

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年第四季度 Q4 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2022年的發展方向及創新意念的部署
- To look into SMEs' direction of development in 2022 and planning on innovation

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年第四季度 Q4 2021





本季重點 Key Points of this Quarter



48.2

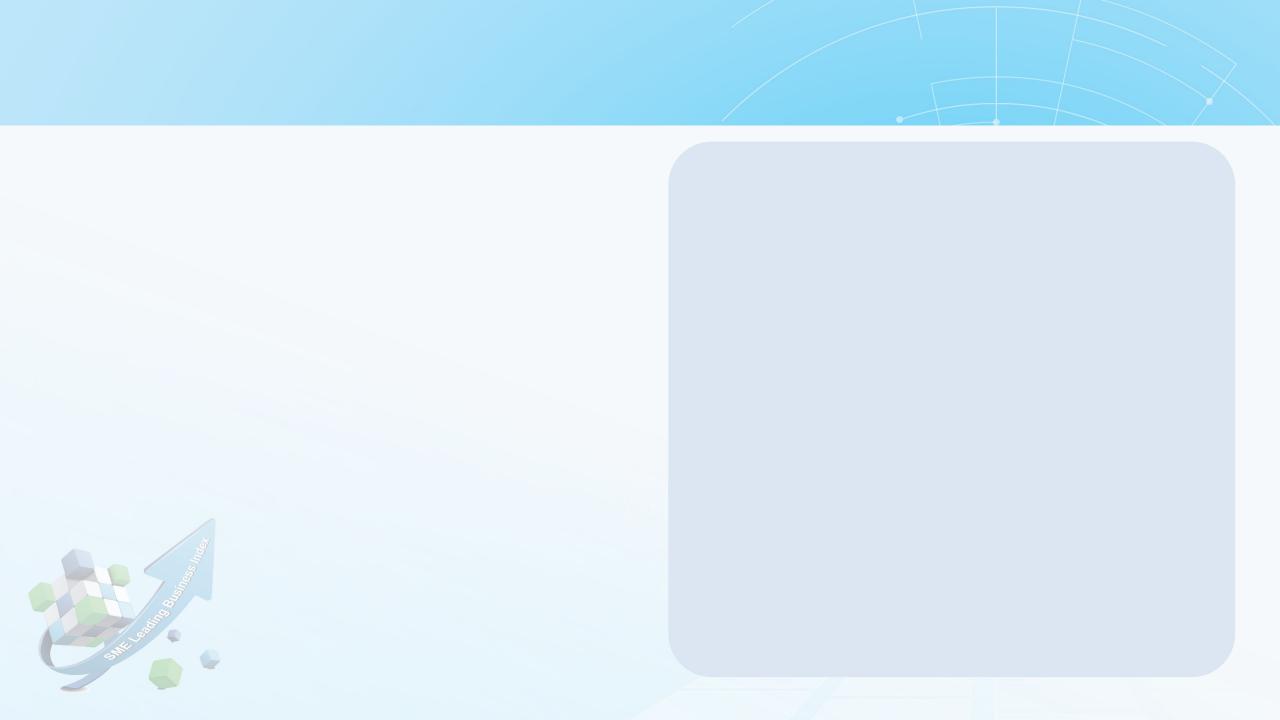
第四季綜合營商指數由46.6上升至48.2,處於三年來高位 Standing at a three-year high, Q4 Overall Index increased from 46.6 to 48.2



「招聘意向」於2019年第三季以來創兩年半新高 Recruitment sentiment has reached 2.5-year high since Q3 2019



中小企於2022年的營運重點為「開發或提升產品/服務」 SME's top focus in 2022 is expected to be "Product / Service Development or Enhancement"

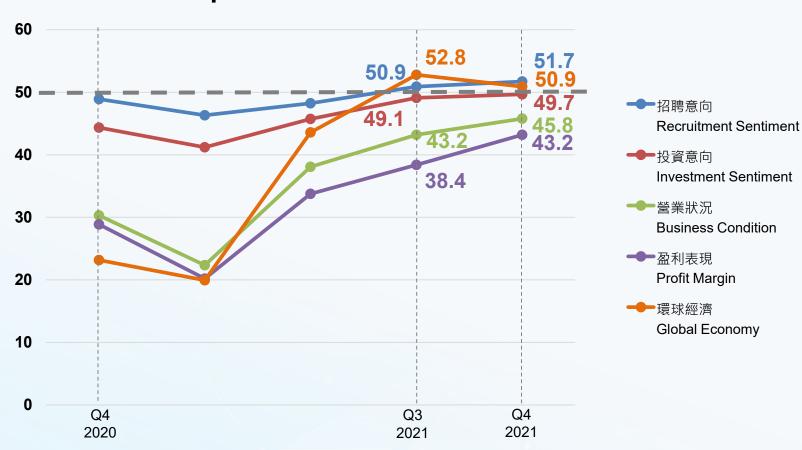


五大分項指數

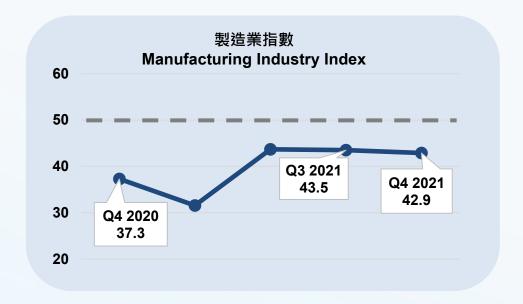
Five Component Sub-Indices of Overall Index

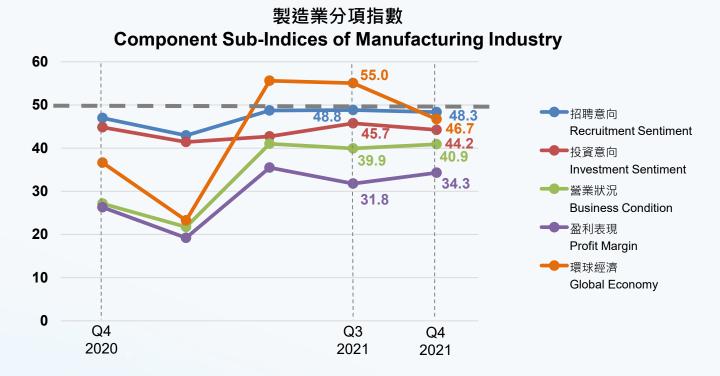
- 「環球經濟」輕微下跌,仍維持於50.9,其他分項指數全線上升
- 「招聘意向」表現最好,錄得51.7
- Component sub-indices went up simultaneously except for the slight softening on "Global Economy", which still remained at 50.9
- "Recruitment Sentiment" performed the best at 51.7

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



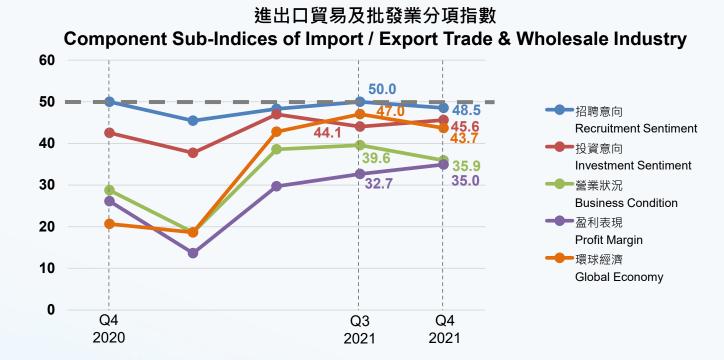




- 行業指數趨於持平,較上季微跌 0.6 至 42.9
- 分項指數中的「環球經濟」跌幅明顯,下跌8.3 至 46.7
- Industry index maintained flat with marginal decrease by 0.6 to 42.9 compared to last quarter
- "Global Economy" component sub-index showed a visible downturn, decreased by 8.3 to 46.7

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



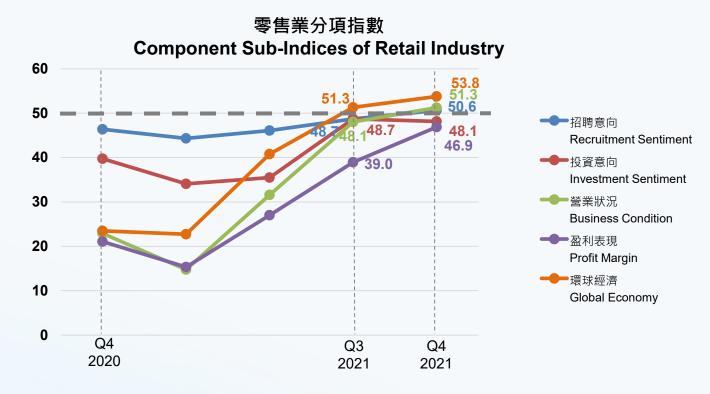




- 行業指數較上季微跌 0.6 至 42.1
- 多項分項指數錄得跌幅,惟「投資意向」及「盈利表現」仍然上升
- Industry index slightly decreased by 0.6 to 42.1 compared to last quarter
- Most component sub-indices showed a decline, except "Investment Sentiment" and "Profit Margin" which presented an upturn

零售業 Retail



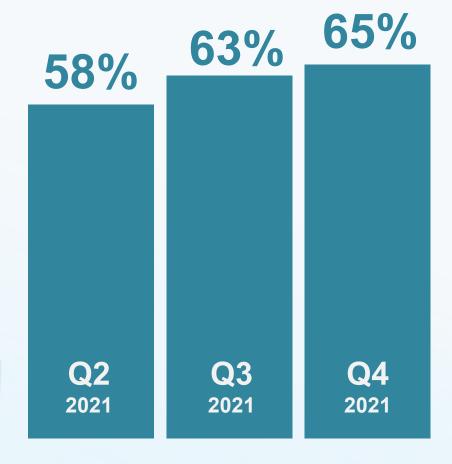




- 行業指數較上季持續上升 2.8 至 49.7
- 五項分項指數中有三項錄得50中性水平以上
- Industry index increased continually by 2.8 to 49.7
- 3 out of the 5 component sub-indices recorded above 50 neutral level

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

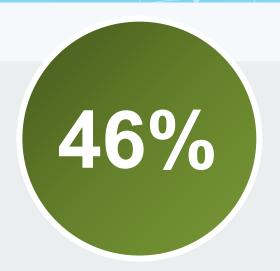
整體投資額轉變的預期

Expectation towards Changes on Overall Investment



產品及市場推廣 Product and Marketing Promotion

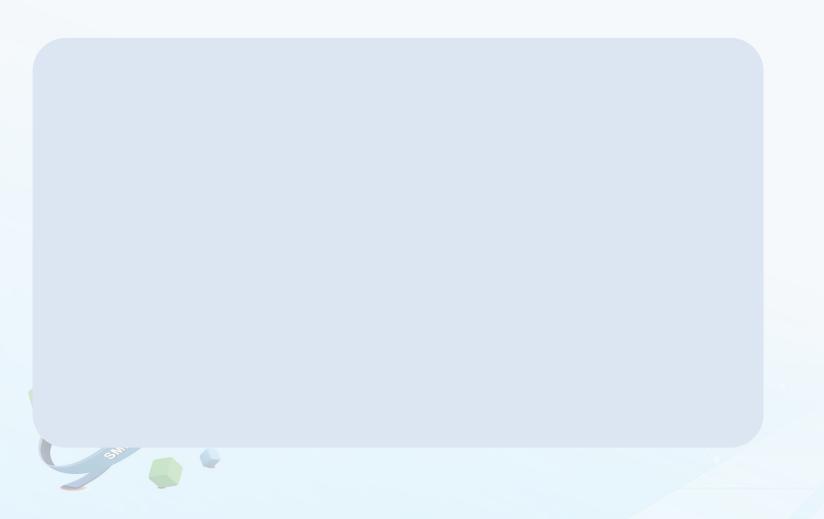
投資增長驅動力 Investment Growth Driver



庫存 Inventory

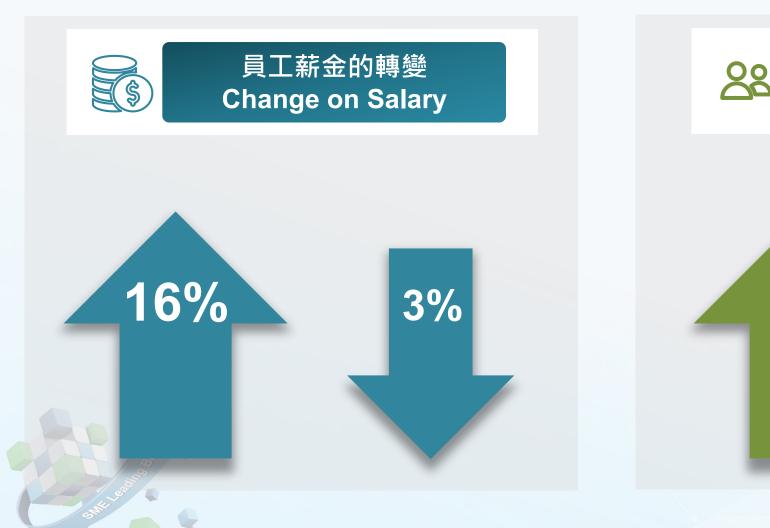


招聘意向創兩年半新高 Recruitment Sentiment Reaches 2.5-year High



員工管理轉變的預期

Expectation towards Changes on Staff Management







Standard Chartered Hong Kong SME Leading Business Index

調查專題

Featured Topic

香港中小企對2022年的發展方向及創新意念的部署 Hong Kong SMEs' Direction of Development in 2022 and Planning on Innovation



2022年度發展方向 Direction of Development in 2022

營運資源投放重點:

Major resources allocation:







2022年度發展方向 Direction of Development in 2022

營運資源投放最少於:

Putting least resources on:





2022年度策略重點 Strategic Focus in 2022





中小企2022年於「創新意念」的策略計劃 SMEs' Strategic Plan on "Innovation" in 2022

「創新意念」被列為較次要的策略重點 "Innovation" is ranked low as a strategic focus



通過「創新意念」最期望達到的效果 Expected Results through Innovation



推行「創新意念」過程中遇到的挑戰 Challenges in Applying Innovation

1

難以預計效益 Difficulty in Predicting Returns 2

擔心成本太高 / 缺乏資金 Worries on High Cost / Lack of Capital 3

不切合公司業務性質 Impracticability to Business Nature





生產力局建議中小企:善用數據 實踐創意轉型

HKPC's Insight: SMEs to Innovate and Succeed with Smart Use of Big Data



工業4.0升級 - 綜合技術顧問支援 Industry 4.0 Upgrade – Technical Support and Consultancy

- 人工智能 AI
- 機械人 Robotics
- 物聯網 IoT
- 大數據 Big Data
- 數據可視 Data Visualisation



企業4.0升級 - 中小企數碼化入門方案包 Enterprise 4.0 Upgrade - Digital Transformation Starter Kit

- 自動化數據分析
 Automated Data Analysis
 - 機構內部共享數據
 Sharing Data within the Organisation
 - 掌握預測性見解 Predictive Insights
 - 優化供應鏈 Optimisation of Supply Chain



發展高增值物流 Develop High Value-Added Logistics

- 推動數據科技應用
 Promoting use of Big Data Technology
- 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



人才變革、配合創新 Talent Transformation with Innovation

- 生產力學院「未來技能 FutureSkills」課程 HKPC Academy FutureSkills Programmes
 - · 營銷科技 MarTech
 - 零售科技 RetailTech



建立同業交流網絡 Peer-to-Peer Network to Exchange Ideas

• 中小企 X 初創交流平台:知創企業家網絡

SMEs x Startups Exchange Platform: InnoPreneur Network





十大主要服務 10 Major Services



設計思維研討會 Design Thinking Workshops



企業戰略制定和業務轉型 Enterprise Strategic Planning & Business Transformation



企業戰略及產品評估 Enterprise Strategies & Product Evaluation



創新的產品和服務開發 Development of Innovative Products & Services



聯合開發產品原型 Jointly Develop Prototypes



企業輔導及諮詢 Enterprise Coaching & Consultancy



創新與創意培訓 Innovative & Creative Training



尋找相關專家 Connect with Relevant Experts



靈活項目管理 Flexible Project Management



創新商業模式 Innovative Business Model





智能創新 Innovation



智能方案 Smart Solutions – 5G / Drone / Industrial IoT / OEM to OBM



政府資助 Funding Support



「智」敢想像「創新」商機 Dare to Innovate Capture the Opportunities



政商薈萃·分享灼見

帶領中小企把握未來經濟發展與技術趨勢創造的機遇

Government and business heavyweights to help SMEs capture the essence of impending economic development and technology trends ahead





18-19 November 2021

四大論壇 The 4 Panels



宏觀經濟展望:「創新常態」下的機遇 Macroeconomic Outlook: Opportunities under the Innovative Normal



未來藍圖解構:迎接十四五規劃與大灣區機遇與挑戰

Future Blueprint Analysis: Manage Opportunities and Challenges of 14th Five-Year Plan and Greater Bay Area



夢想成真:再工業化的實踐與前景 Dreams Come True: Realisation and Development of Reindustrialisation



邁向綠色生活: 碳中和策略及減少碳排放措施

Going Green: Carbon Neutral Strategies and Measures to Reduce Carbon **Emissions**

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

專家點評

Expert's Analysis





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年第四季度 Q4 2021





報告下載 Report Download



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

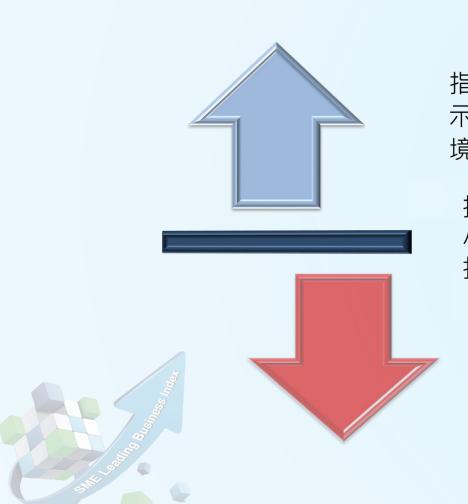




指數介紹 Introduction



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 9 月進行
 This survey was conducted in September 2021
- 訪問了 817 間本港中小企業的管理層
 Management of 817 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 Disclaimer

- 本調查報告內容及數據均屬香港生產力促進局所有。未經本局授權不得對報告內容及數據作出任何修改或將其出售。對於本調查報告內容及數據中出現的任何錯誤、偏頗、疏漏或延誤,或據此而採取之任何行動,本局概不負上任何責任。對於因使用本調查報告內容及數據而產生的任何特殊的、附帶或相應的損失,本局概不負上任何責任。
- The content and data in this report is owned by Hong Kong Productivity Council (HKPC). Without the authorization of HKPC, any changes to the report content and data, as well as selling of the report, are not permitted. HKPC shall not have any liability, duty or obligation for or relating to the content and data contained herein, any errors, inaccuracies, omissions or delays in the content and data, or for any actions taken in reliance thereon. In no event shall HKPC be liable for any special, incidental or consequential damages, arising out of the use of the content and data.