



*In recent years, Hong Kong's textiles and clothing industry has been labelled by some people as a 'sunset' industry. Is the industry really going downhill? Prof. Philip Yeung Kwok-wing, Dean of Faculty of Applied Science and Textiles and Chair of Textiles and Clothing, and industrialist Ms. Sophie Leung Lau Yau-fun have talked to Profile about the challenges and opportunities facing the industry.*

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# The road ahead for Hong Kong's textiles and clothing industry

by **Connie Chan**



For decades, the textiles and clothing industry has been one of Hong Kong's largest export-earner and the dominant employer of the territory's manufacturing workforce. But in recent years, some people are suggesting that the industry is shrinking, labeling it as a 'sunset' industry. Is the industry really going downhill?

Prof. Philip Yeung Kwok-wing, Chair of Textiles and Clothing and Dean of Faculty of Applied Science and Textiles at the PolyU, said people who hold this pessimistic view see only the manufacturing part of the industry. "It's true that manufacturing activities in Hong Kong have diminished, due to expensive land and manpower, but if the industry is viewed as a whole, taking into account product development, marketing and merchandising etc., Hong Kong's textiles and apparel business is as strong as ever."

Government statistics provide the best indicators that bespeak the importance and vitality of the industry. In 1997, domestic exports of textiles and clothing products, including re-exports, amounted to \$291,947 million, accounting for 20 per cent of the total export. Hong Kong is also a world leader in textiles and clothing trade and has consistently ranked in the top five of the world's largest exporters.

According to Prof. Yeung, the true picture is that the industry is gradually assuming a new look.

"Over the past decade, Hong Kong's textiles and clothing industry has undergone a substantial transformation. From a pure manufacturing base, we have moved to become an important regional business centre for sourcing garments and textiles products," Prof. Yeung said.

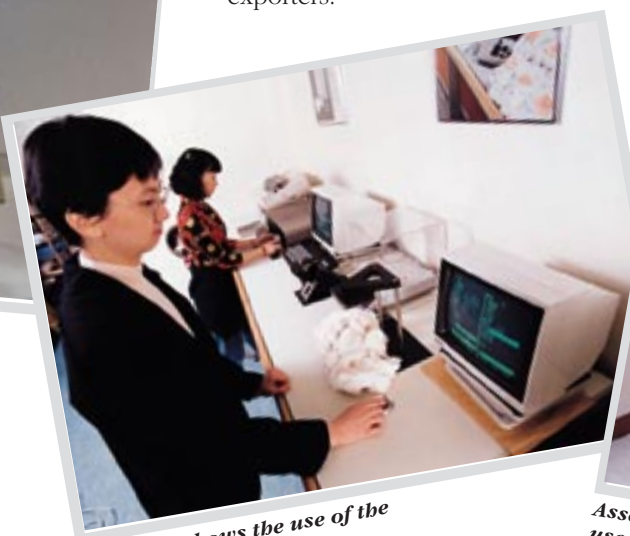
In view of the escalating cost of producing locally, many companies have moved their production plants to the Mainland and Southeast Asia to take advantage of the low labour and space costs, while operating local offices and factories to deal with product development and design, merchandising and the overall production control and management.

This strategy of a global production network, together with efforts in product and process upgrading, have enabled the industry to successfully maintain its leading position in the global market.

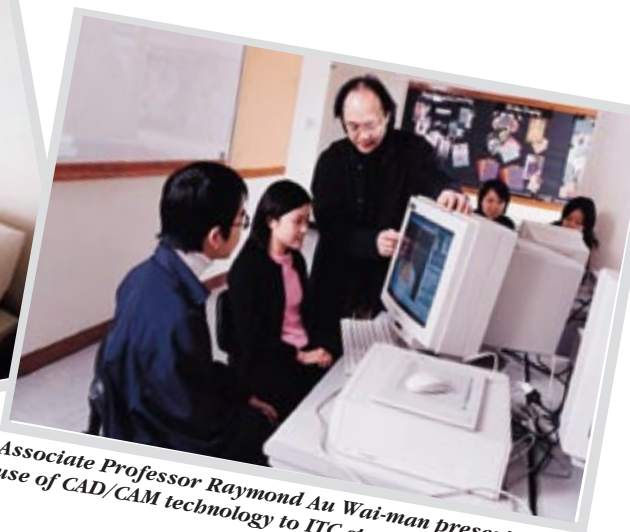
"Hong Kong has established a good name as a reliable sourcing and control centre for international buyers. We are well known for good product quality, flexibility and above all on-time delivery. Many buyers in fact are willing to pay 10 to 20 per cent more sourcing from Hong Kong for the guarantee of quality.



*The ITC Annual Fashion Gala.*



*A student shows the use of the Cotton Fibre Tester.*



*Associate Professor Raymond Au Wai-man presents the use of CAD/CAM technology to ITC students.*

“And I believe this will continue to be the direction of development for the industry in the foreseeable future,” the professor said.

Prof. Yeung pointed out that manpower requirements have also changed along with the changing face of the industry.

To remain competitive in the world market, the industry needs high-calibre people who are skilful in advanced technology to upgrade prod-



*Mrs. Leung*

ucts and processes. People with good marketing and management skills are also in great demand to support Hong Kong's operations as a control centre.

The PolyU's Institute of Textiles and Clothing (ITC) has promptly responded to this industry need by introducing new programmes with a merchandising and marketing core, and plans are in hand to bring in the focus of product development in the

## Apparel Product Development and Marketing: Set to become an Area of Excellence

### Major projects

#### Development of Product-based Information Systems

The objective is to develop product-based information systems for denim wear and knitwear, integrating databases and expert systems of relevance to consumer needs, market competition, product specification, textiles and clothing manufacturing technology, design, merchandising and marketing strategies.

#### Investigating the Markets of Denim Wear in Hong Kong and the Mainland

This project will investigate the consumption patterns, consumer behaviour and brand awareness of young people in the Mainland in the context of denim apparel. Research will focus on Beijing, Shanghai, Xian, Guangzhou, Chengdu, Harbin of the Mainland as well as Hong Kong. Information obtained will be useful to manufacturers and retailers in determining product characteristics and merchandise assortments.

#### Design of Light Weight Denim Fabrics for Apparel

The project will deliver a developed technology for the design and production of lightweight denim, in addition to providing sampling service for aesthetically enhanced fabrics and apparel. Fine counts of rotor-spun yarn will also be developed.

#### Study of Colour Variations that occur after Denim Warp Yarn Dyeing and Garment Washdown

By establishing a correct control of warp yarn dyeing parameters and by working out the relationship between dye penetration and dyeing parameters, the quality of warp dyeing will be significantly improved. The problems of shade depth variation often encountered by garment washing companies will also be solved.

#### Alternative Methods for Pumice Stone Washing

Denim washing using pumice stones generates considerable solid waste. The project will explore alternative methods of achieving the stone-washed effect and the possibilities of modifying pumice stones or replacing it with new materials.



undergraduate curriculum. Technology training too will be product based.

In addition, a new award in Fashion Retailing has been added to the Higher Diploma/Higher Certificate Scheme in Fashion and Textiles Studies and a new award in Apparel Merchandising has also been added to the distance-learning Certificate in Fashion and Clothing Manufacture in the current academic year.

"As Hong Kong's sole provider of textiles and clothing education at tertiary level, ITC has the responsibility of meeting industry's manpower requirements promptly and correctly. That's why we've always been proactive in assessing training needs and all our programmes are subject to regular review to ensure that the contents are up-to-date and meet the current needs of the industry," Prof. Yeung emphasized.

Industrialist Mrs. Sophie Leung Lau Yau-fun agreed with Prof. Yeung that Hong Kong has a competitive edge as a regional or even global service centre for international buyers, but she warned that it can be dangerous if the industry relies too much on outward processing arrangements.

"The massive shift of production operations to low wage countries will not benefit the industry in the long run. If Hong Kong is to focus on high value-added products, then manufacturing



**Prof. Yeung**

should be based locally so that the production process can be closely monitored to ensure optimal quality and on-time delivery," said Mrs. Leung, who represents the textiles and garment functional constituency on the Legislative Council.

Prof. Yeung and the legislator are on the same front when we talk about the problems facing the industry.

People's misconception of the industry is the biggest problem. Prof. Yeung said Hong Kong people often wrongly think that the local textiles and clothing industry is a 'sunset' industry where career prospects are few and gloomy, and many young people are thus discouraged to join the industry.

Furthermore, people nowadays prefer working in the service and financial sectors, thinking that they offer better

prospects and this has made manpower recruitment really difficult. "Indeed, the industry has been gravely misunderstood and neglected," Mrs. Leung exclaimed.

Hong Kong's textiles and garment industry has been relatively slow in adopting hi-technol-

ogy and this is another major problem, according to Mrs. Leung.

"The industry has not been very active in research and development, and this probably has to do with the fact that most companies were traditionally mainly engaged in commissioned jobs which normally do not require a lot of R&D on the part of the local company," Prof. Yeung elaborated.

But in order to expand into the high value-added market, the industry needs to employ advanced technology that will help to increase productivity and improve quality.

"It is against this challenging background that the PolyU has recently selected Apparel Product Development and Marketing for further development into an Area of Excellence (AoE) of international pre-eminence. Our goal is to build upon our existing strength to help industry enhance its competitiveness through application of advanced product development and process techniques," said Prof. Yeung.

More recently, the Government's Industry and Technology Development Council has recommended a grant of \$4.99 million to support ITC and the Clothing Industry Training Authority to jointly establish the territory's first Textiles Manufacturing Technology Centre to help the industry develop and upgrade their employees' skills in quality evaluation.

The road ahead for Hong Kong's textiles and clothing industry is filled with potentials and opportunities as it is with challenges and obstacles. But given Hong Kong people's intelligence and adaptability to changes, chances are high that we shall overcome all obstacles and thrive on the challenges if the industrial sector, the university and the government will join hands in working out a long-term development strategy for the industry. ❖



*Mrs. Leung discuss the prospect of the industry with ITC Head Dr. Patrick Chong (right) and his staff.*

# 香港紡織及製衣業的發展前景

**過** 去數十年來，紡織及製衣業一直是香港外貿的重要支柱和勞動人口的主要僱主。可是，近年來有關這門工業萎縮的傳聞四起，究竟紡織及製衣業是否真的變成了「夕陽工業」？

理大紡織及製衣學講座教授兼應用科學及紡織學院院長楊國榮教授表示，持這悲觀論調的人的着眼點有限於工業的生產部分。他說：「無可否認，由於香港的土地價格及工資高昂，純粹從事工業生產的業務規模的確大不如前；但是若我們從宏觀的角度看，把產品發展、市場推廣和營銷也考慮在內，香港的紡織及製衣業仍是一片興旺。」

事實上，據政府統計，一九九七年外銷的紡織及成衣產品佔本港外貿總值兩成；論成衣外銷貿易額，香港一直位列全球前五名內。

楊教授指出，紡織及製衣業在近十年經歷了重大的轉變，香港已經由一個專注生產的基地蛻變為亞太區內搜購成衣產品的重要商業中心。很多公司已將生產線遷移到內地和東南亞，由香港的辦事處負責產品設計和管理工作。這套採用全球生產網絡模式的策略，配合產品質素提升，令到香港的紡織及製衣業可以在世界市場保持領導地位。楊教授相信，在可見的將來這也是工業應有的發展方向。

另一方面，隨著工業發展出現新面貌，對人力資源有不同的需求。楊教授稱業界不僅需要高質素的技術人才提高產品和生產程序的質素，也需要優秀的市場推廣和管理專材從事營運和管理工作。為配合這發展，理大紡織及製衣學系已因應推出多項不同程度的新課程，滿足業界的需求。楊教授強調，理大作為全港唯一有提供紡織及成衣課程的高等院校，對培育專業人材責無旁貸；校方會定期評估業界對培訓的需求，並確保課程內容足以應付工業的需求。

資深業內人士，首屆立法會紡織及製衣界功能界別代表梁劉柔芬女士認同楊教授的意見，認為香港確具有成為國際成衣

買家服務中心的優勢。不過，她指出若業界過分依賴工序外遷會帶來隱憂。她說：「長遠而言，把生產過程大幅遷移到低工資國家對工業發展沒有好處。若然香港要發展高增值的產品，便需要有本地的生產基地加以配合。這樣做可以令生產過程受到更嚴格的監管，確保質素控制和送貨準時。」

論及業界面臨的問題，楊教授與劉議員異口同聲指出「形象」是最大問題。由於香港人普遍有錯覺認為紡織及製衣業為夕陽工業，很多年青人寧取金融及服務業而不願意投身業內發展，令到招聘人材方面遇上困難。

此外，劉議員指出紡織及成衣業緩於採用高科技亦構成另一問題。楊教授補充

說，大部分本地公司從事的傳統業務毋須太多科研；但是要擴展高增值產品市場，紡織及製衣業需要採用先進科技提高生產力，改善產品質素。他說：「理大正是在這富挑戰性的背境底下，選定服裝產品開發及市場推廣為卓越學術領域。我們的目的，是要建基在現有的基礎上，透過推廣產品發展和生產的先進技術加強工業的競爭能力。」最近理大更獲得政府工業支援資助計劃撥款，與製衣業訓練局合作籌辦全港第一所紡織科技研發中心。

香港的紡織及製衣業的前景既有機遇，也有障礙。憑著香港人一貫面對轉變的智慧和適應力，工業界、大學和政府定可以攜手合作釐定對策，促使紡織及製衣業蓬勃發展。

## 理大將發展成卓越學術領域 — 服裝產品開發及市場推廣

### 主要研究項目

#### 發展產品資訊系統

研究發展牛仔布產品資訊系統，就顧客所需、市場競爭、產品類別、紡織及成衣製造科技、設計、買賣推銷以及市場策略等範疇而設立綜合資料庫及專家系統。

#### 探討香港與中國內地的牛仔布服裝市場

是項研究項目將深入分析年青人對牛仔布服裝產品的消費模式及商標意識等。主要研究地方包括中國多個城市，結果將有助製造商及零售商確定產品的特點及商品分類。

#### 設計輕便牛仔布纖維

這研究計劃可提供更優良的織物及服裝樣本，推動設計及製造輕便牛仔棉布的先進科技，及發展轉杯紗的幼支數。

#### 研究牛仔布輕紗染色及成衣洗水後出現的顏色差異

透過準確的輕紗染色變數控制及計算，了解染料滲透能力及變數的關係，輕紗染色的素質控制可以顯著改善。這項研究將能解決成衣洗濯公司日常遇到的顏色深淺差異問題。

#### 浮水石洗濯的另類方法

傳統方法會產生大量固體廢料。是項研究將開發另類方法，改良現時浮水石洗濯法或改用新的物料取代，達到石洗的理想效果。