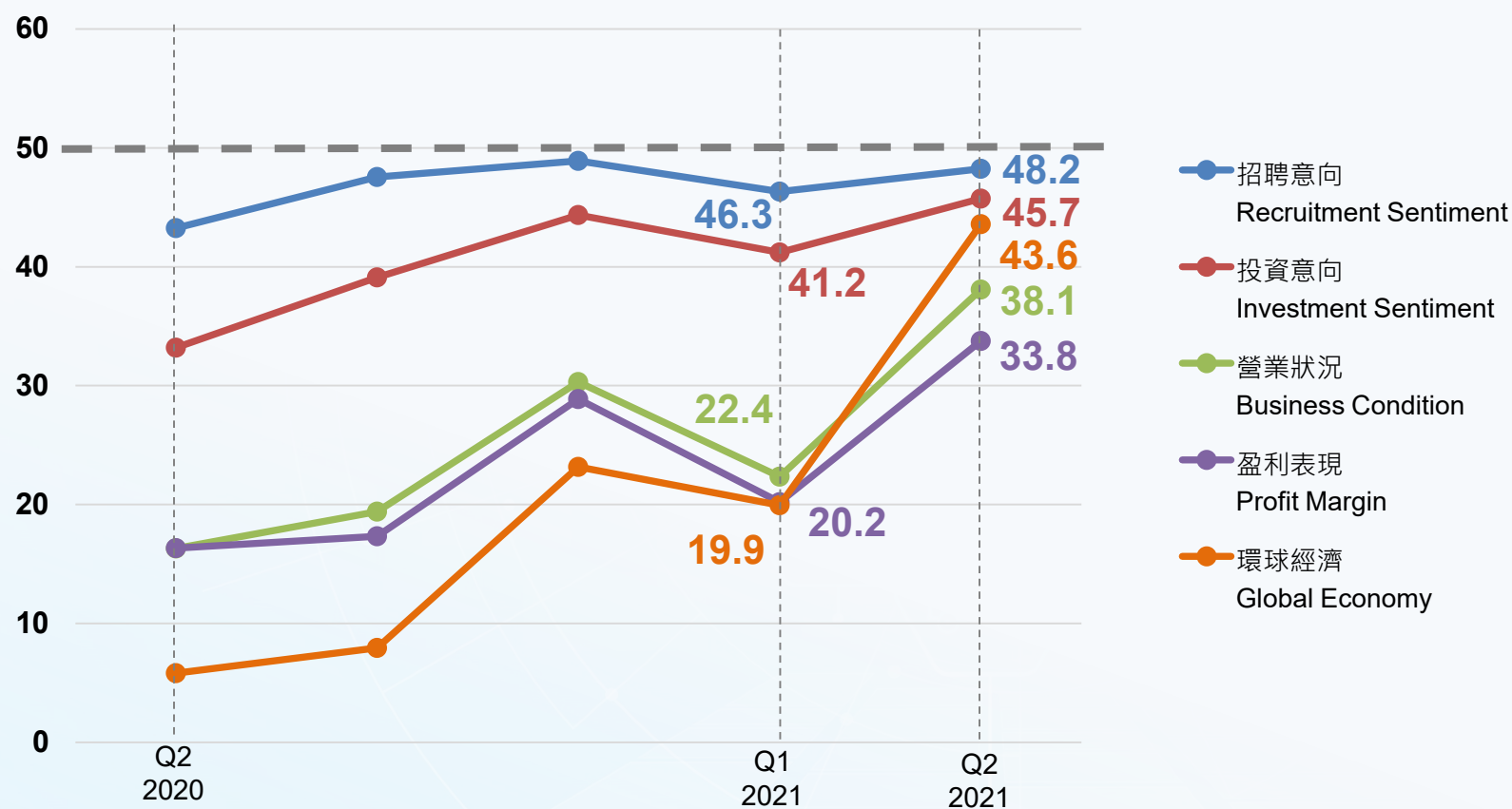
五大分項指數

Five Component Sub-Indices of Overall Index

- 五大分項指數全線上升
- 「環球經濟」錄得最明顯升幅，由19.9升至43.6
- All five component sub-indices went up simultaneously
- “Global Economy” recorded the most significant rise from 19.9 to 43.6

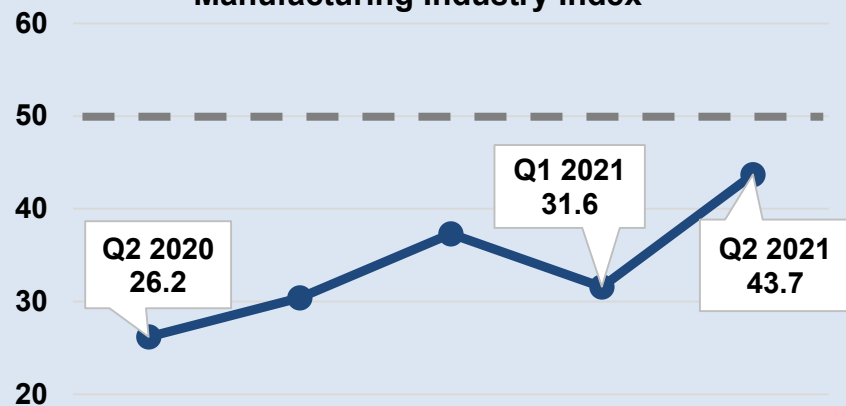


綜合營商指數中的五大分項指數
Five Component Sub-Indices of Overall Index

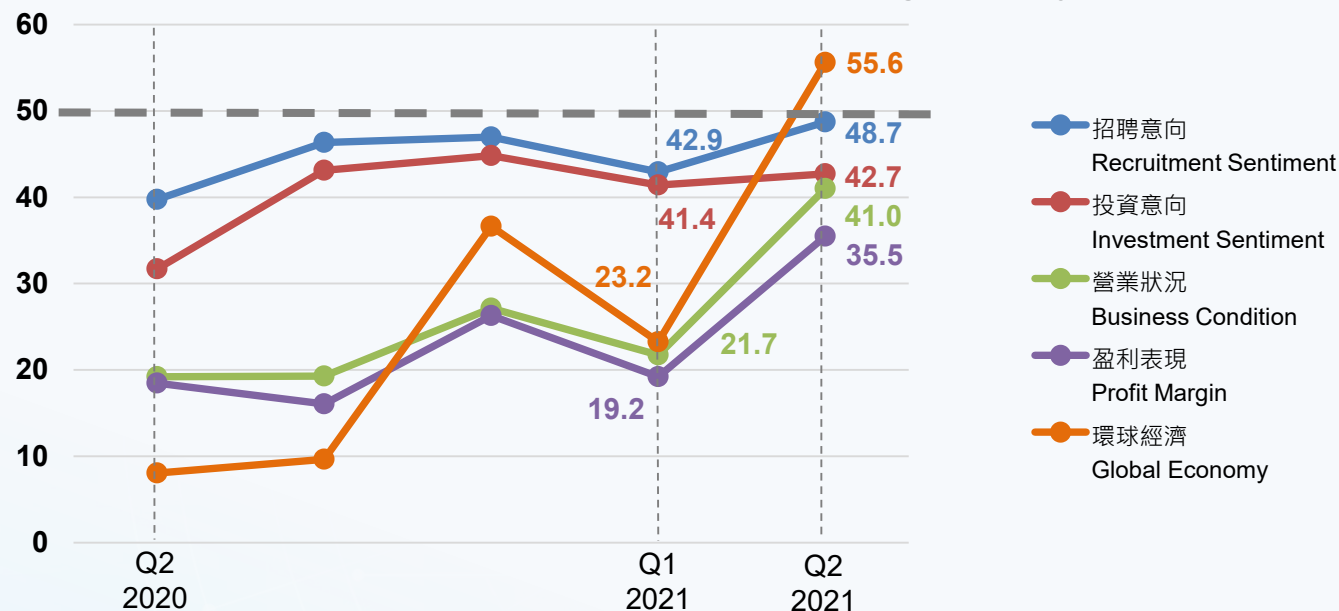


製造業 Manufacturing

製造業指數
Manufacturing Industry Index



製造業分項指數
Component Sub-Indices of Manufacturing Industry

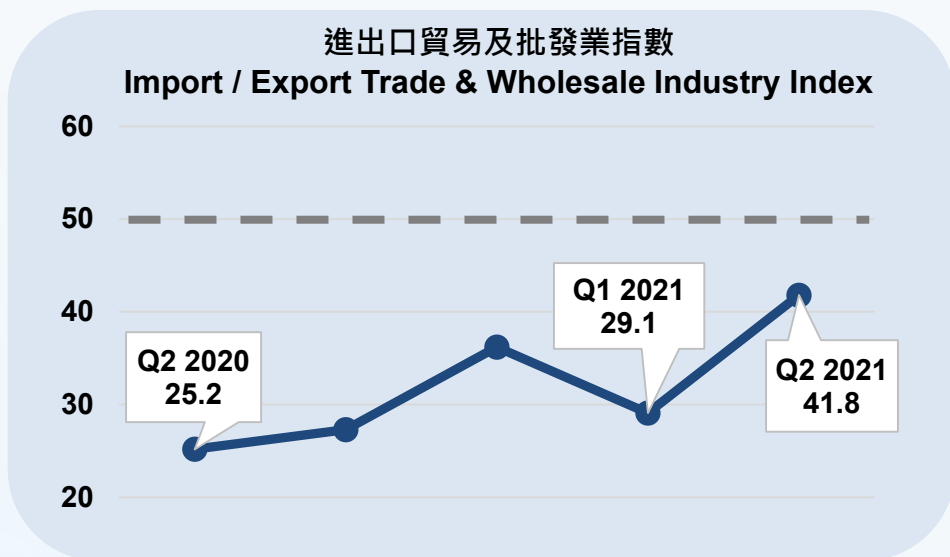


- 行業指數較上季上升 12.1 至 43.7
- 對比上季，各個分項指數均見上升，當中最明顯為「環球經濟」，上升32.4至55.6
- Industry index increased by 12.1 to 43.7
- As compared to last quarter, all component sub-indices showed an uptrend, especially “Global Economy” which soared by 32.4 to 55.6

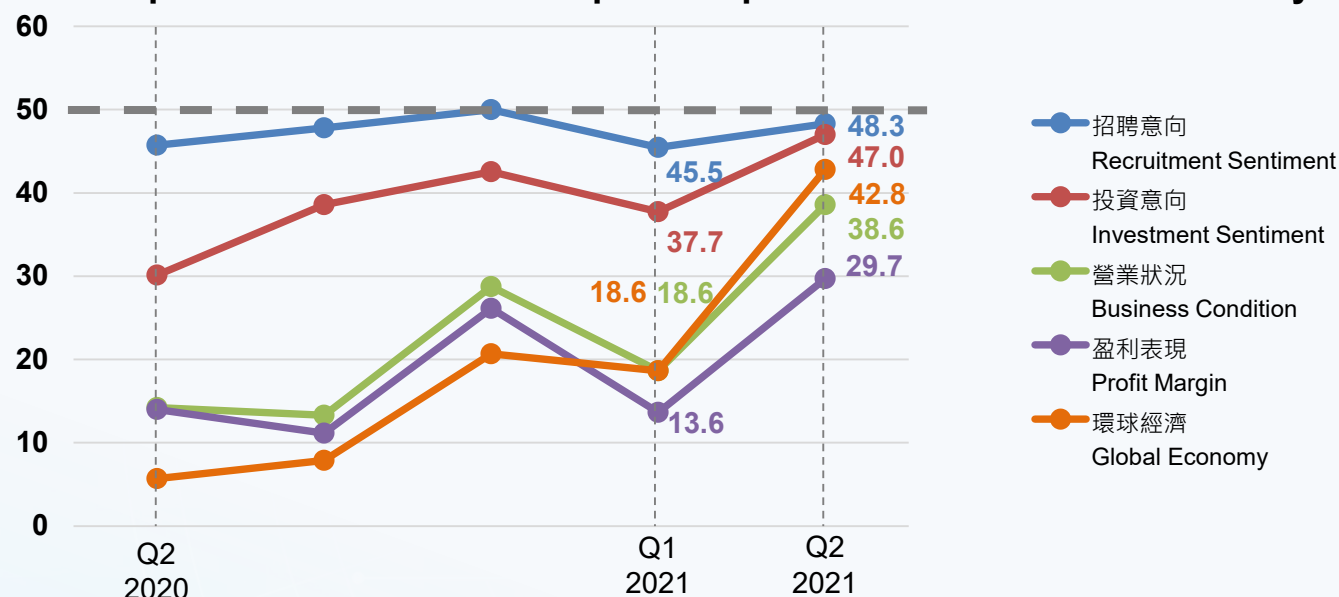


進出口貿易及批發業

Import / Export Trade & Wholesale



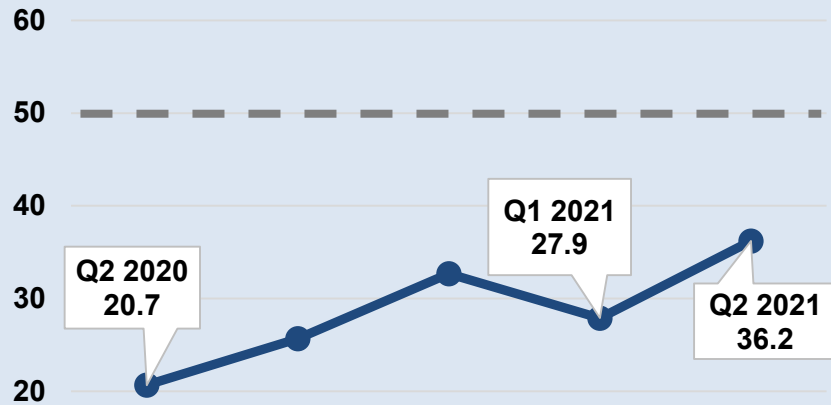
進出口貿易及批發業分項指數
Component Sub-Indices of Import / Export Trade & Wholesale Industry



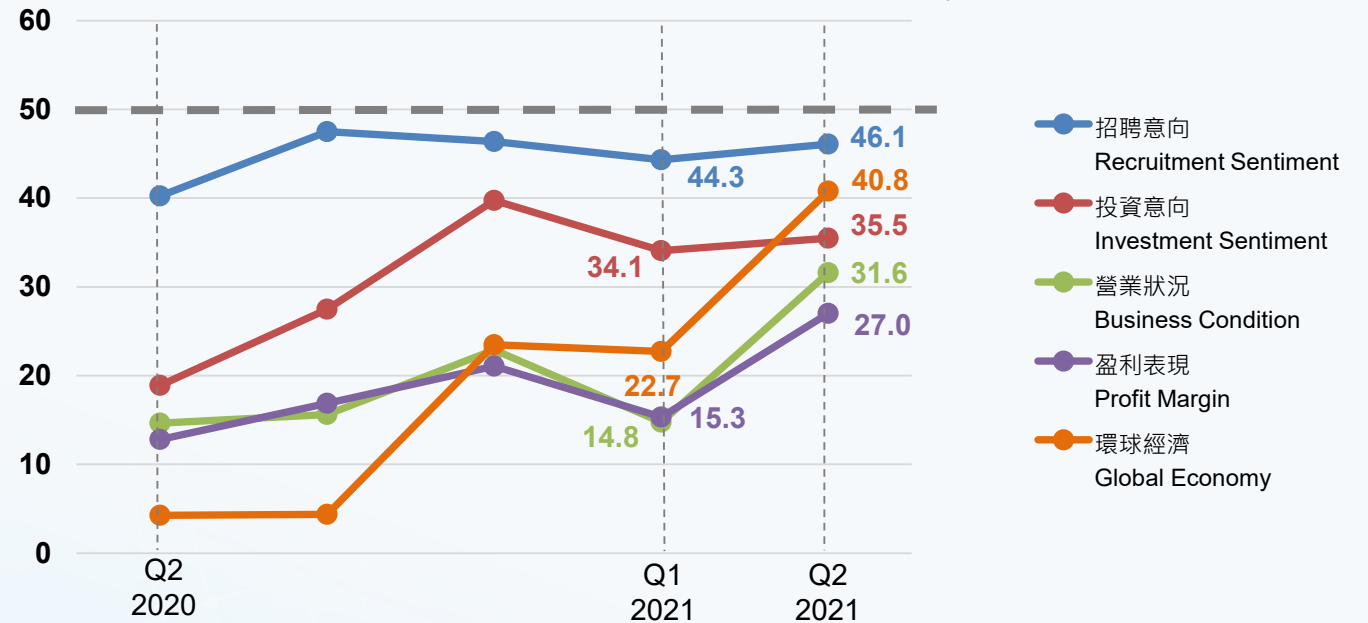
- 行業指數較上季上升 12.7 至 41.8
- 分項指數中的「環球經濟」、「營業狀況」和「盈利表現」升幅較明顯
- Industry index increased by 12.7 to 41.8
- “Global Economy”, “Business Condition” and “Profit Margin” showed relatively stronger increase among the sub-indices

零售業 Retail

零售業指數
Retail Industry Index



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



- 行業指數較上季上升 8.3 至 36.2，所有分項指數均錄得上升
- 惟零售業指數仍然處於11大行業之中最低
- Industry index increased by 8.3 to 36.2, with all component sub-indices recorded a rise
- Despite this, Retail Industry index remained the lowest among the 11 industries



行業指數首三位

Top 3 on Industry Index

51.0

資訊及通訊業
Information and
Communications

49.4

金融及保險業
Financing and
Insurance

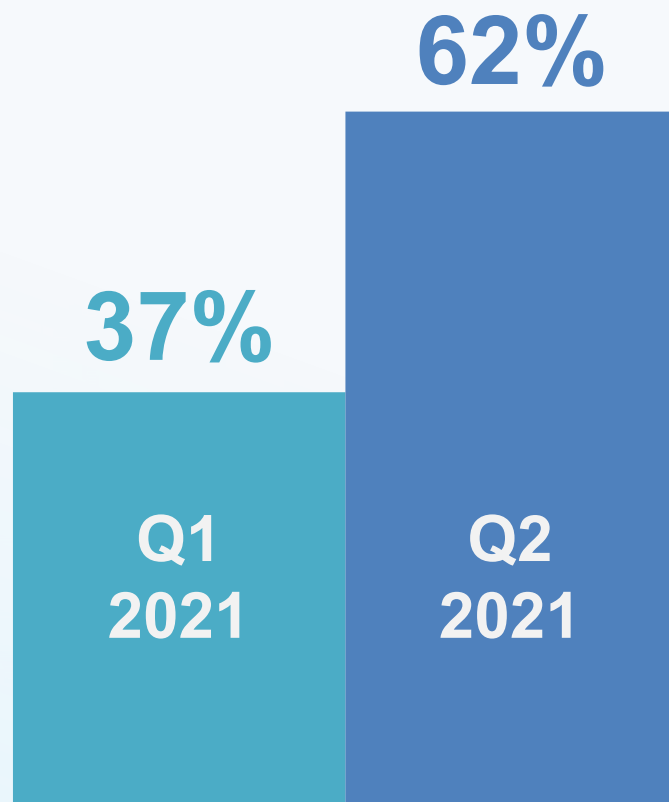
46.2

地產業
Real Estate

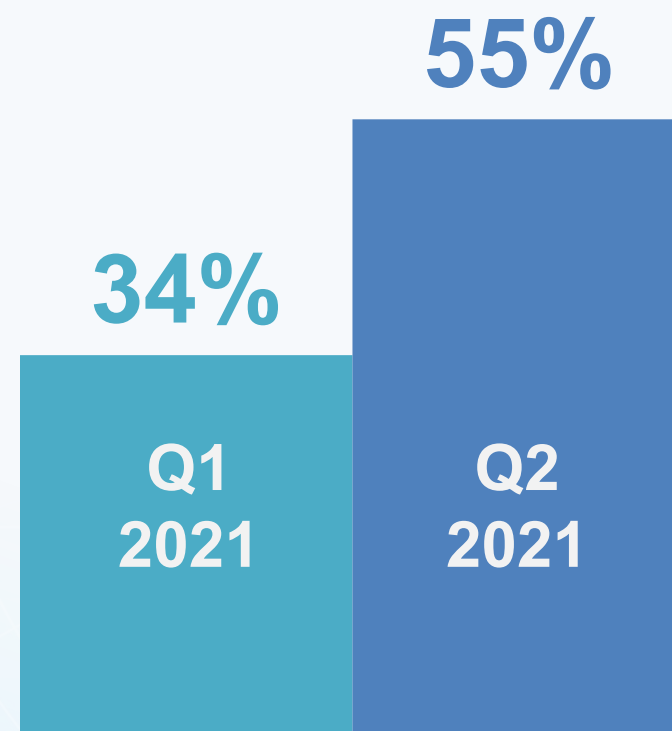


預期營業額及利潤變化

Expectation towards Turnover & Profit Changes



營業額上升或不變
Sales Increase or Remain
Unchanged



利潤上升或不變
Profit Increases or Remains
Unchanged



預期成本和價格的變動

Expectation towards Cost & Price Changes

成本上升
Rise of Cost

產品 / 服務價格上升
Rise of Product / Service Price

原材料
Raw material

58%

薪金
Wage

14%

租金
Rental

10%

18%



增加投資的主要範疇

Categories with Increasing Investment

主要投資項目
和重點行業

Key investment
areas & major
industries



資訊科技系統
Information
Technology

金融及保險業
Financing and Insurance

44%



研究及開發項目
R&D

資訊及通訊業 及 住宿及膳食服務業
Information & Communications and
Accommodation & Food Services

43%



產品及市場推廣
Product &
Marketing
Promotion

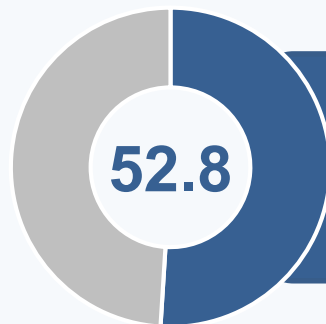
資訊及通訊業 及 住宿及膳食服務業
Information & Communications and
Accommodation & Food Services

36%

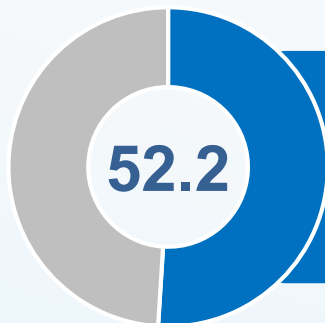


招聘意向高於50的行業

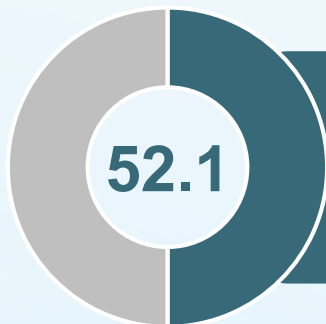
Industries above 50 in Recruitment Sentiment



資訊及通訊業
Information and Communications



住宿及膳食服務業
Accommodation and Food Services



金融及保險業
Financing and Insurance



環球經濟展望

Expectation over Global Economy

持正面或中性看法

Holding a positive or neutral perspective



Q2 2021
59%

Q1 2021
28%



渣打香港中小企領先營商指數

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調查專題

Featured Topic

香港中小企就2021-22財政預算案的部署

Hong Kong SMEs' Planning in Response to 2021-22 Budget



對財政預算案寬減項目的看法

Views on Reduction Items in the Budget

最多中小企認為受惠的
寬減項目

The reduction items that
most SMEs deemed as
beneficial



1

商業登記費寬免

Waiver of Business Registration Fees

2

利得稅寬減

Profit Tax Reduction

3

差餉寬減

Rates Concession

計劃如何使用因寬減而節省的開支

Plan on Using the Amount Saved from the Reduction in the Budget

48%

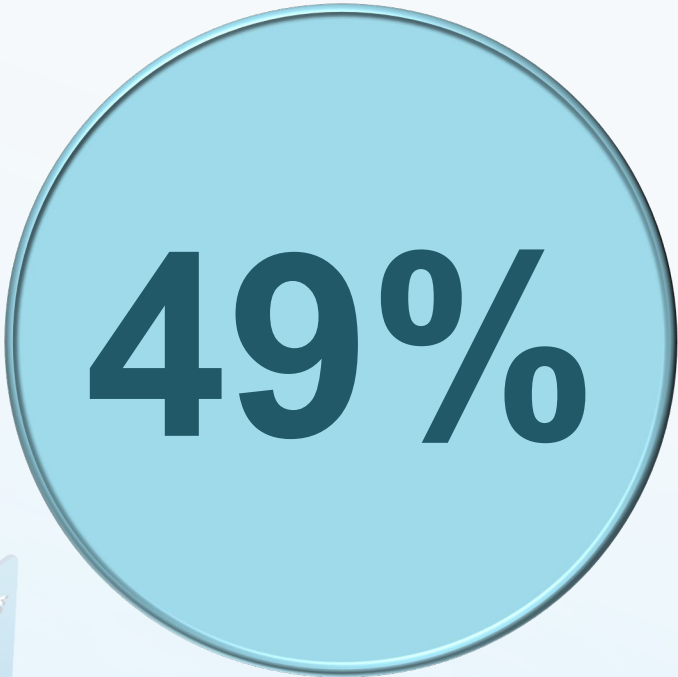
強化公司現金流

Enhance company's cash flow



對申請貸款 / 資助的意向

Intention towards Applying Loan / Funding Schemes



49%

中小企已經或有興趣申請
預算案中提及的貸款 /
資助計劃*

SMEs have applied or
interested in applying the
loan / funding schemes*
mentioned in the Budget

*註：調查訪問的貸款 / 資助計劃

*Note: Loan / funding schemes
interviewed in the survey

貸款計劃 Loan Schemes

- 百分百擔保特惠貸款
Special 100% Loan Guarantee
- 預先批核還息不還本
Pre-approved Principal
Payment Holiday

資助計劃 Funding Schemes

- BUD 專項基金
BUD Fund
- 科技券
Technology Voucher
Programme
- 專利申請資助計劃
Patent Application Grant
Scheme
- 再工業化資助計劃
Re-industrialisation Funding
Scheme
- 創新及科技基金的其他計劃
Other Schemes of Innovation
and Technology Fund



未有打算申請貸款 / 資助的原因

Reasons of not Applying Loan / Funding

34%

資金充裕
Sufficient capital



30%

不符合申請門檻
Not meeting
the application threshold

23%

對項目認識有限
Limited understanding of
the schemes

對貸款項目的意向

Intention towards Loan Support

曾經申請
Have applied

最多已申請
行業
Top industry

建造業
Construction

最普遍項目
Top item

百分百擔保特惠貸款
Special 100%
Loan Guarantee

有興趣申請
Interested in applying

最有興趣
行業
Top industry

製造業
Manufacturing

最有興趣
項目
Top item

預先批核還息不還本
Pre-approved Principal
Payment Holiday



對資助項目的意向

Intention towards Funding Support

曾經申請
Have applied

最多已申請
行業
Top industry

製造業
Manufacturing

最普遍項目
Top item

科技券
Technology Voucher

有興趣申請
Interested in applying

最有興趣
行業
Top industry

金融及保險業
Financing and Insurance

最有興趣
項目
Top item

科技券、專利申請資助
Technology Voucher,
Patent Application Grant



未來一年首三個最希望發展的數碼化項目

Top 3 Digitalisation Items that Most Wished to Develop in the Coming Year

1

網上營商
Online businesses

2

線上工作/會議平台
Online working /
conference platform

3

數碼支付
Digital payment





全方位技術支援 All-Round Technical Support



智能生產技術
Smart production technologies



科技商品化平台：TechDive
R&D commercialisation platform: TechDive



「工業4.0」、「企業4.0」方案
Industry 4.0, Enterprise 4.0 solutions



培訓未來科研人才：生產力學院
FutureSkills for R&D Talent: HKPC Academy



廠房布局設計及生產力提升
Plant layout design & productivity enhancement



中小企 x 初創交流平台：知創企業家網絡
SMEs x startups exchange platform :
InnoPreneur Network



產品測試及合規
Product testing & compliance



日內瓦國際發明展2021奪15項殊榮

15 awards won at the 2021 Geneva International Exhibition of Inventions



Gold Medal with
Congratulations of Jury

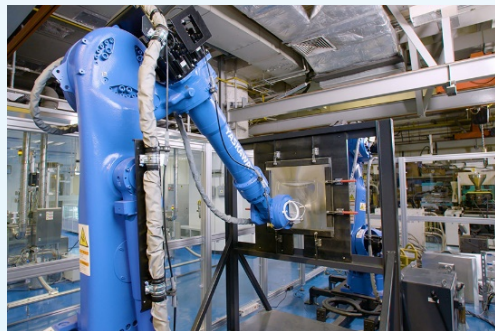
無觸按鈕 kNOw Touch



未來冰袋 Qoolmate x TTFIC



電流輔助訂製板金自由成形技術 EAFF



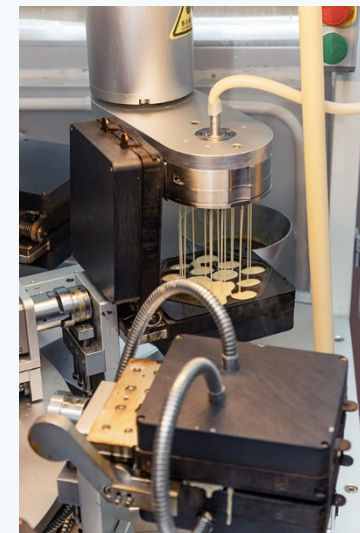
MAKE SMART SMARTER

成就習上

貓頭鷹智能生產線
The OWL Intelligent Production Line



急凍雞蛋仔 Egg Waffle



保心安 Po Sum On Medicine





多項政府資助計劃的秘書處 Secretariat for Various Government Funding Schemes

-  BUD專項基金 BUD Fund
-  專利申請資助計劃 PAG
-  智慧交通基金 Smart Traffic Fund
-  回收基金 Recycling Fund
-  零售業人力需求管理科技應用支援計劃 RETAAS
-  第三方物流服務供應商資助先導計劃
Pilot Subsidy Scheme for Third-party Logistics Service Providers
-  中醫藥發展基金 Chinese Medicine Development Fund
-  清潔生產夥伴計劃 CPPP
-  遙距營商計劃 D-Biz Programme



中小企資援組 SME ReachOut

-  一站式資訊 One-stop information
-  一對一諮詢服務 One-on-one consultation service
-  填表攻略 Form-filling tips

 **75**
推廣活動
Outreach activities

 **+14,000**
人參與
Participants

 處理查詢
Inquiries handled
12,000

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Results

專家點評

Expert's Analysis



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調查結果

Results

2021年第二季度
Q2 2021



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>



渣打香港中小企領先營商指數

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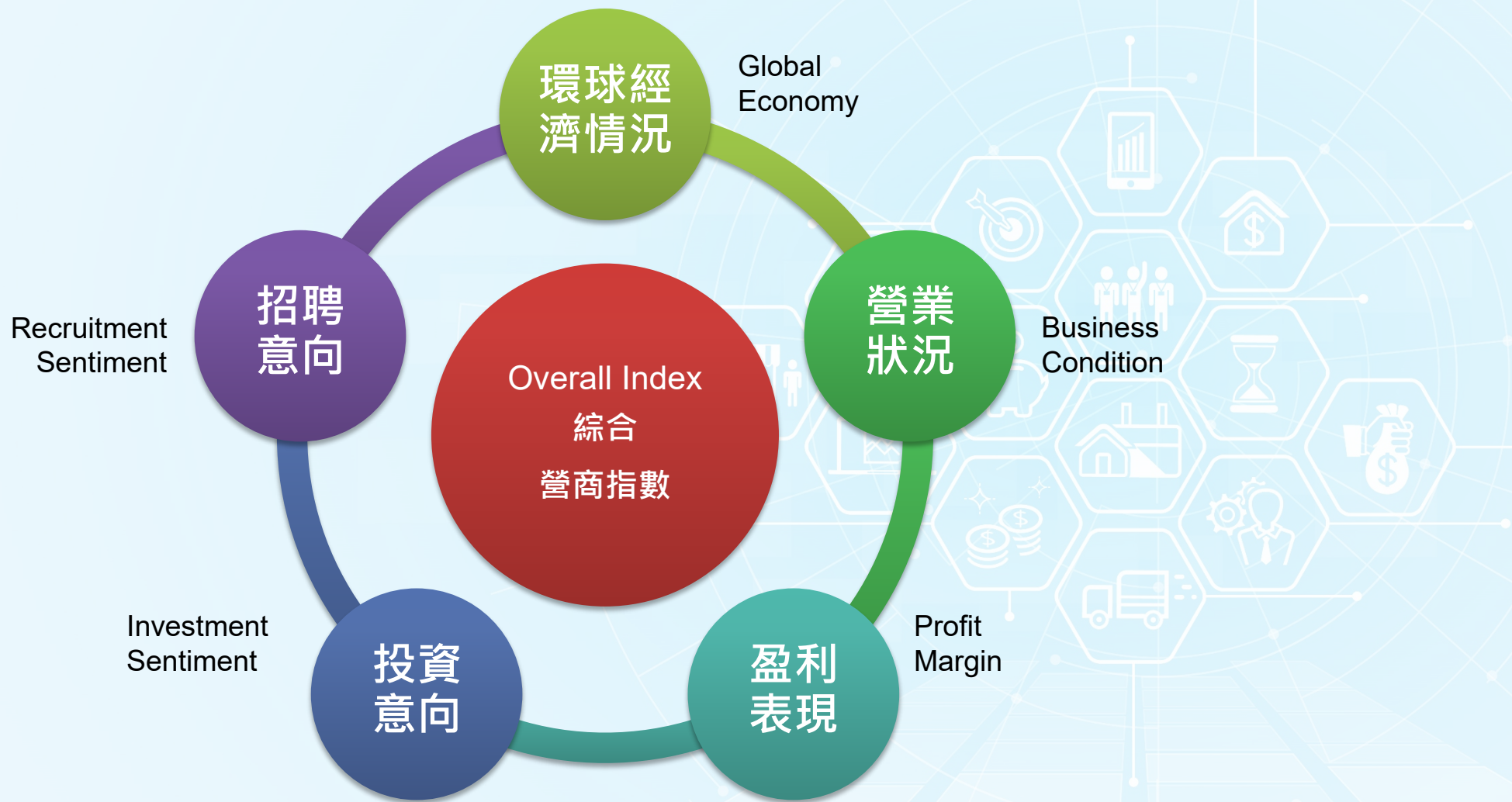
調查背景

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 2021 年 3 月進行
This survey was conducted in March 2021
- 訪問了 805 間本港中小企業的管理層
Management of 805 SMEs were interviewed

涵蓋行業

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



免責聲明

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