



Transport & Logistics Services Council
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Hong Kong Institute of Asia-Pacific Studies Research Associate Gordon Kee
presents the preliminary results of the study
香港亞太研究所副研究員紀緯紋講述研究的初步結果

Synergies amongst Logistics SMEs Essential to Embrace Changes

With the support of the SME Development Fund, the FHKI's Transport & Logistics Services Council commissioned Hong Kong Institute of Asia-Pacific Studies (HKIAPS) of The Chinese University of Hong Kong (CUHK) to conduct a study on "Challenges, Opportunities and Strategic Responses of Logistics SMEs under the National 12th Five-Year Plan" in 2012. In this regard, the FHKI organised a "Seminar on Opportunities of eCommerce Platform for Logistics SMEs in Hong Kong" on 23 August, to share with more than 80 participants preliminary results of the research project.

Hosted by Chairman of Transport & Logistics Services Council Ir Dr David Ho, the seminar was well received by industry players. Gordon Kee, researcher of the study, elaborated on the preliminary results, including difficulties facing the industry and some possible solutions. Legislative Councillor (transport) Frankie Yick and some other industry players were also invited to speak at the seminar to discuss the latest development of logistics industry.

Overview of HK Logistics Industry

The Hong Kong logistics industry employed more than 190,500 workers and generated added value of 67.7 billion in 2011, representing year-on-year reductions by 0.1 per cent and 18 per cent respectively, according to Hong Kong Monthly Digest of Statistics: The Four Key Industries and Other Selected Industries in the Hong Kong Economy published by Census and Statistics Department in April 2013.

Regarding the recent situation of SMEs, Half-yearly Economic

Report 2013 published by the Government in August 2013 states that the diffusion indices¹ on business receipts of logistics SMEs are 44.7, 50.0 and 47.4 in May, June and July 2013 respectively, reflecting a little deterioration in business performance amid challenging external trading environment.

Cross-sector Collaborations

Gordon Kee, Research Associate of HKIAPS of the CUHK, revealed the preliminary results of the study and suggested logistics SMEs forge cross-sector collaborations to cope with the changing market conditions.

He explained, "Local SMEs in the logistics industry generally provide only one single service. Many of them are faced with difficulties such as escalating operation costs, a decline in number of orders and a shortage of manpower."

"We suggest logistics SMEs form alliances amongst themselves. The benefits of co-operations are manifold. Parties of an alliance can complement the strengths of one another, expand customer base and market share, share costs and internal resources, enhance bargaining power and prevent wasteful competition."

Technological Support

To further improve supply chain efficiency, Mr Kee also suggested intensified use of technology amongst logistics SMEs. By capitalising relevant government funding schemes and collaboration opportunities with academia and research sectors, local SMEs may benefit from commercialisation of research outputs in lower costs.

¹ The diffusion indices indicate respondents' view of their business situation versus the preceding month. Diffusion Indices reading above the boom-bust threshold of 50 indicate that the business situation is generally favourable, where indices below 50 indicate otherwise.

Logistics enabling technologies, such as the emergent Radio Frequency Identification technology, can improve the visibility of elements flowing along the supply chain. This uplifts efficiency by enabling tracking and tracing of goods, reducing goods shrinkage and improving inventory management.

The need for efficient supply chain management is rising with increased international procurement, marketing and trading activities. Such an efficient supply chain is built upon a set of high value-added logistics services, and these consist of essentially integrated solutions to support and facilitate different elements in the supply chain. Examples are product labelling and packaging, light assembly, transportation management, inventory management, customs clearance, shipment consolidation, cargo tracking and tracing and supply chain consultancy.

Towards Value added Logistics

Another speaker at the seminar, Zhao Qiang, Executive Vice President - Operations of Lee Kum Kee International Holdings Ltd, pointed out that enterprises, including Lee Kum Kee, opt to outsource the logistics activities to third-party logistics companies. “The more professional and customised services a logistics company provides, the more competitive it becomes.”

Mr Zhao says, “Lee Kum Kee has a three-tier system in global supply chain management. The first tier includes warehousing, inventory management, transportation, distribution and labelling. The second tier is the provision of quality control, packaging and processing whilst the third tier is product tracking and tracing, order management, procurement management and ordering system.”

Companies with an extensive sales network need to ensure delivery and replenishment just-in-time to reduce costs, shrinkage and risks of inventory. In addition, they have specified requirements on quantity, quality and variety in distribution of goods from point of origin to point of consumption. These value added logistics services envisage many business opportunities for logistics companies. 🚚

The Final Report of the study on “Challenges, Opportunities and Strategic Responses of Logistics SMEs under the National 12th Five-Year Plan” and Codes of Best Practice will be published in November 2013. For details, please visit <http://www.cubk.edu.bk/proj/sme-logistics/index.html>.



物流業中小企 — 聯盟合作 早着先機

工總的運輸與物流業協會去年底得到「中小企業發展支援基金」撥款資助，委託香港中文大學香港亞太研究所進行「國家十二五規劃下物流業中小企面對的挑戰、機遇與應對策略」研究。就此，工總於8月23日舉行「為香港物流業中小企尋找生存之路 — 從電子商貿平台中獲取機遇」研討會，向80多位參加者闡述該項研究的初步結果。

研討會由運輸與物流業協會主席何志盛博士主持，邀請調研小組的研究員紀緯紋講述研究的初步結果，包括業界面對的問題和應對策略。另外，協會也邀請立法會航運交通界易志明議員及多位業界人士擔任講者，探討物流業的發展路向。

本港物流業概況

根據政府統計處於2013年4月發表的《香港統計月刊：香港經濟的四個主要行業及其他選定行業》，本港物流業於2011年的就業人數是190,500，產生的增加價值有677億元，按年跌幅分別為0.1%及18%。

政府2013年8月出版的《二零一三年半年經濟報告》的物流業中小企「業務收益動向指數」¹在2013年5月、6月及7月分別是44.7、50.0及47.4。數據反映近月外圍環境不穩下，物流業中小企的業務收益稍微減少。

跨界別合作

香港中文大學香港亞太研究所副研究員紀緯紋簡介研究的初步結果，指出物流業中小企要尋求跨界別合作，以應對行業轉變。

他解釋：「物流業中小企多數只提供一項服務，很多都要面對經營成本上升、訂單數量下跌及人手不足等問題。」

「我們建議物流業中小企之間締結聯盟。合作可以帶來很多好處，例如合作的各方可以互補優勢、擴大客戶基礎和市場份額、攤分成本、共用資源、增強議價能力和避免惡性競爭。」

善用資訊科技

物流業中小企要提升供應鏈效率，紀緯紋建議可善用資訊科技。他們可以參與政府有關的資助計劃，並與大學和研究機構合作研發所需的技術，務求以較低的成本進行科研成果商品化項目。

物流及供應鏈管理應用技術，例如新興的射頻識別技術，能提高供應鏈中重要資訊的透明度，可追蹤貨物、減少損耗和改善存貨管理，從而提升效率。

國際採購、市場推廣和貿易活動日益頻繁，需要有效的供應鏈管理作為支援，而關鍵則在於提供高增值物流服務。高增值物流涵蓋支援和促進供應鏈內不同環節運作的程序。例子有產品標籤和包裝、簡單裝配、運輸管理、存貨管理、清關支援、貨物集運、追蹤貨物去向與來源和供應鏈顧問服務。

邁向增值物流

李錦記國際控股有限公司（李錦記）執行副總裁（營運）趙強在研討會上指出，李錦記等企業為拓展全球銷售網絡，傾向把物流工作外判予第三方物流公司。「物流公司有愈多專業和度身訂造的服務，就愈有市場競爭力。」

趙強說：「李錦記把物流服務分為三級。第一級是倉儲、存貨管理、運輸、配送和加貼標籤；第二級是質量控制、包裝和加工；第三級是產品可追溯管理、訂單管理、採購管理和訂貨系統。」

企業需要適時將貨物付運和補給，以減低存貨的成本、損耗和風險。而且，貨物從來源地送到消費地的過程中，企業在數量、質量和類別方面亦有個別要求。這些增值物流服務可為業界帶來機遇。➡

1 動向指數顯示回應者認為業務情況對上一個月比較的整體轉向。動向指數若錄得高於強弱分界線50，表示業務情況向好，低於50則表示情況相反。

「國家十二五規劃下物流業中小企面對的挑戰、機遇與應對策略」研究的《終期報告》及《最佳實踐手冊》將於2013年11月公布。有關研究項目的詳情，可瀏覽<http://www.cuhk.edu.hk/proj/sme-logistics/index.html>。