

Trade and Industrial Organisation Support Fund (TSF)

Final Report on Approved Project

Grantee	:	Hong Kong Laundry Services Association Limited
Implementation Agent(s) (if any)	:	Hong Kong Productivity Council
Project reference no.	:	T20 001 003
Project title	:	An industrial survey of laundry services industry for the sustainable development and digital transformation in Hong Kong
Period covered in this report (whole project duration)	:	From 20/10/2020 to 19/01/2022 (dd/mm/yyyy) (dd/mm/yyyy)

1. Project Details

Project summary (in about 150 words)

The project aims to carry out an industrial survey and a global market research for the laundry service industry to study the mode of operation, level of automation, use of technology, opportunity in GBA/Mainland/overseas markets etc. After data collected during the survey and the findings of the research study, interview and case study are consolidated and analysed to compose a report in this project.

Besides, in order to update the practitioners with the latest environment of the laundry industry, to arouse sharing and discussion about the development of laundry services industry in Hong Kong, as well as to draw the attention of the launch of the survey and to disseminate the survey and research study result, two industrial seminars are organised and a project website is also built for the promotion of project activities and the dissemination of the report.

Project objectives (in about 50 words)

1. The project aims to carry out an industrial survey and a global market research for the laundry service industry to study the mode of operation, level of automation, use of technology, opportunity in GBA/Mainland/overseas markets etc.

2. To figure out the way to assist the industry in strengthening the operation, enhancing efficiency and effectiveness, and extending businesses

3. To extend the promotion of Hong Kong laundry service industries in order to meet the potential business partners and learn more the business environment in GBA/Mainland/overseas markets etc..

Collaborating Organisations (if any)

The Hong Kong Research Institute of Textiles and Apparel Limited (HKRITA)

Hong Kong Federation of Restaurants & Related Trades Limited (HKFORT)

Hong Kong Hotels Association Limited

Key personnel

	<u>Name</u>	<u>Post title and name of organisation</u>
Project Coordinator	: Charles Lam	Chairman, Hong Kong Laundry Services Association Limited
Deputy Project Coordinator	: Apple Kong	Vice Chairman, Hong Kong Laundry Services Association Limited

Project duration

	<u>Commencement date</u> (dd/mm/yyyy)	<u>Completion date</u> (dd/mm/yyyy)	<u>Project duration</u> (no. of months)
As stated in the project agreement	20/10/2020	19/10/2021	12 months
Revised (if applicable)	20/10/2020	19/01/2022	15 months

2. Summary of Project Results

Governance

Name of Project Team Member	Position in the Project
Mr Charles Lam	Project Coordinator (from the Applicant)
Ms Apple Kong	Deputy Project Coordinator (from the Applicant)
<i>Other Project Team Members from the Applicant:</i>	
-	-
<i>Other Project Team Members from the Implementation Agent (if any):</i>	
Dr Ming GE	Project member
Ms Samantha CHAN	Project member
Ms Lili CHEN	Project member
Ms Suki FAN	Project member
Ms Angela Tai	Project member
<i>Others Project Team Members from the supporting organization</i>	

Please state the composition of the steering committee (or other committees) formed under the project.

- (1) Mr. Charles LAM, Chairman of Hong Kong Laundry Services Association Limited
- (2) Mr. Ringo WONG, Founding Chairman of Hong Kong Laundry Services Association Limited
- (3) Dr. Ming GE, General Manager of HKPC
- (4) Mr. Sun TAO, Business Development Director of HKRITA
- (5) Representative from HKHA
- (6) Representative from HKFORT
- (7) Representative from CLP Group
- (8) Representative from Hong Kong and China Gas Company Limited (Towngas)

Project deliverables

Please list out the project deliverables carried out during the project duration in accordance with the approved project proposal and provide details on the actual result achieved for each deliverable.

Details of the deliverable conducted	Quantifiable target (as stated in the approved project proposal)	Actual result achieved	Reasons for not achieving the target (if applicable)
1. Seminars			
1.1: Seminars 1 Date: 15 Jan 2021 Time: 16:30 -18:30 (2 hours) Venue: Online format Topics covered: 「洗衣業發展新趨勢」研討會 Speaker list: 1. Mr. Charles Lam, Chairman, Hong Kong Laundry Services Association Limited 2. Dr. Ming Ge General Manager, Robotics and Artificial Intelligence of HKPC 3. Dr Gloria Lei Yao, Director, Project Development of HKRITA 4. 東華大學丁雪梅教授 5. 廣東省洗染行業協會秘書長施劍榮先生 Other details: N/A	-Target no. of participants: <u>100</u> -Number of tentative speakers: <u>4 speakers</u> -Leaflet contained seminar's rundown and speaker information will be produced and distributed to participants during the seminar. -On-site banners will be produced and displayed on stage during the seminar.	-Actual no. of participants: <u>100</u> -Number of speakers invited: <u>5 Speakers</u> -Leaflet are produced and distributed to participants during the seminar. -On-site banner is produced and displayed on stage during the seminar.	N/A
1.2: Seminars 2 Date: 12 Jan 2022 Time: 16:00 -19:00 (3 hours) Venue: Online format Topics covered: 「香港洗衣服務業可持續發展及數碼轉型調研」線上線下研討會 Speaker list: 1. Mr. William Li, Chairman, Hong Kong Laundry Services Association Limited 2. Mr. Eddy Lam, Deputy Head, Intelligent Application of HKPC 3. Mr. Zou Man Bo, Marketing Director of TianTianxiyi (China) 4. Mr. Alan Kwok, General Manager of Jaunty Specialty Laundry Co. Ltd.(Taiwan) 5. Mr Kenny LAM, General Manager of Pionier Laundry Limited Discussion Panel Moderator: Mr. William Li, Chairman, Hong Kong Laundry Services Association Limited Speaker: 1. Mr Kenny LAM, General Manager of Pionier Laundry Limited	-Target no. of participants: 100 - Number of tentative speakers: <u>7 speakers</u> -Leaflet contained seminar's rundown and speaker information will be produced and distributed to participants during the seminar. -On-site banners will be produced and displayed on stage during the seminar.	-Actual no. of participants: 104 -Number of speakers invited: <u>8 speakers</u> -Leaflet are produced and distributed to participants -On-site banner is produced and displayed on stage during the seminars.	N/A

Details of the deliverable conducted	Quantifiable target (as stated in the approved project proposal)	Actual result achieved	Reasons for not achieving the target (if applicable)
<p>2. Mr. Ken Lai, Business Development Manager of Clifton Ltd</p> <p>3. Mr. Dick To, Manager, Laundry Department of Four Season Hotel</p> <p>4. Dr Gloria Lei Yao, Director, Project Development of HKRITA</p> <p>Other details: N/A</p>			
2. Industrial Survey			
<p>Methodology: The survey is an online survey. An online electronic survey platform is built for this survey. The URL of the survey platform is placed on the project website for public access.</p> <p>Date of survey (if applicable): Jul to Oct 2021</p> <p>Other details: The survey is promoted to the target group of surveyees through: (i) One round of eDM to be sent by HKPC to the members and business network of Hong Kong Laundry Services Association, HKPC and the collaborating organisation in this project; (ii) One advertisement placing on the seasonal magazine of the Hong Kong Laundry Services Association; (iii) Survey Invitation letters are sent to laundry companies or shops in Hong Kong by mail in order to have a full coverage of targeted companies, including those traditional laundry service companies which are not willing to or seldom receive eDM; and (iv) One e-banner (one month) on the website of the Hong Kong Laundry Services Association (http://www.hklsa.com.hk).</p>	Target no. of survey: <u>500</u>	Actual no. of survey: <u>291</u>	<p>The response rate is nearly 60% of our target no.</p> <p>Some feedbacks are received of surveyees after follow up call. Some of traditional laundry company owners are elderly and they didn't know how to use online survey. Besides, some laundry shops are closed during the outbreak of COVID-19 and the registration address are wrong. Therefore, the invitation letter couldn't deliver to the surveyees finally.</p>
3. Global Market Research			
<p>Date of research: from Mar 2021 to Jan 2022</p> <p>Methodology: The research study is included (i) Desktop research of the laundry services industry in global, Mainland and local aspects to collect information about the laundry service industry's mode of operation, level of technology and</p>	The research findings will be consolidated with findings of the industrial survey to compose the e-report	The e-report is finished and released on the project website.	N.A.

Details of the deliverable conducted	Quantifiable target (as stated in the approved project proposal)	Actual result achieved	Reasons for not achieving the target (if applicable)
<p>automation etc.;</p> <p>(ii) Interviews with local industrial representatives for experience sharing or advice on energy efficiency solution, safer and healthier solution, sustainable laundry systems, and technology development and professional solution, etc. (see Deliverable 4 below for details); and</p> <p>(iii) Case studies of industrial players to study their strength on strong market share, successful business mode or strategy, professional management skills etc. through desktop research, literature review on global research reports and interviews with the two selected Hong Kong companies etc. (see Deliverable 5 below for details).</p> <p>Other details: N/A</p>			
4. Interview with local industrial representatives			
<p>Date of interview: from Feb to Aug 2021</p> <p>• Selection criteria of interview: Interviewees are selected according to their expertise/knowledge on any of the following elements or criteria:</p> <p>(1) Energy efficiency solution</p> <p>(2) Possible measures to save energy and water consumption</p> <p>(3) Enhance efficiency in logistics</p> <p>(4) Possible new business models for advancement</p> <p>(5) Safer and healthier solution</p> <p>(6) Sustainable laundry systems</p> <p>(7) Technology development and professional solution etc.</p>	<p>Target no. of interview: <u>10</u></p> <p>(<u>5</u> local laundry services enterprises and <u>5</u> enterprises related to the laundry services industry)</p>	<p>Actual no. of interview: <u>13</u></p> <p>(<u>7</u> local laundry services enterprises and <u>6</u> enterprises related to the laundry services industry)</p>	N/A
5. Case study of Industrial Players			
<p>Date of case study: from May to Aug 2021</p> <p>• Selection criteria of case study according to their strength in any of the following elements or criteria:</p> <p>(1) High reputation in Laundry industry around the world</p> <p>(2) Successful business model and strategy</p> <p>(3) Professional management solution for laundry industry</p> <p>(4) Talent development and best</p>	<p>Target no. of case study: <u>6</u></p> <p>(<u>2</u> enterprises from global/overseas; <u>2</u> enterprises from the Mainland and <u>2</u> enterprises from Hong Kong)</p>	<p>Actual no. of case study: <u>7</u></p> <p>(<u>2</u> enterprises from global/overseas; <u>3</u> enterprises from the Mainland and Taiwan, <u>2</u> enterprises from Hong Kong)</p>	N/A

Details of the deliverable conducted	Quantifiable target (as stated in the approved project proposal)	Actual result achieved	Reasons for not achieving the target (if applicable)
practice etc..			
6. Report			
<p>Publishing date: Jan 2022</p> <p>Topics covered: 香港洗衣服務業可持續發展及數碼轉型調研書</p> <p>No. of pages: 60 pages</p> <p>Distribution channels:</p> <p>The report is released on project website and promoted to the practitioners through:</p> <p>(i) One round of eDM to be sent to the members and business network of Hong Kong Laundry Services Association, HKPC and the collaborating organisations in this project;</p> <p>(ii) One feature article (4 pages) on the seasonal magazine of the Hong Kong Laundry Services Association; and</p> <p>(iii) One e-banner (one month) on website of the Hong Kong Laundry Services Association (http://www.hklsa.com.hk).</p> <p>Soft copy available at: https://www.laundryservicehk.com/report</p> <p>Other details: NA</p>	<p>Target no. of copies: <u>1 e-version</u></p>	<p>Actual no. of copies: <u>1 e-version</u></p>	N/A
7. Project Website			
<p>Launching date: Jan 2020</p> <p>Web address: https://www.laundryservicehk.com/</p> <p>Languages: Traditional Chinese</p> <p>Other details: Update of the project activities and deliverable disseminations.</p>	<p>Target no. of website: <u>1</u></p>	<p>Actual no. of website: <u>1</u></p>	N.A.
8. Promotion			
<p>8.1. eDMs</p> <p>Contents: To promote the seminars, online survey, and the research report</p> <p>Distribution channels: eDM to be sent to the members and business network of Hong Kong Laundry Services Association, HKPC and the collaborating organisations in this project;</p> <p>Other details: NA</p>	<p>Target eDMs sent out: <u>4 rounds</u> (2 rounds of eDM for the 2 seminars, one round for the survey and one round for the report)</p>	<p>Actual eDMs sent out: <u>4 rounds</u></p>	N.A.
<p>8.2. Advertisement on the seasonal magazine of Hong Kong Laundry Services Association</p>	<p>Target no. of pages (printed advertisement): <u>7pages</u></p>	<p>Actual no. of pages (printed advertisement): <u>7pages</u></p>	N.A.

Details of the deliverable conducted	Quantifiable target (as stated in the approved project proposal)	Actual result achieved	Reasons for not achieving the target (if applicable)
<p>Contents: To promote the seminars, online survey, and the research report</p> <p>Distribution channels: printed copies are distributed at the laundry shops and enterprises and e-copies are released on HKLSA website</p> <p>Other details: NA</p>	<p>(1) 1 full page advertisement for the promotion of the first seminar (Dec 2020 issue)</p> <p>(2) 1 full page advertisement for the promotion of the second seminar (Jun 2021 issue)</p> <p>(3) 1 full page advertisement for the promotion of the survey (Mar 2021 issue)</p> <p>(4) 4 full pages feature article on the research report (Sep 2021 issue)</p>	<p>(1) 1 full page advertisement for the promotion of the first seminar (Dec 2020 issue)</p> <p>(2) 1 full page advertisement for the promotion of the second seminar (Dec 2021 issue)</p> <p>(3) 1 full page advertisement for the promotion of the survey (Jun 2021 issue)</p> <p>(4) 4 full pages feature article on the research report (Sep 2021 issue)</p>	
<p>8.3 Online advertisements on the website of Hong Kong Laundry Services Association</p> <p>Contents: To promote the seminars, online survey, and the research report</p> <p>Period of on-line advertisement: <u>1 month</u> of each e-banner</p>	<p>Target duration of on-line advertisement: <u>1</u> month of each advertisements</p> <p>•Four e-banners placed on the website of the Hong Kong Laundry Services Association (http://www.hklsa.com.hk):</p> <p>(i)for the promotion of the first seminar</p> <p>(ii)for the promotion of the second seminar</p> <p>(iii)for the promotion of the survey</p> <p>(iv)for the promotion of the research report</p>	<p>Actual duration of on-line advertisement: <u>1</u> month of each advertisements</p>	N.A.
<p>8.4 Letter</p> <p>Contents: To promote the industrial survey</p>	<p>Target no. of letter will be sent out: <u>2000</u> copies</p>	<p>Actual no. of letter sent out: <u>2000</u> copies</p>	N/A

Key implementation stages

Please indicate in the status below if the deliverable is completed according to schedule (C), completed but delayed (D) or not achieved (N). If it is delayed or not achieved, please indicate the actual completion date (if applicable) and provide the reasons.

	<u>Project deliverable</u> (all deliverables as set out in the approved project proposal)	<u>Original target completion date</u> ¹	<u>Revised target completion date</u> (if applicable)	<u>Status</u> (C/P/D/NA)	<u>Reasons for not meeting the original target completion date</u>
(a)	Form a steering committee	19/11/2020	N.A.	C	N.A.
(b)	Construct project plan and key program schedule	19/11/2020	N.A.	C	N.A.
(c)	Invite the speakers to participate in seminars	31/01/2021	N.A.	C	N.A.
(d)	Build the project website	31/01/2021	N.A.	C	N.A.
(e)	Prepare for the online survey platform	31/01/2021	N.A.	C	N.A.
(f)	Promote the project activities through eDM, advertisements on HKLSA' s seasonal magazine, and e-banners on HKLSA' s website	31/01/2021	N.A.	C	N.A.
(g)	Promote the survey through eDM and advertisements on HKLSA' s seasonal magazine	31/03/2021	N.A.	C	N.A.
(h)	Organize a half day seminar about the new trend of laundry service industry plus project launch	31/03/2021	N.A.	C	N.A.
(i)	Carry out the industrial survey	31/08/2021	N.A.	C	N.A.
(j)	Carry out global market research	31/08/2021	N.A.	C	N.A.
(k)	Prepare and conduct the on-site interviews with local industrial representatives and case studies of industrial players	31/08/2021	N.A.	C	N.A.
(l)	Promote the second seminar through eDM and advertisements on HKLSA' s seasonal magazine	31/08/2021	N.A.	C	N.A.
(m)	Prepare and publish the research report	19/10/2021	19/01/2022	C	Note (i)
(n)	Promote the research report through eDM and a feature article on HKLSA' s seasonal magazine	19/10/2021	19/01/2022	C	Note (i)
(o)	Organize a half day seminar to disseminate the survey result and sharing by those companies in the case study	19/10/2021	19/01/2022	C	Note (i)
(p)	Posting updates on the project website	19/10/2021	19/01/2022	C	Note (i)
(q)	Project Dissemination	19/10/2021	19/01/2022	C	Note (i)

Note:

¹ As stated in the approved project proposal.

- (i) Due to the outbreak of COVID-19, some deliverables are delayed to implement.