

SME Development Fund/
Dedicated Fund on Branding, Upgrading and Domestic Sales
(Organisation Support Programme)

Final Report of Approved Project

Project ref. no. : D11 003 002
Project title : A Feasibility Study on the Development of Professional
Wholesale Markets in Hong Kong
Period covered : From 1 September 2012 to 30 November 2013
(dd/mm/yy) (dd/mm/yy)

I. Project Details

(Please mark with "*" if any of the following project details is different from that in the project proposal appended to the project agreement.)

Project Reference and Title

A Feasibility Study on the Development of Professional Wholesale Markets in Hong Kong

Project Summary (in not more than 150 words)

To study the feasibility for Hong Kong manufacturing industries to further utilize local operation, retail and wholesale infrastructure to develop into professional wholesale markets; and to share the study results with manufacturing industries so as to facilitate their future development planning.

Project Objective(s) (in not more than 80 words)

香港廠商的銷售渠道一向以出口為主，鮮有以大規模的批發模式運作。產品宣傳展銷方面，則倚重本地及海外的展覽會。展覽會是本地廠商向買家宣傳、推廣及售賣商品的重要途徑，部分行業一年舉行兩至三次大型展銷，某些行業則未有定期舉行展覽會。總的來說，由於資源所限，展覽會不能長期舉行。展覽會過後，廠商得靠自己的資源延續推廣工作，然而，單靠個別企業的商品吸引買家來港採購，成效並不顯著。

環顧鄰近地區，發展專業批發市場蔚然成風。例如浙江省義烏市，經當地政府集中發展展銷批發業，現已成為全球最大的專業商品集散地；又如韓國首爾的東大門及南大門，經政府統一規劃發展後，今天已成為亞洲一個重要的日常消費用品批發零售市場。發展專業批發市場為這些地區帶來的效益，實在不容忽視。

目前，香港仍未有具規模的專業化批發市場，多年來，香港的批發業只局限於過去工商業界的自然組合；且只是紮根於個別地區，例如長沙灣的成衣時裝業、紅磡的珠寶玉石業、葵涌的電子產品業、觀塘的玩具禮品業及黃竹坑的傢具家品業。

就客觀條件而言，香港應擁有建立大規模專業批發市場的有利條件——香港為自由貿易港、交通運輸網絡發達、治安良好、法治制度完善及工商業界一向享有良好聲譽。何況香港有不少「硬件」和「軟件」，可以支持專業批發業的發展。這些「硬件」包括社區的設施、資源的配套、乃至政府一系列活化工廈措施下可改變用途的工廈等；「軟件」則包括熱衷地區發展的區議會、社區團體、專業團體等。

根據項目小組成員觀察所得，現有不少非洲旅客大舉搜羅香港貨品，甚至不惜以客運形式將貨品運回祖國，可見他們對香港貨品的需求；這又是否意味批發市場早已萌芽而只欠積極推動呢？此外，內地旅客境外消費數字屢創新高，我們是否可藉發展專業批發市場分一杯羹？

發展專業批發市場估計可為本港帶來巨大經濟效益，就即時效益而言，建立專業批發市場可增強香港廠商的宣傳推廣實力與效益，又可因營運需要提供直接的就業職位，鼓勵年青人創業。長遠而言，建立專業批發市場可望成為香港一門新行業——批發業，並可發展成為香港經濟的重要板塊。

香港既擁有客觀發展專業批發條件，發展後復對本港的效益宏大，但本港從未有發展成專業批發市場便很值得探究。例如：是否因為自由市場對專業批發沒有太大的需求，因而沒有發展動力？是否因為香港的客觀條件不足以支持批發市場的發展？是否因為聚集發展會引致同業競爭加劇？是否因為受資源限制？

「創建香港的專業批發市場」策略性發展研究旨在：

- 1) 研究本港的製造業、批發零售業及進出口貿易業是否可在現有的運作、零售及批發基礎上，提升成為專業批發市場；若研究結果正面，發展專業批發市場可讓哪一產業受惠？預期發展的挑戰為何？發展策略為何？若研究結果不支持發展專業批發市場，原因為何？
- 2) 向製造業界提供研究結果以作他們的未來發展參考。

Grantee /Collaborating/Implementation Organisation Agent

Grantee : The Hong Kong Chinese Importers' and Exporters' Association

Collaborating Organisation(s) : Nil

Implementation Agent(s) : (i) Institute for Entrepreneurship, The Hong Kong Polytechnic University
(ii) PolyU Technology and Consultancy Co. Limited

Key Personnel

	<u>Name</u>	<u>Company/Organisation</u>	<u>Tel No. & Fax No.</u>
Project Co-ordinator	Ms May LO	Institute for Entrepreneurship, The Hong Kong Polytechnic University	3400 2755/ 2764 5287
Deputy Project Co-ordinator	Ms Edna CHOI	Institute for Entrepreneurship, The Hong Kong Polytechnic University	3400 2768/ 2764 5287

Project Period

	<u>Commencement Date</u> (day/month/year)	<u>Completion Date</u> (day/month/year)	<u>Project Duration</u> (No. of months)
As stated in project agreement	1 September 2012	31 August 2013	12 months
Revised (if applicable)	1 September 2012	30 November 2013	15 months

Methodology Employed

- 1) 按政府統計處製造業行業分類，蒐集行業現存分析及發展資料，綜合分析行業目前的發展情況，包括：企業貨品種類及其針對的客戶群、客戶來源、採購渠道、採購頻率及其採購量、推廣策略、未來策略性發展方向等。
- 2) 蒐集目前香港可使用地區資源 (例如：室內體育場館、露天劇場、社區會堂等設施)及未來地區規劃 (例如：交通配套，城市規劃)資料等，分析拓展專業批發市場的可行性。
- 3) 實地考察已發展成形的批發市場，並與批發市場的管理層訪談，例如韓國首爾的東大門及南大門、日本東京馬喰町、浙江省義烏市小商品城、瀋陽市中國傢具城、深圳華南城等，藉此了解批發市場的運作模式及其成功要素，分析引入該模式至香港的可行性，暫定實地考察三個市場。
- 4) 根據步驟(1)至(3)所得的結果，草擬問題稿，擬定訪談對象的篩選條件，根據條件邀請製造業業界人士參與深入小組訪談。探討業界對發展專業批發市場的意見，包括預期市場發展潛力、於發展中將遇到的挑戰等。
- 5) 綜合分析所蒐集的資料，為製造業編制「創建香港的專業批發市場」策略性發展研究報告。印製1,000本及製作電子版研究報告。
- 6) 舉辦專題講座 (2場)，向製造同業公佈、講解及分析研究結果。
- 7) 拜訪各大製造業商會講解及分析研究結果。暫定拜訪八個具代表性的商會。

2. Summary of Project Results

Project Deliverables

(Please list out the targeted project deliverables as stated in the project proposal appended to the project agreement and provide details of actual result achieved, including beneficiaries, for each of them.)

- (i) A feasibility study report on the development of professional wholesale markets in Hong Kong.
- (ii) Two seminars to disseminate the result of study.

Actual Benefits to SMEs/Enterprises

(Please indicate in clear, specific, tangible and quantifiable terms the benefits of the project and its contribution to enhancing the competitiveness of Hong Kong's SMEs / enterprises in general or SMEs / enterprises in specific sectors / assist Hong Kong enterprises in general or in specific sectors in developing brands, upgrading and restructuring business operations, and promoting domestic sales in the Mainland, in not more than 400 words.)

The feasibility study has successfully encouraged active discussions and considerations on the potentials, benefits and challenges of developing professional wholesale markets in Hong Kong amongst key members of the manufacturing industries in Hong Kong. The study analyzed in details the competitive advantages of Hong Kong in extending our existing wholesale infrastructures to develop professional wholesale markets, and addressed the challenges that respective stakeholders must tackle to support the development. To illustrate how existing infrastructures can relatively be enhanced, two examples, namely the fashion and apparel wholesale cluster in Shumshuipo district and the jewelry cluster in Hunghom district, were presented to facilitate easy understanding of the concepts and findings discussed in the study.

Via the study result announcement seminars, over 110 business owners and key representatives of enterprises from manufacturing industries exchanged their views and thoughts on the future strategic development directions of the manufacturing sector and agreed that should professional wholesale markets be successfully developed, new distribution channels targeting customer segments, who are proven to be in favour of products made by Hong Kong manufacturers, will be established, and thereby enhancing the overall competitiveness and sustainability of the sector.

1,000 copies of the study reports were disseminated to manufacturing industry members, trade associations, and community development stakeholders, such as urban planners and district council members. Study results were also disseminated to 33 trade associations, covering 24 different manufacturing industries in Hong Kong. Online version of the study report is also made available to support Project Team's upcoming efforts in promoting the study results to relevant members in future informal and formal industry gatherings.

Milestones (in chronological order)

(# Please indicate if the milestone is completed (C), deferred (D) or not achieved (N). If it is deferred, please indicate the revised completion date. For those milestones which are deferred or not achieved, please also provide the reasons under item 2.4.)

Milestone (as set out in the approved project proposal appended to the project agreement)	Original target completion date	Revised target completion date (if applicable)	Status (C/D/N) #
(a) 蒐集及分析行業及香港地區發展資料	31/10/2012		C
(b) 實地考察已發展成形的批發市場	31/12/2012		C
(c) 進行深入小組訪談	28/2/2013		C
(d) 編制策略性發展研究報告	30/11/2013		C
(e) 舉辦專題講座及拜訪商會	30/11/2013		C

Marketing/Dissemination Activities (in chronological order)

(Please provide details of all completed and on-going promotional and/or dissemination activities for each of the project deliverables. Such activities may include advertisements, seminars, workshops, etc.)

<u>Date/ Period</u>	<u>Description</u>	<u>No. of beneficiaries (SMEs/Enterprises*)</u> *please delete as appropriate
14/11/2013	Advertising result announcement seminar on Apple Daily, Metro Daily and Headline Daily	Around 54,000 [#] enterprises
15/11/2013	Advertising result announcement seminar on Oriental Daily and AM730	Around 64,000 [#] enterprises
18/11/2013	Conducting result announcement seminar at the Hong Kong Convention and Exhibition Centre	86 key representatives from 38 enterprises industries, from watch and clock, gifts and premiums, electronics, jewellery, fashion and apparel, trading and wholesale industries, as well as the business sector
22/11/2013	Conducting result announcement seminar at the Hong Kong Polytechnic University	39 key representatives from 18 enterprises from electronics, furniture and jewellery, trading and wholesale industries, as well as the business sector
23/11/2013 to 30/11/2013	Visiting and disseminating study results to 33 association secretariats, covering 24 manufacturing industries	Around 6,000 enterprises from manufacturing sector
Total no. of beneficiaries :		124,056 enterprises

[#]Remarks: The estimated number of beneficiaries is based upon the readership profiles provided in 2013 Nielsen Media Index Hong Kong Mid-Year Report.

Future Plan for Promoting the Project Deliverables

Both HKCIEA and IfE will actively promote the study results to manufacturing industry members in its future networking formal and informal activities. The Association will consider printing additional copies of the report for distribution to industry members or other relevant stakeholders on need basis.