

專題研究報告

Report on Research Study





《業界如何發揮香港的優勢和經驗在珠三角地區拓展內銷》研究報告

Report on “Tapping the Domestic Market of the Pearl River Delta Region by Leveraging the Strengths of Hong Kong”

擴大內地消費需求是國家《十二五規劃》的重大政策導向之一。廣東省及珠三角地區是中國規模最大的區域性內銷市場，消費能力極高，香港的企業如能把握機會，發揮在開拓國際市場、供應鏈管理、批發分銷及物流服務等方面已累積的豐富經驗和優勢，以廣東省和珠三角市場作為起點，推動港商在珠三角地區拓展內銷，繼而全面打開內地市場，將有助於促進香港和珠三角地區成為全國和亞太區的消費品生產、物流、分銷和零售中心，及推動粵港兩地經濟進一步發展。

Boosting domestic consumption is one of the major policy directives of the National 12th Five-Year Plan. Guangdong and the Pearl River Delta region together form the largest regional domestic market within China. It is opportune for Hong Kong enterprises to leverage their strengths and experience in market development, supply chain management, wholesale and distribution, and logistics services etc., to tap into the domestic market of the Pearl River Delta region, which is a good starting point for opening up the Mainland market. This would help facilitate the development of Hong Kong and the Pearl River Delta region into a production, logistics, distribution and retail centre of consumption goods for China as well as the Asia Pacific region, and boost economic growth in both Hong Kong and Guangdong.



有見及此，大珠三角商務委員會特別成立專題研究小組，與香港特別行政區政府中央政策組協作進行研究，並發表《業界如何發揮香港的優勢和經驗在珠三角地區拓展內銷》研究報告。通過走訪從事電子產品、家庭電器、鐘錶、珠寶首飾、服裝、食品及藥品的香港製造企業，以及分銷商和金融等服務企業，分析及總結受訪企業開拓內銷的經驗，報告提出一系列具實務性和可行的建議，供業界、工商團體、支援服務機構及兩地政府參考。

In light of the above, the Business Council set up a Task Group to look into the issue. In collaboration with the Hong Kong Government Central Policy Unit, the group conducted a research and published a report on “Tapping the Domestic Market of the Pearl River Delta Region by Leveraging the Strengths of Hong Kong”. After collecting the views of Hong Kong enterprises with business in electronics products, domestic electrical appliances, watches and jewellery, clothing, and food and drug, and distributors and financial services providers, and consolidating their experience in selling in the Mainland, the report put forward a set of practical recommendations for the reference of the trade, business associations, industry support organisations and the Governments of Hong Kong and Guangdong.

報告採用一套新思維，建議開拓內銷市場的工作須跳出協助在內地港資製造業轉型升級的框框，把內銷作為一個新行業來推動，目標是將內銷發展成為香港新的經濟支柱和動力。

歸納成功開拓內銷的港商經驗顯示，港商產品的品質與價位，最能迎合珠三角正在興起的龐大中產階級市場的需要。香港可利用香港服務業的優勢，包括在產品質控和國際化標準、開拓市場（包括市場諮詢、產品設計與推廣、品牌管理）、供應鏈管理（生產、採購、分銷、零售一體化與為企業提供各類業務的解決方案）、分銷與零售服務（包括行銷網路、顧客服務、法律諮詢、商業仲裁，物流運輸）、以及融資便利、支援中小企業的公共服務平台和服務機構等優勢，以廣東省和珠三角市場作為開拓內銷的起點，逐步推展到全國。

報告又提到，雖然港商是最早涉足珠三角的外資企業，但不少香港生產商過往的業務以代工生產(OEM)為主，並以歐美日為主要出口市場，如要轉型拓展內銷，以往的經驗未必適用。由於生產與銷售是兩回事，建立銷售管道，參與品牌和銷售管理需要專門知識和投入龐大資源，並不是所有香港生產商均具備做內銷的條件和意願。因此，報告建議香港工商團體和支援服務機構在開拓內銷的工作，可針對一部分有潛力及意願開拓內銷和品牌的香港生產商，鼓勵他們轉型和制定長期資源投入計劃或活用現有內銷通道，並積極利用兩地政府的內銷政策開拓內地市場。

The report looked at the issue from a new angle, suggesting not to restrict the mindset to providing assistance to Hong Kong manufacturers in the Mainland in their endeavour to upgrade and restructure to tap into the domestic market. Instead, a new approach should be adopted to develop domestic sale as a new type of business sector with a view to developing it into a new economic pillar of Hong Kong and to provide new momentum for economic growth.

For those Hong Kong enterprises which have succeeded in selling in the Mainland, their experience show that the quality and pricing of Hong Kong products best meet the needs of the huge and thriving middle class market in the Pearl River Delta region. The strengths of Hong Kong stem from its experience in product quality control and adoption of international standards, market development (including market research, product design and promotion, and brand management), supply chain management (integrated production, procurement, distribution and retail, and business consulting for enterprises), distribution and retail services (including distribution network, customer service, legal consultancy, commercial arbitration, and logistics and transport), financing facilitation, and the availability of a sophisticated platform supported by numerous providers of public service for small and medium enterprises, etc. Hong Kong enterprises could leverage their strengths in tandem with the early and pilot implementation of Guangdong in market opening to develop the Pearl River Delta domestic market.

It was pointed out in the report that although Hong Kong enterprises were amongst the first foreign-invested enterprises to venture into the Pearl River Delta region, many of them remained engaged in original equipment manufacturing (OEM) business with Europe, US and Japan as their major export markets. Production and sales are two separate types of business. Expertise and enormous resources are required in sales channel development as well as brand and sales management. Not all Hong Kong manufacturers have both the potential and intent to develop domestic sales. Hence, in promoting the development of the domestic market, business associations and industry support organisations should focus on those Hong Kong manufacturers with the potential and intent to develop domestic sales and establish their brands in the Pearl River Delta region. Incentives should be given for them to undergo restructuring, make plans for long-term resource investment, make adaptive use of existing domestic sales channels, and make the best out of the domestic sales support policies of the two Governments for developing the PRD domestic market.



至於其他主力做生產的港商，報告建議他們可以活用一些低成本管道進入內銷市場，例如可與港商經營的國際品牌代理及國際流通品牌連鎖合作，利用他們已建立的通道在內地開拓銷售市場；與大規模綜合連鎖銷售商合作；供貨與港商品牌擁有者；更多利用展銷會及香港貿易發展局(貿發局)「香港·設計廊」開拓市場；合力設立品牌集合店，品牌聯盟以達致規模效益，減少市場開拓成本；及利用互聯網，開通網上銷售等。

報告亦建議鼓勵及幫助從事品牌推廣及管理，分銷及流通等的香港服務業企業，為在內地香港生產商提供服務，協助和配合香港生產商開拓內銷市場。具體來說，報告建議特區政府考慮從協助企業發展品牌、升級轉型及拓展內銷市場設立的10億元專項基金撥出一筆特定資金，以協助相關服務業企業與製造商合作開拓內銷市場。

As for Hong Kong enterprises focusing on manufacturing, the report suggested they could use the relatively low-cost channels to enter the domestic market. These include cooperation with the Hong Kong companies who are the agents of or run the business for the international brands and make use of their established channels to open up the Mainland market; cooperation with large-scale integrated chain stores; supply of merchandise to Hong Kong brand owners; further use of trade exhibitions/fairs and Hong Kong Trade Development Council's (HKTDC) Design Gallery to open up the market; setting up multi-brand stores and brand alliance to achieve economy of scale and reduce market development cost; and setting up online shop which is an effective way to reach consumers directly at a low cost.

Incentives and support should also be given to the Hong Kong service sector engaged in brand promotion and management, distribution and circulation, etc. so that it could provide complementary services and assistance to Hong Kong manufacturers in the Mainland to open up the domestic market. The report recommended that the Hong Kong Government could consider earmarking a specific sum under the \$1 billion Dedicated Fund on Branding, Upgrading and Domestic Sales (BUD Fund) to assist the related service providers to develop the domestic market in cooperation with manufacturers.



長遠來說，建立香港城市品牌有助個別港商開拓內銷市場。因此，報告建議可以優先以食品、保健產品及化妝品等對品牌及質量要求特別高的產品類別作為香港在內地建立香港城市品牌的突破口。

至於在政府及公營機構支援方面，報告建議研究一個比較全面性和針對性的策略，在供應鏈的上、中、下游向港企提供支援。例如，貿發局或工商團體可協助宣傳及舉辦展銷會、洽談會等，協助產品生產企業接觸已擁有分銷通道的企業和專門提供開拓市場服務的企業，探討合作方法和空間；貿發局可擴大「香港·設計廊」的香港產品推廣功能；香港出口信用保險局可以更積極為港企內銷業務提供擔保；而生產力促進局可以提供品牌管理及銷售相關的輔導及培訓等。

In the long run, a Hong Kong city brand would be helpful to individual Hong Kong enterprises seeking access to the domestic market. Products with particularly high requirement for brand identity and quality – such as food products, health products and cosmetic products – could serve as the entry points for the Hong Kong city brand to establish itself in the Mainland.

The report also suggested that a targeted but comprehensive strategy should be worked out for the government and public sector to provide support to the players along the supply chain. For examples, HKTDC or business associations could, by organising trade exhibitions and fairs, assist Hong Kong manufacturers to explore cooperation with enterprises with established retail channels, and service providers specialising in opening up domestic markets; HKTDC could magnify the promotion functions of Design Gallery for Hong Kong products; the Hong Kong Export Credit Insurance Corporation could play a more proactive role in providing insurance for Hong Kong enterprises' domestic sales; and the Hong Kong Productivity Council could provide consultation and training in areas relating to brand management and sales.





此外，網上購物近年已廣為新一代消費者所接受，報告建議港商、工商團體和工商支援服務機構可考慮合力建立「香港產品」的網上銷售平台。

最後，報告建議粵港兩地政府繼續加強合作，利用先行先試措施，在珠三角地區營造良好的內銷環境。

With online shopping popular among consumers of the new generation in recent years, an online sales platform for “Hong Kong Products” could be set up jointly by Hong Kong enterprises, business associations and industry support organisations.

The Hong Kong and Guangdong Governments should work closer together to create a better environment of domestic sales in the Pearl River Delta region through pilot cooperative measures.

研究報告全文可於以下網址瀏覽下載：
<http://www.cmab.gov.hk/tc/issues/council.htm>

The report can be downloaded from this website:
<http://www.cmab.gov.hk/en/issues/council.htm>