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行業集中度統計數字
Statistics on Sectoral Concentration

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Statistics on Sectoral Concentration

根據政府統計處進行的經濟活動按年統計調查結果可編製多種統計指標，用以分析香港各經濟行業的營商情況及表現。當中，行業集中度統計數字可顯示個別行業的業務集中程度。

本文參考以業務收益計算的 2019 年及 2020 年行業集中率及赫芬達爾指數統計數字，分析香港選定經濟行業的業務集中程度。它是在過往年份就此課題所發布的同類文章的更新版。

A wide range of statistical indicators can be compiled from the results of the Annual Survey of Economic Activities conducted by the Census and Statistics Department for analysing the business situation and performance of various economic sectors in Hong Kong. Among others, statistics on sectoral concentration can throw light on the extent of business concentration within individual sectors.

This article analyses the extent of business concentration in selected economic sectors of Hong Kong by making reference to the Concentration Ratios and Herfindahl-Hirschman Indices compiled in terms of business receipts in 2019 and 2020. It is an update of similar articles on the same subject published in preceding years.

如對本文有任何查詢，請聯絡政府統計處經銷服務統計組
(電話：(852) 3903 7398；電郵：asw@censtatd.gov.hk)。

Enquiries on this article may be directed to the Distribution Services Statistics Section,
Census and Statistics Department
(Tel. : (852) 3903 7398; E-mail : asw@censtatd.gov.hk).

行業集中度統計數字

Statistics on Sectoral Concentration

1. 引言

1.1 根據政府統計處進行的經濟活動按年統計調查結果可編製多種統計指標，用以分析香港各經濟行業的營商情況及表現。當中，行業集中度統計數字可顯示個別行業的業務集中程度。

1.2 就一個行業而言，行業集中度統計數字顯示該行業內一個設定數目的大型機構單位在行業內按某特定經濟活動量數所計算的佔有率。文章內的行業集中度統計數字是按「行業」所編製的，它們並不一定適合用作反映市場競爭的指標。因此在許多情況下，以本文內的行業集中度統計數字作為市場競爭程度的概略指標是不適當的。應注意以下有關「行業」與「市場」的分別：

- (i) 部分在本地市場出售的產品是進口的，而部分本地生產的產出是作為出口的。因此，市場的整體規模與本地生產的規模，以及個別機構單位的市場佔有率與其在本地生產的佔有率，均可能存在很大的差別。這個因素對像香港般細小而開放的經濟體而言，尤其重要；
- (ii) 個別行業或許因生產／售賣／提供多種不同的產品／服務而被包括在多於一個市場之內；以及
- (iii) 多個行業可能參與生產／售賣／提供同一種產品／服務；有時多個行業所生產／售賣／提供的不同產品／服務有高度替代性，因而只形成單一市場。

1. Introduction

1.1 A wide range of statistical indicators can be compiled from the results of the Annual Survey of Economic Activities conducted by the Census and Statistics Department for analysing the business situation and performance of various economic sectors in Hong Kong. Among others, statistics on sectoral concentration (SSC) can throw light on the extent of business concentration within individual sectors.

1.2 For an industry, SSC indicate the share of a given number of large establishments in the industry in terms of a specific measure of economic activity. SSC in this article are compiled on an “industry” basis and they may not necessarily be applicable for use as indicators of market competition. Therefore, using SSC in this article as proxy indicator of competition situation in the market would not be appropriate in many circumstances. The following differences between “industry” and “market” should be noted:

- (i) some of the products for sale in the local market are imported, and some of the outputs of local production are for exports. The result is that the overall size of the market could be very different from the size of local production, and that the shares of individual establishments in the market could be very different from their shares in local production. This factor is particularly significant in a small and open economy like Hong Kong;
- (ii) an industry may produce/sell/provide more than one product/service, and thus possibly embrace more than one market; and
- (iii) several industries may be involved in the production/sales/provision of the same product/service; sometimes different products/services produced/sold/provided by several industries are close substitutes, and thus constitute only one single market.

1.3 政府統計處曾於 2020 年 8 月出版的《香港統計月刊》的專題文章，參考以業務收益計算的 2017 年及 2018 年行業集中率（CR）及赫芬達爾指數（HHI）統計數字，分析香港選定經濟行業的業務集中程度。本文是該專題文章的更新版，展示 2019 年及 2020 年的數字。CR 及 HHI 的數值越高，顯示行業集中度越大。有關 CR 及 HHI 的詳細概念，請參閱刊載於《香港統計月刊》2016 年 10 月號的相關專題文章。

2. 香港的行業集中度

2.1 表 1 至 5 分別展示選定經濟行業以業務收益計算的首 10、20 及 50 間機構單位的 CR 以及 HHI。以下各段是參考 2019 年及 2020 年各主要經濟行業的 CR 及 HHI 數字，對有關業務集中度的情況所作的分析。

(i) 工業

2.2 從表 1 可見，2020 年金屬製品、機械及設備製造業的業務集中度最高，首 10 間及首 50 間機構單位分別佔該行業約 93% 及 97% 的業務收益。（表 1）

(ii) 屋宇建築、建造及地產業

2.3 在 2020 年，地產經紀及代理以及其他地產服務的業務集中度最高，首 10 間及首 50 間機構單位分別佔該行業約 72% 及 80% 的業務收益。（表 2）

1.3 A feature article analysing the extent of business concentration in selected economic sectors of Hong Kong, making reference to the Concentration Ratios (CR) and Herfindahl-Hirschman Indices (HHI) compiled in terms of business receipts in 2017 and 2018, was published in the August 2020 issue of the *Hong Kong Monthly Digest of Statistics (HKMDS)*. This article is an updated version of that article, presenting figures for 2019 and 2020. Higher values of CR and HHI indicate greater sectoral concentration. For the detailed concepts on CR and HHI, please refer to the relevant feature article published in the October 2016 issue of *HKMDS*.

2. Sectoral concentration in Hong Kong

2.1 In terms of business receipts, the respective CR for the leading 10, 20 and 50 establishments as well as HHI for selected economic sectors are presented in Tables 1 to 5. The extent of business concentration by major economic sector is analysed in the following sections with reference to CR and HHI in 2019 and 2020.

(i) Industrial sector

2.2 As noted from Table 1, manufacturing of metal products, machinery and equipment had the highest business concentration in 2020. The top 10 and top 50 establishments constituted about 93% and 97% of the industry share of business receipts respectively. (Table 1)

(ii) Building, construction and real estate sectors

2.3 In 2020, real estate brokerage and agency, and other real estate services not elsewhere classified had the highest business concentration. The top 10 and top 50 establishments constituted about 72% and 80% of the industry share of business receipts respectively. (Table 2)

表 1 2019 年及 2020 年按工業選定行業組別劃分的集中率及赫芬達爾指數
Table 1 Concentration Ratios (CR) and Herfindahl-Hirschman Indices (HHI) in selected industry groups in the industrial sector, 2019 and 2020

香港標準行業 分類 2.0 版 編碼 ⁽¹⁾ HSIC V2.0 code(1)	選定行業組別 Selected industry group	年 Year	機構單位數目 Number of establishments	集中率 CR			赫芬 達爾 指數 HHI
				首 10 大 CR ₁₀	首 20 大 CR ₂₀	首 50 大 CR ₅₀	
10-12	食品、飲品及煙草製品業 Manufacturing of food, beverages and tobacco	2019	1 118	0.39	0.53	0.71	0.022
		2020	1 104	0.46	0.59	0.76	0.030
13-14	紡織製品及成衣製造業 Manufacturing of textiles and wearing apparel	2019	640	0.45	0.54	0.76	0.029
		2020	598	0.36	0.45	0.57	0.040
17-18	紙製品、印刷及已儲錄資料媒體的複製業 Manufacturing of paper products, printing and reproduction of recorded media	2019	1 877	0.35	0.42	0.51	0.032
		2020	1 765	0.39	0.46	0.54	0.036
19-23	化學、橡膠、塑膠及非金屬礦產製品業 Manufacturing of chemical, rubber, plastics and non-metallic mineral products	2019	657	0.47	0.61	0.82	0.043
		2020	628	0.51	0.66	0.85	0.038
24-25, 28-30, 33	金屬製品、機械及設備製造業 Manufacturing of metal products, machinery and equipment	2019	1 573	0.92	0.94	0.96	0.222
		2020	1 483	0.93	0.95	0.97	0.230
26-27	電器、電子及光學製品業 Manufacturing of electrical, electronic and optical products	2019	173	0.71	0.84	0.93	0.080
		2020	170	0.66	0.82	0.98	0.094
15-16, 31-32	其他製造行業 Other manufacturing industries	2019	1 214	0.70	0.74	0.80	0.223
		2020	1 109	0.47	0.55	0.64	0.050
37-39	污水處理、廢棄物管理及污染防治活動 Sewerage, waste management and remediation activities	2019	326	0.70	0.88	0.94	0.074
		2020	332	0.64	0.85	0.94	0.066

註釋： CR_n 以業務收益計算首 n 間機構單位的集中率。

(1) 「香港標準行業分類 2.0 版」於 2008 年 10 月推出，並於 2009 年度的經濟活動按年統計調查開始使用。有關「香港標準行業分類 2.0 版」的詳情，請參閱刊載於《香港統計月刊》2008 年 11 月號的相關專題文章。

Notes : CR_n Concentration Ratio of the top n establishments in terms of business receipts.

(1) The Hong Kong Standard Industrial Classification Version 2.0 (HSIC V2.0) was introduced in October 2008 and has been used as from the 2009 round of Annual Survey of Economic Activities. For details of the HSIC V2.0, please refer to the relevant feature article published in the November 2008 issue of *HKMDS*.

表 2 2019 年及 2020 年按屋宇建築、建造及地產業選定行業組別劃分的集中率及赫芬達爾指數

Table 2 Concentration Ratios and Herfindahl-Hirschman Indices in selected industry groups in the building, construction and real estate sectors, 2019 and 2020

香港標準行業 分類 2.0 版 編碼 HSIC V2.0 code	選定行業組別 Selected industry group	年 Year	機構單位數目 Number of establishments	集中率 CR			赫芬 達爾 指數 HHI
				首 10 大 CR ₁₀	首 20 大 CR ₂₀	首 50 大 CR ₅₀	
41-42	樓房的建造及土木工程 Construction of building and civil engineering	2019	1 317	0.33	0.51	0.71	0.017
		2020	1 466	0.29	0.43	0.65	0.014
43	專門建造活動 Specialised construction activities	2019	23 504	0.12	0.19	0.29	0.003
		2020	24 473	0.14	0.21	0.32	0.004
6811-6813	地產發展及／或租賃 Real estate development and/or leasing	2019	6 327	0.46	0.60	0.79	0.028
		2020	6 921	0.42	0.58	0.77	0.030
6822	地產保養管理服務 Real estate maintenance management	2019	803	0.55	0.67	0.80	0.039
		2020	905	0.45	0.57	0.71	0.026
6821, 6829	地產經紀及代理以及其他地產服務 Real estate brokerage and agency, and other real estate services not elsewhere classified	2019	3 111	0.62	0.67	0.74	0.085
		2020	3 074	0.72	0.77	0.80	0.116
711	與建造及地產活動相關的建築、測量及工 程服務 Architectural, surveying and engineering services related to real estate and construction	2019	2 304	0.40	0.52	0.71	0.040
		2020	2 321	0.39	0.53	0.72	0.039

(iii) 進出口貿易、批發及零售業以及住宿及膳食服務業

2.4 進出口貿易、批發及零售業以及住宿及膳食服務業內各行業組別的業務集中度普遍相當有限。然而，燃料零售業（2020 年的 CR₁₀ 及 HHI 分別為 0.84 及 0.197）及快餐店（0.82 及 0.145）均展示着較高業務集中度的行業組別。（表 3）

(iii) Import/export, wholesale and retail trades, and accommodation and food services sectors

2.4 The extent of business concentration was generally quite limited in various industry groups in the import/export, wholesale and retail trades, and accommodation and food services sectors. Retail of fuel (CR₁₀ and HHI for 2020 at 0.84 and 0.197 respectively) and fast food shops (0.82 and 0.145) were however the industry groups showing higher business concentration. (Table 3)

表3 2019年及2020年按進出口貿易、批發及零售業以及住宿及膳食服務業選定行業組別劃分的集中度及赫芬達爾指數

Table 3 Concentration Ratios and Herfindahl-Hirschman Indices in selected industry groups in the import/export, wholesale and retail trades, and accommodation and food services sectors, 2019 and 2020

香港標準行業 分類 2.0 版 編碼 HSIC V2.0 code	選定行業組別 Selected industry group	年 Year	機構單位數目 Number of establishments	集中度 CR			赫芬 達爾 指數 HHI
				首 10 大 CR ₁₀	首 20 大 CR ₂₀	首 50 大 CR ₅₀	
45	進出口貿易業 Import/export trade	2019	74 600	0.11	0.16	0.25	0.002
		2020	74 178	0.13	0.17	0.24	0.003
	其中： Of which:						
451201,	食品、酒類飲品及煙草進出口貿易業 Import/export of food, alcoholic drinks and tobacco	2019	4 763	0.15	0.20	0.33	0.004
4513, 452201, 4523		2020	4 722	0.16	0.22	0.28	0.004
451401- 451405, 452401- 452405	衣物、鞋類及有關製品進出口貿易業 Import/export of clothing, footwear and allied products	2019	11 910	0.17	0.24	0.34	0.005
		2020	11 667	0.20	0.26	0.35	0.006
46	批發業 Wholesale	2019	13 270	0.13	0.17	0.26	0.003
		2020	13 065	0.14	0.19	0.31	0.004
	其中： Of which:						
460201,	食品、酒類飲品及煙草批發業 Wholesale of food, alcoholic drinks and tobacco	2019	3 508	0.13	0.17	0.26	0.004
4603		2020	3 336	0.14	0.21	0.31	0.005
460401- 460405	衣物、鞋類及有關製品批發業 Wholesale of clothing, footwear and allied products	2019	1 286	0.13	0.18	0.27	0.005
		2020	1 213	0.15	0.19	0.31	0.005
47	零售業 Retail	2019	42 751	0.23	0.33	0.48	0.008
		2020	42 586	0.25	0.35	0.50	0.010
	其中： Of which:						
4711,	食品、酒類飲品及煙草零售業 Retail of food, alcoholic drinks and tobacco	2019	9 753	0.62	0.69	0.76	0.071
4721-4723		2020	9 772	0.64	0.71	0.77	0.095
4731-4733	燃料零售業 Retail of fuel	2019	185	0.84	0.89	0.94	0.198
		2020	188	0.84	0.90	0.94	0.197
部分 Part of 4751, 4771	衣物、鞋類及有關製品零售業 Retail of clothing, footwear and allied products	2019	8 309	0.33	0.43	0.60	0.018
		2020	8 098	0.32	0.44	0.63	0.017
4773	運輸設備零售業 Retail of transport equipment	2019	950	0.66	0.81	0.88	0.081
		2020	884	0.64	0.77	0.89	0.067

表 3 (續)

2019 年及 2020 年按進出口貿易、批發及零售業以及住宿及膳食服務業選定行業組別劃分的集中率及赫芬達爾指數

Table 3 (cont'd)

Concentration Ratios and Herfindahl-Hirschman Indices in selected industry groups in the import/export, wholesale and retail trades, and accommodation and food services sectors, 2019 and 2020

香港標準行業 分類 2.0 版 編碼 HSIC V2.0 code	選定行業組別 Selected industry group	年 Year	機構單位數目 Number of establishments	集中率 CR			赫芬 達爾 指數 HHI
				首 10 大 CR ₁₀	首 20 大 CR ₂₀	首 50 大 CR ₅₀	
55	住宿服務業(1) Accommodation services(1)	2019	1 065	0.24	0.39	0.67	0.012
		2020	1 045	0.24	0.38	0.63	0.011
56	膳食服務業 Food services	2019	15 053	0.19	0.25	0.31	0.006
		2020	14 665	0.21	0.28	0.35	0.008
	其中： Of which:						
561101,	中式餐館及酒樓	2019	4 910	0.14	0.16	0.19	0.005
561109- 561111	Chinese restaurants	2020	4 592	0.14	0.16	0.20	0.004
5612,	快餐店	2019	895	0.81	0.85	0.88	0.132
561902	Fast food shops	2020	847	0.82	0.86	0.89	0.145

註釋：(1) 住宿服務業包括酒店、賓館、旅舍及其他提供短期住宿服務的機構單位。

Note: (1) Accommodation services sector covers hotels, guesthouses, boarding houses and other establishments providing short term accommodation.

(iv) 運輸、倉庫及速遞服務業

2.5 航空運輸業（2020 年的 CR₁₀ 及 HHI 分別為 0.95 及 0.425）、速遞活動（0.88 及 0.150），以及水上運輸業（0.78 及 0.214）的 CR₁₀ 及 HHI 數值較高，顯示這些行業組別的業務集中度較業內其他組別為大。（表 4）

(iv) Transportation, storage and courier services sector

2.5 Higher values of CR₁₀ and HHI observed in air transport (CR₁₀ and HHI for 2020 at 0.95 and 0.425 respectively), courier activities (0.88 and 0.150) and water transport (0.78 and 0.214) indicated that the business of these industry groups was more concentrated than other groups in the sector. (Table 4)

表 4 2019 年及 2020 年按運輸、倉庫及速遞服務業選定行業組別劃分的集中率及赫芬達爾指數

Table 4 Concentration Ratios and Herfindahl-Hirschman Indices in selected industry groups in the transportation, storage and courier services sector, 2019 and 2020

香港標準行業 分類 2.0 版 編碼 HSIC V2.0 code	選定行業組別 Selected industry group	年 Year	機構單位數目 Number of establishments	集中率 CR			赫芬 達爾 指數 HHI
				首 10 大 CR ₁₀	首 20 大 CR ₂₀	首 50 大 CR ₅₀	
49	陸路運輸業 Land transport	2019	18 794	0.53	0.57	0.63	0.131
		2020	18 735	0.47	0.51	0.56	0.082
50	水上運輸業 Water transport	2019	713	0.74	0.82	0.90	0.187
		2020	716	0.78	0.86	0.92	0.214
51	航空運輸業 Air transport	2019	114	0.98	0.99	##	0.483
		2020	107	0.95	0.98	##	0.425
52	貨倉及運輸輔助活動 Warehousing and support activities for transportation	2019	5 918	0.25	0.33	0.47	0.013
		2020	6 044	0.25	0.36	0.51	0.009
532	速遞活動 Courier activities	2019	444	0.88	0.94	0.98	0.159
		2020	449	0.88	0.93	0.97	0.150

註釋：## CR_n ≥ 0.995。

Note: ## CR_n ≥ 0.995.

(v) 資訊及通訊、金融及保險、專業及商用服務業

(v) *Information and communications, financing and insurance, professional and business services sectors*

2.6 2020 年人壽保險承保人 (CR₁₀ 及 HHI 分別為 0.84 及 0.092)、非人壽保險承保人 (0.62 及 0.079)、電訊業 (0.62 及 0.056)，以及銀行業 (0.59 及 0.061) 的 CR₁₀ 及 HHI 數值較高，顯示這些行業組別的業務集中度較業內其他組別為大。(表 5)

2.6 Higher values of CR₁₀ and HHI observed in life insurance underwriting (CR₁₀ and HHI at 0.84 and 0.092 respectively), non-life insurance underwriting (0.62 and 0.079), telecommunications (0.62 and 0.056) and banking (0.59 and 0.061) in 2020 indicated that the business of these industry groups was more concentrated than other groups in the sectors. (Table 5)

表 5 2019 年及 2020 年按資訊及通訊、金融及保險、專業及商用服務業選定行業組別劃分的集中率及赫芬達爾指數

Table 5 Concentration Ratios and Herfindahl-Hirschman Indices in selected industry groups in the information and communications, financing and insurance, professional and business services sectors, 2019 and 2020

香港標準行業 分類 2.0 版 編碼 HSIC V2.0 code	選定行業組別 Selected industry group	年 Year	機構單位數目 Number of establishments	集中率 CR			赫芬 達爾 指數 HHI
				首 10 大 CR ₁₀	首 20 大 CR ₂₀	首 50 大 CR ₅₀	
58-63	資訊及通訊業 Information and communications	2019	11 095	0.34	0.46	0.61	0.018
		2020	11 117	0.33	0.46	0.63	0.017
	其中： Of which:						
58-60	出版活動；電影、錄像及電視節目 製作活動、錄音及音樂出版活 動；及節目編製及廣播活動 Publishing activities; motion picture, video and television programme production, sound recording and music publishing activities; and programming and broadcasting activities	2019	3 097	0.37	0.50	0.66	0.023
		2020	3 008	0.40	0.53	0.68	0.025
61	電訊業 Telecommunications	2019	355	0.64	0.79	0.92	0.058
		2020	355	0.62	0.82	0.95	0.056
62-63	資訊科技服務活動；資訊服務活動 Information technology service activities; information service activities	2019	7 643	0.29	0.41	0.56	0.012
		2020	7 753	0.27	0.37	0.52	0.010
6412	銀行業(1) Banking(1)	2019	179	0.61	0.75	0.92	0.071
		2020	188	0.59	0.75	0.91	0.061
64 (不包括 excluding 641), 66 (不 包括 excluding 662)	金融業 (銀行除外) Financing (except banking)	2019	8 929	0.36	0.46	0.59	0.022
		2020	9 078	0.39	0.48	0.60	0.025
	其中： Of which:						
642	投資及控股公司 Investment and holding companies	2019	3 949	0.49	0.59	0.66	0.050
		2020	4 005	0.52	0.62	0.71	0.060
644, 649	信託、基金及相關金融工具及其他金 融服務活動 Trusts, funds and similar financial entities and other financial service activities	2019	1 609	0.57	0.69	0.78	0.044
		2020	1 626	0.56	0.67	0.77	0.042
661, 663	金融服務輔助活動 (保險及退休基金 除外) 及基金管理 Activities auxiliary to financial service activities (except insurance and pension funding) and fund management	2019	3 371	0.44	0.56	0.70	0.029
		2020	3 447	0.44	0.55	0.70	0.031

表 5 (續) 2019 年及 2020 年按資訊及通訊、金融及保險、專業及商用服務業選定行業組別劃分的集中度及赫芬達爾指數

Table 5 (cont'd) Concentration Ratios and Herfindahl-Hirschman Indices in selected industry groups in the information and communications, financing and insurance, professional and business services sectors, 2019 and 2020

香港標準行業 分類 2.0 版 編碼 HSIC V2.0 code	選定行業組別 Selected industry group	年 Year	機構單位數目 Number of establishments	集中度 CR			赫芬 達爾 指數 HHI
				首 10 大 CR ₁₀	首 20 大 CR ₂₀	首 50 大 CR ₅₀	
65, 662	保險業	2019	2 765	0.75	0.86	0.95	0.080
	Insurance	2020	2 780	0.76	0.88	0.96	0.075
	其中： Of which:						
6511, 6520	人壽保險承保人	2019	64	0.84	0.95	##	0.099
	Life insurance underwriting	2020	64	0.84	0.96	##	0.092
6512	非人壽保險承保人	2019	114	0.62	0.80	0.98	0.071
	Non-life insurance underwriting	2020	117	0.62	0.79	0.96	0.079
部分 Part of 6622	保險經紀	2019	785	0.49	0.59	0.72	0.033
	Insurance brokers	2020	779	0.44	0.55	0.68	0.030
6621, 部分 Part of 6622, 6629	保險及退休基金輔助活動 (不包括保險經紀)	2019	1 802	0.40	0.53	0.64	0.022
	Activities auxiliary to insurance and pension funding (except insurance brokers)	2020	1 821	0.43	0.51	0.61	0.025
69-75 (不包 括 excluding 711)	專業、科學及技術活動	2019	27 499	0.12	0.19	0.33	0.003
	Professional, scientific and technical activities	2020	27 478	0.12	0.19	0.32	0.003
	其中： Of which:						
6911-6912	法律活動	2019	2 723	0.29	0.41	0.59	0.012
	Legal activities	2020	2 778	0.29	0.44	0.62	0.013
6921-6922	會計、簿記及核數活動、稅務顧問	2019	5 455	0.54	0.63	0.68	0.036
	Accounting, bookkeeping and auditing activities, tax consultancy	2020	5 574	0.51	0.60	0.64	0.032
74	廣告及市場研究	2019	2 960	0.39	0.49	0.61	0.023
	Advertising and market research	2020	2 863	0.41	0.50	0.64	0.032

表 5 (續)

2019 年及 2020 年按資訊及通訊、金融及保險、專業及商用服務業選定行業組別劃分的集中率及赫芬達爾指數

Table 5 (cont'd) Concentration Ratios and Herfindahl-Hirschman Indices in selected industry groups in the information and communications, financing and insurance, professional and business services sectors, 2019 and 2020

香港標準行業 分類 2.0 版 編碼 HSIC V2.0 code	選定行業組別 Selected industry group	年 Year	機構單位數目 Number of establishments	集中率 CR			赫芬 達爾 指數 HHI
				首 10 大 CR ₁₀	首 20 大 CR ₂₀	首 50 大 CR ₅₀	
77-82	行政及支援服務活動	2019	12 244	0.14	0.21	0.34	0.004
	Administrative and support service activities	2020	12 111	0.17	0.23	0.35	0.005
	其中： Of which:						
77	租賃活動	2019	648	0.35	0.49	0.80	0.026
	Rental and leasing activities	2020	659	0.38	0.52	0.76	0.024
78	就業活動	2019	2 502	0.32	0.41	0.57	0.015
	Employment activities	2020	2 543	0.31	0.40	0.53	0.014
79	旅行代理、代訂服務及相關活動	2019	2 261	0.27	0.38	0.49	0.010
	Travel agency, reservation service and related activities	2020	2 177	0.40	0.47	0.61	0.040

註釋：## CR_n ≥ 0.995。

- (1) 海外銀行本地代表辦事處劃分於銀行業內。但由於這些本地代表辦事處並無業務收益，在計算銀行業的 CR 及 HHI 時，並不包括這些本地代表辦事處。

Notes: ## CR_n ≥ 0.995.

- (1) Local representative offices of foreign banks are classified under the banking industry. However, as they have no business receipts, they are not included in the calculation of CR and HHI of the banking industry.

(vi) 2015 年至 2020 年期間集中率的變動

2.7 因應分析需要，在 2015 年至 2020 年的 5 年間，CR₁₀ 錄得較大變動（即超過 ±0.1）的行業組別按變動情況分為兩組（分別是 CR₁₀ 下跌超過 0.1 及 CR₁₀ 上升超過 0.1）。同時，各組亦會按其 2020 年 CR₁₀ 的數值劃分為三類（分別是高集中度（CR₁₀ ≥ 0.67）、中集中度（0.33 ≤ CR₁₀ < 0.67）及低集中度（CR₁₀ < 0.33））。

(vi) Changes in CR between 2015 and 2020

2.7 To facilitate analysis, industry groups with larger changes in CR₁₀ value (i.e. more than ±0.1) during the 5-year period between 2015 and 2020 are classified into two categories (viz. CR₁₀ with value decreased by more than 0.1 and CR₁₀ with value increased by more than 0.1). Meanwhile, they are also classified into three categories according to the CR₁₀ value in 2020 (viz. high concentration (CR₁₀ ≥ 0.67), medium concentration (0.33 ≤ CR₁₀ < 0.67) and low concentration (CR₁₀ < 0.33)).

2.8 表 6 顯示各選定行業組別同時按上述兩個準則分類下的分布情況。2015 年至 2020 年期間有 3 個行業組別的 CR₁₀ 數值超過 ±0.1 的變動。其中，其他製造行業 (-0.32) 錄得最大的變動。(表 6)

2.9 應注意的是，分析行業集中度統計數字應着重於不同時間的比較而非跨行業的比較，因為行業間的規模可能差異很大，而較小規模的行業的 CR 數值一般會較大。

2.8 Table 6 shows the distribution of selected industry groups when both classification criteria mentioned above are applied simultaneously. It was found that there were 3 industry groups with changes of more than ±0.1 in CR₁₀ value between 2015 and 2020. Among them, other manufacturing industries (-0.32) recorded the largest change. (Table 6)

2.9 It should be noted that analysis of the SSC should focus on temporal comparison rather than cross-industry comparison, because the size of individual industries may differ widely from one another, and smaller-sized industries generally tend to have higher values of CR.

表 6 按 2020 年首 10 大機構單位集中度組別及 2015 年至 2020 年期間首 10 大機構單位集中率的變動情況劃分的選定行業組別
Table 6 Selected industry groups by 2020 CR₁₀ group and direction of change in CR₁₀ between 2015 and 2020

2020 年 首 10 大機構單位 集中度組別 2020 CR ₁₀ group	2015 年至 2020 年期間首 10 大機構單位集中率的變動情況 Direction of change in CR ₁₀ between 2015 and 2020			
	數值下跌超過 0.1 的 首 10 大機構單位集中度 CR ₁₀ with value decreased by more than 0.1		數值上升超過 0.1 的 首 10 大機構單位集中度 CR ₁₀ with value increased by more than 0.1	
	按香港標準行業分類 2.0 版編碼界定的行業組別 Industry groups defined in terms of HSIC V2.0 codes	變動 Change	按香港標準行業分類 2.0 版編碼界定的行業組別 Industry groups defined in terms of HSIC V2.0 codes	變動 Change
高集中度 High concentration (CR ₁₀ ≥ 0.67)	-	-	-	-
中集中度 Medium concentration (0.33 ≤ CR ₁₀ < 0.67)	15-16, 31-32	-0.32	26-27 6512	+0.22 +0.29
低集中度 Low concentration (CR ₁₀ < 0.33)	-	-	-	-

註釋：有關表 6 所示各「香港標準行業分類 2.0 版」編碼所代表的選定行業組別名稱，請參閱表 1 至 5。
 - 不適用。

Notes: Descriptions of industry groups corresponding to HSIC V2.0 codes shown in Table 6 can be found in Tables 1 to 5.
 - Not applicable.