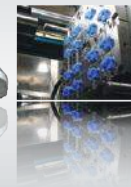
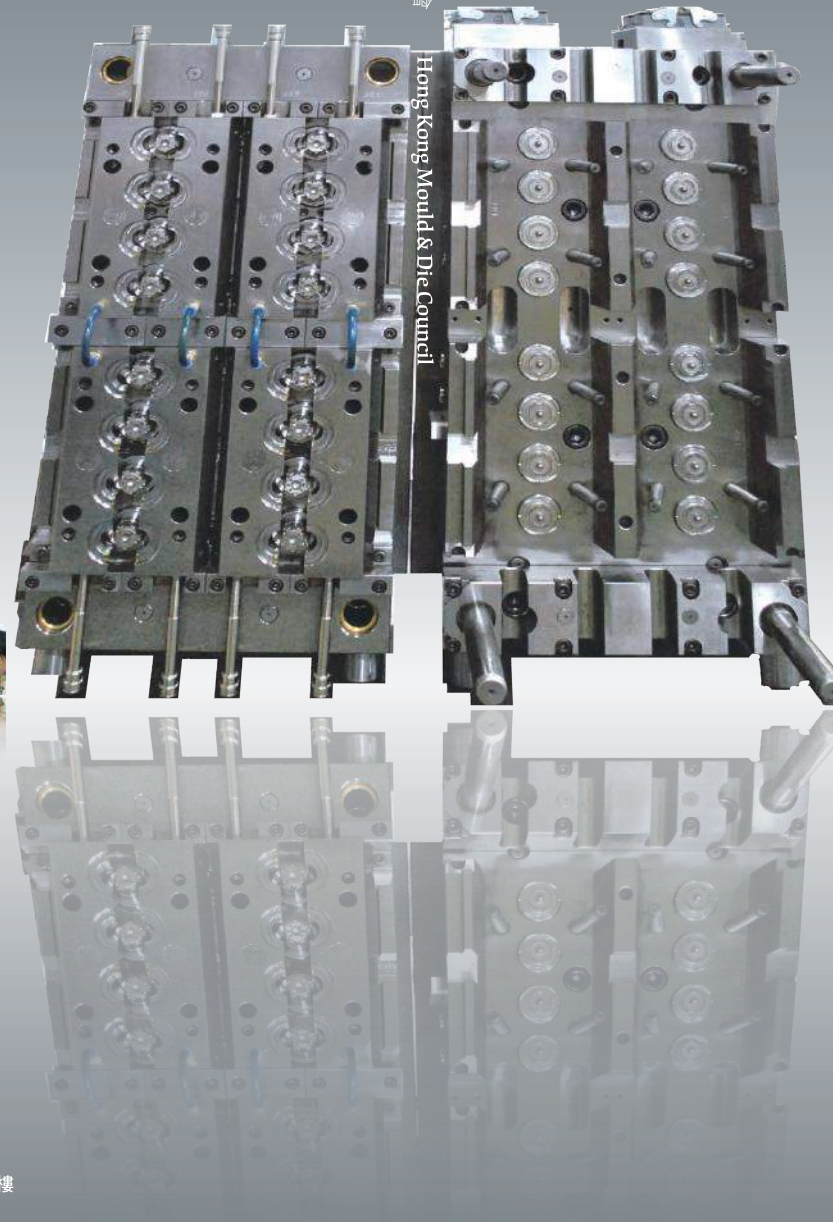




2011

香港模具協會

Hong Kong Mould & Die Council



香港工業總會
Federation of Hong Kong Industries

香港模具協會
Hong Kong Mould & Die Council

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INTRODUCTION OF HONG KONG MOULD & DIE COUNCIL 香港模具協會簡介

香港模具協會2011-13年度的主席及副主席楊傑傑先生及黃嘉文先生。
Mr Jack Yeung and Mr Colman Wong, Chairman and Vice-chairman of
Hong Kong Mould & Die for the 2011-2013 term of office



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香港模具協會自1989年於香港工業總會轄下正式成立至今，服務本港模具業界逾20年，一直致力促進本港模具業界的交流，向政府反映行業的需要，並已經發展成香港模具業界最具代表性之工商業組織之一。本會的宗旨如下：

- 促進本港模具業利益
- 提高模具業技術水平，加強在海外的競爭能力
- 組織與模具業利益的重要活動
- 向協會會員發佈有關資料
- 向有關政府部門反映模具業的意見

香港模具協會現有接近200名會員，主席及副主席帶領着由24名執委組成的執委會籌辦不同的活動，執委會按會務分為7個小組委員會：包括科技發展委員會、期刊及網站委員會、康樂聯誼活動委員會、社交事務委員會、國內事務委員會、教育及培訓委員會及貿易發展委員會，由小組召集人帶領。香港模具協會2011-13年度的主席及副主席為楊傑傑先生及黃嘉文先生。

香港模具協會促進會務及會員間的溝通，於2008年全面更新網站，定期透過網站與會員分享最新的行業資訊，每年的點擊頻率高達195萬以上。如欲了解更多關於本會或行業資訊，

請瀏覽 <http://www.hkmdc.org.hk>。

Hong Kong Mould and Die Council, established under the auspices of the Federation of Hong Kong Industry in 1989, aims at serving as a channel voicing up the industrial needs for more than 20 years. It has been one of the major trade association representing the common interests of the mould and die industry in Hong Kong. The objectives of the Council are listed as follows:

- To promote the interests of the Hong Kong mould and die industry.
- To upgrade the technological level of the mould and die industry and to strengthen its competitiveness overseas.
- To organize activities of interest and importance to the mould and die industry.
- To disseminate relevant information to fellow members.
- To represent the best interests of the mould and die industry and to advise the Government on matters related to the industry.

The Council has about 200 company's member and seven individual sub-committees, namely, Technology Development, Periodic Publication & Website, Sports Activities, Social Affairs, Mainland Affairs, Education & Training and Trade Development. Led by the Chairman, Vice-chairman and conveners of seven sub-committees, the Executive Council is with 24 executive members are responsible to various events and activities for members. Mr Jack Yeung and Mr Colman Wong are the Chairman and Vice-chairman of the Council respectively for the 2011-2013.

To foster the Council's execution and better the communications among members, the Council's website is revamped in 2008 to provide members a full grasp of industry updates, which is well received by over 1.95 million visitors over the years.

For more information about HKMDC, please visit:
<http://www.hkmdc.org.hk>

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CHAIRMAN'S STATEMENT

主席的話

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香港模具協會2011-13年度
主席楊悰傑先生

Mr Jack Yeung,
Chairman of Hong Kong Mould & Die Council
for 2011-13

CHAIRMAN'S STATEMENT

主席的話

我很榮幸、也很感激，香港模具協會給了我支持和信任，推選了我出任模協的新一屆主席。與此同時，受惠於各位前任主席：孫啟烈BBS太平紳士、黎玉成先生以及陶偉洪先生的英明領導，在我接受出任主席這個重任時，模協已打穩基石，並發展成香港模具業界最活躍且最具影響力的商會之一。另外，在工總的支援下，模協在服務珠三角地區的會員已取得重大進展。

模協一直以促進和提升香港模具業為己任，致力與多方面合作，一同維護工業的增長，並協助廠商加強在全球市場的競爭力。模協亦從不間斷地遊說有關當局，為會員締造一個有利發展的環境。

未來兩年，我們的工作有兩大重點。首先，我們會加強對會員在產品創新和技術提升方面的支援，讓會員與環球市場接軌。第二，我們將加強與內地及海外的商會合作，組織更多商務考察、聯誼及商務配對等活動，協助會員進入環球的傳統和新興市場；

珠三角的經營成本不斷上漲，各樣規管也日趨嚴格，香港模具廠商的壓力越來越大，唯一的出路只有改變營商策略，配合當前的大環境。現在，我們必須提高創新能力，製造出附加值高的產品；因為透過創新，產品才會具有更高的議價能力，使我們能將高成本轉移至買家和消費者。

作為模具行業工作者，我深諳創新絕非易事；但倘若默守成規，則有如坐以待斃，結果將十分慘痛。

此外，我們正與Q嘜洽談合作計劃，探討為模具業界度身製訂Q嘜計劃的可行性，希望藉此有助會員提供的模具產品和服務建立信譽。當然還有工總長久以來的支援，其轄下的香港設計委員會有很多經驗豐富的專家，歡迎各位會員諮詢其專業意見，並樂意協助會員解困。

歐美市場訂單銳減，以出口為主導的香港，於全球經濟下滑時，當然無法幸免。更甚的是，還要應對電力及勞工短缺、原材料成本上升，及繁重規管等，會員必須加強創新技術或產品的研發，並考慮開拓內銷，以及到世界各地的新興市場發掘新機遇。

過去數月，模協推出了幾個項目協助港商進行內銷，以及到世界各地的新興市場發掘商機。當中包括參展第五屆asiamold 2011 - 廣州國際模具應用與設計及製造技術展覽會、上海、蘇州及常州三天考察團，以及全力支持工總舉辦的聯誼活動。我們現正籌備其他計劃，包括參與2012 國際橡塑展第二十六屆中國國際塑料橡膠工業展覽會(CHINAPLAS)、2012年德國國際塑料加工技術展(FAKUMA)，以及組織考察團到訪日本的汽車生產基地名古屋，開拓汽車市場的商機。

為了協助會員應對當前的營商困境，我們將強化會員服務，同時亦與工總、各行業商會以及政府各部門保持密切聯繫，適時建議當局推出措施，減低環球市場轉變對業界的影响，協助會員逆境自強。

It is a great honour for me to have been elected to be the HKMDC Chairman. I am very grateful to my colleagues for the trust they have put in me. In taking on my new role and the responsibility it carries, I have benefited tremendously from a strong foundation that my predecessors, Messrs Cliff Sun, BBS, JP, Edward Lai and Harry To, have built for the HKMDC. Under their capable leaderships, the HKMDC has developed into one of the most vibrant and influential trade associations representing the mould and die industry in Hong Kong. It has also made great strides in serving our members by extending our reach to the PRD with the help of the FHKI, where thousands of factories operated by Hong Kong industry players.

Entrusted with a mandate to foster the improvement and advancement of the mould and die industry, the HKMDC has worked on various fronts to underpin the growth of the industry and support manufacturers in enhancing competitiveness in the global market. It has also been relentless in lobbying the authorities to help shape a good business environment conducive to our fellow members.

In the next two years, our work will be focused on two priority areas. First, we will step up support for members in product innovation and technology advancement to keep members updated on global market trends. Second, we will further promote co-operations with mainland and overseas trade associations and organise more trade missions, networking events and business matching activities to facilitate members' access to both new growth and traditional markets around the world.

increased costs at least partially, to customers to secure the profit. While this option will involve investment in R&D, design, branding and marketing, it will prove a great benefit to company in the long run.

Members who want to strengthen their technological and innovation competence should make use of a wide range of advisory and funding programmes launched by the SAR government. HKMDC is being in close relations with local universities, R&D centres and industry support organisations which have strong expertise in technological areas; members are encouraged to collaborate with them to develop and market innovative products for niche segments with growth potential or unmet needs.

Additionally, we have been in conversation with the Q-mark scheme to investigate possibility in introducing a tailored Q-scheme for mould and die industry to build reputation for their tooling products and service; not to mention we are always supported by the FHKI, and its Design Council are always there to provide professional advice and assistance to us.

In the face of lacklustre demand from the US and European markets, Hong Kong, as a small export-led economy, will not be immune to the looming global downturn. Together with the continuing wrestle in PRD with persistent power shortages, escalating labour and material costs, and onerous regulatory issues, members should give serious thoughts to explore domestic sales or overseas emerging markets in tandem with business innovation as an option for business development.

Over the past months, HKMDC has embarked on a number of new initiatives to help members pursue domestic sales in the Mainland and explore business opportunities in emerging markets. The major ones included our participation in asiamold 2011, Shanghai three-day mission as well as showing full support to the FHKI's networking events. Other projects in the pipeline include our possible participation in Chinaplas 2012 and Fakuma as well as a trade mission to Japan to investigate business opportunities in automotive industries.

While continuing to strengthen our work to support members in coping with the worrying business environment, we shall keep close liaison with the FHKI, industry associations, government sectors and make timely suggestions for measures to mitigate the impact of any global chance on Hong Kong businesses to help members to stay ahead of the curves.

The scale of these tasks seems enormous, but I am fortunate to have a good team behind me. My vice, Mister Colman Wong, conveners of our seven sub-committees as well as all executive members, are all distinguished industrialists in mould and die or related industries with strong commitment to the HKMDC. Together with members, we endeavour to make the HKMDC stronger and build a brighter future for mould and die industry in Hong Kong.

With the good reputation for the quality, safety and stylish appeal of our products which we have long enjoyed, I believe Hong Kong mould shops are still capable to carry on taking the lead across Asia. We are only coming across the elimination period, and I believe prospective outlook is just around the corner awaiting us!

Always remember: Bright Future lies in Adversity – May all of us could stand still in the winding road!

Jack Yeung,
Chairman for 2011-13
Hong Kong Mould & Die Council



其中把企業由代工生產(OEM)轉型為原設計製造(ODM)或原品牌製造(OBM)可謂不二法門。全球不少首屈一指的模具企業已成功採用這生產模式，製造零部件、配件，甚至產品。企業以此重新定位，不但能夠從芸芸競爭對手之中突出自己，更可以加強本身的議價能力，把新增的成本(至少部分)轉嫁給買家。企業要轉型自不免須在研發、設計、營造品牌和市場推廣等範疇加大投資，不過長遠來說，企業定能從中受惠。

會員可多加善用政府先後推出各類型的諮詢和資助計劃，以加強研發、創新的實力。此外，模協與本地大學、研發中心和工業支援機構保持緊密聯繫，他們具有專業的技術及知識，在各個與模具業有關的科技領域上，已奠下起穩固基礎。我希望會員能多與這些機構合作，針對個別有需求大且具增長潛力的市場，開發新穎、具創意的產品。

儘管任務艱巨，但我有幸能與卓越的團隊共事：副主席黃嘉文先生、7位小組召集人以及各執委都是模具界的佼佼者，並積極投身模協工作。我們將與會員一起，發展模具業，使其繼續壯大，建設業界的燦爛未來。

憑藉本港模具業界的優厚條件，我相信業界必定能於未來的亞洲、以至全球地區傲視同儕。在亞洲取得優勝地位。只要能順利渡過此艱苦的淘汰潮，璀璨的未來正在我們前面！

「逆境求存 孕育美好明天」 - 願我們能互動互勉，攜手克服刻下的困境，與香港的模具業共創明天！

香港模具協會
2011-13年度主席
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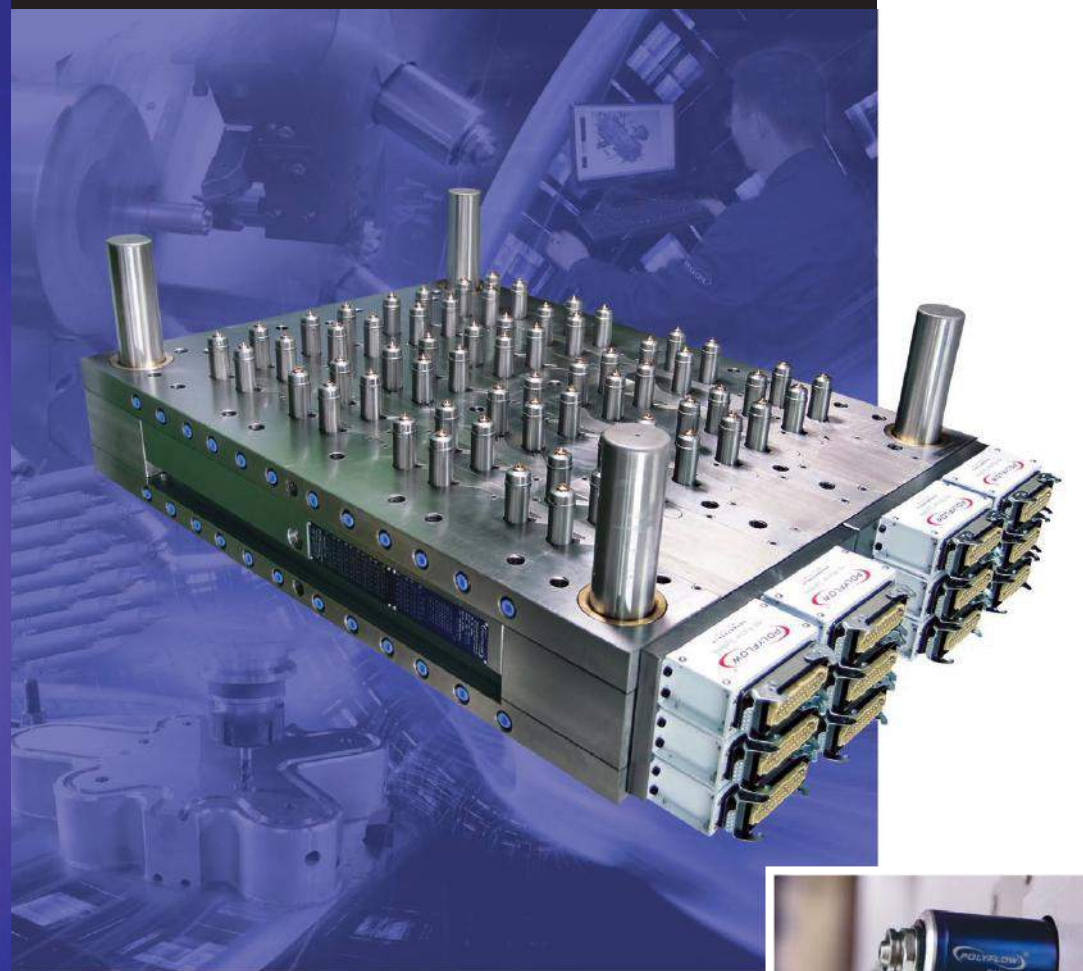


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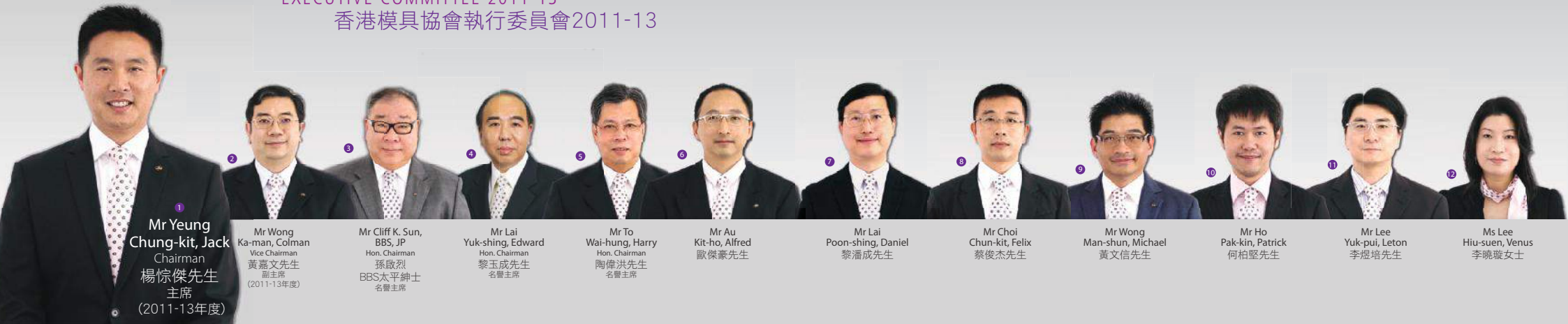
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HONG KONG MOULD & DIE COUNCIL
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香港模具協會執行委員會2011-13



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薪火相傳 尋找模具新人類 Tapping the young generation in driving the industry's development

自1993起，香港模具協會每年也舉辦香港模具協會年獎（學生組）比賽，以鼓勵香港年青人投身模具行業，為他們提供就業出路，深受本港各大專院校支持。協會本年將繼續與各大專院校合作推廣此比賽。

隨着香港模具行業轉型，以及本港院校教育形式的轉變，2011年起學生組之賽制亦稍作修改，將分為「實習組」及「科研組」兩個組別，希望藉此鼓勵及推動具潛質的學生於模具界發展，為他們提供升學出路，以繼承薪火相傳的精神；提高年青人對模具業的興趣，吸引相關學科的畢業生投身業界；以及為年青人是供交流經驗及技術切磋的平台，讓不同學系的學生活用模具及相關技術，為未來工業發展開創新局面。

本會欣然宣佈本年度的得獎組別是香港專業教育學院（柴灣）工程管理及科技系的Lau Chi Hang、Law Po Yee 及Tong Ka Man。

Established in 1993, Hong Kong Mould & Die Council has been organizing the Hong Kong Mould & Die Council Awards -Student Group every year receiving overwhelming response from local universities. The objective of setting up the Student Awards, having been jointly promoted by HKMDC and local institution, are to pursue sustainable development of the industry.

Whilst the transformation of the mould and die industry together with alter of Hong Kong education system, the Student Awards were divided into two competition groups, namely "The Best Internship of the Year" and "The Best R&D Project

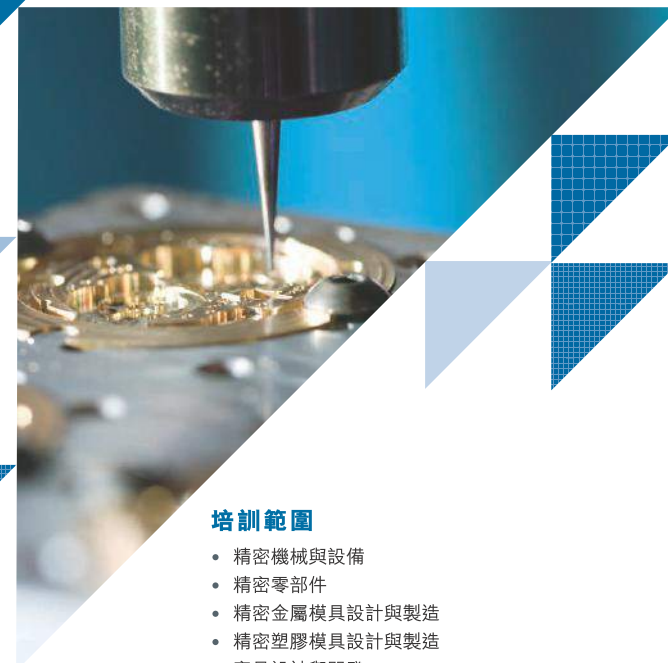
of the Year", to refocus the practicability and maintain relevance to the actual environment. It is hoped that the Awards provide the young people an ideal platform for experience sharing and exchanging views in order to solicit new insights and creative ideas for advancing the industry; it will also help investigate potentials and passion of the young generation and lay a solid foundation for the mould and die industry.

The HKMDC is delighted to announced that the group with three participants including Lau Chi Hang, Law Po Yee and Tong Ka Man from The Hong Kong Institute of Vocational Education (Chai Wan) majoring in Department of Engineering Management and Technology.



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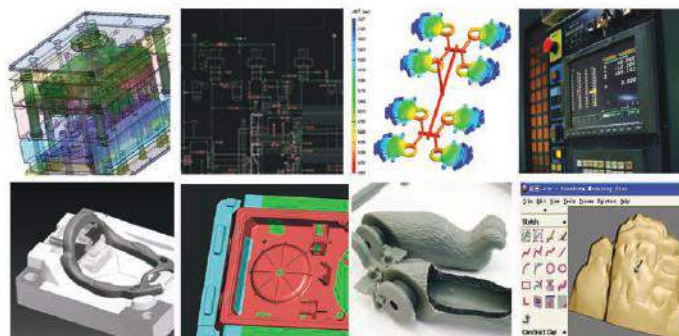


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海關企業分類管理辦法及通關改革 New Measures of the PRC Customs on Classified Management of Enterprises and Customs Clearance Reform

2010年11月，海關總署公布了修訂後的《中華人民共和國海關企業分類管理辦法》（海關總署令第197號），同時廢止了以海關總署第170號令公布的原《辦法》，修訂後的新《辦法》於今年1月1日起施行。

4月7日，香港特區政府聯同包括香港工業總會在內的主要商會在香港舉行《中華人民共和國海關企業分類管理辦法》（下稱《辦法》）宣講會。海關總署廣東分署副主任趙民率領廣州、黃埔及深圳關區的官員向港商介紹新《辦法》。

新《辦法》將企業分為五個管理類別。AA類企業為信用突出企業，A類、B類、C類、D類分別為信用良好、信用一般、信用較差和信用很差的企業。據統計，在2011年第一季度，廣東關區註冊登記港資有效企業中有251家為AA類，佔1.1%；A類和B類企業分別有2,345家和19,897家，分別佔10.4%和88.2%。

企業分類管理新辦法

A類進出口貨物收發貨人應同時符合下列條件：

- 已適用B類管理一年以上；
- 連續一年無走私罪、走私行為、違反海關監管規定的行為；
- 連續一年未因進出口侵犯知識產權貨物而被海關行政處罰；
- 連續一年無拖欠應納稅款和應繳罰款項；
- 上一年度進出口總值50萬美元以上；
- 上一年度進出口報關差錯率5%以下；
- 會計制度完善，業務記錄真實、完整；
- 主動配合海關管理，及時辦理各項海關手續，向海關提供的單據和證件真實、齊全、有效；
- 每年報送《經營管理狀況報告》；
- 按照規定辦理《中華人民共和國海關進出口貨物收發貨人報關註冊登記證書》的換證手續和相關變更手續；
- 連續一年在商務、人民銀行、工商、稅務、質檢、外匯、監察等行政管理部門和機構無不良記錄。

新《辦法》將報關差錯率從3%調至5%，以及在上述最後一項條件添加了「連續一年」這一時間範圍。此外，新《辦法》明確了報關企業代理報關貨物侵犯知識產權的認定方式，即如果報關企業代理報關的貨物因侵犯知識產權而被海關沒收，但該企業履行了「合理審查義務」，不影響其管理類別的評定（見《辦法》第二節第十三條）。

AA類進出口貨物收發貨人應同時符合下列條件：

- 符合A類管理條件，已適用A類管理一年以上；
- 上一年度進出口報關差錯率3%以下；
- 通過海關稽查驗證，符合海關管理、企業經營管理和貿易安全的要求；
- 每年報送《經營管理狀況評估報告》和會計師事務所出具的上一年度審計報告；每半年報送《進出口業務情況表》。

這一標準取消了原《辦法》中對上一年度進出口總值的要求（上一年度進出口總值為3,000萬美元以上，中西部為1,000萬美元），代以「上一年度進出口報關差錯率3%以下」，為更多中小企跨入AA類提供了便利。每年報送的《經營管理狀況報告》改為《經營管理狀況評估報告》。



其他調整內容為：

- 根據舊《辦法》，「警告以及罰款額在人民幣10,000元以下的違反海關監管規定行為，不作為企業分類管理評定記錄。」；新《辦法》將罰款額由10,000元調至30,000元。
- 「報關差錯率」的定義調整為「指上一年度企業所有報關員以該企業作為申報單位進行申報被記分的總次數，除以該年度企業作為申報單位申報的報關單及進出境備案清單總票數的百分比。」
- 新《辦法》中的「以上」、「以下」均包含本數。
- 新辦法對「一年內」第一次進行了定義，為「涉及向上調整企業管理類別的，以《企業分類管理申請受理決定書》作出之日倒推12個月計算；涉及向下調整企業管理類別的，以最近一次行政處罰決定作出之日倒推12個月計算。」



分類通關改革

海關分類通關改革是企業分類管理的實際應用。海關設置了三種通關模式，即「低風險快速放行」、「低風險單證審核」和「高風險重點審核」。

海關分類通關於2009年5月開始試點階段，並於2010年5月進入深化改革階段。廣東關區分類通關目前已應用於全部出口貨物；進口貨物的分類通關改革已在黃埔和深圳海關全面開展，在廣州海關等則局部試點。

AA類管理企業的報關單適用於低風險通道（「低風險快速放行」或「低風險單證審核」），而C、D類管理企業報關單適用於高風險通道。A、B類管理企業報關單則根據商品風險程度和物流等因素，參考海關管理資料，運用參數甄別手段，歸入相應通道。

由此可見，海關企業分類管理促進企業守法自律、提高海關管理效能，並透過分類管理評級，給予商譽良好和守法的企業較大的通關便利。

新《辦法》全文詳見：
<http://www.customs.gov.cn:82/gate/big5/www.customs.gov.cn/publish/portal0/tab1/info246102.htm>

廣州海關AA類管理企業名單：
<http://www.customs.gov.cn:82/gate/big5/guangzhou.customs.gov.cn/publish/portal31/tab18366/>

資料提供：《珠三角工業家》
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國家風險評估：日本 Country Risk Analysis : Japan

國家評級：A1（負面觀察）

營商環境評級：A1

主要宏觀經濟指標

	2008*	2009	2010 (e)	2011 (f)
本地生產總值增長（%）	-1.2	-6.3	3.9	0.3
家庭消費增長率	-0.6	-1	1.9	-1
投資增長率	-2.6	-14	-0.2	3.2
出口增長率	1.6	-24.1	24	2.7
公營部門收支（佔本地生產總值比率）	-2.1	-7.1	-7.7	-7.9

風險評估

出口回升帶動2010年經濟強勁增長

由於亞洲區的需求強勁（佔出口的54%），日本出口在2010年表現理想（增長24%），並回復金融海嘯前的水平。雖然家庭消費增長輕微（1.9%），財政政策也很保守，但日本經濟仍錄得3.9%的增長，是自1991年以來最快的增長速度，表現出人意料。

地震及海嘯的影響將持續多月

日元升值令出口收縮，加上人們擔心稅後收入原地踏步甚至下跌打擊家庭消費，2010年第四季經濟表現停滯。2011年3月的地震及海嘯令日本經濟雪上加霜，再加上核輻射危機，日本陷入前所未見的困境。水電短缺，道路、口岸及鐵路等基礎設施破壞，令災區（受災的四個縣佔國內生產總值的6.2%）的工廠運作受到影響，甚至波及更遠、更工業化的地區（神奈川縣及靜岡縣），這些區域的電力由位於日本東北發生事故的核電廠提供。最受影響的行業包括汽車、電子、鋼鐵、藥品及食品。本已疲弱的出口勢將在未來一段時間進一步放緩，同時亦波及中國、南韓及台灣的出口，它們依賴來自日本的有關電子零件及半製成品，組裝後運往日本、美國及歐洲。然而，日本產能過剩的情況，可能減低這一負面影響。由於日元升值，日本貨品的競爭力將被削弱。資產由海外調回日本，以及保險公司、企業及個人利差交易進行平倉，日元升值將持續。然而，日本央行持有大量儲備用作穩定日元，以及支持出口，可採取貨幣政策減低日

元升值的壓力。雖然國家團結將確保災民獲得援助，但住戶受到前所未見的災害打擊，其消費信心難免被削弱。隨著儲蓄於過去幾年一直下降（2010年儲蓄佔可支配收入2.5%），消費將進一步下降。經濟下滑可能於今夏見底，而重建工作將令經濟復蘇。復蘇的速度視乎東京電力公司處理核污染及回復電力供應的能力。雖然有關支出不菲，但日本應有能力應付。日本公債高企，佔國內生產總值225%，而日本民眾為主要債權人（佔95%）。日本持有大量海外資產，佔國內生產總值60%，而政府亦可動用主要來自企業的儲備（佔國內生產總值25%）。我們將經濟增長預測下調至0.3%。

小型企業情況最嚴峻

不少大型日本及外國企業的生產設施，以至較小型的外判商和高科技樞紐，均設於受地震及海嘯影響的地區。日本及時系統的生產模式旨在減少存貨，卻導致生產停頓加劇。缺乏原料供應令生產停頓；電力配給影響工業生產，尤以電子零件業為甚，有關企業的產量佔全球總產量的21%。外判商將面對原料價格上升，但卻受制於合約所定的單價而無法將上升的成本轉嫁給買家，令邊際利潤備受壓力。金融海嘯前，這些公司早已受低利潤、過分依賴個別大客戶，以及難以獲得信貸等問題所困擾。反觀大企業，它們大多能重整資金流（由2009年中的60%增至去年的超過115%）。日元升值和近期災害的教訓將迫使製造業加速向海外設立生產線，令外



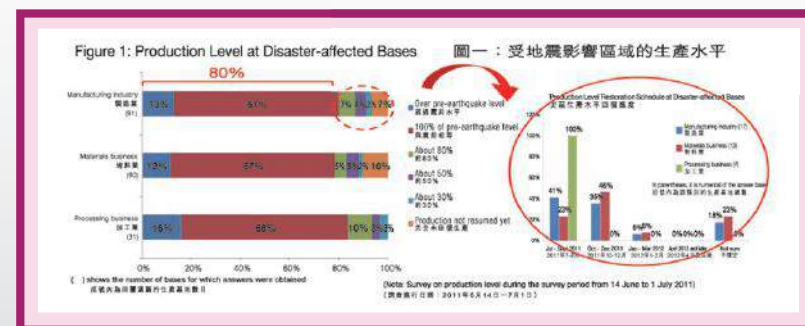
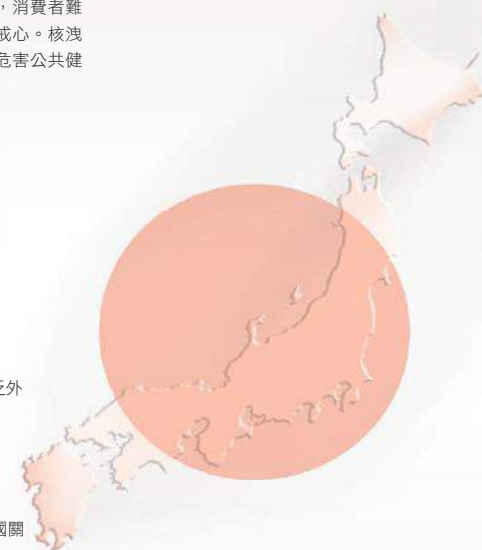
判商的前景更加黯淡。即使核污染受控，消費者難免對日本製產品（特別是農產品）產生戒心。核洩漏及石化物料燃燒對環境的污染，不單危害公共健康，也對農業發展產生長期的負面影響。

優點

- 處於區內有利地理位置
- 專注出口
- 高儲蓄率
- 日本民眾為公債的主要債權人

弱點

- 政府不穩影響危機的處理
- 勞動人口下跌（人口組合不理想及缺乏外來移民）
- 三分之一的勞動人口缺乏就業保障
- 小型企業生產力低
- 因資源問題（稀土及東海油田）與中國關係緊張



資料提供：《香港工業家》
Contributed by Hong Kong Industrialist

東日本地震後產業狀況第二次調查 Survey on the Actual Status of Industries after Great East Japan Earthquake

日本經濟產業省在6月進行了東日本311地震後產業狀況的調查，藉此瞭解受地震影響區域的工業生產和零部件採購的最新狀況，以及「自肅」對經濟的影響。是次調查於6月14日—7月1日期間進行，共123家企業參與調查（65家從事製造業，58家從事零售及服務業）。

調查顯示，八成受地震影響區域的生產基地已恢復運作，甚至超越地震前的水平。就生產低於地震前水平的區域，七成以上預計將於2011年年底回復地震前的水平（圖一）。

調查亦顯示，八成多未直接受地震影響的區域的生產基地已回復甚至超越地震前的水平。就生產低於地震前水平的生產商，約九成表示將於2011年年底回復地震前的水平。當中原因包括：地震重建的需求、由受地震影響區域轉移到未受地震影響的區域的生產活動、供應鏈回復正常，以及海外市場需求增加等。

從新供應商採購零部件的廠商佔受訪廠商的97%。與2011年4月公布的調查報告相比，當時有12%從事物料業的企業未能接洽合適供應商，現在所有企業均能接洽合適供應商。就加工業而言，未能接洽的比率則由48%下降至18%。不少受訪企業轉向位於山陰山陽、近畿及西日本地區的供應商採購零部件。於海外設廠的企業則轉向中國及亞洲區內的供應商。

三成從事製造業的受訪企業表示外貿業務倒退，不少客戶要求取消合約，主要原因是供應不足，以及海外客戶對核電事故過份憂慮。

大部份公司表示，2011年設備投資的計劃一概不變。不少從事製造業的企業甚至打算增加設備投資，以減少人手、開發新產品、提升產能和改善維修保養。約一半受訪企業預期由於地震重建的需求帶動，銷售額將持續上升。

接近六成從事零售及服務業的受訪企業表示，目前銷售額比地震前為低。八成以上從事零售及服務業的受訪企業認為「自肅」導致銷售額下跌。然而，九成企業相信「自肅」的效應正在淡化。

如欲了解調查報告之詳細內容，請瀏覽以下網址：
http://www.meti.go.jp/english/press/2011/0801_03.html



資料提供：《香港工業家》
Contributed by Hong Kong Industrialist



工傷員工故意拒絕復工，如何處理？
HOW TO HANDLE THE SITUATION WHEN AN
EMPLOYEE REFUSES TO RETURN TO WORK?



個別勞動者發生輕微工傷事故後，經常以「休工傷假」為由故意拒絕上班，「休假」持續的狀態短則數月，長則一年以上，給企業的經營管理帶來不少麻煩。香港模貝協會特別邀請了「南方勞動關係在線」的首席顧問鍾永棟先生，以案例形式為會員講解企業應如何應對類似情況。

案例

小王為大陸某超市的員工。2010年12月3日，小王上班期間被超市貨架上掉下來的商品砸到了左腳；事後被醫院診斷為左腳面上有瘀血、腫脹，影響走路，但沒有出現骨折、骨裂；醫院建議休假兩周。隨後，小王向超市遞交了休假申請書。

兩周後，小王沒有回超市，也沒有遞交休假申請書，僅通過同事傳達繼續休假的要求；超市也無法直接聯繫上小王。

春節前，超市內部張貼公告，聲稱小王無故曠工，自2011年1月3日起作自動離職處理。春假過後，2011年2月18日，小王回到超市，要求超市報銷工傷醫療費用，補發休假期間的工資待遇。

分析

小王要求報銷醫療費用和補發工資待遇，很有可能成立。如果小王在一年內自行申報工傷，且最終被確認為工傷，那麼超市必須承擔醫療費用。

對於小王休假兩周以後的期間，如果小王聲稱是領導口頭同意其繼續休假的，那麼此期間究竟是曠工還是休假，就難以定論。雖然小王沒有證據證明領導口頭同意其繼續休假，但是超市也難以證明小王曠工，因為考勤卡上的考勤紀錄只能證明小王甚麼時候有上班，甚麼時候無上班，考勤紀錄反映的是無上班的狀態，而不能反映無上班的原因。

建議

1. 企業的制度應明確工傷假期的享受條件、勞動者申請休假時須提交的資料、內部的審批流程，明確沒有到崗且沒有辦理休假手續者將構成無故曠工，除非其沒有能力辦理，如重傷、臥床不起、神智不清等（此制度應依法制定並告知勞動者，否則無效）。
2. 對於無故曠工的勞動者，企業應及時向其發出書面警告通知書，以表明企業並非放任其曠工或准許其口頭請假（最好在其曠工的次日或第三日發出，越早發出對企業越有利）。
3. 被企業警告後，勞動者仍曠工且程度嚴重的，企業可發出書面解僱通知書（曠工多少天才構成「嚴重」存在爭論；司法實踐中，連續曠工五天或一年內累計10天，通常能被認為「嚴重」；連續曠工三天未必當然構成「嚴重」）。

綜合上述案例，小王休假兩周後，沒有辦理續假手續，也沒有回超市報到，超市應及時向其發出警告通知書。如果小王仍曠工不歸，達到一定天數時，超市即可將其解僱。

作者簡介

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資料提供：《香港工業家》
Contributed by Hong Kong Industrialist

環保塑膠及環保標籤認證 Green Plastics and Eco-label Certification

環保塑膠

環保塑膠大致可分為三類，包括：可生物降解塑料、可堆肥塑料，以及可降解塑料。

「可生物降解塑料」可由細菌、黴菌、藻類等天然微生物的作用而降解，其分子鏈會被分解，最終成為大自然的一份子（例如：二氧化碳和水），一般可由再生的天然資源製成。澱粉類塑料、聚乳酸（PLA）、聚羧基烷酸（PHA）等聚合物，均屬於「可生物降解塑料」。

「可堆肥塑料」在堆肥環境下，可被微生物自然分解成二氧化碳、水、無機化合物和生物質（Biomass），而且其分解速度與其他已知的可堆肥材料（如植物、食物殘餘、紙張等）一致。「堆肥」是模仿大自然有機分解的過程，為微生物提供一個合適的環境，讓其以較快將有機物質分解為穩定腐殖質。

「可降解塑料」在光、氧或水等特定環境下，塑料結構會出現明顯變化，導致某些可量度的特性（如拉伸強度）有所改變，而當中的降解反應並不一定由天然微生物引起。這類塑料的降解速度，可透過相關添加劑的用量來控制。

環保塑料的可降解特性，對環境具有潛在的正面影響，例如：

- （1）降解塑料產生的堆肥可增加泥土的有機碳含量、水分和養分，有助減少肥料用量和抑制植物病害。
- （2）可降解塑袋能促進廚餘分解速度，間接減少堆填區的需求。
- （3）以可降解薄膜代替泥土覆蓋堆填區，有助延長堆填區壽命。

環保塑料現已被廣泛應用於不同的產品，其中包括：手提電腦機殼，汽車內部塑膠件，可降解茶包，可降解餐具及可降解高爾夫球釘等。



可降解餐具



可降解高爾夫球釘



手提電腦機殼

環保標籤認證

近年，香港廠商面對進口產品和本土產品的競爭，價格和品質方面的優勢往往並非最明顯，因此若然在環保方面能夠突破，並通過第三方以客觀的認證標準，取得市場認可的環保標籤，便可突出廠商和產品在環保上的增值，強化競爭優勢。

目前，全球各地共制定了30多個不同的綠色環保標籤計劃，涵蓋了大部份港商的出口市場。例如：歐洲的環保標籤（EU-Eco-label），美國的綠色標記（Green Seal），日本的環保標記（Eco Mark）和中國的環保標籤等。環保標籤不但鼓勵企業推行綠色製造，更引導企業有效運用資源，減少廢物產生，減少排放污染物質，優化循環再用，從而降低營運成本。由於環保標籤屬第三方客觀認證，因此更是一個有效的市場推廣工具，不過香港對這方面認知尚未普及。

有見及此，香港塑膠業廠商會聯同生產力促進局及塑料工程師學會-香港分會，在工業貿易署中小企業發展支援基金的資助下，完成了一項技術支援計劃，協助本港廠商獲取認可的國際環保標籤認證，從而提高環保產品的認可性，鼓勵企業積極投入綠色生產、開發環保產品。



智能水煲、智能手機保護殼



多功能手提桶及手提花灑

該項目通過推行四個環保標籤個案研究，協助業界建立環保產品製造的最佳範例，並分別為智能水煲、智能手機保護殼、多功能手提桶及手提花灑，成功取得香港、加拿大和澳洲的環保標籤，作為進軍國際綠色產品市場的「通行證」。

生產力促進局整合了有關申請環保標籤經驗，編製了一本技術手冊，介紹綠色塑膠產品的设计、選料和製造技術，以及分享成功取得環保標籤認證的案例；同時，亦建立了『環保標籤資料庫-塑膠產品』，載有10個不同地區的環保標籤計劃資料，以供製造商透過網站查詢（www.hkplastics-ma.com），從而因應個別市場或塑膠產品類別，識別合適的環保標籤和產品標準。



香港、加拿大和澳洲的環保標籤

資料提供：《香港生產力促進局》
Contributed by Hong Kong Productivity Council



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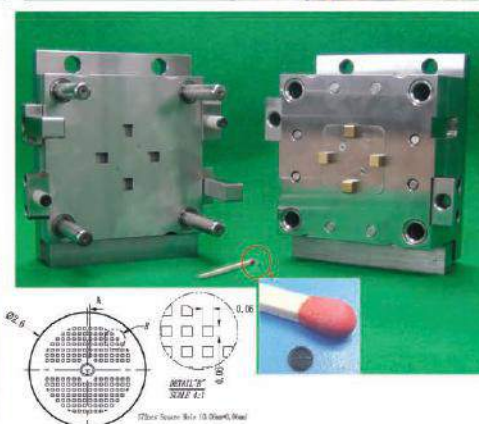
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INTERVIEW WITH DR. ROY CHUNG,
CHAIRMAN OF THE FEDERATION OF HONG KONG INDUSTRIES:
Challenges and Opportunities for Hong Kong mould and die industry under the 12th Five-Year Plan
香港工業總會主席鍾志平博士專訪：
十二·五規劃對香港模具行業的挑戰和機遇



第十一屆全國人民代表大會第四次會議通過的《中華人民共和國國民經濟和社會發展第十二個五年規劃綱要》（《十二五規劃綱要》），於今年3月16日正式公佈。《十二五規劃綱要》是國家今後五年經濟和社會發展藍圖，相信可以為香港創造不少新機遇，進一步推動特區的經濟發展。香港模具協最近訪問了香港工業總會主席鍾志平博士，就國家「十二五」規劃與香港模具業前景，瞭解他的看法。

記者：鍾博士你認為國家《十二五規劃綱要》的重要性何在？

鍾志平：在《十二五規劃綱要》下，國家在未來五年將進一步深化「以科學發展為主題，加快轉變經濟發展方式為主線」的發展理念，達到「擴大內需」、「產業結構升級」及「改善民生」等多項發展目標，推動國家走上可持續、更協調、更均衡的發道路。

擴大內需方面，《十二五規劃綱要》提出要「建立擴大消費需求的長效機制」，通過推進城鎮化、深化收入分配制度改革、健全社會保障體系和營造良好的消費環境，增強居民消費能力，逐步擴大國內市場總體規模。相信有助國家建立以消費、投資、出口協調拉動經濟增長的可持續發展模式，令國家得以平衡發展。

產業結構升級方面，《十二五規劃綱要》認為應改變低成本、低增值的產業發展模式、大力發展服務業、先進製造業及戰略性新興產業，發揮科技創新對產業

結構優化升級的驅動作用，提升產業核心競爭力。具體目標包括淘汰落後產能、大力發展中西部資源、產業技術、透過各種政策支持，引導發展節能環保、資訊技術、生物、高端裝備製造、新能源、新材料、新能源汽車這七大戰略性新興產業。

改善民生方面，《十二五規劃綱要》提出加快城鄉居民收入增長，實現居民收入增長和經濟發展同步，扭轉城鄉、區域、行業和社會成員之間收入差距擴大趨勢。具體目標包括擴大就業規模、調整收入分配、深化工資制度改革，以及提供更多社會保障、醫療衛生、住房保障、社會服務等。

記者：你認為在「十二五」下香港工業的前景如何？

鍾志平：中國社會消費品零售市場相當龐大，2010年零售總額達15.5萬億元人民幣。由於居民消費只佔國內生產總值的36%，國家將拓寬居民就業及收入渠道，刺激消費需求，令消費市場整體規模進一步

擴大。香港廠商在內地從事生產，產品以出口市場為主。隨著內地消費市場規模擴張，將有很大的發展和增長空間，廠商可增加對發展內銷的力度，積極建立銷售渠道和品牌。內地消費者對香港的產品良好，特別是在品質、設計等方面評價甚高；他們對香港作為一個時尚潮流中心也有好感，令港商在開拓內地市場、以至發展自主品牌，具有一定的優勢。

「十二五」規劃提出把科技進步和創新作為加快轉變經濟發展的方式，重點培育和發展七大戰略性新興產業。國家整體科技活動仍落後於先進國家，必須引進各種關鍵技術、零部件、國內短缺資源和節能環保產品來支援產業發展。

隨著國家「十二五」規劃提出加快產業轉型升級，傳統的低增值加工貿易產業未必能適應新形勢，港商若不盡快轉型，經營前景會變得嚴峻。港企應朝高增值方向發展，轉走「價高質優」的產品路線，當中，研發、設計及建立品牌對廠商為產品增值尤其重要。香港具備完善的研發基礎和設施網路，企業應善用資源鼓勵創新，著重發展有優勢和潛力的新興產業，如先進醫療診斷器材、中藥保健產品、環保產品及物料(如竹材)、高規格的飛機艙內裝置和各類深加工工業，以配合國家「十二五」規劃發展戰略性新興產業目標。

另外，香港向來是內地採購科技產品的窗口，多元化的金融服務亦為內地科技項目提供所需資金，而廠商擁有與外國科技合作的豐富經驗，大可與內地企業加強合作，協助它們引進海外先進科技及產品。

記者：就香港模具業方面，你怎樣看這行業於「十二五」期間的機遇？

鍾志平：近年來，內地模具業發展非常迅速，中國已成為重要的模具生產國。2000年到2007年，內地模具銷量和出口量以年均20%的速度增長。受全球金融危機影響，2008年到2009年的增長有所減緩。

2009年模具的銷售額為1,000億元人民幣，但是2010年模具的銷量已達1,120億元人民幣。

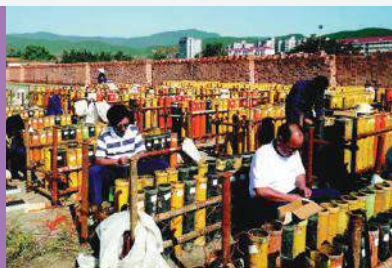
模具是機械行業的基礎，支援眾多下游行業。廣東是國內最大的模具生產、出口和進口地區。許多內地省份為了發展自己的工業體系，把模具行業視作戰略產業，提供優惠政策，支持本土企業發展。特別是長三角的地方政府，努力發展模具產業，與珠三角的模具業力爭。

在「十二五」期間，國家走向社會經濟全面發展，為香港模具業提供廣闊的發展空間。另外，作為傳統出口市場的歐美國家經濟陷入低谷，失業率高企，消費市場萎縮，低沉的困局難以短期內解決，香港的模具生產商勢將轉向內地市場發展。一些香港模具商正計劃在內地加大投資建設新廠，專門供應內地市場。

目前，許多香港公司沒有選擇供應中國本土品牌，他們所瞄準的領域主要為跨國企業，例如德國和日本汽車製造商，他們在傳統的本土製造基礎以外尋找供應商，以達到削減成本的目的。由於這些跨國企業對質量要求甚高，香港模具廠今後將更側重研發技術含量較高的專案。

國內品牌的實力越來越大，對產品質素的要求也不斷提高，而內地模具生產商技術水準多為中低檔，無法滿足較高的要求，這些企業正是港商日後的目標客。

此外，在「十二五」期間，內地為加快農村居民收入增長，將推出惠農政策，加快農業機械化的發展，加大農機裝備製造和農機服務體系建設。這將為模具企業帶來商機，廠商必須正視這發展，做好相應準備。



INTERVIEW WITH DR. ROY CHUNG,
CHAIRMAN OF THE FEDERATION OF HONG KONG INDUSTRIES:
Challenges and Opportunities for Hong Kong mould and die industry under the 12th Five-Year Plan
香港工業總會主席鍾志平博士專訪：
十二·五規劃對香港模具行業的挑戰和機遇

記者：你提到汽車是香港模具廠目標市場，除此以外，哪個市場值得港商留意？

鍾志平：作為模具使用量最大的汽車行業，有機構預測在「十二五」期間將會以年均10%左右的速度增長，加上現存龐大的汽車量所帶動的維修配件市場，汽車零部件將保持較高的增長速度，預計「十二五」期間汽車模具的年均增速不會低於10%。

電子及資訊產業也是模具廠的大用戶，交通、航空、新能源、醫療器械、建材等行業也將為模具帶來龐大的市場。以醫療器械為例，目前藥品與醫療器械消費的比例為2.5:1，而發達國家是1:1；美國在醫用塑膠方面的人均年消耗費用為300美元，而中國只有30元人民幣，可見發展潛力之大。

另外，2010年國家人均塑膠消費量約為46公斤，僅為發達國家的三分之一。在「以塑代鋼」、「以塑代木」的必然趨勢下，工程塑料製品業在「十二五」期間預計也會維持較快的增長速度，這將支持塑膠模具市場高速發展。

記者：現時不少廠商均談及轉型升級，你認為在「十二五」期間香港模具業在推動產業轉型升級有何作用？

鍾志平：在工業發展過程中，模具擔當相當重要的角色。模具是工業生產中不可或缺的特殊基礎工藝裝備；於電腦技術、智慧控制和綠色製造等精密生產過程，模具既是高新技術載體，又是高新技術產品。因此，在國家經濟發展、國防現代化和高端技

術服務中，模具起到十分重要的支撐作用。模具工業是重要的基礎工業，工業走向高端發展，模具須先行，沒有高水準的模具就沒有高水準的工業產品。香港模具業若能提升本身技術水平，生產高質素的產品，未來的商機確實無盡，對推動內地產業轉型升級更可發揮一定作用。

反過來說，「十二五」期間，廣東省將堅持內外源經濟並重、內資與外資並引、內銷與外銷並拓、傳統與新興產業並舉，實施創新驅動，推動發展現代服務業、加工貿易轉型升級、戰略性新興產業等，以及發展珠三角現代產業示範區。香港模具廠大可借助新材料、新能源、環保等關鍵領域的發展，推動本身優化升級，做大做强。



記者：你認為目前政府政策對支援模具業的發展是否足夠？

鍾志平：去年，工業與資訊化部發佈了《裝備製造業技術進步和技術改造投資方向（2010年）》，列舉了21個大項320個專案的技術改造，其中涉及基礎零部件、特種鑄鍛件，有十種模具作為重點鼓勵發展的項目，這十種模具基本上已涵蓋了需要國家支援發展的各種高水準的模具產品。這對企業進行技術改造，提升產品品質，將產生積極作用。然而，企業要提升產品水平需用上先進的設備和技術，當中需要投入大量資金。如果內地降低入口先進設備的關稅，有助減輕企業的負擔。另外，政府亦可鼓勵和推進企業技術改造、技術創新等方面，制訂相應的優惠政策。

我亦相信人才培訓對模具業的長足發展極為重要，因此期望內地政府加強人才培訓工作及培訓基地建設，積極開展職工技能鑑定和考試發證工作，提升員工素質。此外，當局也須提高企業對加強職工（特別是技能人才）培訓的意識，加強模具企業職工的在崗培訓和繼續教育的力度，以提高職工質素。

記者：你認為從事模具業的香港廠商在內地發展有甚麼優勢？

鍾志平：香港企業目前在專業知識和技術方面領先內地對手，但是差距已逐漸縮小。至於市場營銷、執行國際商業做法、與客戶保持長期良好關係方面，香港廠商仍優於內地企業，而且香港廠商深懂靈活應變，採用新技術也較內地對手更快。



另外，香港模具業近年致力提升技術水平，開拓新產品，當中包括應用納米技術及先進材料。不少廠商還打算投放更多資源，開發內地市場，特別針對內銷的法規、行業營運和銷售渠道深入研究，希望在內地龐大的市場，發掘更多商機。

記者：你認為「十二五」期間香港模具業的前景是否樂觀？

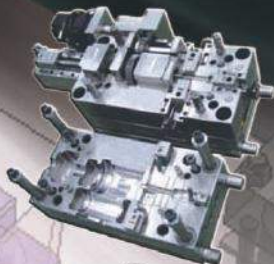
鍾志平：目前，香港模具廠商的營商策略相當有效，企業平穩發展之餘，也有很強的競爭力。我見到不少企業通過更新技術和加強自動化，提高營運效率，也有企業把盈利投入研發，更有企業與技術供應商合作，在製造技術上保持領先地位。另外，也有企業嘗試與客戶建立更密切的夥伴關係，個別會承擔投資模具生產設備的部份資金，以及就模具的價值作出具體的擔保，吸引客戶採用其產品。

總的來說，港商雖然面對劇烈的競爭和嚴峻的挑戰，但「十二五」也為香港企業帶來巨大的商機。我有信心香港模具商必能看準機會，在內地市場開拓更大的市場空間。





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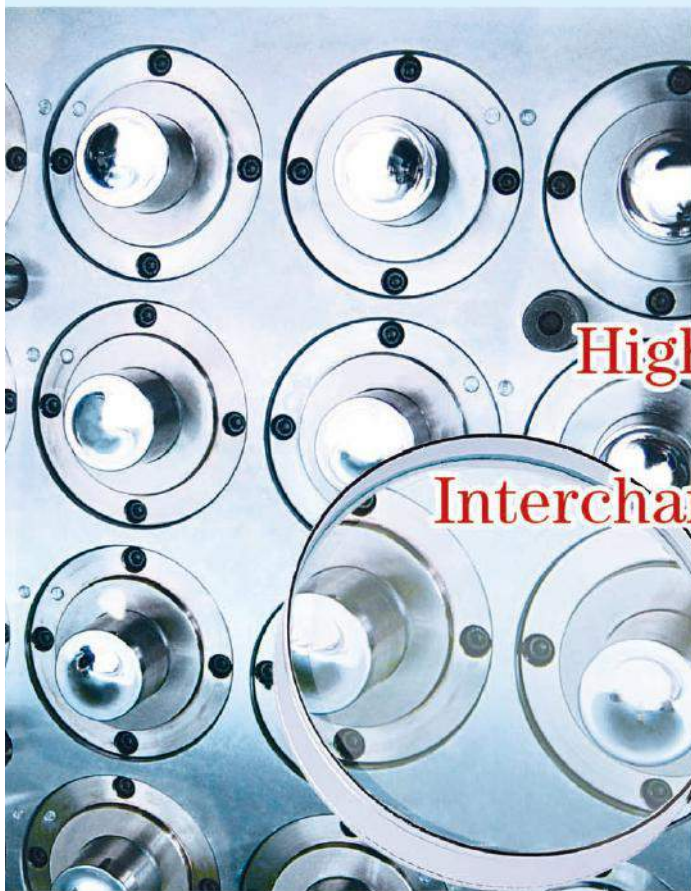
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《香港製造業中小企：迎戰未來》報告
行業市況分析報告— 模具業

2010年2月，工總得到工業貿易署「中小企業發展支援基金」撥款資助，委託了Michael Enright 教授領導的研究小組，開展香港製造業中小企的研究，從宏觀剖析環球經濟的最新形勢、珠三角當前的營商環境及中小企廠商面對的種種挑戰。研究報告出了中小企廠商可以採用的應對策略，當中更有針對模具行業的現況和前景的研究，其中包括企業成功經驗的個案研究。

模具業

模具用於將金屬、塑料、玻璃、橡膠等原料鑄壓成標準部件，因此模具產品涉及塑膠、五金、電器、玩具、家庭用品、鐘錶、汽車零部件、通訊設備、辦公室儀器、攝影及光學用品、消費電子產品等多個產業¹。從事模具業的主要是日本、德國、美國、意大利等發達國家的企業。中國是模具業佔有重要地位的唯一發展中國家。模具行業的領先技術也多來自發達國家。

香港模具業從起步開始就採用了來自美國的世界級生產系統²。20世紀80年代後，香港模具企業逐步將生產設施遷移至廣東，競爭力隨之不斷增強，能夠以中檔的價格提供世界級的模具產品。廣東模具產業的發展得益於香港的投資。2005年一份報告顯示，2003年在廣東投資的香港模具企業估計已超過一萬家，僱用香港員工約有81,000人³。香港企業目前在專業知識和技術方面領先於其內地對手，但是差距已在逐步縮小。內地企業也開始通過從外國投資企業招聘熟練技工和工程師來提高其專業知識和競爭力。

業界人士對中國內地市場的持續增長頗有信心，認為內地的汽車、機械和電子行業存在大量機會⁴。以汽車來說，生產一個型號的汽車需要1,500副模具⁵，而中國2009年汽車的銷量是1,364萬輛⁶，足見增長潛力之大。這將為能夠正確定位細分市場的香港企業提供巨大機會。然而，即使市場機會不斷增加，香港在這一行業的地位仍有可能面對強有力的競爭威脅。

行業概況

模具行業在香港的統計中屬於「其他機械、設備、儀器及零件製造業」類別。2008年，香港此類製造業的生產總值是54億港元，僱員工5,591名，僱員平均年收入約為156,680港元，工資大約佔行業生產總成本的20%⁷。香港這一行業的工資水平是內地同一行業總體工資水平的五倍。這種差距可以解釋為

香港與內地總體工資水平的差距、香港僱員更多屬於高級員工，以及香港更多地生產高質量、高增值的產品，所以投入的勞動成本也較高。

圖表1. 行業平均月薪（人民幣元）

地區	平均月薪
香港	11,489
長三角	1,881
珠三角	2,439
中國內地	2,200

圖表2. 香港及世界主要模具出口國（百萬美元）

2007		2008		2009	
出口國	貨值	貨出口	國值	出口國	貨值
日本	1,821	日本	1,969	日本	-
意大利	1,389	中國內地	1,850	中國內地	1,769
中國內地	1,344	德國	1,404	德國	1,132
德國	1,253	意大利	1,274	意大利	1,094
韓國	951	韓國	1,053	美國	940
香港	452	香港	467	香港	411

來源：2007-2009年聯合國商品貿易統計數據。貿易分類採用聯合國《國際貿易標準分類》（修訂3）第7491分組：金屬鑄造用砂箱、模座、模型、金屬用模具（鑄錠模除外）、金屬碳化物用模具、玻璃用模具、礦物材料用模具、橡膠或塑料用模具。

圖表3. 香港及世界主要模具進口國（百萬美元）

2007		2008		2009	
出口國	貨值	貨出口	國值	出口國	貨值
美國	1,593	美國	1,533	中國內地	1,210
中國內地	1,288	中國內地	1,442	墨西哥	1,143
墨西哥	1,061	墨西哥	1,212	美國	1,141
德國	694	德國	841	德國	735
日本	670	日本	724	日本	-
香港	406	香港	454	香港	414

- 1 香港模具協會，香港生產力促進局，《模具業技術人員需求問卷調查報告》，2005年4月。
- 2 2010年4月9日香港模具協會訪談記錄。
- 3 香港模具協會，香港生產力促進局，《模具業技術人員需求問卷調查報告》，2005年4月。
- 4 2010年4月9日香港模具行業訪談記錄。
- 5 2009年香港模具協會年度報告廣告頁。
- 6 溫家寶，《2010年政府工作報告》，2010年3月5日第十一屆全國人民代表大會第三次會議。
- 7 香港政府統計處，「其他機械、設備、儀器及零件製造業」類別2008年統計數據。

圖表4. 香港模具出口值（百萬美元）

2007			2008			2009		
	貨值	按年變動百分率	貨值	按年變動百分率	貨值	按年變動百分率	貨值	按年變動百分率
世界	3,523	1.3	3,635	3.0	3,187	-12.3%		
中國內地	1,486	-10.0	1,376	-7.4	1,294	-6.0%		
美國	420	-5.1	460	9.6	351	-23.8%		
越南	194	135.0	154	-20.8	219	42.6%		
德國	144	42.05	199	38.22%	172	-13.8%		

注釋：主要出口貿易國按照2009年的排名列出。
來源：2006-2009年聯合國商品貿易統計數據。貿易分類為聯合國《國際貿易標準分類》（修訂3）第7491分組。

圖表5. 香港模具出口值（百萬美元）

2007			2008			2009		
	貨值	按年變動百分率	貨值	按年變動百分率	貨值	按年變動百分率	貨值	按年變動百分率
世界	3,164	-0.9	3,534	11.7	3,213	-9.1		
中國內地	2,116	9.9	2,516	18.9	2,385	-5.2		
日本	442	-27.8	488	10.4	384	-21.3		
美國	64	-28.6	70	10.1	110	57.5		
韓國	190	84.5	158	-16.6	71	-55.5		

來源：2006-2009年聯合國商品貿易統計數據。貿易分類為聯合國《國際貿易標準分類》（修訂3）第7491分組。

圖表6. 三個模具大省的模具生產（2008年1月至11月）

企業數			僱員			生產總值		
	數量	佔比 (%)	人數	佔比 (%)	產值(10億元RMB)	佔比 (%)		
中國內地	1,932	100.0	348,065	100.0	90.87	100.0		
廣東	456	23.6	126,025	36.2	26.23	28.9		
江蘇	302	15.6	43,112	12.4	20.64	22.7		
浙江	379	19.6	81,624	23.5	10.41	11.5		

注釋：全部國有企業和年銷量500萬人民幣以上的非國有企業的初步統計數據。
來源：China Mechanical Electrical Data Online，中國國家統計局，中國機電數據網。

2009年港產模具出口貨值為1.88億港元，比上一年增長13%。香港轉口模具貨值29億港元，佔香港總轉口貨值的0.12%。目前還沒有香港投資於內地的模具企業與加工貿易工廠出口值的相關統計⁸。從1991年至2000年，日本一直是世界上最大的模具出口國。而中國從2007年開始進入出口國的前三名。最大的模具進口國則是美國、中國和墨西哥。

近年來，中國成為重要的模具生產國。2009年，中國出口模具17億美元，進口模具12億美元⁹，成為除日本（統計數字未公布）之外進出口值最高的國家。2007年珠三角和長三角地區產值佔了中國當年模具總產出的三分之二¹⁰。廣東是國內最大的模具生產、出口和進口地區，2009年廣東出口模具7.56億美元，佔中國模具總出口的42%，進口模具3.68億美元，佔中國模具總進口的19%¹¹。

2000年到2007年，中國內地模具的國內銷量和出口量都以年均20%的速度增長¹²。受全球金融危機影響，2008年到2009年的增長有所減緩。2009年模具的銷售額為1,000億元人民幣¹³，但是2010年首四個月模具的銷量已經接近1,000億元人民幣¹⁴。國內市場規模接近七倍於出口市場規模。

香港模具製造商所面臨的問題

駐內地生產的香港企業在市場營銷、執行國際商業做法和與客戶保持長期的良好關係方面優於內地企業。他們經營更靈活，決策更快，更快採用新的適用技術，對市場變化的反應也更加迅速。但是，駐內地生產的香港企業也發現他們的成本依舊過高，不如內地企業進取，而且融資也比其國內競爭對手困難。

在模具行業，客戶對價格比較敏感，而內地模具生產企業卻很擅於以價格作為競爭手段。全球金融危機對供應玩具、家電、電子產品、電腦周邊設備等傳統出口行業的香港模具企業影響很大¹⁵。由於這些行業的出口減少，模具企業受到降價的壓力。在2009年情況最壞的時期，需求比高峰期下跌了40%到45%。到2010年，模具產品的價格仍比高峰時低20%，在經濟低潮期更加難以支撐，倒閉企業不在少數。

- 8 香港政府統計處，2009年港產出口及轉口商品貿易統計，貿易分類採用聯合國《國際貿易標準分類》（修訂3）第7491分組：金屬鑄造用砂箱、模座、模型、金屬用模具（鑄錠模除外）、金屬碳化物用模具、玻璃用模具、礦物材料用模具、橡膠或塑膠用模具。
- 9 聯合國商品貿易統計數據。貿易分類為聯合國《國際貿易標準分類》（修訂3）第7491分組，comtrade.un.org。
- 10 「中國模具工業的現狀與發展趨向」，中國模具工業協會常務副理事長兼秘書長曹延安在2007年法蘭克福國際模具展覽會「中國論壇」上的演講，www.cdma.com.cn。
- 11 由於統計分類差別，中國各省的模具貿易統計不一定與聯合國《國際貿易標準分類》（修訂3）第7491分組重合。
- 12 「中國模具工業的現狀與發展趨向」，中國模具工業協會常務副理事長兼秘書長曹延安在2007年法蘭克福國際模具展覽會「中國論壇」上的演講，www.cdma.com.cn。
- 13 「集群生產我國模具產業謀求發展轉型」www.mymould.net.cn。
- 14 第十三屆中國國際模具技術和設備展覽會新聞，www.wjczyjibcn.com。
- 15 香港模具協會簡介，www.industryhk.org。

HONG KONG MANUFACTURING SMES : PREPARING FOR THE FUTURE

INDUSTRY SITUATION REPORT — MOULD & DIE MANUFACTURING

《香港製造業中小企：迎戰未來》報告

行業市況分析報告— 模具業

香港中小企無法像中國內地企業那樣獲配資金，這使他們在這一行業的增長更加困難。通常內地企業的投資可以高達一億元人民幣。數家中國本土大型企業從德國、日本和美國購買先進的設備和技術，生產高質量的模具。這些企業正在蠶食原來香港模具企業的市場份額。

相比一些行業，模具在珠三角不算是勞動密集型產業，因此勞動成本的增加和新勞動合同法所帶來的管理支出對模具企業的影響並不如某些行業大¹⁶。但是，模具行業需要的受過較高等級培訓的技術人才卻常常短缺。香港企業發現，有些內地僱員在得到足夠的訓練之後，就離開公司獨自創業，無疑加大了公司的競爭壓力¹⁷。

中國內地的地方保護主義是影響香港模具企業的一個主要問題。模具是機械行業的基礎，為下游行業提供必要產品。許多內地省份為了發展自己的工業體系，把模具行業作為一個戰略產業，提供優惠的政策支持本土企業的發展。特別是長三角的政府部門，努力發展模具產業，力圖與珠三角的模具產業抗衡。這種地方性的競爭對香港企業的影響尤其大。廣東政府也有對當地模具企業提供優惠政策，同時在評估非本土企業的受惠資格時引用較嚴格標準，所以香港企業在兩方面都失利。

2009年，中國政府出台了為期兩年的主要行業調整和振興規劃。這將會增加對模具產品的需求，由此提高了模具行業的長期成長潛力。廣東省政府出台了對省內11個主要行業的調整與振興規劃。《廣東省裝備製造業調整和振興規劃》¹⁸的目標之一，就是鼓勵精密模具產業的發展以支持其他行業增值，因此對模具行業的影響最大。



中央政府「汽車下鄉」政策實施期限的延長和「家電下鄉」政策實施力度的加大¹⁹都將促進2010年汽車和家電銷售量的增長。僅2009年，中央財政就投入450億元人民幣資金，補貼汽車摩托車下鄉、汽車家電以舊換新和農機具購置²⁰。

模具產品不在出口加工的限制目錄之內。而由於加工貿易限制類目錄只包括加工金屬，不限制模具行業所用的金屬原料的進口，因此其上游供應行業也不受限制。2010年7月，包括主要鋼鐵產品、金屬加工材在內的406項產品的出口退稅被取消。其中，鋼材是模具的主要原料。在2010年6月，國務院決定調整鋼鐵行業產業結構，淘汰落後產能，關閉效率低的小企業，整合大企業，升級產品並提高工廠的能源利用效率。這些措施短期內會對模具行業的原料供應產生影響。

國家政策對模具產業的支持和對模具產品的持續需求促使一些大的模具使用公司建立起自己的模具生產車間。模具行業的客戶特徵就是他們通常都是大企業，自身對模具的需求龐大，資金充裕，也容易獲得自行生產模具的資金支持。其結果就是一些模具企業發現來自長期大客戶的訂單在短時間內突然消失。

香港中小企業的應對策略

規模大一些的模具公司為渡過全球金融危機，減少推出新產品，轉而更加專注於保持或者提高現有產品的質量²¹。

面對較低的營業利潤，企業通過更新技術或自動化來提高效率。這種做法從長遠來看也能提高效率並降低成本。

另一種策略是通過加強客戶重視的價值來提高售價，如新的產品特性、有創意的設計或更快的回應時間等。這種方法讓香港企業充分利用在現代設備、先進技術、良好設計以及嚴格的生產和質量控制等方面的優勢。

一些香港企業憑藉技術脫穎而出，但這需要巨額投資。這對於香港中小企廠商的規模來說，無疑是個挑戰。但是事實說明，此行業中能夠盡其所能地專注研發、採用新技術和創新的公司在未來會有更光明的前景。有企業會把部分盈利投入研發，也有企業建立合資夥伴關係，或與技術提供者達成其他的商業約定，以此在製造技術上保持領先地位。

為克服難於籌措到充足資金的困難，模具行業的香港中小企努力向本地或海外的投資者展示其優勢。對全球投資者而言，這些優勢除了包括前面已經提到的以外，還包括良好的英語溝通能力，以及優良的社會與硬件基礎設施。這些基礎設施對那些取道香港考察珠三角的國外投資者具有相當的吸引力。香港企業還會與中國內地的企業建立夥伴關係，以通過這些企業獲得內地資金。

為能盡量保持與內地企業成本相若，香港企業嚴格控制低成本地區之外的僱員人數。另一方面，要獲得所需工人，並能與長三角低成本廠商競爭，搬遷到長三角也是此行業的香港企業考慮的一項戰略。

一些香港企業也在試圖與顧客建立合夥關係以確保顧客不會自己進行模具生產。這種深層的合作可以通過若干方式實現，而協議的關鍵點包括：投資模具生產設備所產生的資金風險由誰承擔；作出具體的擔保安排讓客戶相信外判比他們自己進行模具生產更有利。不涉及內部生產的更深層合作也可以通過在主要客戶工廠鄰近的地方選址達成。

香港企業通過游說來應對內地的保護主義，但也理解這樣的游說可能收效甚微。為了克服可能的政策歧視，香港模具廠商也竭力向政府證明，他們的經驗、管理能力和創新能力使他們比本土企業對該行業貢獻更多價值；並強調他們對中國各省政府希望吸引的下游活動尤為重要。

案例分析 — 導新數控工程有限公司

導新數控工程有限公司（導新）是1983年成立的模具生產企業，總部位於香港。最初幾年是承包CNC的工作，之後於1985年收購國際製模廠有限公司，開始提供全套的注塑模具。導新設立之初只有五名員工，目前僱員已經接近190名。其中六名員工在香港工作，其他員工在中國內地工作。

1995年導新將它的部分生產設備從香港遷至珠三角，創立了中港合資企業廣州導新模具注塑有限公司（廣州導新）。合資企業在廣州建立了3,000平方米的廠房，提供製模和注塑加工服務。2005年，廣州導新擴大了生產車間面積並配置了新的注塑機器。遷址之初，導新只是將所有的生產活動遷至廣州，而工程技術活動則留在香港進行。兩年後，導新把它的工程技術活動也遷移至廣州。目前，香港只有一個聯絡辦公室，主理船運、營銷等協調計劃工作。

導新剛遷址中國內地的時候，營業額較低。為拓展業務，導新針對主要的潛在客戶進行營銷推廣活動。這些活動包括參展、分發公司宣傳冊、隨時更新網站內容等一系列活動。在一次參展中，一家德國汽車照明公司（Hella）與導新簽訂了一張試訂單。公司非常重視這張試訂單並成功執行，因此導新在汽車照明模具領域站穩了腳跟，而這一領域也成為導新的主要市場。

導新的產品銷往世界各地，主要市場包括中國內地、美國、法國、德國、西班牙、墨西哥、巴西等。其中一半在中國內地銷售，另外一半銷往其他地區。導新最直接的客戶是汽車部件生產企業，如Hella、Valeo、AL、Decoma、CML、ARTEB、Stanley、Koito等。

問題與挑戰

來自中國內地模具企業的成本競爭是導新面臨的一個主要困難。逐步降低的模具價格對導新提出了進一步的挑戰。儘管他們在內地的產量在增加，產品的平均價格卻在降低。

模具是相對資本密集型的行業。行業技術變化也很快。因此企業必須對技術作出投資。對導新這樣規模較小的企業來說，如果要進行技術創新，成本會非常大。

珠三角熟練技工不多。內地企業不斷進入該行業，生產規模不斷增長，更增加了對有經驗的工程師和技工的需求。導新的一些員工也被中國內地企業許以優惠條件，吸引他們加盟。一些員工也離開導新開始自己創業。

16 以2009年《中國統計年鑑》數據為基礎計算的生產總值與僱員之比。
17 2010年4月9日香港模具行業訪談記錄。
18 《廣東省裝備製造業調整和振興規劃實施意見》（粵府辦[2009]121號），2009年11月10日發。
19 「汽車下鄉」政策的實施期限延長至2010年12月31日。「摩托車下鄉」政策的實施期限延長至2013年1月31日。「家電以舊換新」政策的實施期限延長至2011年12月31日，並且適用範圍從最初的9個試點省市擴大到全國範圍。
20 溫家寶，《2010年政府工作報告》，2010年3月5日第十一屆全國人民代表大會第三次會議。
21 2010年4月9日香港模具協會訪談記錄。

HONG KONG MANUFACTURING SMES : PREPARING FOR THE FUTURE

INDUSTRY SITUATION REPORT — MOULD & DIE MANUFACTURING

《香港製造業中小企：迎戰未來》報告

行業市況分析報告— 模具業

中國內地的監管環境要比香港複雜繁瑣。一些日常的手續在中國內地完成要比在更自由的市場完成花費更多的時間。但是，中國政府的一些措施偶爾也會有利於導新的發展。例如，當導新在1990年遷入廣州時，當地政府給予它兩年免繳公司所得稅和三年減半繳納公司所得稅的優惠。

導新過去曾遇到過的挑戰，是它的內地合作夥伴沒有按照原來預計的數量向導新購買。其時，導新卻已經按照其購買需求而僱用了額外的員工，並購買了額外的設備。導新必須重新調整業務，並為此承受了幾年的損失。

企業策略

導新應對挑戰的主要方式是專攻車燈模具細分市場。這個專攻市場正好契合了中國內地正在迅速成長的汽車市場。細分市場策略是成功的，目前車燈模具佔導新銷售額接近95%。較小的規模和靈活的經營讓導新的適應性更強，決策更快，也能更快採用新的適用技術，對市場的變化也反應迅速。這也是導新所具有的國內大型模具生產企業無法比擬的優勢。

導新專注於一步步提高自己的經營製造水平。作為一個小型企業，雖然不能投入大量資金讓技術跳躍式發展，導新仍會通過投資研發讓企業技術水平保持前列，並不斷提高製造效率和精準性。只要價格合理，導新也購買其他企業研發的適用技術。例如，導新是香港第一間同時擁有CNC電蝕機、線割機、電腦鏜床及自動編程的模具企業。早在1988年，導新就開始採用電腦加工機床。導新還與香港生產力促進局等專業組織和戰略夥伴一起探討提高技術和管理水平，並參加香港模具協會組織的各項活動，從中了解最新的行業資訊，不斷提高其業務水平。

導新努力創造良好聲譽，拓展優質客戶網絡。這些無形資產讓導新比中國內地的競爭者更容易爭取到業務、採用國際商業做法，並能夠長期與客戶保持良好的關係。

導新跟隨在珠三角設廠的主要客戶進入內地。它在廣州找到了一個合作人並於1995年設立了合資廠，從而減少了土地和勞動成本並容易獲得勞動力。導新發現廣州本地工人比較安心工作，不太像來自國內其他

地區的員工那樣容易離開公司並成為公司的競爭者，因此廣州本地工人是導新的主要僱用對象。可是，導新也發現，吸引廣州本地工人也越來越困難。近來，導新不得不招募中國北方的工人。

導新明白是員工作出決定和採取行動來幫助公司保持競爭力，因此必須善待員工，從而讓他們按要求作決定和工作。到目前為止，導新已經和幾間大學合作進行員工培訓教育項目，提高員工素質。

質量認證是導新向客戶證明其嚴格重視質量的主要方式，也是自我提升的主要途徑。導新擁有ISO9001:2000質量管理系統認證並在生產系統中採用ISO16949的標準。公司還成立了一個質量提升委員會來幫助評估和提高產品標準。導新曾獲香港玩具協會「卓越營運獎」，並多次獲得協會的模具設計獎項。

導新近年較少進行市場營銷活動，因為它知道在細分市場大家都彼此熟悉。在這個市場上主要的客戶「少於10個」，而導新認為在這個細分市場上它的全球主要競爭公司在10至15家之間。相對競爭對手來說，導新的資金規模較小。它認為，如果只就資金實力競爭，而不重視質量、創新和可靠性，那麼導新不可能生存至今。

導新的總經理李煜培先生認為，最重要的成功要素就是對市場變化、技術變化、營商環境變化、行業的主要變化和總體變化都要有充分的認識。企業必須學會管理變化，並迅速應對影響公司業務的變動。導新適應變化的需要找到並保持「最優規模」，經營原則是最大的靈活性。特別是產品線，設計緊湊小巧靈活以滿足客戶的不同需求。

未來規劃

導新計劃未來保持穩定而持續的增長，無意「太激進」。具體來說就是希望在未來五年保持5%的年收入增長率、大於5%的利潤率以及雙位數的員工工資增長率。

公司將投資研發，特別是在開發新的製造方法和提高機器效能方面進行研發。公司計劃安裝更多的新設施和更多的高端跳床。過去幾年的投資模式是將公司銷售收入的一定比例投入研發和增添新的設備。未來還

會用這樣的投資模式，因為舊的機器折舊迅速，技術也在不斷變化。

導新打算在長三角設立分公司，以照顧它在那地區的客戶。公司並不打算將全部生產搬遷到長三角，但是將生產擴展到長三角，與主要客戶同處一地對公司有利無弊。導新還沒有在中國之外進行生產的打算。公司對中國汽車市場的前景和自己在細分市場中的增長機會都有信心。2005年，導新擴大了工廠規模，購買了更多設備。產品進一步細分化的趨勢也讓導新公司競爭力更強。公司準備保持技術上的領先地位，並依舊專注於高端車燈部件模具的製造。

導新致力於成為能持續發展的製造商，並在業務圈中保持和諧關係。公司也承諾為人們的未來保護環境，為此已經投資建立了廢物循環系統以減少污染，希望通過這些投資證明自己愛護環境的態度。

導新案例的啟示

從導新的案例中我們可以得出如下啟示：

- 在模具行業企業需要學會預測市場、技術、營商環境方面的變化，並隨時準備迅速適應以求生存。
- 對於有些客戶考慮獨立生產模具，香港的模具生產廠商必須向客戶展示購買模具的優勢、模具公司專業性服務的價值，希望更好地了解和預期客戶需求的積極態度以及進行商業合作的各種機會。
- 廠商應該通過多樣化來化解客戶風險，包括與多個客戶保持聯繫、地區市場多元化、進入更多領域等。
- 模具行業需要特殊技能的勞動力，因此中小型模具企業的員工可能被競爭對手挖走，或者員工離開成立自己的公司。所以中小模具企業必須採取辦法吸引和留住主要的員工。
- 企業可以通過提高工資、比競爭公司為員工提供更好的工作條件和福利來解決勞動力短缺難題。
- 中小企廠商可以考慮將生產工廠遷移到長三角等目前技術工人短缺還不過於嚴重而成本也相對較低的地區。

- 中小企廠商應該充分利用中國內地政府提供的優惠政策和措施。這些優惠可能各地區不同，實行的時間也有差異。中小企應該認真了解適合他們的鼓勵政策。
- 如果公司只競爭資金實力，忽視質量、創新、靈活性和可靠性方面的競爭，存活將相當不易。
- 中小企廠商應該努力發展細分市場。作為細分市場上的經營者能夠讓中小企業更加靈活、更快做出決策、更快採用新的適用技術、也能夠更快對市場變化做出反應。這是國內大型模具製造商所無法比擬的優勢。
- 模具是資本比較密集的行業，技術變化也很快。要保持競爭力，企業需要對研發和設備有不斷的資金投入。
- 人們對環境和污染的日益關注，意味着企業如果能有愛護環境的聲譽，將會有更多機會獲得訂單並發展新的商業關係。
- 中小企廠商雖然缺少大量的資金投入來實現技術的跳躍性發展，但是可以隨時關注技術的最新進展並採用其他公司創造的新技術。
- 質量認證是向客戶證明企業嚴格重視質量的主要方式，也是自我提升的主要途徑。



HONG KONG MANUFACTURING SMES : PREPARING FOR THE FUTURE INDUSTRY SITUATION REPORT — MOULD & DIE MANUFACTURING 《香港製造業中小企：迎戰未來》報告 行業市況分析報告—模具業

In February 2010, the FHKI successfully carried out the research on Hong Kong Manufacturing SMEs: Preparing for the Future funded by the Trade and Industry Department's SME Development Fund and undertaken by a research team led by world renowned business strategist Professor Michael Enright, who has written extensively on the PRD industrial development. The survey indicated a myriad of pressing challenges faced by SMEs operating in the PRD. The study also examined the present situations of Hong Kong mould and die manufacturing. Case studies of Hong Kong firms in these sectors that are adjusting to the current challenges are provided as real world examples that SME manufacturers may follow. Moulds and dies are used to turn metal, plastics, glass, rubber, and other source materials into standardised components.

The Mould and Die Industry

Moulds and dies are therefore important to a very wide range of industries including plastics, hardware, electric equipment, toys, home appliances, watches and clocks, auto parts, communication equipment, office instruments, optical instruments, consumer electronics, and other products.¹ The mould and die sector is dominated mostly by firms from developed countries including Japan, Germany, the US, and Italy. China is the only developing country that has a strong presence in the sector. The developed countries lead the sector in technology.

Hong Kong's mould and die industry started with a world-level production system borrowed from the US.² Hong Kong firms have been gaining competitive strength since the 1980s when they started to move their production facilities to Guangdong. Today they have the capacity to produce world quality moulds and dies at a moderate price. The mould and die industry in Guangdong developed mainly as a result of investment by Hong Kong firms. An estimate for 2003 shows that there were over 10,000 Hong Kong invested firms in the PRD producing moulds and dies employing about 81,000 Hong Kong staff.³ Hong Kong firms currently lead their Mainland competitors in expertise and technology, but the gap has been closing. Chinese firms often target experienced engineers and technicians from foreign-invested firms to improve their knowledge and competitiveness.

Industry players are confident that the Chinese Mainland market will keep growing and they see strong opportunities in the automobile, machinery, and electronic industries.⁴ For instance, to produce one model of car requires 1,500 mould and die sets.⁵ With China selling 13.64 million motor vehicles in 2009 alone,⁶ this is a large and growing market. This should provide ample opportunity for Hong Kong companies that can find the right niches going forward. However, Hong Kong's position in this industry is one that could come under significant competitive threat even as market opportunities expand.

Basic Facts about the Industry

The Gross Industrial Output (GIO) for Hong Kong was HK\$5.4 billion in 2008 for the "Machinery, equipment, apparatus parts and components" sector which includes moulds and dies. There were 5,591 employees in the sector in Hong Kong with an estimated average annual wage of HK\$156,680. Wages were approximately 20 per cent of total costs for the sector.⁷ Wages for the sector in Hong Kong are five times those for the sector in China as a whole. This is likely explained by general wage disparities between Hong Kong and China, the employment of more senior staff in Hong Kong, and the fact that higher value end products are produced in Hong Kong with corresponding higher quality and more costly labour inputs.

Hong Kong's total domestic exports for moulds and dies in 2009 were HK\$188 million, a 13 per cent decrease from the previous year. Re-exports from Hong Kong were HK\$2.9 billion or 0.12 per cent of total re-exports. No data is available for Mainland China based processing and non-processing trade companies.⁸ Japan was the world's largest mould and die exporter from 1991 to 2008, while China has been among the top three since 2007. The largest importers of moulds and dies are the US, China, and Mexico.

- Hong Kong Mould & Die Council and Hong Kong Productivity Council, Survey Report on Technician Demand in the Mould and Die Sector, 2005.
- Interview with Hong Kong Mould & Die Council, 9 April 2010.
- Hong Kong Mould & Die Council and Hong Kong Productivity Council, Survey Report on Technician Demand in the Mould and Die Sector, 2005.
- Interview with Hong Kong Mould & Die Council, 9 April 2010.
- Advertising page, Hong Kong Mould & Die Council Annual Report 2009.
- Report on the Work of the Government 2010, Wen Jiabao, delivered at the Third Session of the Eleventh National People's Congress on 5 March 2010.
- Hong Kong Census and Statistics Department data on "Machinery, equipment, apparatus, parts and components, n.e.c.", 2009.
- Hong Kong Census and Statistics Department, Hong Kong Merchandise Trade Statistics 2009, Domestic Exports and Re-exports, Trade category UN SITC rev.3 code 7491 – Moulding boxes for metal foundry; mould bases; moulding patterns; moulds for metal (other than ingot moulds); metal carbides, glass, mineral materials, rubber or plastics.

Exhibit 1. Average Monthly Wages for the Sector in RMB

Region	Average Monthly Wages
Hong Kong	11,489
YRD	1,881
PRD	2,439
China	2,200

Exhibit 2. Top Mould and Die Exporters in the World and Hong Kong, US\$ millions

2007		2008		2009	
Exporter	Value	Exporter	Value	Exporter	Value
Japan	1,821	Japan	1,969	Japan	-
Italy	1,389	China	1,850	China	1,769
China	1,344	Germany	1,404	Germany	1,132
Germany	1,253	Italy	1,274	Italy	1,094
Korea	951	Korea	71,053	US	940
Hong Kong	452	Hong Kong	467	Hong Kong	411

Sources: UN Commodity Trade Statistics Database 2007-2009; Trade category UN SITC rev.3 code 7491 – Moulding boxes for metal foundry; mould bases; moulding patterns; moulds for metal (other than ingot moulds); metal carbides, glass, mineral materials, rubber or plastics.

Exhibit 3. Top Mould and Die Exporters in the World and Hong Kong, US\$ millions

2007		2008		2009	
Exporter	Value	Exporter	Value	Exporter	Value
US	1,593	US	1,533	China	1,210
China	1,288	China	1,442	Mexico	1,143
Mexico	1,061	Mexico	1,212	US	1,141
Germany	964	Germany	841	Germany	735
Japan	670	Japan	724	Japan	-
Hong Kong	406	Hong Kong	454	Hong Kong	414

Sources: UN Commodity Trade Statistics Database 2009; Trade category UN SITC rev.3 code 7491.

Exhibit 4. Mould and Die Exporters from Hong Kong, \$ millions

2007		2008		2009	
Exporter	Value	Exporter	Value	Exporter	Value
US	1,593	US	1,533	China	1,210
China	1,288	China	1,442	Mexico	1,143
Mexico	1,061	Mexico	1,212	US	1,141
Germany	964	Germany	841	Germany	735
Japan	670	Japan	724	Japan	-
Hong Kong	406	Hong Kong	454	Hong Kong	414

Notes: The major trade partners are based on the ranking in 2009. Source: UN Commodity Trade Statistics Database 2006-2009; Trade category UN SITC rev.3 code 7491.

Exhibit 5. Mould and Die Exporters from Hong Kong, \$ millions

Region	2007		2008		2009	
	Value	Y-o-Y Change (%)	Value	Y-o-Y Change (%)	Value	Y-o-Y Change (%)
World	3,164	-0.9	3,534	11.7	3,213	-9.1
China	2,116	9.9	2,516	18.9	2,385	-5.2
Japan	441	-27.8	488	10.4	384	-21.3
US	64	-28.6	70	10.1	110	57.5
Korea	190	84.5	158	-16.6	71	-55.5

Sources: UN Commodity Trade Statistics Database 2006-2009; Trade category UN SITC rev.3 code 7491.

Exhibit 6. The Mould and Die Sector of Top Three Provinces (January-November 2008)

	Establishments		Employment		GIO	
	Value	Percentage (%)	Value	Percentage (%)	Value (RMB billion)	Percentage (%)
C a	1,932	100.0	348,065	100.0	90.87	100.0
Guangdong	456	23.6	126,025	36.2	26.23	28.9
Jiangsu	302	15.6	43,112	12.4	20.64	22.7
Zhejiang	379	19.6	81,624	23.5	10.41	11.5

Notes: Figures are of state-owned enterprises and non-state-owned enterprises with annual sales of RMB 5 million. Figures are preliminary. Sources: National Bureau of Statistics of China; China Mechanical Electrical Data Online.

In recent years, China has grown into a major producer in the sector. In 2009, in the absence of Japan's statistics, China reported higher imports and exports for moulds and dies than any other country, with exports of US\$1.7 billion and imports of US\$1.2 billion.⁹ The Pearl River Delta and Yangtze River Delta regions accounted for two thirds of China's total mould and die output in 2007.¹⁰ The largest producer, exporter, and importer of mould and die products in China is Guangdong. In 2009, Guangdong exported US\$756 million of moulds and dies, 42 per cent of China's total, and imported US\$368 million moulds and dies, 19 per cent of China's total.¹¹

Domestic and export sales of mould and die products for Mainland China grew at an annual rate of 20 per cent from 2000 to 2007,¹² but growth slowed in 2008 to 2009 as a result of the global financial crisis. Sales in 2009 totalled RMB 100 billion,¹³ but sales in the first four months of 2010 reached just under RMB 100 billion.¹⁴ The domestic market is approximately seven times the size of the export market.

9 UN Commodity Trade Statistics Database, category 7491 (SITC.3), comtrade.un.org.

10 www.cdmia.com.cn.

11 Trade statistics the mould and die sector for individual provinces of China may not all fall exactly into the UN SITC category of 7491 due to anomalies in the compiling of China's statistics.

12 "Current status and development trend for China Mould and Die industry", Speech delivered by Cao Yan'an, Executive Vice President of China's Mould and Die Council, on International Mould Exhibition in Frankfurt, 2007.

www.cdmia.com.cn.

13 www.mymould.net.cn.

14 News from the thirteenth China International Mould Technology and Equipment Exhibition, 2010. www.jmcyibcn.com.

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Issues for Hong Kong Mould and Die Manufacturers

Hong Kong owned mould and die firms that manufacture in the Chinese Mainland have advantages in marketing, in implementing international business practices, and in maintaining good customer relationships over the long term versus Mainland competitors. They also tend to be more flexible, make decisions faster, be quicker to adopt new and suitable technologies, and respond to market changes rapidly. However, Hong Kong owned firms that manufacture in the Mainland have relatively high costs, are less aggressive than Mainland Chinese firms, and find it harder to obtain financing in the Mainland than their Chinese peers.

Buyers in the mould and die industry are highly price sensitive and competition from Mainland China owned mould and die companies has intensified. The global financial crisis affected Hong Kong mould and die firms supplying traditional export sectors like toys, home appliances, electronics, and computer peripherals.¹⁵ With lower exports in these markets, mould and die firms were put under pressure to reduce prices. During the worst period in 2009, demand fell by 40 to 45 per cent from its peak. By 2010, prices were around 20 per cent lower than the peak and profit margins for larger companies down from 12 per cent to five per cent. Firms that were small, could not offer special technological advantages, or offer a niche product, were more vulnerable to the downturn and many closed down.

Growth in the sector is becoming more difficult for Hong Kong SMEs because they are less likely to receive the sort of capital allocations that are being given to Mainland

China companies. Often large investments of up to RMB 100 million are made into Mainland China companies. Several of the large Chinese mould and die companies have acquired advanced equipment and technologies from Germany, Japan, and the US, that has given them the capability to develop high quality moulds. These companies are encroaching on the market share held by Hong Kong owned mould and die companies.

Since the mould and die industry is less labour-intensive than many other industries in the Pearl River Delta, it is less vulnerable to labour cost increases and costs associated with administering the Labour Contract Law than in many other industries.¹⁶ However, the industry uses specialised labour in the form of highly trained technicians and this category of labour is often in short supply. Hong Kong firms find that their Mainland Chinese personnel sometimes leave to start their own companies once they have received sufficient training. This creates additional competitive pressure.¹⁷

Local protectionism in Mainland China is an important issue affecting Hong Kong mould and die companies. The mould and die industry is the basis of the machinery sector, providing essential products to its downstream industries. In order to develop their own industries, many Chinese provinces treat the mould and die industry as a strategic industry and offer favourable policies to support and develop indigenous companies. YRD governments have been particularly aggressive in their attempts to compete with the PRD and this is having a significant impact on Hong Kong owned companies. The Guangdong Government also offers favourable policies to local mould and die companies, but applies stricter criteria when assessing the eligibility of firms that are not fully owned by Mainland interests, so companies from Hong Kong lose out both ways.

The Central Government has implemented a two-year plan (2009-2011) for restructuring and revitalising 10 key industries. This may result in an increase in demand for mould and die products, which would improve the long-term potential of the sector. The Guangdong Government has tabled its own restructuring and revitalisation plans for 11 key industries. The plan for the

equipment manufacturing industry¹⁸ will have the greatest direct impact on the mould and die sector and is designed to encourage its development so as to support other industries that have been identified as value-adding.

It is further expected that the time extension of the "Home appliance and motor vehicles to the countryside" and the "Motor vehicle and home appliance replacement" policies will boost the sales growth of motor vehicles and home appliances in 2010.¹⁹ In 2009 alone, the Central Government provided RMB 45 billion in subsidies for vehicle and appliance trade-ins and for rural residents to purchase home appliances and motor vehicles, including motorbikes.²⁰

The mould and die sector is not limited by any export processing restrictions, it is also not likely that suppliers to the sector are limited because the restricted categories cover processed metals and not the raw unprocessed metals that are used in mould and die production. In July 2010, export rebates on 406 products including key steel products, and semi-finished nonferrous metals were eliminated. Steel is a key input for mould and die sector. In June 2010, the State Council announced a restructuring of the industry by closing smaller less efficient plants, consolidating towards larger plants, and upgrading the production and energy efficiency of the plants. These moves may have a short-term impact on supply for the mould and die sector.

Policy support for the industry as well as increased overall need for mould and die operations has led some large customer companies to set up their own mould and die shops. The nature of the industry is that many customers are large, have sufficient internal demand, are financially secure, and can obtain the capital needed to take mould and die manufacturing in-house. Consequently, a number of firms in the sector have seen orders from longstanding customers go to nil in a relatively short period of time.

Response Strategies of Hong Kong SMEs Larger companies that survived the global financial crisis scaled back new product launches and focused more on maintaining and improving the quality of their existing product range.²¹

One response to lower operating margins has been to improve efficiency through the use of innovative technology or automation that will bring about long-term efficiencies and cost reductions.

Another approach has been to identify attributes that customers value enough to justify a price premium such as new product features, creative designs, or faster response times. In this way, the Hong Kong firms are playing to their advantages of modern equipment, advanced technology, good design, tightly controlled production, and strict quality control.

Some Hong Kong firms are differentiating on the basis of technology, which requires significant investment that might be challenging for Hong Kong's SMEs given their small size. However, it appears that in this sector companies which focus on research and development, technology adoption, and innovation to the extent that they are able may face the best prospects of doing well in the future. Some firms are investing a proportion of their revenues into ongoing research and development, while others have formed joint-venture partnerships or entered into other business arrangements with technology providers that keep them at the front of advances in manufacturing technology.

To combat the problem of obtaining sufficient capital, Hong Kong SMEs in the sector have made efforts to communicate their advantages to investors from the region or from overseas. For global investors, these advantages go beyond those already mentioned to include an ability to better communicate in English, as well as better social and physical infrastructure attract potential foreign-firm investors during their visits to the PRD via Hong Kong. Firms in the sector have also taken to partnering with firms in the Chinese Mainland to tap into the funds that those firms can access.

Hong Kong firms have been limiting the number of employees they have outside low-cost environments to try to maintain cost parity with Mainland firms. Moving to the YRD is also a strategy that Hong Kong firms in the sector are considering in order to obtain workers they need and to compete against other lower cost manufacturers who operate in the YRD.

18 "Opinion on Implementing the Plan for Restructuring and Invigorating Guangdong's Equipment Manufacturing Industry," Yuefubao [2009] no 121, 10 November 2009.

19 The "Vehicles to the Countryside" policy has been extended until 31 December 2010 and the "Motorcycles to the Countryside" policy until 31 January 2013. The current "Home appliance replacement" policy has been extended until 31 December 2011.

20 Report on the Work of the Government 2010, Wen Jiabao, delivered at the Third Session of the Eleventh National People's Congress on 5 March 2010.

21 Interview with Hong Kong Mould and Die Council, 9 April 2010.



HONG KONG MANUFACTURING SMES : PREPARING FOR THE FUTURE

INDUSTRY SITUATION REPORT — MOULD & DIE MANUFACTURING

《香港製造業中小企：迎戰未來》報告

行業市況分析報告—模具業

Some Hong Kong firms are finding ways to partner with customers to ensure their customers do not establish in-house mould and die activities. There are several ways in which this type of deep collaboration could take place with the main points for agreement being which firm takes on the capital risk by investing in the equipment, and what guarantees are put in place to ensure that outsourcing remains more beneficial to the customer than bringing the mould and die activities under its own control. Deeper collaboration that does not involve in-house manufacturing is also being achieved by locating next to the factories of major customers.

Hong Kong firms are responding to protectionism in China by lobbying, but this is being done with an understanding that little is likely to be achieved. Some Hong Kong mould and die manufacturers hope to overcome possible policy bias by demonstrating that due to their experience, managerial capabilities, and capacity to innovate, they have more value to add to the industry than indigenous firms, and to underscore the belief that they are important to the downstream activities that remain attractive to provincial governments in China.

Case Study – Datamatic CNC Engineering Company Limited

Established in 1983, Datamatic CNC Engineering Company Limited (Datamatic) is a mould and die manufacturing company headquartered in Hong Kong. After a few years of sub-contracting CNC jobs, Datamatic acquired the International Mould Factory Company Limited in 1985 to provide complete sets of injection moulds. Datamatic commenced business with five employees and the company now has approximately 190 employees with all except six being located in the Chinese Mainland.

In 1995, Datamatic shifted its production from Hong Kong to the PRD where it set up a Sino-Hong Kong joint venture named Datamatic Guangzhou Injection Mould Company Limited (Datamatic Guangzhou). The joint venture built a workshop of 3,000 square metres in Guangzhou to provide turnkey mould making and pilot moulding solutions. In 2005, Datamatic Guangzhou expanded its workshop and installed an advanced moulding machine. At first, Datamatic relocated all of its manufacturing but kept its engineering activities in Hong Kong. After about two to three years, Datamatic moved its engineering activities to Guangzhou as well. These days, Hong Kong acts as a liaison office and takes care of

the coordination and planning of activities such as marketing and shipping.

When Datamatic first moved to China business was slow. To try and develop new business, Datamatic engaged in marketing and promotion activities in major potential customer markets. This involved doing exhibitions, sending company catalogues out, ensuring that the website was up-to-date, and a range of similar activities. At one of the exhibitions a German company making automotive lighting (Hella) placed a trial order with Datamatic. The firm took the trial order very seriously, the order went very well, and Datamatic got a foothold in the automotive lighting industry, an industry that has become its main market.

Datamatic sells its products all over the world with major markets in China, the US, France, Germany, Spain, Mexico, and Brazil. Its major direct clients are car component manufacturers such as Hella, Valeo, AL, Decoma, CML, ARTEB, Stanley, and Koito. Approximately 50 per cent of Datamatic's production stays in the Chinese Mainland and the other 50 per cent is shipped to other places.

Issues and Challenges

Dealing with cost-driven competition from Mainland China owned mould and die companies is one of Datamatic's major challenges. Steadily decreasing prices for mould and die manufacturing is a further challenge for Datamatic. Although the turnover in the mould and die industry in Mainland China is increasing, average product prices are dropping.

The industry is relatively capital intensive and the technology used in the industry is fast evolving, meaning that regular investments in technology must be made. Smaller firms like Datamatic face relatively large costs if they try to pioneer new technology.



There is a shortage of skilled technicians for the sector in the PRD. The entry and growth of firms from the Chinese Mainland has increased demand for trained engineers and technicians. Many Datamatic employees have been offered attractive packages by Chinese firms and a number have left to start companies of their own.

China's regulatory environment is viewed as more onerous than Hong Kong's. Performing routine tasks in China takes far longer than it takes in more developed and less heavily regulated markets. However, the actions taken by the Chinese Government occasionally work in Datamatic's favour. For instance, when Datamatic moved to Guangzhou in the 1990s the company was given a tax holiday on company tax for three years at half-tax and for two years entirely free of tax.

Early on, Datamatic met with a significant challenge when its partner in the Mainland did not buy nearly as much from Datamatic as was initially projected. Datamatic had already invested in additional staff and facilities with the expectation that significant internal demand from within the group of companies controlled by the Mainland Chinese partner would be forthcoming. When this did not occur, Datamatic had to reassess its business aspirations and accept several loss-making years.

Company Strategy

Datamatic's key response to its various challenges has been to focus on developing a niche market in automobile lens moulds. This niche feeds into the automobile market in the Chinese Mainland, a market that is projected to grow rapidly. Presently the niche strategy is paying off and approximately 95 per cent of Datamatic's sales are related to automotive lighting. Being a smaller and more nimble operator allows Datamatic to be more flexible, to make decisions faster, to more quickly adopt new and suitable technologies, and to rapidly respond to market changes. This enables Datamatic to create advantages that are hard for the large Mainland owned mould and die manufacturers to match.

Datamatic's focus is to continuously improve its operations and its business step-by-step. Being a smaller operator the company does not have the money to spend to make quantum leaps in the development of technology, but it makes targeted investments in research and development to keep the company at the leading edge of technology and to improve the precision and

efficiency of its operations. It also applies new affordable technology developed by others. For example, Datamatic was the first company in Hong Kong that provided Computer Number Control (CNC), Electrical Discharge Machining (EDM), Wire-EDM, and CNC services. Datamatic was one of the first to start to fully computerise its equipment in 1988. Datamatic regularly teams up with professional organisations such as the Hong Kong Productivity Council) and strategic partners to explore more business and technology advancement. Datamatic also takes part in activities that are organised by the Hong Kong Mould & Die Council to get the latest industry information which it then uses to make continuous improvements to its business.



Datamatic has worked hard to develop a good reputation and a good client network. Through these assets, Datamatic has advantages over Mainland China owned competitors in obtaining business, in implementing international business practices, and in maintaining good customer relationships over the long-term.

Datamatic moved into China to follow major clients who began setting up significant manufacturing operations in the PRD. The company identified a possible partner in Guangzhou and formed a joint venture in 1995. This helped reduce land and labour costs and improved access to labour. Datamatic has found that workers from Guangzhou are less likely to leave the company and set up as competitors than workers who come from other parts of China. Knowing them to be more stable, Datamatic targets workers from Guangzhou. Increasingly however, Datamatic is finding that it is difficult to attract workers from Guangzhou. In recent times, this means that Datamatic has had to look to recruit staff from the Northern part of China.

HONG KONG MANUFACTURING SMES : PREPARING FOR THE FUTURE INDUSTRY SITUATION REPORT — MOULD & DIE MANUFACTURING 《香港製造業中小企：迎戰未來》報告 行業市況分析報告—模具業

The company knows that its staff make the decisions and take the actions that will help it remain competitive. This means that the staff have to be well trained so that they are capable of making decisions and taking action as required. To this end, Datamatic has in collaboration with several universities implemented a number of training and educational programmes aimed at developing its staff.

Quality accreditation is important to Datamatic as a signal to its customers that the company is committed to quality, and as a means of driving internal improvements. Datamatic has ISO 9001:2000 accreditation and has adopted elements of ISO 16949 in its manufacturing system. The company has also instituted a Quality Improvement Committee to help review and improve product standards. Datamatic has received an "Operation Excellence Award" as well as awards for "mould design" several times from the Hong Kong Mould & Die Council.

Datamatic does no direct marketing these days, because it operates in a niche market in which all the key players in the industry know one another. The number of major clients is "less than ten" and the number of firms that Datamatic counts as serious competitors globally in its niche is between 10 and 15. Datamatic has a smaller capital base than all the companies it considers competitors. If competition was based purely on financial strength rather than on other factors like quality, innovation, and reliability, then Datamatic would have to fight hard to survive.

The General Manager of Datamatic, Mr Leton Lee, thinks that the most important element of success is being aware of changes in market, technology, business environment, the industry, and other changes in general. Companies have to learn how to manage changes and how to respond quickly to shifts in the factors that affect the business. Datamatic has adapted to the need to deal with change by finding an "optimum size" and sticking to it. Datamatic's business is set up to afford maximum flexibility. The production line, in particular, is designed to be as compact as possible to enable Datamatic to be more flexible and responsive to client needs.

Future Plans

Datamatic plans to maintain stable and steady growth into the future and does not intend doing anything "too aggressive." This translates into expectations of revenue

growth of around five per cent each year for the coming five years, greater than five per cent increases in profit, and double digit salary increases for staff.

The company will invest in research and development, concentrating particularly on the development of new manufacturing methodology and on improved machine facilities. Datamatic plans to install more new facilities and more high-end milling machines. The investment pattern during the last few years has been to reinvest a percentage of company sales revenue into research and development and the establishment of new facilities. This practice will continue into the future since the old machines depreciate fast and the technology changes fast.

Datamatic is considering setting up a subsidiary in the YRD to support its clients in that part of China. The company does not envision moving manufacturing wholesale to the YRD, but it can see the merit in considering expanding into the YRD so as to have a presence there alongside major clients. Datamatic does not plan to manufacture outside of China. The company is optimistic about the Chinese automobile market and the opportunities for growth in its niche. Datamatic enlarged the size of its plant in 2005 and purchased more equipment. These changes allow for further product diversification which will make Datamatic more competitive. The Company plans to stay at the forefront of advances in technology and will continue to focus on manufacturing high-end products for automobile lighting components.

Datamatic aims to be a sustainable manufacturer and to maintain a harmonious relationship with the communities in which it operates. The company is committed to environmental protection so as to provide for a better future for all people and to this end it has invested in a waste recycling system to reduce pollution and to be able to claim status as an environmentally friendly firm.

Lessons from the Datamatic Case

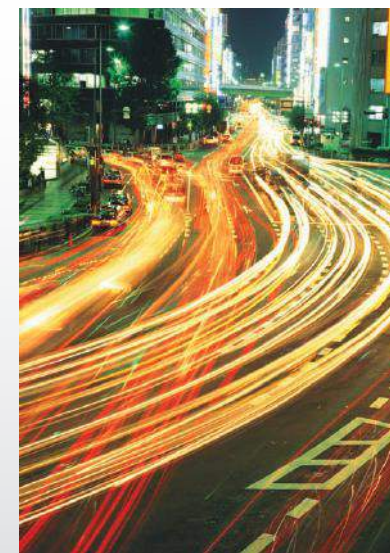
There are a number of lessons that can be learned from the Datamatic case.

- Firms in the sector need to learn to expect and anticipate changes in market, technology, and business environment, and be ready to adapt quickly in the ways that are needed to survive.

- Hong Kong firms must demonstrate their value to customers that are considering taking their mould and die work in-house by emphasising the advantages that accompany sourcing externally, the expertise that a specialist company can provide, a willingness to better understand and anticipate customer needs, and opportunities to engage in forms of business collaboration.
- Firms should diversify customer risk by developing relationships with more multiple customers in multiple geographic markets and in multiple industries.
- Hong Kong firms operating in the PRD face higher materials costs than many of their Mainland competitors as well as potential material shortages because non-local companies are required to import some of the critical materials that are used in production.
- Since SMEs in the mould and die industry use specialised labour that can be attracted away by competitors or can leave to set up firms of their own, the SMEs need to have means of attracting and retaining key personnel.
- Firms can combat labour shortages by paying higher wages and offering better conditions and benefits to workers than competing firms.
- SMEs may consider moving their manufacturing operations to other locations, such as the YRD, where competition for skilled workers is less intense at present and where costs are lower in general.
- SMEs should identify and take advantage of incentives and policy measures that are put in place by authorities in Mainland China. These will be different across different locations and will have time-limits. SMEs will need to do their homework to figure out which incentives best suit them.
- Companies that try to compete based purely on financial strength rather than on other factors like quality, innovation, flexibility, and reliability, will have to fight hard to survive.
- SMEs should focus on developing a niche market. Being a niche operator allows an SME to be more flexible, to make decisions faster, to more quickly adopt new and suitable technologies, and to rapidly

respond to market changes. This creates advantages that are hard for the large Mainland mould and die manufacturers to compete against.

- The mould and die industry is capital intensive and the technology is fast evolving. To remain competitive, firms should consider how they will fund ongoing investments in research and development and facilities.
- Increased environmental and pollution concerns mean that a firm that can claim status as being environmentally friendly is likely to improve its chances of securing business and developing new business relationships.
- SMEs won't have the money to spend to make quantum leaps in the development of technology, but they can be alert to advances in technology and apply new technology when others develop it.
- Quality accreditation is an important signal to customers that the company is committed to quality and is a means of driving internal improvements.



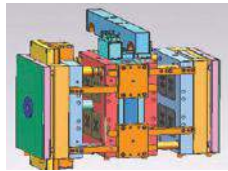
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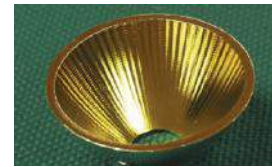
Optical Lens



Co-injection - Grommet - Automotive



Optical Lens



Reflector



Insert Molding - Sensor



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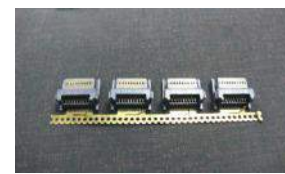
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INTERVIEW WITH TK MOLD LTD., The Winner of HKMDC Awards 2011 : Tool Design Awards 香港模具協會年獎2011：最佳模具設計大獎得主 東江模具有限公司專訪

穩健專注 屢創佳績

近年來，香港和內地模具行業的競爭愈趨激烈。2010年香港模具協會「最佳模具設計金獎」得主、東江集團董事總經理翁建翔、副總經理盧功善及東江科技（深圳）有限公司技術主管朝格圖分享了集團的成功經驗。

東江集團（前身為東江機械製模廠）於1983年成立，初期以從事製模為主，其後於1986年開展注塑業務，規模在幾年間進一步擴大。到了上世紀90年代初，東江先後把注塑和製模業務遷入內地，並於2002年起以深圳為管理基地。同年，東江進行重組，成立有限公司，以子公司分管注塑、製模及對外貿易業務。

東江集團董事總經理翁建翔指出，根據營商環境轉變而作出業務調整，是東江賴以成功的關鍵。他說：「東江成立之初，香港和台灣的資訊科技業興起，故此我

針對客戶 提升價值

東江強調系統性運作，務求在「標準」和「精密」模具兩大類產品均達到優質水平。副總經理盧功善指出：「傳統上，製模十分強調『師傅』和個別技工的水平，可是對現代企業而言，工藝標準化和生產規模化是不可或缺的。加上無論在產品設計、工程技術，以及生產管理和認證等層面，『標準』和『精密』模具之間都有很大分別，因此必須訂立具針對性的生產制度。」

他舉例說，「標準」模具的技術較為成熟，容易符合產品要求，也能夠在製作過程中修訂設計；而「精密」模具以服務高端產品為主，生產的安全性、穩定性以及準確性非常重要，從一開始在技術上就不能有絲毫差錯。他指出：「我們的宗旨是在不同的細分市場盡力做到最好，並為客戶提升價值，提供優質的服務。事實上，不少曾短暫離開的客戶，最終因為未能找到符合其要求的商業夥伴，而重新鞏固與東江的合作關係。」盧功善亦指出，在2008年環球金融海嘯期間，雖然東江的客戶數目略為下跌，但產品價值卻有所增加，證明了集團「以客戶為本」的策略十分成功。

東江的模具和注塑業務在保持獨立生存能力的同時，亦保持緊密聯繫。翁建翔指出：「東江採納『榕樹式』

共同發展 共同提升

談及「共同發展、共同提升」的集團理念，翁建翔強調這不是一項偉大的構思，而只是服從自然法則，做好應做的事，在企業各個層面建立正確的價值觀，從而令社會、企業、員工、供應商和客戶共同得益。他說：「以員工為例，東江堅持『用人唯才、人盡其才』，盡力提供公平的平台，提拔有能力的僱員，並重視他們的培訓和個人發展。」他特別指出，東江對員工一視同仁，不會區分香港和內地員工，非常重視企業的內部團結。

盧功善補充：「我們認為適當的人才流動是自然和健康的現象，亦不會因為員工出錯或選擇離開而作出任何指摘；相反，我們會用心研究事情發生的原因，聆聽員工的意見，找出可以改進的地方。事實上，曾在東江工作的員工十分受到同行歡迎，這證明了東江在行內的良好信譽。」對企業和員工表現的專注，正是東江前進的原動力。

優秀作品 迎接未來

東江多年來積極參與香港模具協會舉辦的獎項，並於2006年榮獲「卓越營運大獎」。去年，東江再接再厲，成功奪得「最佳模具設計金獎」（作品：洗衣機桶後蓋

前後蓋模具採用了縱列式模具（Tandem Mould）結構（前後蓋在同一個模具中生產），而香水盒則採用了8+8疊層模技術，兩者均有效提升了生產效率和質量，也是東江近年在『精密』模具方面的努力成果之一。」他還指出，東江在參與獎項前會預先進行內部評比，選取較為突出的作品參賽，更設立了「激勵機制」，按不同作品、不同工序表揚參與技術人員的貢獻。

2010年，東江在蘇州建立了新的注塑廠，是集團進入長三角和華東的第一步。翁建翔指出：「雖然東江現時沒有計劃把生產基地北移，但我們必須為未來的業務發展作好部署。事實上，東江在上世紀90年代初已進入珠三角，在技術含量較高的模具業當中可說是『先行一步』。」至於市場拓展方面，由於東江以服務高端市場為主，而內地市場很大程度上仍是以價格競爭主導，因此在短期內仍會專注於海外市場，與當地的先進模具企業競爭；不過翁建翔強調，東江會密切留意內銷市場的發展。



們以製造電腦面板、屏幕等模具為主；到了90年代，內地對『白色家電』的需求大增，多個著名品牌相繼冒起，所以我們把業務重心逐步轉移到電器的『標準』模具；到了約10年前，由於內地模具工廠的技術日趨成熟，競爭激烈，考慮到企業的長遠發展，我們決定轉型至以服務海外市場為主，並發展內地缺乏的先進『精密』模具技術。現時，東江超過90%的模具和注塑產品均出口到海外。」

的擴張模式，意即我們的注塑業務在發展初期獲得模具業務的養分作支援，但在發展到一定水平時便有了獨立生存能力，避免令集團整體陷入發展瓶頸，反過來影響原有的模具業務。事實上，東江的重組也是建基於這一點，務求令企業管理得到優化。」



模具）和兩個『優異獎』（作品：工具箱前後蓋模具和香水盒）。技術主管朝格圖表示：「『卓越營運大獎』講求企業的整體運作，而『最佳模具設計獎』則是以產品為核心的評選；這些獎項是對東江各方面成績的認同。」

他續稱：「我們的金獎作品無疑突顯了我們在『標準』模具方面的既有技術優勢，但更令我們感到鼓舞的，是兩個『精密』模具作品成功奪得優異獎，其中工具箱



INTERVIEW WITH TK MOLD LTD., The Winner of HKMDC Awards 2011 : Tool Design Awards 香港模具協會年獎2011：最佳模具設計大獎得主 東江模具有限公司專訪

Achieving Excellence with Solid Foundation and Concentration

In recent years, competition between the Hong Kong and Mainland mould industries is getting more intense. TK Group Managing Director Michael Yung, Deputy General Manager Godsend Lu and TK Technology (Shenzhen) Ltd Technology Supervisor Robin Chao share the successful experience of the Group, which won the 2010 Hong Kong Mould & Die Council Tool Design Gold Award.

TK Group (former TK Machinery Mold Factory) was founded in 1983, with mould manufacturing as its initial core business. It entered the plastic injection business in 1986 and the scale of operation was further expanded within a few years. Entering the early 1990s, TK consequently relocated its tooling and plastic injection businesses to the Mainland, and made Shenzhen as its management base in 2002. In the same year, TK Group underwent restructuring and a limited company was set up, with its plastic injection, tooling and external trade businesses governed by its respective subsidiaries.



Michael Yung, Managing Director of TK Group, points out that suitable business adjustment according to changes in the operational environment is a key to TK Group's success. He says, "At the initial stage of TK Group's foundation, Hong Kong and Taiwan's information technology (IT) industry was heading towards its peak. As such, we focused on manufacturing covers and screens for computers. Reaching the 1990s, with the surging demand for 'white goods' and the emergence of celebrated brands, TK Group slowly moved its business focus to 'standard' moulds for electrical appliances. Lastly, about 10 years ago, foreseeing that techniques adopted by Mainland mould factories would become more mature with more intense competition to come, we decided to transform ourselves to serve overseas markets

and developed 'precision' mould technologies that were not yet fully explored in the Mainland. This was for the sake of TK Group's long-term development and for now, over 90 per cent of our mould and plastic injection products are exported."

Customer-oriented and Value-added Services

TK Group stressed on systemic operations in order to strive for excellence in both "standard" and "precision" moulds. Deputy General Manager Godsend Lu says, "Traditionally, mould-making relies on the skills of individual masters and craftsmen, but modern enterprises cannot survive without standardisation and economy of scale. On the other hand, there is a vast difference between 'standard' and 'precision' moulds in terms of product design, engineering and technology, as well as production management and certification. A product-oriented manufacturing system is thus necessary."

For example, technologies regarding "standard" moulds are more mature and it is easy to fulfil product requirements. Amendments can also be made in between the manufacturing process. However, "precision" moulds mainly serve high-end products, where safety, stability and precision are of utmost importance. One cannot make any mistake either, right from the beginning of the design stage. As Mr Lu points out, "Our aim is to achieve excellence in different market segments, offering quality service and added-value to our customers. In fact, many customers came back to us for business after a short departure as they found that virtually no other companies could fulfil their requirements." He also mentioned that during the global financial crisis in 2008, despite the drop in



the number of customers, product value actually increased. This shows the success of TK Group's customer-oriented strategy.

TK Group's tooling and plastic injection businesses maintain close relationships with each other while earning capabilities of their own development. Mr Yung illustrates, "We adopted a mode of expansion like that of a banyan tree. While our injection business relied on the support of our tooling business at an early stage, it gained the capability of survival soon afterwards. This prevented the emergence of a development bottleneck which would have affected the core tooling business. In fact, TK Group's restructuring was also based on this, with the aim of streamlining corporate management."

Developing with the Company

When elaborating on the Group motto of "Developing with the Company", Mr Yung stressed that it is not a grand idea but a natural rule that aims to do the right thing at the right moment and establish positive ethics throughout the whole Group, which in turn brings benefits to society, the enterprise, staff members, providers as well as customers. He says, "Taking staff as an example, TK Group insists on hiring staff members solely based on their skills and talents, and they are given the best chance to demonstrate their capabilities. We try our best to provide a platform for fair competition, where staff can receive good training and engage in personal development with the outstanding ones being promoted." He especially points out that TK Group does not distinguish Hong Kong and Mainland staff, which is important for group solidarity.

Mr Lu adds, "We regard that appropriate movement of talents is a natural and healthy phenomenon, and we will not blame anyone when an error occurs or a staff member chooses to leave. Rather, we will pay attention to why things happened that way and listen to staff's opinions in order to make improvements. In fact, our former staff members are welcomed by other companies, which indicates our high reputation as an employer." A performance-based culture for both the enterprise and the staff members is the biggest power of advancement for TK Group.

Quality Products and Embrace the Future

TK Group has actively participated in the award schemes held by the Hong Kong Mould & Die Council (HKMDC) in the past few

mould products that successfully obtained the Certificate of Merit. Among them, the Toolbox Covers (Front and Back) have adopted the 'tandem mould' technology that enables simultaneous manufacturing of the front and back covers, and the Perfume Box has used an 8+8 palletising die. Both have effectively improved manufacturing efficiency and quality, and have showcased TK Group's recent achievement in the field of 'precision' mould." He also illustrates that TK Group has launched a pre-selection process in order to pick the outstanding products for HKMDC's award selection. An internal "motivate mechanism" is also established that recognises staff based on their responsible projects and production processes.

In 2010, TK Group set up a new plastic injection factory in Suzhou, which is the company's first facility in Eastern China and the YRD region. Mr Yung says, "Although currently TK Group does not plan to relocate the whole production base northward, we have to prepare well for the future. Indeed, TK Group moved from Hong Kong to PRD in the 1990s, far ahead of others in the Hong Kong mould and die industry which is technology-intensive." As for market development, since TK Group mainly serves the high-end market and a large part of the Mainland market is still focused on price competition, it will continue to focus on its overseas business and compete with advanced companies there in the short term. However, Mr Yung stresses that TK Group will pay close attention to the development of the domestic market.



years. It was granted the Operation Excellence Award in 2006, and it continued the successful story by winning the Tool Design Gold Award (Product: Drum of Washing Machine) and two Certificates of Merit (Products: Toolbox Covers (Front and Back) and Perfume Box) in 2010. Technology Supervisor Robin Chao says, "The Operation Excellence Award focuses on the overall operation of an enterprise, whereas the Tool Design Award is a product-based recognition. These awards show that TK Group's achievements in various aspects are well recognised."

He continues, "The Gold Award product undoubtedly demonstrates our long lasting competitive advantage in 'standard' moulds, but we are even more encouraged by the two 'precision'



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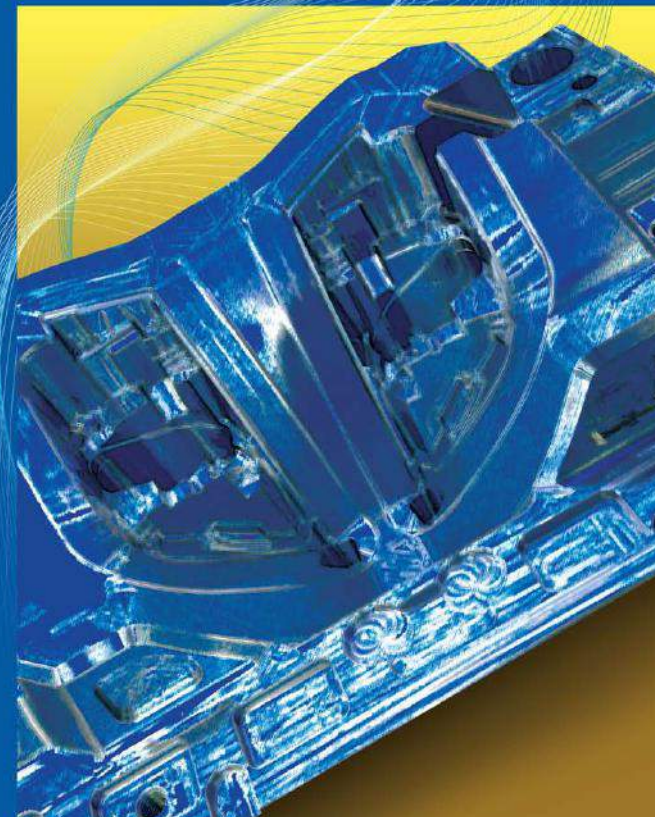
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國際同儕 模具商機聚廣州

香港模具協會本年度再度與廣州光亞法蘭克福展覽有限公司及Euromold主辦方—德國DEMAT展覽公司合作，在2011年9月21至23日假廣州保利世貿博覽館攜手打造第五屆asiamold 2011—廣州國際模具應用與設計及製造技術展覽會，並取得空前成功。

asiamold是著名的歐洲模具展Euromold的姊妹展，本年吸引了接近300多家公司參與asiamold 2011，當中不少模具協會會員。展覽成功吸引全球來自42個國家及地區、共9,655名人士進場參觀，為模具製造業提供一個國際性的商貿平台，商拓展更多商機。

多角度展示實力

香港的模具業界精益求精，力臻完美，致力提升技術，投入大量資源引進各類高科技設備，提升行業競爭力。近年更涉足多元化、質優的高科創新產品，生產的模具及相關產品質素持續上升，加上價格合理，深受全球客戶歡迎，蜚聲國際。



有見及此，香港模具協會特別於asiamold 2011設立HK Gallery「香港展覽廊」，向國際展示本地模具業的技術、卓越工藝和創新思維，建立香港模具業的專業形象。HK Gallery設於展館中央位置，人流極佳，展品豐富，包括靜態的小型模具展區和動態的「注塑模具製作工作坊」，分別展出本地製造的模具及模具樣板、熱流道及電鍍產品和即場示範最先進的注塑技術，為業內的模具公司，特別是中小企締造良機，藉asiamold推廣新技術和產品，提升他們在國際間的知名度。

再者，珠三角地區是亞洲最大的模具生產基地，不少國內買家親臨會場物色模具供應商，不少參展企業也表示透過asiamold 2011這個參展平台，加強了企業在國內的知名度，並建立更多業務聯繫，為企業進軍內地市場奠定基礎。

asiamold 2011舉辦期間，本會於接待了一個30多人的日本模具業考察團。他們在2011年9月20日本會會員廣州導新模具注塑有限公司參觀，瞭解香港模具製造業的技術水平，互相交流切磋，探討合作空間。

Global Counterparts gathering in Guangzhou

With joint efforts from Hong Kong Mould & Die Council (HKMDC), Guangzhou Guangya Messe Frankfurt Co Ltd and DEMAT, organiser of Euromold, the 5th asiamold 2011 exhibition was once again successfully held at the Poly World Trade Centre Expo (Pazhou), Guangzhou from 21 to 23 September.

asiamold 2011, the Asian equivalent of the renowned euromold trade fair, attracted over 300 exhibitors, 9,655 visitors and 270 exhibitors from all over the world; and it is definitely an ideal platform for industry players to develop networks and explore business collaboration.

Hong Kong Gallery – an ideal platform to showcase the industry's excellence

To strive for betterment and competitiveness of the industry, Hong Kong mould makers are devoting extra effort in upgrading technology and investing state-of-the-art equipment to stay ahead of the curve. Standards of Hong Kong tooling products are continually on the rise and manufacturing a wide range of high-tech products of exceptional quality, which have gained global reputation.

As such, the HK Gallery was set up by the Hong Kong Mould & Die Council this year to showcase their leading technology, outstanding craftsmanship and the full play of creativity to foster the professional image of the mould and die industry in Hong Kong. Located at the heart of the exhibition hall, Hong Kong Gallery displayed a diversified series of technologically-advanced exhibits from our members; not only many moulds and samples were presented, but also the highlights of the Gallery – the plastic injection automation machine to showcase our expertise, and the booth received overwhelming response from visitors.



The PRD region has gradually developed to the largest mould and die manufacture hub in the world, and attracted potential buyers to come over to Guangzhou and visited the asiamold trade show to seek suitable partners. It is of definite that Hong Kong Gallery is an ideal spring board for enterprises to tap into the mainland market.

Hong Kong Mould & Die Council received a Japan delegation with over 30 industry players at Guangzhou during asiamold 2011. On 20 September, they visited Datamatic CNC Engineering Co. Ltd., one of our members which stationed at Guangzhou to see the technology level of Hong Kong mould and die industry and investigate co-operation opportunities.



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