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

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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 2023 年及 2024 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 2023 and 2024. It is an update of similar articles on the same subject published in preceding years.

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行業集中度統計數字

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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反映該行業內一個設定數目的大型公司在特定經濟活動指標中的佔比。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，以及個別公司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 (C&SD) 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 companies 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. Therefore, the overall size of the market could be very different from the size of local production, and the shares of individual companies in the market could also 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 2024 年 9 月出版的專題文章，參考以業務收益計算的 2021 年及 2022 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 2023 年及 2024 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，請參閱統計處 2016 年 10 月出版的「行業集中度統計數字」專題文章。用戶可以在統計處網站 (www.censtatd.gov.hk/tc/EIndexbySubject.html?pcode=FA100084&scode=310) 下載該刊物。

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 間公司的 CR 以及 HHI。以下各段是參考 2023 年及 2024 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) 製造及廢棄物管理業

2.2 從表 1 可見，2024 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 間公司分別佔該行業約 96% 及 98% 的業務收益。（表 1）

(ii) 屋宇建築、建造及地產業

2.3 在 2024 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 間公司分別佔該行業約 71% 及 83% 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 2021 and 2022, was published by the C&SD in September 2024. This article is an updated version of that article, presenting figures for 2023 and 2024. 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 entitled "Statistics on Sectoral Concentration" published by the C&SD in October 2016. Users can download the publication at the C&SD website (www.censtatd.gov.hk/en/EIndexbySubject.html?pcode=FA100084&scode=310).

2. Sectoral concentration in Hong Kong

2.1 In terms of business receipts, the respective CR for the leading 10, 20 and 50 companies 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 2023 and 2024.

(i) *Manufacturing and waste management sectors*

2.2 As noted from Table 1, manufacturing of metal products, machinery and equipment had the highest business concentration in 2024. The top 10 and top 50 companies constituted about 96% and 98% of the industry share of business receipts respectively. (Table 1)

(ii) *Building, construction and real estate sectors*

2.3 In 2024, real estate brokerage and agency, and other real estate services not elsewhere classified had the highest business concentration. The top 10 and top 50 companies constituted about 71% and 83% of the industry share of business receipts respectively. (Table 2)

表 1 2023 年及 2024 年按製造及廢棄物管理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 manufacturing and waste management sectors, 2023 and 2024

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	公司數目 Number of companies	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、飲品及煙草製品製造業 Manufacturing of food, beverages and tobacco	2023	1 255	0.41	0.56	0.74	0.025
		2024	1 342	0.40	0.54	0.73	0.024
13-14	紡織製品及成衣製造業 Manufacturing of textiles and wearing apparel	2023	503	0.56	0.64	0.79	0.066
		2024	480	0.53	0.60	0.80	0.070
17-18	紙製品、印刷及已儲錄資料媒體的複製製 造業 Manufacturing of paper products, printing and reproduction of recorded media	2023	1 511	0.21	0.26	0.39	0.007
		2024	1 458	0.22	0.31	0.49	0.009
19-23	化學、橡膠、塑膠及非金屬礦產製品製造 業 Manufacturing of chemicals, rubber, plastics and non-metallic mineral products	2023	587	0.49	0.71	0.85	0.036
		2024	569	0.50	0.69	0.87	0.034
24-25, 28-30, 33	金屬製品、機械及設備製造業 Manufacturing of metal products, machinery and equipment	2023	1 445	0.92	0.95	0.97	0.284
		2024	1 403	0.96	0.97	0.98	0.325
26-27	電器、電子及光學製品製造業 Manufacturing of electrical, electronic and optical products	2023	148	0.71	0.82	0.91	0.093
		2024	139	0.69	0.77	0.87	0.118
15-16, 31-32	其他製造行業 Other manufacturing industries	2023	997	0.42	0.54	0.66	0.017
		2024	948	0.27	0.46	0.67	0.012
37-39	污水處理、廢棄物管理及污染防治活動 Sewerage, waste management and remediation activities	2023	419	0.67	0.79	0.85	0.062
		2024	451	0.59	0.74	0.87	0.045

註釋： CR_n 以業務收益計算首 n 間公司的集中率。

(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，請參閱統計處出版的「修訂香港標準行業分類」專題文章。用戶可以在統計處網站 (www.censtatd.gov.hk/tc/EIndexbySubject.html?pcode=FA000008&scode=452) 下載該刊物。

Notes : CR_n Concentration Ratio of the top n companies 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 entitled "Revision of the Hong Kong Standard Industrial Classification" published by the C&SD. Users can download the publication at the C&SD website (www.censtatd.gov.hk/en/EIndexbySubject.html?pcode=FA000008&scode=452).

表 2 2023 年及 2024 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, 2023 and 2024

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	公司數目 Number of companies	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	2023	1 654	0.39	0.55	0.72	0.022
	Construction of buildings and civil engineering	2024	1 646	0.41	0.56	0.73	0.023
43	專門建造活動	2023	25 549	0.12	0.19	0.30	0.003
	Specialised construction activities	2024	24 373	0.10	0.17	0.26	0.002
6811-6813	地產發展兼／或租賃	2023	7 679	0.44	0.60	0.83	0.034
	Real estate development and/or leasing	2024	7 957	0.45	0.62	0.80	0.032
6822	地產保養管理服務	2023	918	0.50	0.64	0.74	0.033
	Real estate maintenance management	2024	886	0.52	0.65	0.76	0.035
6821, 6829	地產經紀及代理以及其他地產服務	2023	2 876	0.66	0.71	0.78	0.086
	Real estate brokerage and agency, and other real estate services not elsewhere classified	2024	2 705	0.71	0.78	0.83	0.094
711	與建造及地產活動相關的建築、測量及工 程服務	2023	2 422	0.39	0.48	0.61	0.034
	Architectural, surveying and engineering services related to real estate and construction	2024	2 439	0.40	0.50	0.63	0.036

**(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，快餐店（2024 年的 CR₁₀ 及 HHI 分別為 0.79 及 0.148）及燃料零售（0.83 及 0.379）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. Fast food shops (CR₁₀ and HHI for 2024 at 0.79 and 0.148 respectively) and retail sale of fuel (0.83 and 0.379) were however the industry groups showing higher business concentration. (Table 3)

表 3 2023 年及 2024 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, 2023 and 2024

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	公司數目 Number of companies	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	2023	75 028	0.19	0.25	0.34	0.007
	Import/export trade	2024	69 315	0.23	0.28	0.37	0.016
	其中： Of which:						
	451201, 食品、酒類飲品及煙草進出口貿易	2023	5 466	0.11	0.19	0.41	0.004
	4513, Import/export of food, alcoholic drinks	2024	5 475	0.11	0.16	0.28	0.004
	452201, and tobacco						
	4523						
	451401- 衣物、鞋類及有關製品進出口貿易	2023	10 243	0.26	0.33	0.41	0.009
	451405, Import/export of clothing, footwear and	2024	9 499	0.21	0.27	0.34	0.006
	452401- allied products						
	452405						
46	批發業	2023	12 919	0.11	0.17	0.25	0.003
	Wholesale trade	2024	12 295	0.14	0.20	0.31	0.003
	其中： Of which:						
	460201, 食品、酒類飲品及煙草批發	2023	3 157	0.13	0.18	0.28	0.004
	4603 Wholesale of food, alcoholic drinks and	2024	3 286	0.12	0.18	0.29	0.004
	tobacco						
	460401- 衣物、鞋類及有關製品批發	2023	977	0.12	0.18	0.35	0.006
	460405 Wholesale of clothing, footwear and	2024	889	0.14	0.17	0.27	0.005
	allied products						
47	零售業	2023	45 286	0.26	0.36	0.50	0.010
	Retail trade	2024	43 531	0.23	0.32	0.47	0.008
	其中： Of which:						
	4711, 食品、酒類飲品及煙草零售	2023	10 663	0.58	0.65	0.73	0.071
	4721-4723 Retail sale of food, alcoholic drinks and	2024	10 206	0.58	0.66	0.74	0.066
	tobacco						
	4731-4733 燃料零售	2023	163	0.88	0.91	0.95	0.439
	Retail sale of fuel	2024	172	0.83	0.90	0.95	0.379
	部分 Part of 衣物、鞋類及有關製品零售	2023	6 750	0.42	0.52	0.66	0.038
	4751, 4771 Retail sale of clothing, footwear and	2024	6 046	0.45	0.58	0.72	0.037
	allied products						
4773	運輸設備零售	2023	1 058	0.69	0.77	0.87	0.080
	Retail sale of transport equipment	2024	888	0.68	0.78	0.88	0.083

表 3 (續) 2023 年及 2024 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, 2023 and 2024

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	公司數目 Number of companies	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 Accommodation services	2023	955	0.24	0.39	0.65	0.012
		2024	942	0.25	0.40	0.66	0.013
56	膳食服務業 Food services	2023	15 516	0.20	0.27	0.34	0.007
		2024	15 351	0.22	0.29	0.36	0.008
	其中： Of which:						
561101,	中式餐館及酒樓	2023	4 711	0.13	0.17	0.22	0.004
561109- 561111	Chinese restaurants	2024	4 671	0.16	0.19	0.21	0.005
5612,	快餐店	2023	931	0.79	0.84	0.88	0.140
561902	Fast food shops	2024	932	0.79	0.84	0.88	0.148

(iv) 運輸、倉庫及速遞服務業

2.5 航空運輸業（2024 年的 CR₁₀ 及 HHI 分別為 0.98 及 0.506）、水上運輸業（0.75 及 0.249）及速遞活動（0.86 及 0.138）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高。（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 2024 at 0.98 and 0.506 respectively), water transport (0.75 and 0.249) and courier activities (0.86 and 0.138) indicated that the business of these industry groups was more concentrated than other groups in the sector. (Table 4)

表 4 2023 年及 2024 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, 2023 and 2024

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	公司數目 Number of companies	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	2023	19 706	0.53	0.57	0.63	0.126
	Land transport	2024	19 483	0.53	0.57	0.62	0.130
50	水上運輸業	2023	813	0.69	0.79	0.89	0.203
	Water transport	2024	773	0.75	0.84	0.92	0.249
51	航空運輸業	2023	108	0.95	0.99	##	0.483
	Air transport	2024	102	0.98	0.99	##	0.506
52	貨倉及運輸輔助活動	2023	6 419	0.19	0.26	0.39	0.006
	Warehousing and support activities for transportation	2024	6 300	0.21	0.29	0.42	0.007
532	速遞活動	2023	647	0.81	0.87	0.92	0.117
	Courier activities	2024	672	0.86	0.89	0.95	0.138

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

2.6 2024 年人壽保險承保人（CR₁₀ 及 HHI 分別為 0.87 及 0.139）、投資及控股公司（0.70 及 0.114）及電訊業（0.70 及 0.076）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高。
（表 5）

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

2.6 Higher values of CR₁₀ and HHI observed in life insurance underwriting (CR₁₀ and HHI at 0.87 and 0.139 respectively), investment and holding companies (0.70 and 0.114) and telecommunications (0.70 and 0.076) in 2024 indicated that the business of these industry groups was more concentrated than other groups in the sectors. (Table 5)

表 5 2023 年及 2024 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, 2023 and 2024

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	公司數目 Number of companies	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	2023	11 277	0.36	0.48	0.63	0.021
	Information and communications	2024	11 510	0.36	0.48	0.63	0.021
	其中： Of which:						
58-60	出版活動；電影、錄像及電視節目製	2023	2 969	0.34	0.47	0.67	0.019
	作活動、錄音及音樂出版活動；及	2024	3 012	0.32	0.47	0.64	0.018
	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						
61	電訊業	2023	341	0.69	0.86	0.96	0.071
	Telecommunications	2024	319	0.70	0.87	0.96	0.076
62-63	資訊科技服務活動及資訊服務活動	2023	7 967	0.28	0.40	0.55	0.011
	Information technology service activities and information service activities	2024	8 179	0.27	0.38	0.52	0.011
6412	銀行業(1)	2023	176	0.61	0.76	0.92	0.073
	Banking(1)	2024	172	0.61	0.76	0.92	0.074
64 (不包括 excluding 641), 66 (不 包括 excluding 662)	金融業 (銀行除外) Financing (except banking)	2023	9 697	0.44	0.56	0.69	0.038
		2024	10 025	0.46	0.55	0.67	0.040
	其中： Of which:						
642	投資及控股公司	2023	4 288	0.69	0.82	0.90	0.102
	Investment and holding companies	2024	4 514	0.70	0.78	0.88	0.114
644, 649	信託、基金及相關金融工具；及其他金	2023	1 721	0.64	0.74	0.82	0.091
	融服務活動	2024	1 662	0.63	0.71	0.82	0.084
	Trusts, funds and similar financial entities; and other financial service activities						
661, 663	金融服務輔助活動 (保險及退休基金	2023	3 688	0.36	0.46	0.63	0.022
	除外)；及基金管理	2024	3 849	0.37	0.48	0.65	0.023
	Activities auxiliary to financial service activities (except insurance and pension funding); and fund management						

表 5 (續) 2023 年及 2024 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, 2023 and 2024

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	公司數目 Number of companies	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	
65 (不包括 excluding 652), 662	保險業	2023	2 806	0.79	0.89	0.96	0.094
	Insurance	2024	2 708	0.77	0.88	0.96	0.109
	其中： Of which:						
6511	人壽保險承保人	2023	61	0.89	0.98	##	0.117
	Life insurance underwriting	2024	71	0.87	0.98	##	0.139
6512	非人壽保險承保人	2023	120	0.57	0.77	0.93	0.042
	Non-life insurance underwriting	2024	118	0.54	0.76	0.96	0.039
部分 Part of 6622	保險經紀	2023	753	0.56	0.66	0.78	0.046
	Insurance brokers	2024	702	0.64	0.73	0.79	0.070
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)	2023	1 872	0.44	0.57	0.73	0.024
	Activities auxiliary to insurance and pension funding (except insurance brokers)	2024	1 817	0.53	0.62	0.71	0.041
69-75 (不包 括 excluding 711)	專業、科學及技術活動	2023	28 023	0.12	0.20	0.35	0.003
	Professional, scientific and technical activities	2024	28 386	0.12	0.20	0.34	0.003
	其中： Of which:						
691	法律活動	2023	2 768	0.28	0.40	0.53	0.011
	Legal activities	2024	2 782	0.27	0.39	0.56	0.011
692	會計、簿記及核數活動、稅務顧問	2023	5 694	0.53	0.61	0.65	0.035
	Accounting, bookkeeping and auditing activities, tax consultancy	2024	5 819	0.51	0.59	0.64	0.034
74	廣告及市場研究	2023	2 928	0.38	0.48	0.60	0.021
	Advertising and market research	2024	2 907	0.39	0.48	0.65	0.023

表 5 (續) 2023 年及 2024 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, 2023 and 2024

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	公司數目 Number of companies	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 Administrative and support service activities	2023	11 377	0.15	0.22	0.35	0.004
		2024	11 511	0.17	0.24	0.37	0.005
	其中： Of which:						
78	就業活動 Employment activities	2023	2 521	0.39	0.52	0.66	0.020
		2024	2 527	0.39	0.53	0.66	0.020
79	旅行代理、代訂服務及相關活動 Travel agency, reservation service and related activities	2023	1 899	0.39	0.44	0.53	0.026
		2024	1 938	0.45	0.55	0.69	0.026

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) 2019 年至 2024 年期間集中率的變動

2.7 因應分析需要，在 2019 年至 2024 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 2024 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））。

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。2019 年至 2024 年期間有 10 個行業組別的 CR₁₀ 數值超過 ±0.1 的變動。其中，其他製造行業（-0.43）錄得最大的變動。（表 6）

(vi) Changes in CR between 2019 and 2024

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 2019 and 2024 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 2024 (viz. high concentration (CR₁₀ ≥ 0.67), medium concentration (0.33 ≤ CR₁₀ < 0.67) and low concentration (CR₁₀ < 0.33)).

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 10 industry groups with changes of more than ±0.1 in CR₁₀ value between 2019 and 2024. Among them, other manufacturing industries (-0.43) recorded the largest change. (Table 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。

2.9 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 2024 年首 10 大公司集中率組別及 2019 年至 2024 年期間首 10 大公司集中率的變動情況劃分的選定行業組別

Table 6 Selected industry groups by 2024 CR₁₀ group and direction of change in CR₁₀ between 2019 and 2024

2024 年 首 10 大公司 集中率組別 2024 CR ₁₀ group	2019 年至 2024 年期間首 10 大公司集中率的變動情況 Direction of change in CR ₁₀ between 2019 and 2024			
	數值下跌超過 0.1 的 首 10 大公司集中率 CR ₁₀ with value decreased by more than 0.1		數值上升超過 0.1 的 首 10 大公司集中率 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)	-	-	642	+0.21
中集中度 Medium concentration (0.33 ≤ CR ₁₀ < 0.67)	37-39	-0.11	部分 Part of 4751, 4771 64, 66 (不包括 excluding 641, 662) 部分 Part of 6622 6621, 部分 Part of 6622, 6629 79	+0.12 +0.11 +0.16 +0.14 +0.18
低集中度 Low concentration (CR ₁₀ < 0.33)	15-16, 31-32 17-18	-0.43 -0.13	45	+0.12

註釋：有關表 6 所示各「香港標準行業分類 2.0 版」編碼對應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.