



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年第三季度

Q3 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
- 探討中小企對2021年經濟復甦的看法和部署
- To look into SME's perspective and planning in response to the economic recovery in 2021



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2021年第三季度
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本季重點

Key Points of this Quarter



46.6

第三季綜合營商指數由42.2上升至46.6，處於三年來高位

Standing at a three-year high, Q3 Overall Index increased from 42.2 to 46.6



指數高於50中性水平的行業為「資訊及通訊業」、「地產業」及「社會及個人服務業」

Industries achieved above 50 neutral mark were “Information & Communications”, “Real Estate” and “Social & Personal Services”



「線上平台」依然為中小企於數碼經濟方面的首要核心投資

“Online Platform” remained as SME’s top priority to invest on digital economy

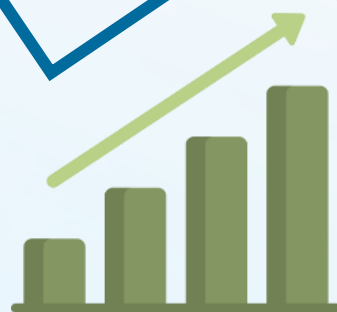
2021年第三季綜合營商指數

Overall Index in Q3 2021

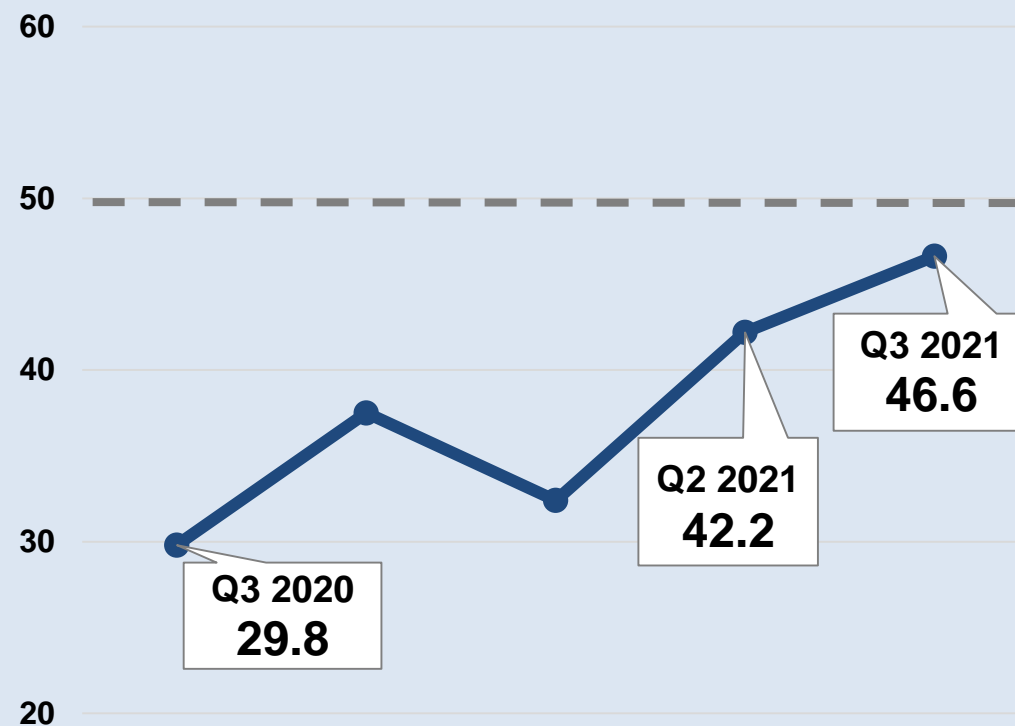
46.6

按季上升
Quarter-over-quarter
increase

4.4



綜合營商指數
Overall Index



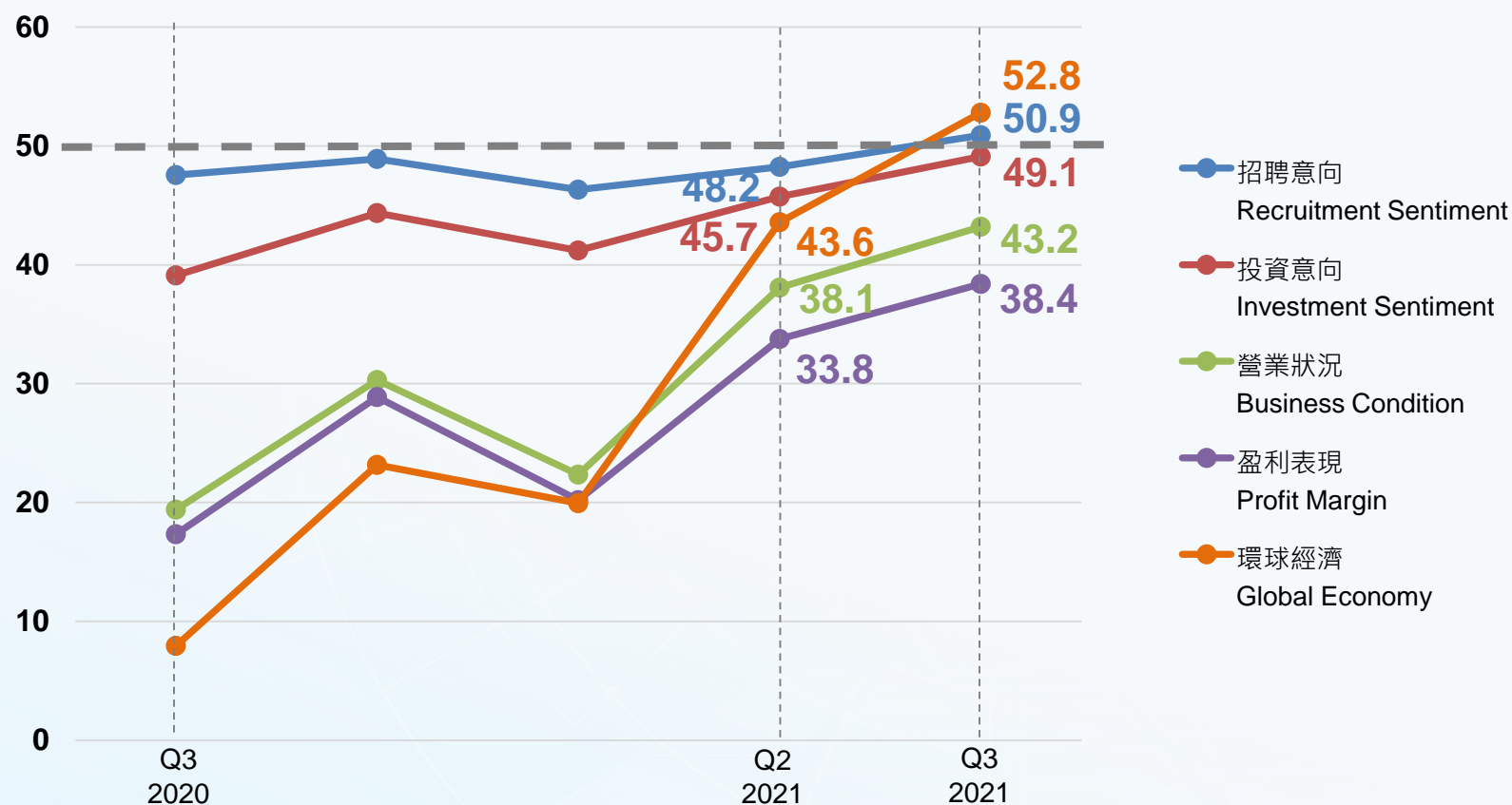
五大分項指數

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43.6跳升至52.8
- All five component sub-indices went up simultaneously
- “Global Economy” recorded the most significant growth and jumped from 43.6 to 52.8

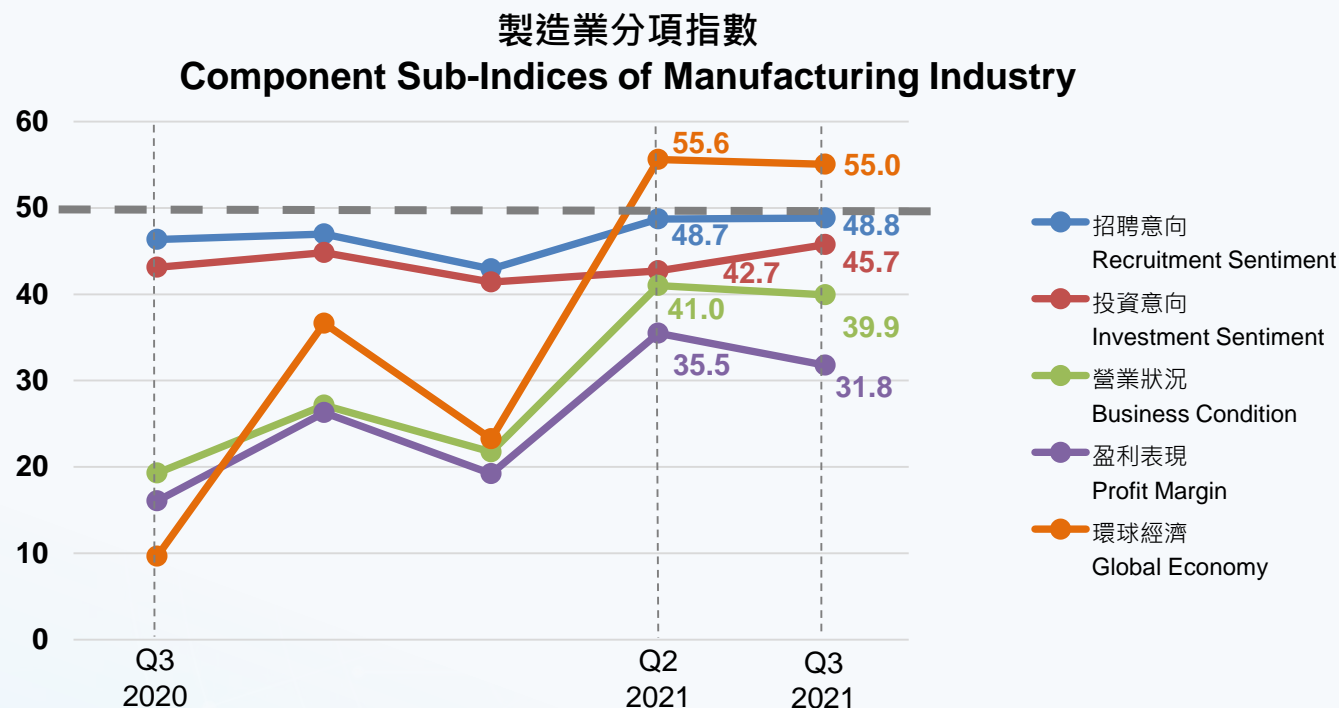
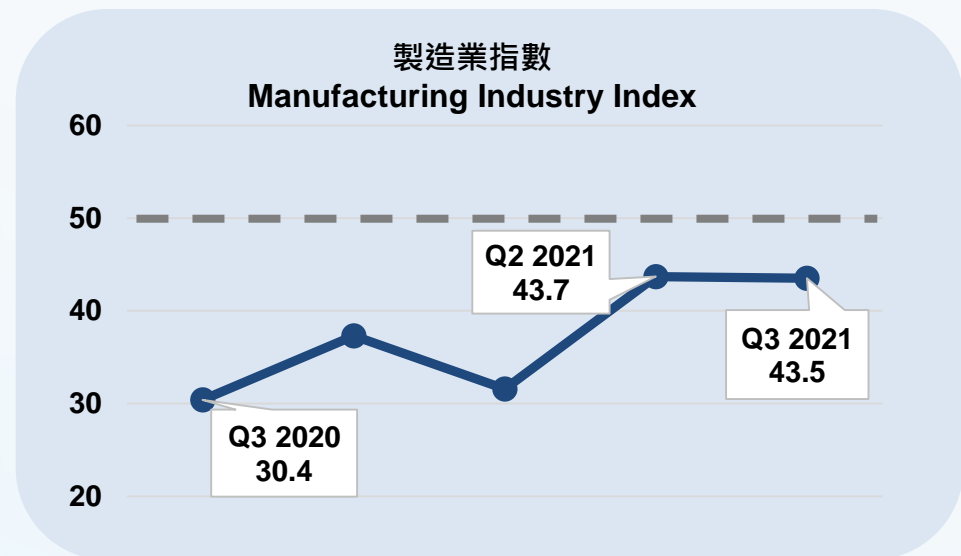


綜合營商指數中的五大分項指數
Five Component Sub-Indices of Overall Index



製造業

Manufacturing



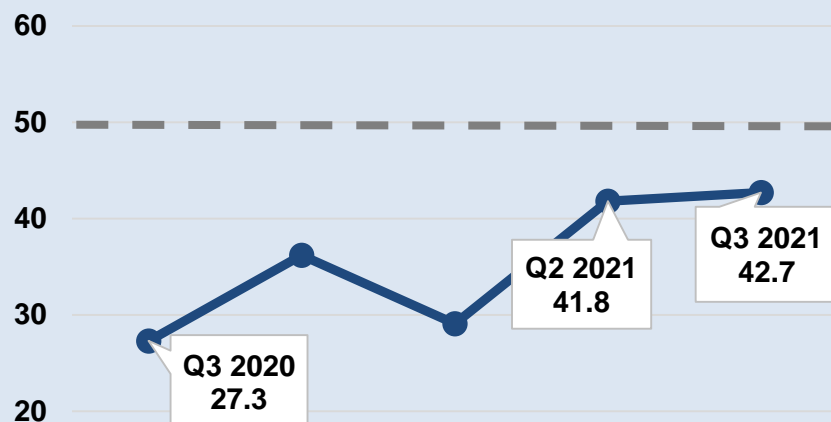
- 行業指數保持平穩，較上季微跌 0.2 至 43.5
- 分項指數中的「投資意向」錄得稍微增幅，上升3.0 至 45.7
- Industry index remained stable with marginal decrease by 0.2 to 43.5 compared to last quarter
- “Investment Sentiment” component sub-index showed a slight uptrend, increased by 3.0 to 45.7

進出口貿易及批發業

Import / Export Trade & Wholesale

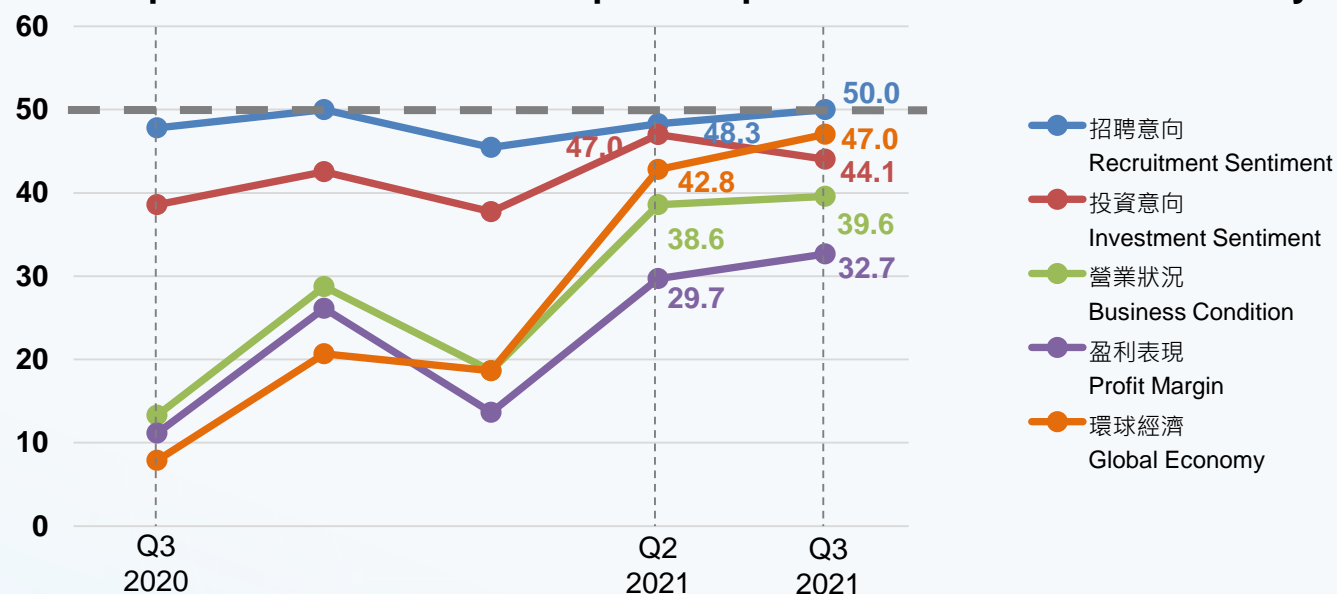
進出口貿易及批發業指數

Import / Export Trade & Wholesale Industry Index



進出口貿易及批發業分項指數

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

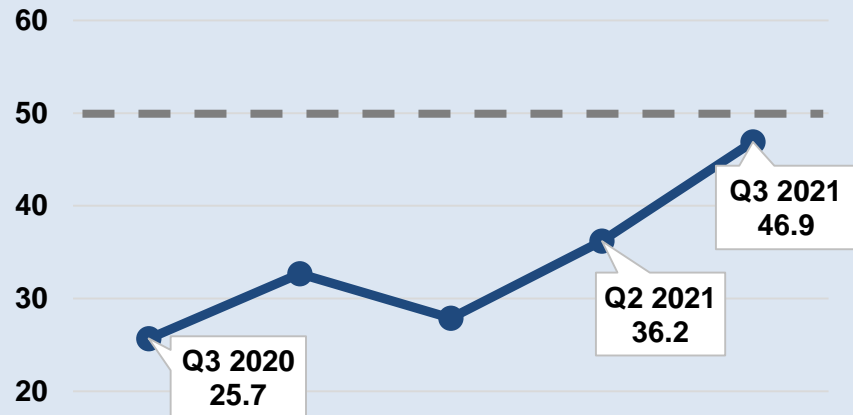


- 行業指數較上季微升 0.9 至 42.7
- 多項分項指數錄得升幅，惟「投資意向」下跌3.0 至44.1
- Industry index slightly increased by 0.9 to 42.7 compared to last quarter
- Most component sub-indices showed an upturn, except “Investment Sentiment” which presented a drop of 3.0 to 44.1

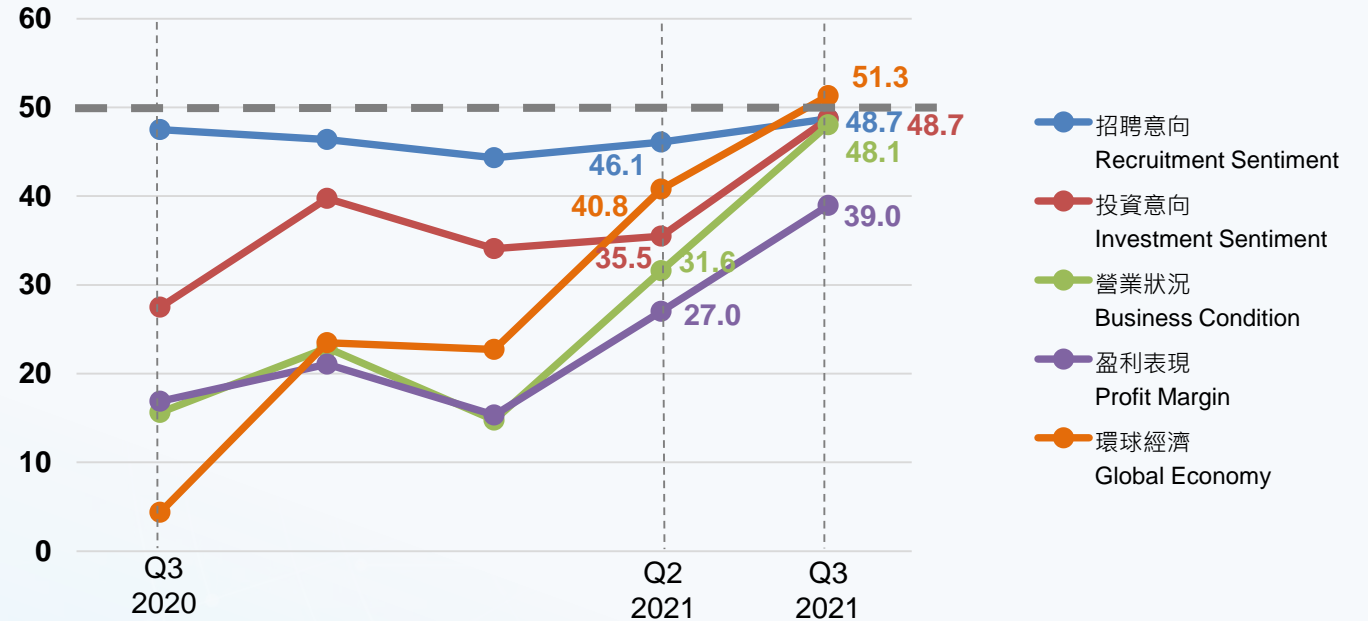


零售業 Retail

零售業指數
Retail Industry Index



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



- 行業指數較上季大幅上升 10.7 至 46.9
- 五項分項指數中有四項錄得10點以上的升幅
- Industry index increased strongly by 10.7 to 46.9
- 4 out of the 5 component sub-indices recorded a rise of 10 as compared to last quarter



指數高於50中性水平的行業

Industries Achieved above 50 Neutral Mark

1 資訊及通訊業
Information and Communications

54.1

2 地產業
Real Estate

52.2

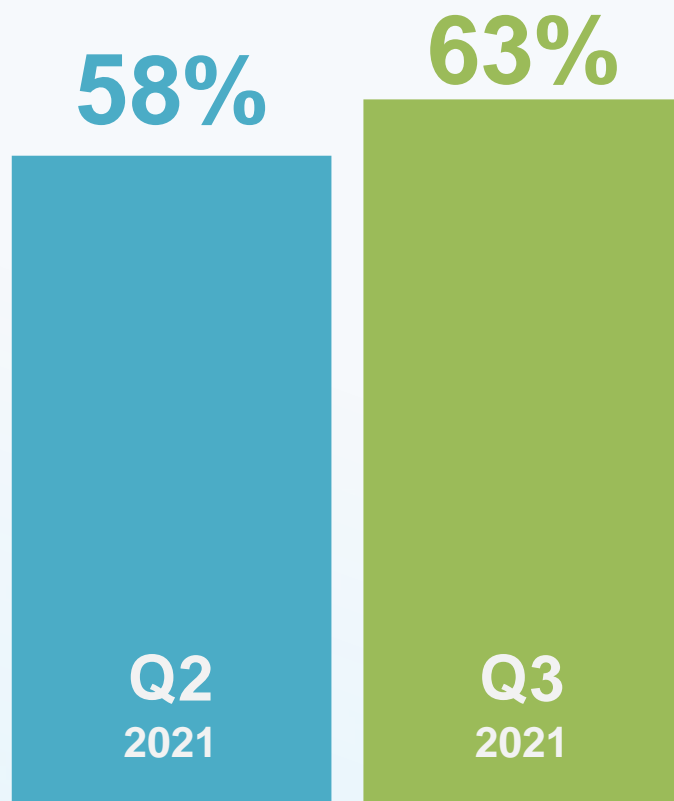
3 社會及個人服務業
Social and Personal Services

50.8

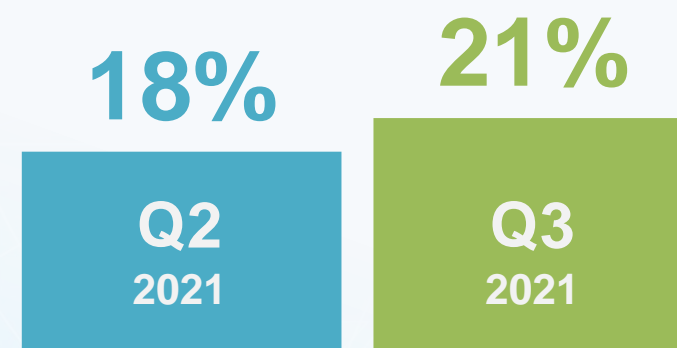


成本及價格上升的預期

Expectation towards Increase on Cost and Price Factors



原材料成本上升
Raw Materials Cost Increase



貨品 / 服務價格上升
Product / Service Price Increase



預期上升的成本及價格

Expectation towards Increase on Cost and Price Factors

最有可能提高原材料成本的首三個行業

Top 3 Industries Most Likely
to See Increase on Raw Materials Cost

製造業
Manufacturing

81%

建造業
Construction

79%

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

72%

最有可能提高產品/服務價格的首三個行業

Top 3 Industries Most Likely
to See Increase on Product / Service Price

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

29%

製造業
Manufacturing

28%

零售業
Retail

27%

計劃增加投資的主要範疇

Key Categories with Increasing Investment



資訊科技系統
Information Technology

24%

中小企 SMEs

44%

資訊及通訊業
Information and Communications

37%

專業及商用服務業
Professional and Business Services

37%

住宿及膳食服務業
Accommodation and Food Services



產品及市場推廣
Product & Marketing Promotion

20%

中小企 SMEs

50%

零售業
Retail

50%

地產業
Real Estate

33%

金融及保險業
Financing and Insurance

渣打香港中小企領先營商指數

Standard Chartered Hong Kong SME Leading Business Index

調查專題

Featured Topic

香港中小企對2021年經濟復甦的看法和部署

Hong Kong SMEs' Perspective and Planning in Response to Economic Recovery in 2021



生意回復或超越疫情前水平的首三個行業

Top 3 Industries with Business Back to / Exceeding the Level before Pandemic

56%

資訊及通訊業
Information and
Communications

54%

地產業
Real Estate

45%

金融及保險業
Financing and
Insurance



讓生意反彈的主要行動

Actions Taken to Achieve Business Rebound

1

改良商品 / 服務
Product / service improvement



2

市場推廣
Market promotion



3

線上擴充
Online expansion



4

提升生產效率
Productivity enhancement



5

使用數碼科技
Use of digital technology



最期待的首三個有利因素

Top 3 Favourable Factors that Most Look Forward To



環球經濟復甦

Global Economic Recovery

1



預期與內地
通關以帶動經濟

Opening of Border
Crossing to Drive Economy

2



放寬社交距離限制

Relaxation of Social
Distancing Measures

3



最擔心的首三個不明朗因素

Top 3 Most Concerned Uncertainties



世界多地
的疫情仍然嚴峻
Severe Epidemic
Situation Worldwide

1



地緣政治緊張局勢
Geopolitical Tensions

2



通脹重臨、
原材料價格飆升
Inflation and Soar
of Raw Material Prices

3



應對通脹的首三個形式

Top 3 Approaches to Cope with Inflation

37.3%



直接反映到價格上

Reflect on the price directly

最高比例
行業
Industries
with highest
ratios

1

建造業
Construction

2

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

3

製造業
Manufacturing

17.4%

升級或推出新產品 / 服務
Upgrade / launch new products / services

16.8%

重新檢視來貨 / 原材料來源
Re-examine sources of goods / raw materials

及
and

16.8%

控制租金成本
Control rental cost

中小企計劃投資的首五個數碼化項目

Top 5 Digitalisation Areas SMEs Plan to Invest on



線上平台
Online platform



雲端服務
Cloud service



IT系統採購或升級
Purchase / upgrade
of IT system



培育數碼人才
Nurture digital talents

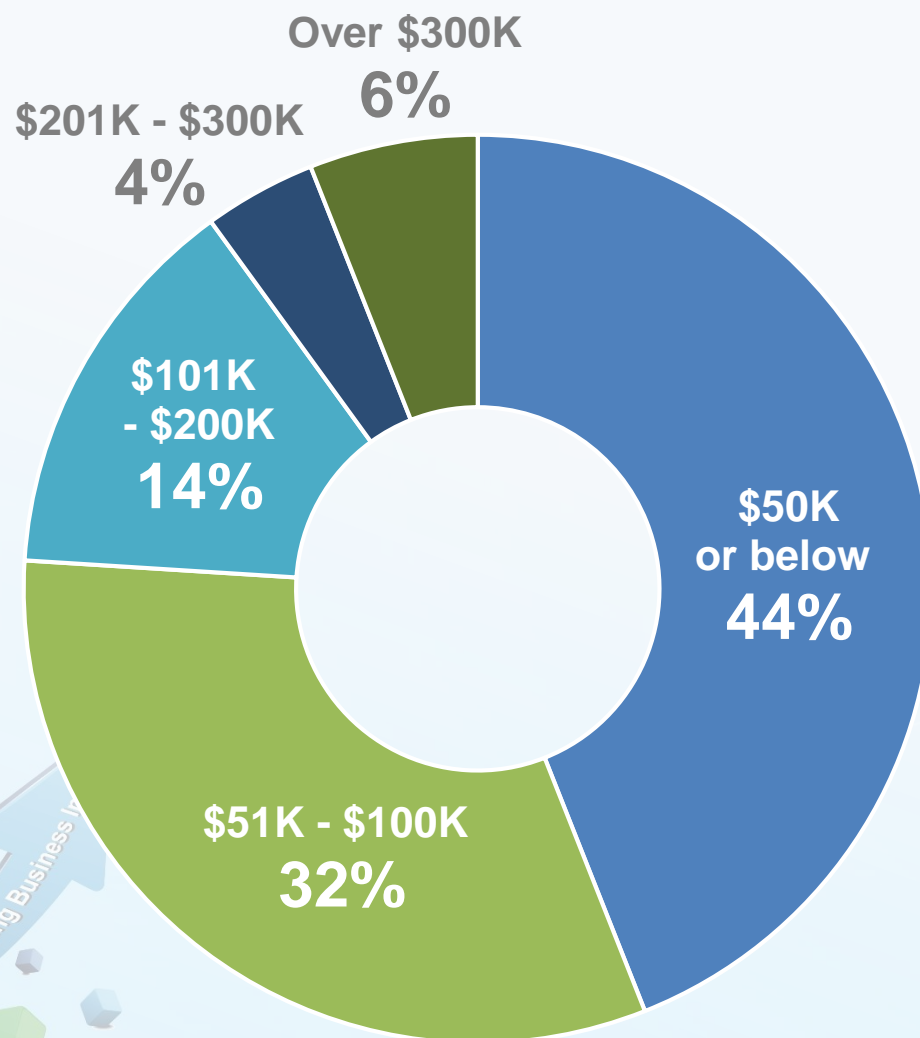


網絡保安
Cyber security



中小企未來一年於數碼轉型的投資預算

SME's Investment Budget on Digital Transformation in Next 1 Year



現時科技方案的選擇琳琅滿目，
中小企可就不同預算達至數碼轉型。

SMEs can achieve digital transformation according to their budgets, leveraging a vast range of technology solutions available in the market.



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



科技券
TVP



智慧交通基金
Smart Traffic Fund



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



BUD專項基金
BUD Fund



清潔生產夥伴計劃
CPPP



回收基金
Recycling Fund



專利申請資助計劃
PAG



綠色就業計劃：
大專畢業生資助項目
Green Employment Scheme:
Graduates Subsidy Programme



零售業人力需求管理科技應用
支援計劃
RETAAS #



遙距營商計劃
D-Biz Programme #



本地口罩生產資助計劃
Local Mask Production Subsidy
Scheme #



中小企資援組：2021政府資助基金博覽+ SME ReachOut – 2021 FundFair PLUS



掌握決勝 Fund 迎接新常態 Make Your Fund Count for the Next Normal

11-13 Aug 2021
@生產力大樓 HKPC Building



展覽攤位
Exhibition



研討會
Seminars



一對一諮詢服務
One-on-one Consultation

讓中小企及初創掌握最新最齊的資助計劃資訊及申請貼士
Offering the latest and most comprehensive Government Funding
information for SMEs and Startups



工業設計及智能製造 Industrial Design & Smart Manufacturing

- 智能生產技術
Smart production technologies
- 廠房布局設計及生產力提升
Plant layout design & productivity enhancement
- 「工業4.0」方案
Industry 4.0 solutions



商品化及產品開發 Commercialisation & Product Development

- 科技商品化平台：TechDive
R&D commercialisation platform: TechDive
- 中小企 x 初創交流平台：知創企業家網絡
SMEs x startups exchange platform: InnoPreneur Network



企業4.0方案 Enterprise 4.0 solutions

- 中小企數碼化入門方案包
Digital Transformation Starter Kit
 -  跨平台數據分析
Cross-platform Big Data Analytics
 -  24/7 聊天機械人
24/7 e-Commerce Chatbox
 -  網絡安全風險評估
Cybersecurity Assessment



測試及認證 Testing & Certification

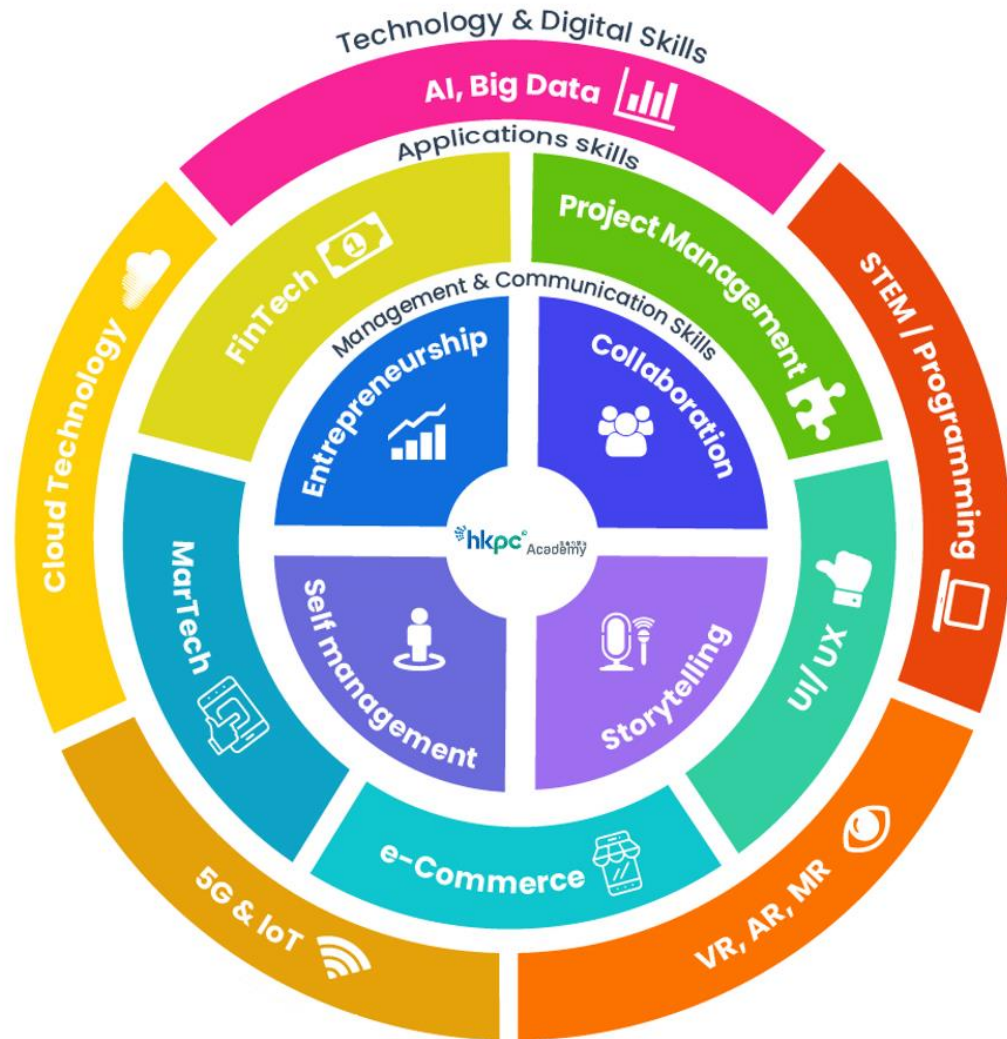
- 產品測試及合規
Product testing & compliance



技術培訓 Smart Manufacturing

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





框架涵蓋14個主題，從技術到人與人之間互動
14 Key Areas from TECHNOLOGY to CONNECTION

課程包括 Programmes include:

- 人工智能與大數據 AI & Big Data
- 雲技術 Cloud Technology
- 5G與物聯網 5G & IoT
- 營銷科技 MarTech
- 電子商務與零售科技 e-Commerce & RetailTech
- 項目管理 Project Management

以及更多 And more...

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Results

專家點評

Expert's Analysis



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調查結果

Results

2021年第三季度
Q3 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” Reports are available on HKPC website:

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



渣打香港中小企領先營商指數

Standard Chartered Hong Kong SME Leading Business Index

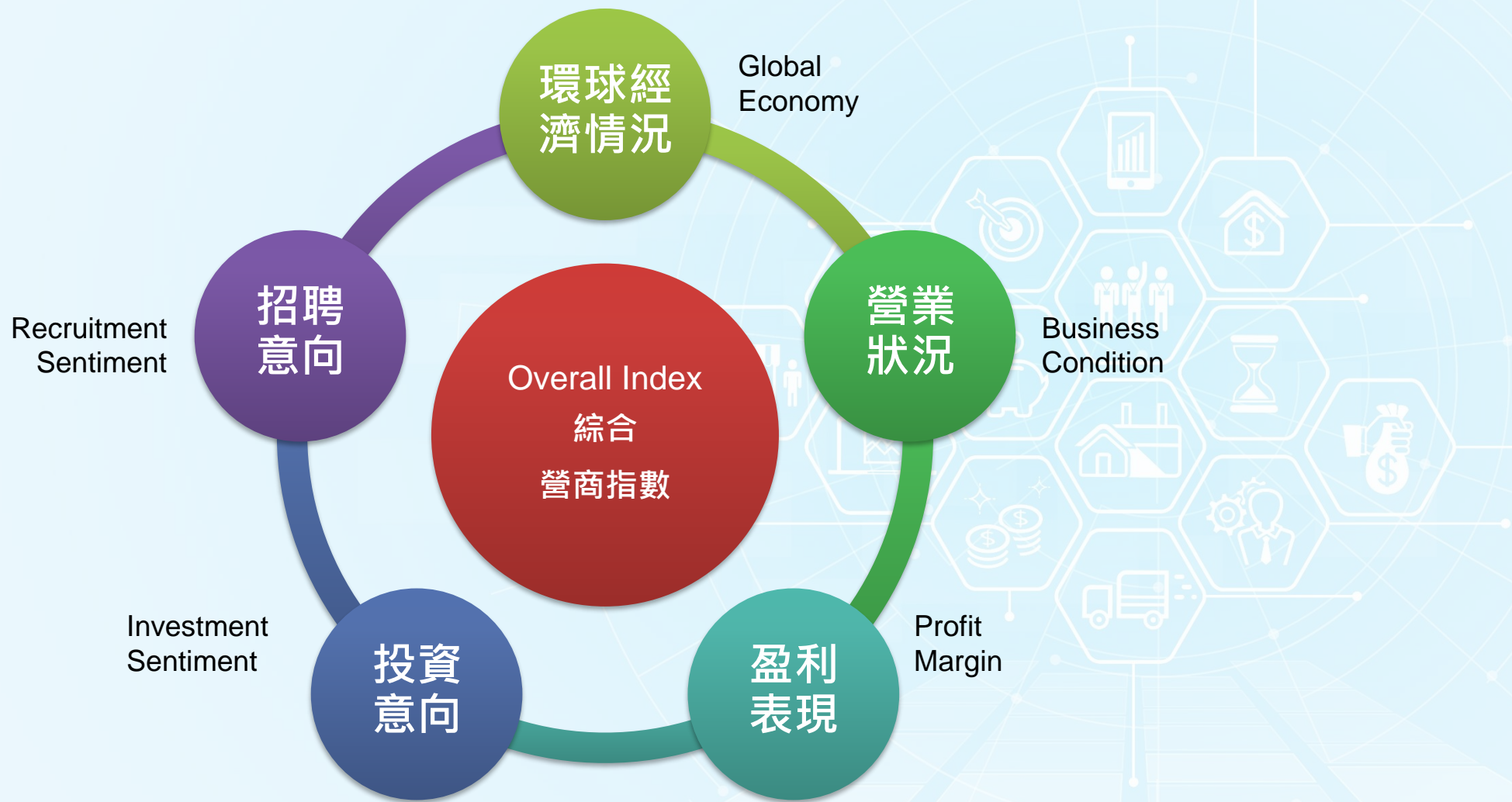
調查背景

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 6 月進行
This survey was conducted in June 2021
- 訪問了 815 間本港中小企業的管理層
Management of 815 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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