一九八六至一九九六年香港製造業結構的轉變
Structural Changes in Hong Kong's Manufacturing Industries, 1986 - 1996

本港製造業的結構隨時間不斷轉變。自七十年代後期起，越來越多的本地企業家，將部分或全部生產程序轉移到中國內地，以利用內地較廉價的勞工和土地。到了九十年代，這種趨勢更加明顯。本文闡述香港十二個主要製造行業自一九八六年到一九九六年間的結構和表現的轉變，分析是以政府統計處「工業生產按年統計調查」所得的結果為依據。

The structure of Hong Kong's manufacturing sector experienced continuous changes over time. Since the late 1970's, more and more local entrepreneurs relocated part (or the whole) of their production processes to the mainland of China to take advantage of the lower labour and land costs. In the 90's, this tendency has become even more significant. This article describes the performance and structural changes in 12 major manufacturing industries in Hong Kong from 1986 to 1996. Analysis is made with reference to the results of the Annual Survey of Industrial Production conducted by the Census and Statistics Department.

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1. 引言

1.1 本港製造業的結構隨時間不斷轉變。在五十至七十年代早期工業化進程中，本地製造業主要集中進行以簡單機械輔助的勞工密集製造程序。典型的例子包括裝配電子手錶和玩具，而製成品主要作出口用途。

1.2 到了八十年代，本地製造商所面對的各種壓力不斷增加，其中包括鄰近經濟地區的競爭，及逐漸高昂的生產成本和勞工短缺等。另一方面，自七十年代後期起，中國內地實行的對外開放政策，亦為本港商人提供了很多機會。越來越多的本地企業家，將部分或全部生產程序轉移到內地，以利用內地較廉價的勞工和土地。到了九十年代，這種趨勢更加明顯。但當中國內地沿海地區的地價和勞工價格不斷上升，製造商又將他們的生產基地轉移到內陸省分，甚至一些鄰近國家，如泰國和印尼等。

1.3 很多時，企業家將整個生產工序遷移往中國內地或鄰近經濟地區，在香港的公司則祇保留其他非生產的功能，例如市場銷售、訂單處理、材料採購、設計、產品發展、品質控制、包裝及後勤服務等。雖然這些香港公司會為中國內地生產提供技術支援服務，但其在本港的營運性質已由製造業轉為貿易業，即是由生產商轉為服務供應商。

1. Introduction

1.1 The structure of Hong Kong's manufacturing sector experienced continuous changes over time. In the early stage of industrialisation from the 50's to the 70's, the local manufacturing sector mainly used labour intensive manufacturing processes, with the help of elementary machinery. Typical examples include assembling of digital watches and toys. The final products were mainly for export sale.

1.2 In the 80's, local manufacturers were increasingly subject to the pressure of keen competition from neighbouring economies, rising production costs, and shortage in labour. On the other hand, the open door policy adopted by the mainland of China since the late 1970's had opened up opportunities. More and more local entrepreneurs relocated part (or the whole) of the production processes to the Mainland to take advantage of the lower labour and land costs. In the 90's, this tendency has become even more significant. However as the costs of land and labour in the coastal area of the Mainland increased, manufacturers tended to shift their manufacturing bases to inner provinces or even to other neighbouring countries such as Thailand and Indonesia.

1.3 In many cases, essentially all manufacturing processes are moved to the mainland of China or neighbouring economies, leaving only such functions as marketing, orders processing, materials sourcing, design, product development, quality control, packaging and logistics with the local firms. Hence the local firms have shifted their operational status from that of manufacturing to that of trading, i.e. from being manufacturers to service-providers, although they may provide technical support services to the manufacturing activities.

1.4 此外，不少傳統的進出口貿易公司亦紛紛從事分判製造工序予中國內地的活動，它們同樣地在不同程度上爲中國內地生產活動提供技術支援服務，藉此利用中國內地廉宜而豐富的勞工及土地資源。另一方面，近年本港有不少新公司成立，作爲中國內地新生產機構的香港基地，其經營方式與傳統的進出口公司有所不同。

1.5 雖然這些進出口公司與在中國內地或鄰近經濟地區的製造業機構關係密切，但其本身並沒有在香港從事任何實際生產工作，因而並非以製造業機構方式經營。因此，下文所論及有關各製造行業的分析，不包括上述各類型的貿易公司在內。有興趣深入了解這些貿易公司特性的讀者，可參閱香港統計月刊一九九八年九月號內一篇名爲「從事製造業相關活動的貿易公司」的專題文章。

1.6 本文闡述香港十二個主要製造行業自一九八六年到一九九六年間的結構和表現的轉變。這些行業共佔一九九六年整體工業總增加價值的百分之九十一、生產總值的百分之九十二，以及僱員數目的百分之九十。本文的分析是以政府統計處「工業生產按年統計調查」所得的結果爲依據。

1.4 Besides, many traditional import/export firms which have become engaged in sub-contract processing arrangement in the mainland of China also render, to various degrees, technical support services to the production in the mainland of China so as to take advantage of the cheap and abundant labour and land resources there. On the other hand, quite a large number of new firms were set up in recent years to serve as a local base for new manufacturing firms in the mainland of China, operating in a way somewhat different from traditional importers/exporters.

1.5 Although all the above-mentioned trading firms have some relationship with manufacturing firms in the mainland of China or neighbouring economies, they were not themselves operating as manufacturing units because they were not taking up the actual production work themselves in Hong Kong. Therefore, such trading firms are not covered in the following analysis on Hong Kong's manufacturing industries. Readers interested in knowing more about the characteristics of these trading firms can refer to a feature article "Trading firms with manufacturing-related functions" in the September 1998 issue of the Hong Kong Monthly Digest of Statistics.

1.6 This article describes the performance and structural changes in 12 major manufacturing industries in Hong Kong from 1986 to 1996. The industries selected covered 91% of total value added, 92% of total gross output and 90% of total employment of the manufacturing sector in 1996. Analysis is made with reference to the results of the Annual Survey of Industrial Production conducted by the Census and Statistics Department.

2. 主要製造行業的表現

2.1 以生產總值計算（參閱表一），服裝製品業和紡織製品業仍爲兩個最大的製造行業。但在過去十年中，這兩個行業在本港製造業中的重要性相對有所下降。以生產總值計，他們所佔的比重分別由百分之二十及百分之十八，下跌至百分之十五及百分之十三。以增加價值計，服裝製品業所佔的比例由百分之廿三下降至百分之十三，紡織製品業亦由百分之十八下降至百分之十二。

2.2 另一方面，印刷、出版及有關行業的生產總值則有顯著增長，部分原因是由於自一九九五年起香港標準行業分類亦將那些從事出版而不負責自行印刷的機構單位包括在該行業內。其他生產總值有顯著增長的行業，包括食品、飲品及煙草製品業（上升百分之一百六十一）；電子零件製造業（上升百分之一百五十四）；化學品、橡膠及非金屬礦產製品業（上升百分之一百四十四）；和辦公室、會計及計算器材製造業（上升百分之一百一十四）。

2.3 生產總值有顯著跌幅的行業包括塑膠製品業（下跌百分之六十七）；和家庭電器用具及電子玩具製造業（下跌百分之五十四）。

2. Performance of major manufacturing industries/industry groups

2.1 The wearing apparel industry and the textiles industry remain two of the largest industries in terms of gross output (see Table 1). However both industries lost some of their relative importance in Hong Kong over the last decade. In terms of gross output, their shares decreased from 20% and 18% to 15% and 13% respectively. In terms of value added, the share of the wearing apparel industry decreased from 23% to 13% of the entire manufacturer sector, and the textiles industry, from 18% to 12%.

2.2 On the other hand, the printing, publishing and allied industries exhibited a very significant growth in gross output (+357%) from 1986 to 1996. This was partly because since 1995, this industry group also included establishments engaged in publishing without printing under the Hong Kong Standard Industrial Classification. Other industries with significant growth in gross output included the food, beverages and tobacco industry (+161%); electronic parts and components industry (+154%); chemical, rubber and non-metallic mineral products industry (+144%); and office, accounting and computing machinery industry (+114%).

2.3 Industries that experienced significant declines in gross output included the plastic products industry (-67%); and electrical appliances, houseware and electronic toys industry (-54%).

表一　選定製造行業的增加價值及生產總值
Table 1　Value added and gross output of selected manufacturing industries/industry groups

	增加價值（十億港元） Value added ($ billion)			生產總值（十億港元） Gross output ($ billion)		
	1986	1996	變動百分率 % change 1996/1986	1986	1996	變動百分率 % change 1996/1986
所有製造行業 All manufacturing industries	6,278	8.245	+ 31	22.722	28.203	+ 24
選定製造行業組別 Selected manufacturing industries/industry groups						
食品、飲品及煙草製造業 Food, beverages and tobacco	257	872	+ 240	878	2,289	+ 161
	(4.1)	(10.6)		(3.9)	(8.1)	
服裝製品業 Wearing apparel	1,425	1,100	- 23	4,479	4,132	-8
	(22.7)	(13.3)		(19.7)	(14.7)	
紡織製品業 Textiles	1,099	947	- 14	4,082	3.733	-9
	(17.5)	(11.5)		(18.0)	(13.2)	
紙張及紙品製造業 Paper and paper products	120	172	+ 44	498	635	+ 27
	(1.9)	(2.1)		(2.2)	(2.3)	
印刷、出版及有關行業 Printing , publishing and allied industries	272	1,145	+ 321	673	3,077	+ 357
	(4.3)	(13.9)		(3.0)	(10.9)	
化學、橡膠及非金屬礦產製品業 Chemicals, rubber and non-metallic mineral produts	182	485	+ 166	744	1,812	+ 144
	(2.9)	(5.9)		(3.3)	(6.4)	
塑膠製品業 Plastic products	606	228	- 62	2,077	683	-67
	(9.6)	(2.8)		(9.1)	(2.4)	
基本金屬、金屬製品、機械及設備製造業 Basic metal, fabricated metal products, machinery and equipment	750	1,028	+ 37	2,476	3,652	+ 47
	(12.0)	(12.5)		(10.9)	(12.9)	
辦公室、會計及計算器材製造業 Office, accounting and computing machinery	226	456	+ 102	1,081	2,310	+ 114
	(3.6)	(5.5)		(4.8)	(8.2)	
電子零件製造業 Electronic parts and components	245	708	+ 189	815	2,070	+ 154
	(3.9)	(8.6)		(3.6)	(7.3)	
家庭電器用具及電子玩具製造業 Electrical appliances, houseware and electronic toys	126	73	- 42	534	248	-54
	(2.0)	(0.9)		(2.3)	(0.9)	
專業及科學設備製造業 Professional and scientific equipment	272	261	- 4	1,644	1,345	-18
	(4.3)	(3.2)		(7.2)	(4.8)	
小計 Sub-total	5,581	7,477	+ 34	19,982	25,986	+ 30
	(88.9)	(90.7)		(87.9)	(92.1)	

註釋：括號內的數字表示個別行業組別的生產總值／增加價值佔所有製造行業生產總值／增加價值的百分比。

Note : Figures in brackets refer to percentage shares of gross output/value added of the individual industries/industry groups.

2.4 最近十年間，越來越多的本地製造商參與分判製造工序予中國內地和其他鄰近經濟地區的活動。在大多數情況下，本地製造商主要負責出口或轉口原材料到內地生產，隨後透過合約的安排，將加工後的貨物重新進口本港。此類貨物通常用作再加工（指半製成品）或轉售（指製成品）。

2.5 在外發加工活動的情況下，部分生產線轉移到內地（或鄰近經濟地區），而製成品則被運返同一個本地製造商。此類通過外發加工安排而銷售的貨品，在統計數字上被記錄為「原件轉售貨品的銷售」。因此，比較自一九八六至一九九六年間轉售在總銷售中所佔的比例，可作為各個工業參與外發加工程度的指標。比較結果（參閱表二）顯示過去十年間家庭電器用具及電子玩具製造業；專業及科學設備製造業；塑膠製品業；電子零件製造業；服裝製品業；及辦公室、會計及計算器材製造業均越來越多參與外發加工的活動。

2.4 In the last decade, more and more local manufacturers have engaged in outward processing activities in the mainland of China and other neighbouring economies. In many situations, the local manufacturers concerned are involved in exporting or re-exporting raw materials to the Mainland for processing, and with a contractual arrangement, in subsequent re-importation of the processed goods into Hong Kong, either for further processing (in the case of semi-manufactures) or resale (in the case of finished goods).

2.5 Under the outward processing arrangement, production for some product lines has been relocated to the Mainland (or other neighbouring economies) and the goods produced are shipped back to the same local manufacturers. Sales of such goods, which were produced through outward processing arrangement, are recorded as "resale of goods in the same condition as purchased" in the statistics. Hence a comparison of resales as a percentage of total sales between 1986 and 1996 may provide an indication of the changes in the extent to which individual industries are involved in outward processing. Results of such a comparison (see Table 2) show that the electrical appliances, houseware and electronic toys industry; professional and scientific equipment industry; plastic products industry; electronic parts and components industry; wearing apparel industry; and office, accounting and computing machinery industry had become more involved in outward processing activities over the last decade.

表二　選定製造行業的原件轉售佔總銷售的百分比

Table 2　Resales as a percentage of total sales in selected manufacturing industries/industry groups

	原件轉售在總銷售中所佔的百分比 * Resales as a % of total sales *		一九八六年至一九九六年間增減百分點 Change in % points between 1986-1996
	1986	1996	
所有製造行業 All manufacturing industries	11	25	+ 14
選定製造行業組別 Selected manufacturing industries/industry groups			
食品、飲品及煙草製造業 Food, beverages and tobacco	17	25	+ 7
服裝製品業 Wearing apparel	9	24	+ 15
紡織製品業 Textiles	14	12	- 2
紙張及紙品製造業 Paper and paper products	3	11	+ 8
印刷、出版及有關行業 Printing , publishing and allied industries	2	3	+ 1
化學、橡膠及非金屬礦產製品業 Chemicals, rubber and non-metallic mineral products	7	10	+ 3
塑膠製品業 Plastic products	9	34	+ 24
基本金屬、金屬製品、機械及設備製造業 Basic metal, fabricated metal products, machinery and equipment	10	17	+ 7
辦公室、會計及計算器材製造業 Office, accounting and computing machinery	10	21	+ 11
電子零件製造業 Electronic parts and components	24	45	+ 21
家庭電器用具及電子玩具製造業 Electrical appliances, houseware and electronic toys	13	61	+ 48
專業及科學設備製造業 Professional and scientific equipment	12	44	+ 32

註釋： * 總銷售包括產品銷售總值、自產自用的機器及原件轉售貨品的銷售總值。

Note : * Total sales include sales of goods produced, machinery produced for own use and resales of goods in the same condition as purchased.

2.6 從生產總值中增加價值所佔比例的增加，反映在過去十年間，本地製造商轉趨生產一些較高增值的產品。這種趨勢在食品、飲品及煙草製造業；電子零件製造業；塑膠製品業；家庭電器用具及電子玩具製造業中較爲明顯（參閱表三），這主要是由於該等工業在有形資產投資和高科技的應用有所增加，及發展高增值新產品所致。

2.6 As reflected by an increase in the percentage of value added in gross output, most of the local manufacturing industries in Hong Kong produced higher value added products in the last decade compared with the past. The trend of product upgrading was obvious in the food, beverages and tobacco industry; electronic parts and components industry; plastic products industry; and electrical appliances, houseware and electronic toys industry (see Table 3). This was the result of greater investment in physical capital, application of more advanced production technology and development of new products with higher value added.

表三 選定製造行業的增加價值在生產總值中所佔的百分比
Table 3 Value added as a percentage of gross output for selected manufacturing industries/industry group

	增加價值在生產總值中所佔的百分比 Value added as a percentage of gross output (%)				
	1986	1993	1994	1995	1996
所有製造行業 All manufacturing industries	28	29	29	28	29
選定製造行業組別 Selected manufacturing industries/industry groups					
食品、飲品及煙草製造業 Food, beverages and tobacco	29	37	36	37	38
服裝製品業 Wearing apparel	32	28	28	28	27
紡織製品業 Textiles	27	26	25	25	25
紙張及紙品製造業 Paper and paper products	24	28	28	25	27
印刷、出版及有關行業 Printing , publishing and allied industries	40	43	41	37	37
化學、橡膠及非金屬礦產製品業 Chemicals, rubber and non-metallic mineral products	25	26	24	23	27
塑膠製品業 Plastic products	29	34	29	29	33
基本金屬、金屬製品、機械及設備製造業 Basic metal, fabricated metal products, machinery and equipment	30	30	29	26	28
辦公室、會計及計算器材製造業 Office, accounting and computing machinery	21	18	21	19	20
電子零件製造業 Electronic parts and components	30	37	39	40	34
家庭電器用具及電子玩具製造業 Electrical appliances, houseware and electronic toys	24	31	34	33	30
專業及科學設備製造業 Professional and scientific equipment	17	18	16	17	19

3. 勞工和生產力

3.1 在過去十年間，僱員人數下降是大多數製造業機構單位的一個共同趨勢。就製造業整體而言，每機構單位的平均僱員人數從一九八六年的十九人跌至一九九六年的十三人（參閱表四）。這主要是由於相對上比較勞工密集的生產程序被遷移到鄰近經濟地區(例如中國內地）所致。

3. Employment and productivity

3.1 Downsizing in employment was a common trend of most manufacturing establishments over the last decade. For the manufacturing sector as a whole, average employment size per establishment decreased from 19 in 1986 to 13 in 1996 (see Table 4). Relocation of the relatively more labour intensive production processes to neighbouring economies such as the mainland of China was the major contributing factor of this trend.

表四 選定製造行業的機構單位數目、就業人數及每間機構單位平均就業人數
Table 4 Number of establishments, number of persons engaged and average employment size per establishment in selected manufacturing industries/industry groups

	機構單位數目 Number of establishments			就業人數 Number of persons engaged			每間機構單位平均就業人數 Average employment size per establishment	
	1986	1996	變動百分率 % change 1996/1986	1986	1996	變動百分率 % change 1996/1986	1986	1996
所有製造行業 All manufacturing industries	50 099	25 859	-48	942 734	327 473	-65	19	13
選定製造行業組別 Selected manufacturing industries/industry groups								
食品、飲品及煙草製造業 Food, beverages and tobacco	976	713	-27	24 667	24 111	-2	25	34
服裝製品業 Wearing apparel	9 247	2 828	-69	276 306	64 664	-77	30	23
紡織製品業 Textiles	5 371	2 654	-51	133 297	46 121	-65	25	17
紙張及紙品製造業 Paper and paper products	1 678	912	-46	17 252	7 459	-57	10	8
印刷、出版及有關行業* Printing , publishing and allied industries*	3 455	4 635	34	34 075	45 222	33	10	10
化學、橡膠及非金屬礦產製品業 Chemicals, rubber and non-metallic mineral products	1 418	786	-45	17 619	10 081	-43	12	13
塑膠製品業 Plastic products	4 786	1 552	-68	91 642	10 877	-88	19	7
基本金屬、金屬製品、機械及設備製造業 Basic metal, fabricated metal products, machinery and equipment	12 542	6 990	-44	116 903	45 620	-61	9	7
辦公室、會計及計算器材製造業 Office, accounting and computing machinery	208	162	-22	26 360	10 766	-59	127	66
電子零件製造業 Electronic parts and components	552	199	-64	30 944	17 653	-43	56	89
家庭電器用具及電子玩具製造業 Electrical appliances, houseware and electronic toys	417	131	-69	22 278	1 966	-91	53	15
專業及科學設備製造業 Professional and scientific equipment	1 685	674	-60	41 046	11 188	-73	24	17

註釋：* 自一九九五年起，印刷、出版及有關行業亦包括從事出版而不負責自行印刷的機構。

Note: * As from 1995, the industry group of printing, publishing and allied industries also includes establishments engaged in publishing without printing.

3.2 就業人數跌幅較明顯的是那些廣泛地參與外發加工活動的行業，包括：家庭電器用具及電子玩具製造業（下跌百分之九十一）；塑膠製品業（下跌百分之八十八）；服裝製品業（下跌百分之七十七）；專業及科學用品設備製造業（下跌百分之七十三）；紡織製品業（下跌百分之六十五）；辦公室、會計及計算器材製造業（下跌百分之五十九）。

3.3 另一方面，印刷、出版及有關行業的就業人數有百分之三十三的升幅。部分是由於九十年代中期，報紙和雜誌市場的擴大所致。此外，這行業需在緊逼時間下運作，這特性亦限制了其向鄰近經濟地區遷移的程度。除此之外，由於自一九九五年起，從事出版而不負責自行印刷的機構單位亦包括在這個行業中，以致這行業的就業人數隨著其機構單位數目的增加而上升。

3.4 有趣的是，比對十年前，大部分行業的非工場工人人數比例明顯增加（參閱表五），其中大部分從事輔助性的服務工序，例如原材料開發、產品設計、生產管理、工程和市場研究等。非工場工人人數比例增幅最大的行業包括：家庭電器用具及電子玩具製造業（從一九八六年的百分之十五點七，增加至九六年的百分之四十九點八）；專業及科學設備製造業（從百分之十四點五增加至百分之四十點五）；和辦公室、會計及計算器材製造業（從百分之十七點二增加至百分之三十七點三）。這些都是需要較高科技及工藝水平的行業。僱員組合的改變反映了由生產程序的機械化和引進新生產科技而引起的勞動力要求的改變。對有大量外發工序活動的行業，這現象亦反映了本地工業向已遷移至鄰近經濟地區的生產線所提供的科技支援角色越趨重要。

3.2 More significant percentage decreases in the number of persons engaged were recorded in those industries/industry groups which were extensively involved in outward processing : electrical appliances, houseware and electronic toys (-91%); plastic products industry (-88%); wearing apparel industry (-77%); professional and scientific equipment industry (-73%); textile industry (-65%) and accounting and computing machinery industry (-59%).

3.3 On the other hand, the printing, publishing and allied industries had a positive growth of 33% in the number of persons engaged. This was partly due to the increasing market of newspapers and magazines in the mid 1990's. The extremely short turnaround time required in this industry limited the extent of relocation to neighbouring economies. Besides, the increase in the number of persons engaged was accompanied by an increase in the number of establishments in these industries, as this industry group also included establishments engaged in publishing without printing since 1995.

3.4 It is interesting to note that the percentages of non-operative employees in most industries increased significantly over the past decade (see Table 5). Significant portions of them are engaged in supporting services such as sourcing of raw materials, product design, production management, engineering, and marketing research. The largest increases in percentage of non-operative employees were in the electrical appliances, houseware and electronic toys industry (from 15.7% in 1986 to 49.8% in 1996); professional and scientific equipment industry (from 14.5% to 40.5%); and office, accounting and computing machinery industry (from 17.2% to 37.3%). These are generally technology and skill intensive industries. The change in employment mix reflects a change in the skill requirement of labour along with the mechanization of production processes and the introduction of new production technologies. For industries where outward processing activities are prominent, this also reflects the increasing role of local industries providing technical support to the production processes relocated to neighbouring economies.

表五 選定製造行業的工場工人及非工場工人的組合

Table 5 Composition of employment between operatives and non-operative employees in selected manufacturing industries/industry groups

	工場工人人數 Number of operatives			非工場工人人數 Number of non-operative employees			非工場工人人數佔總僱員人數百分比 * Non-operative employees as percentage of total employees *	
	1986	1996	變動百分率 % change 1996/1986	1986	1996	變動百分率 % change 1996/1986	1986	1996
所有製造行業 All manufacturing industries	760 229	211 664	-72	123 876	90 502	-27	14.0	30.0
選定製造行業組別 Selected manufacturing industries/industry groups								
食品、飲品及煙草製造業 Food, beverages and tobacco	16 149	15 386	-5	7 428	7 964	+7	31.5	34.1
服裝製品業 Wearing apparel	240 023	49 296	-79	25 243	13 279	-47	9.5	21.2
紡織製品業 Textiles	108 748	33 477	-69	18 109	10 334	-43	14.3	23.6
紙張及紙品製造業 Paper and paper products	12 851	4 946	-62	2 515	1 694	-33	16.4	25.5
印刷、出版及有關行業 Printing , publishing and allied industries	22 090	20 457	-7	7 562	19 759	+161	25.5	49.1
化學、橡膠及非金屬礦產製品業 Chemicals, rubber and non-metallic mineral products	12 374	6 092	-51	3 603	3 144	-13	22.6	34.0
塑膠製品業 Plastic products	74 297	6 587	-91	11 712	2 589	-78	13.6	28.2
基本金屬、金屬製品、機械及設備製造業 Basic metal, fabricated metal products, machinery and equipment	89 026	27 694	-69	13 804	10 695	-23	13.4	27.9
辦公室、會計及計算器材製造業 Office, accounting and computing machinery	21 343	6 706	-69	4 446	3 987	-10	17.2	37.3
電子零件製造業 Electronic parts and components	23 772	12 240	-49	6 565	5 297	-19	21.6	30.2
家庭電器用具及電子玩具製造業 Electrical appliances, houseware and electronic toys	18 609	926	-95	3 460	917	-73	15.7	49.8
專業及科學設備製造業 Professional and scientific equipment	33 765	6 332	-81	5 721	4 307	-25	14.5	40.5

註釋： * 總僱員人數不包括在職東主、在職合夥人及無酬家屬幫工人數。

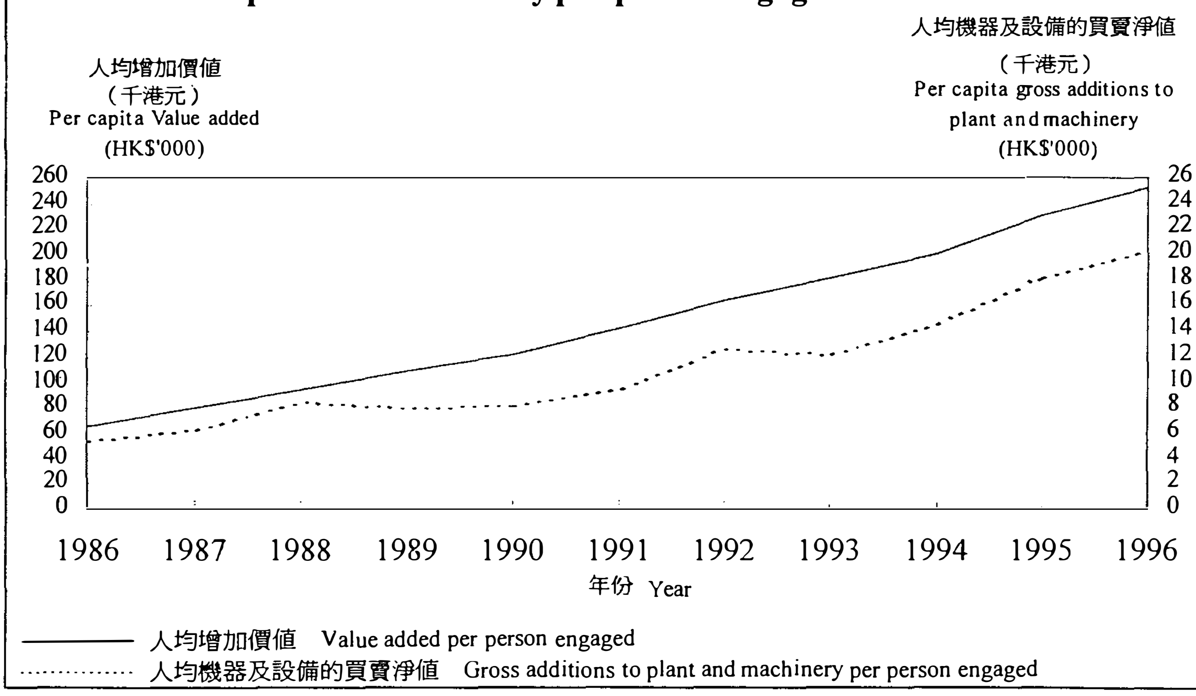
Note : * Total employees do not include working proprietors, active partners and unpaid family workers.

3.5 增加價值相對於就業人數的比率，可粗略反映個別製造業的勞動生產力。以製造業整體而言，這比率在過去十年間一直保持上升趨勢（參閱圖一）。這部分是由於在機械和設備方面投資的增加所致。此外，隨著勞工密集的生產程序轉移到鄰近經濟地區，本地製造商更能集中在資本密集和技術密集（所以有較高增加價值）的活動，亦有助提高製造業的生產力。

3.5 The ratio of value added to number of persons engaged provides a crude indication of labour productivity in an industry. For the manufacturing sector as a whole, this ratio was on an uptrend practically throughout the past 10 years (see chart 1). The improvement was partly attributable to increased investment in machinery and equipment. Moreover, with the relocation of labour intensive production processes to neighbouring economies, local manufacturers concentrated more on capital intensive and skill intensive (hence higher value added) activities, which were conductive to enhancing the productivity of the manufacturing sector.

圖一 人均增加價值及人均機器及設備的買賣淨值

Chart 1 Value added per person engaged and gross additions to plant and machinery per person engaged



3.6 在一九八六年至一九九六年間，生產力增長較高的工業，包括家庭電器用具及電子玩具製造業（每個就業人員的平均增加價值，年增長達百分之二十一）；電子零件製造業（年增長百分之十八）；辦公室、會計及計算器材製造業（年增長百分之十七）；和化學、橡膠及非金屬礦產製品業（年增長百分之十七）（參閱表六）。這些行業生產力的上升主要是由於在這段期間投資的增加，及勞動力密集的工序轉移到鄰近經濟地區所致。

3.6 Industries which had higher productivity growth during the period 1986 to 1996 include electrical appliances, houseware and electronic toys industry (value added per person engaged increased by an average annual growth rate of 21%); electronic parts and components industry (18% per annum); office, accounting and computing machinery industry (17% per annum); and chemicals, rubber and non-metallic mineral products (17% per annum) (see Table 6). The increase in productivity in most of the industries was due to a combination of increased investment and relocation of labour intensive production processes to neighbouring economies during the period.

表六 選定製造行業的機械及設備投資及勞工生產力
Table 6 Investment in plant and machinery and labour productivity in selected manufacturing industries/industry groups

	人均機器及設備買賣淨值每年平均增長百分率 Average annual growth rate of gross additions to plant and machinery per person engaged (%)			人均增加價值每年平均增長百分率 Average annual growth rate of value added per person engaged (%)		
	86-91	92-96	86-96	86-91	92-96	86-96
所有製造行業 All manufacturing industries	12	13	14	16	11	14
選定製造行業組別 Selected manufacturing industries/industry groups						
食品、飲品及煙草製造業 Food, beverages and tobacco	23	22	19	20	7	13
服裝製品業 Wearing apparel	6	-9	2	14	10	13
紡織製品業 Textiles	-1	-11	-1	11	5	10
紙張及紙品製造業 Paper and paper products	9	-13	1	19	5	13
印刷、出版及有關行業 Printing , publishing and allied industries	9	4	11	16	6	12
化學、橡膠及非金屬礦產製品業 Chemicals, r bber and non-metallic mineral products	32	-11	17	18	19	17
塑膠製品業 Plastic products	5	6	4	15	9	12
基本金屬、金屬製品、機械及設備製造業 Basic metal, fabricated metal products, machinery and equipment	10	2	8	18	9	13
辦公室、會計及計算器材製造業 Office, accounting and computing machinery	22	29	27	23	8	17
電子零件製造業 Electronic parts and components	15	13	16	15	15	18
家庭電器用具及電子玩具製造業 Electrical appliances, houseware and electronic toys	90	-1	42	25	19	21
專業及科學設備製造業 Professional and scientific equipment	29	-10	10	16	9	13

4. 成本結構和利潤

4.1 在生產總值中成本的不同組成部分（原料消耗，僱員薪酬和其他營運開支等）及盈餘總額所佔的比重，反映個別行業的成本結構和利潤。

4.2 製造行業最大的支出是生產和運作中原料和物料的消耗（參閱表七）。在一九九六年，每一百元生產總值，其中有六十元用來支付原料和物料的開支。在一九八六年和一九九六年間，大部分製造行業的原料、物料及工業加工與服務的消耗比例均下降。較能藉尋找廉價的原料和物料、提高生產力、及使用節約原材料技術，從而減低原料開支的行業，更能改善其盈利情況。

4.3 雖然生產成本不斷提高，很多製造行業仍能在上述期間提高其利潤。在生產總值中，盈餘總額所佔的比重可反映該行業的總毛利，亦可作爲該行業利潤的指標。

4.4 較能成功提高利潤的行業包括家庭電器用具及電子玩具製造業；食品、飲品及煙草製造業；和電子零件製造業。這些行業的利潤改變部分是通過提高生產力（反映在人均增加價值的上升）而達致的。在一九八六年至一九九六年間，這些行業也同樣較成功地降低非勞工成本。這可由原料和物料在生產總值中所佔比例的顯著下降中看到。

4. Cost structure and profitability

4.1 The shares of various cost components (consumption of materials, compensation of employees, and other operating expenses) and gross surplus in gross output of an industry provide an indication of its cost structure and profitability.

4.2 The largest input content of the manufacturing industries is accounted for by the consumption of raw materials and supplies for production and business operation (see Table 7). In 1996, for each $100 gross output generated in the manufacturing sector, $60 were paid for the costs of materials and supplies. Between 1986 and 1996, the share of the costs of raw materials and supplies consumed decreased in most of the manufacturing industries under study. Industries more capable of reducing raw materials costs through sourcing cheaper raw materials/supplies, improving productivity, and adopting raw materials/supplies conserving production technology will have a better chance to improve the profitability of their business.

4.3 Despite the rising production costs, many manufacturing industries were able to improve their profit margins during the period. The share of gross surplus in gross output, which may be used to represent the gross profit margin of the industry, provides an indication of the profitability of the industry.

4.4 Industries more successful in improving their profit margin included the electrical appliances, houseware and electronic toys industry; food, beverages and tobacco industry; and electronic parts and components industry. Improvement in the profit margins of these industries was partly achieved by improvement in productivity as reflected by an increase in value added per person engaged during the period. They were also more successful in reducing non-labour costs as reflected by a significant decrease in percentage component of raw materials and supplies between 1986 and 1996.

表七　選定製造行業的成本結構（佔生產總值百分比）

Table 7 Cost structure of selected manufacturing industries/industry groups (percentage share of gross output)

	原料、物料及工業加工與服務的消耗 Consumption of materials, supplies & industrial work/services		僱員薪酬 Compensation of employees		其他開支 Other expenses		盈餘總額 Gross surplus	
	1986	1996	1986	1996	1986	1996	1986	1996
所有製造行業 All manufacturing industries	65	60	17	16	8	12	10	11
選定製造行業組別 Selected manufacturing industries/industry groups								
食品、飲品及煙草製造業 Food, beverages and tobacco	59	47	14	17	13	16	14	21
服裝製品業 Wearing apparel	61	64	25	17	9	12	8	7
紡織製品業 Textiles	67	67	15	15	8	11	11	7
紙張及紙品製造業 Paper and paper products	67	63	15	15	9	13	9	9
印刷、出版及有關行業 Printing , publishing and allied industries	50	47	24	25	10	17	16	11
化學、橡膠及非金屬礦產製品業 Chemicals, rubber and non-metallic mineral products	65	62	12	10	11	12	12	15
塑膠製品業 Plastic products	62	55	18	19	8	13	11	14
基本金屬、金屬製品、機械及設備製造業 Basic metal, fabricated metal products, machinery and equipment	61	62	18	17	9	11	11	11
辦公室、會計及計算器材製造業 Office, accounting and computing machinery	75	74	10	8	6	9	10	9
電子零件製造業 Electronic parts and components	60	55	17	13	10	11	14	20
家庭電器用具及電子玩具製造業 Electrical appliances, houseware and electronic toys	67	53	16	13	9	19	8	16
專業及科學設備製造業 Professional and scientific equipment	79	72	10	11	5	10	6	8