



The Future of 'Made in China'

‘中国制造’的前景

Manufacturers in China are torn between the lure of its ever-increasing and sizeable domestic market and the inexorable rise in its costs of production. Does manufacturing in the mainland still hold its appeal for Swiss companies?

by **Mark Andrews**

“**M**anufacturing is getting better and better in China; if you visit factories today versus ten years ago, it is like chalk and cheese,” says Roland Schmid, Managing Director of Vela Eurasia, a Swiss engineering consultancy. But coupled with the increasing sophistication of manufacturing in China, has also been an increase in costs of doing business. Recently, DrM, a Swiss engineering firm that develops clean solid-liquid separation solutions, chose India instead as the site for its new manufacturing plant. The question now facing many Swiss manufacturers in China, is whether the benefits between China’s

中国制造商们常常处于进退两难的境遇：一边是蓬勃发展的国内市场所带来的诸多机遇，一边是无法规避的生产成本上升。在大陆生产制造还能如从前一般吸引瑞士企业的目光么？

作者：**Mark Andrews**

“**中**国制造业发展得越来越好了；今天的工厂和十年前的工厂相比，简直天壤之别，”瑞士工程业咨询公司 Vela Eurasia 的常务董事 Roland Schmid 感叹道。然而，随着中国制造业日趋先进，经营成本也跟着水涨船高。近期，致力于固液分离的瑞士工程业企业 DrM 反倒选择在印度建立新的生产厂家。很多在华瑞士企业都面临同一个问题：巨大的中国本土市场和世界一流的综合价值链所带来的好处，

huge local market and comprehensive, world class, value chain, outweigh its higher (and steadily rising) labour costs? Not all Swiss companies are arriving at the same answer.

China is often said to be the world's factory, but the figures show a changing story. While foreign direct investment (FDI) into China increased year on year by 4.5% in 2016, according to the Ministry of Commerce it declined by 1.6% in the manufacturing sector. "There is definitely a shift in foreign direct investment flows into China, with more being directed at services and green energy," says Jake Liddle, an associate at Dezan Shira & Associates, a China-based consulting firm. "In respect of exporting from China, we see the attractiveness of Chinese manufacturing shrinking in the coming years, but manufacturing here for the local market will gain even more importance," says Rolf Keller, CFO of Franke Asia, a world leading provider of products and solutions for residential kitchens and bathrooms as well as professional kitchen equipment. "FDI into the manufacturing sector may be decreasing, but it hasn't stopped, and we are planning to further invest in automation and digitalisation in China."

Many Swiss companies with manufacturing facilities in China set them up a decade or more ago. "In the 1990s a factory worker got paid about US\$50 a month, today the pay is about the same as in Eastern Europe or Mexico," says Alex Tunik, owner and CEO of Transpacific Far East, a Swiss apparel manufacturer, with operations in China. Bobst, a Swiss firm that supplies equipment and services to manufacturers of packaging and labelling, set up its Chinese facility in Shanghai twenty years ago. "At that time, as for many other foreign companies, China was attractive as primarily a low cost manufacturing country," says Frédéric Badoux, Bobst Shanghai R&D Director.

Since then, there has been a wholesale shift for many companies from seeing China as a place of low cost manufacturing for export, to serving the now very important Chinese market. For example, China is now the world's largest producer of automobiles and they are predominantly made for domestic use. Reinhard Bühler, General Manager of Swiss firm Hatebur's China operation says that, because half of the world's passenger cars are produced in China, Japan and Korea, it makes China a very important market for Hatebur. The company is a global leader in the development and marketing of high productive forging machines and tools. "The reason that we have chosen China for the manufacturing of tools is clearly related to the importance of China in the automotive industry, and the growth expectation for the coming years," says Bühler.

Bobst also saw a shift in its customer base. "Export is still important in our China site activity," says Badoux. "But our China operations will gradually focus more on the local market, for which the demand for high quality, high performance automation is strong at the moment."

Although in the past wages were much lower, so also was productivity. Hourly wages since 2001 have risen by an average of 12% a year, well over the inflation rate. Accompanying this, however,



Jake Liddle
Dezan Shira & Associates

与日益上升的劳动力成本相比, 究竟孰轻孰重? 并不是所有的瑞士公司都给出同样的答案。

人们常说, 中国是全世界的工厂; 不过, 数据上来看这将有所变动。虽然外国对中国的直接投资(FDI) 逐年上升, 并于2016年达到4.5%的增长率, 但是商务部表明制造业部门得到的外国直接投资下降了1.6%。“外国对中国的直接投资发生了明显的转变, 变得更加针对服务业和绿色能源领域,” 中国协力管理咨询公司的顾问 Jake Liddle 总结道。

“未来出口上, 中国制造业将会逐渐失去其优势; 然而, 为本土市场服务的制造业却有望蒸蒸日上,” Franke Asia(致力于打造家庭厨房与卫浴, 以及专业厨具的世界一流企业) 首席财务官 Rolf Keller 这样预测。“外国对中国的直接投资应该是呈下降的趋势, 但是投资的

步伐并未停歇, 而且我们也正在计划加大在华自动化及电子化领域的投资。”

很多在华瑞士企业的生产设备都是在十年前或更早以前建立的。“90年代, 中国工厂工人每月工资大概仅有50美元左右, 如今他们的工资水平已与东欧或墨西哥持平了,” 具备在华业务的瑞士服装制造商 Transpacific Far East 的所有人兼首席执行官 Alex Tunik 评论道。为包装和标签制造商提供器械及服务的瑞士企业 Bobst, 早在20年前就于上海设立了生产厂家。“同样对其他海外企业而言, 当时中国能够吸引他们, 主要是因为中国能够提供廉价的生产,” Bobst 上海区的研发总监 Frédéric Badoux 回忆到。

自那以后, 很多公司都从把中国仅仅当作一个廉价出口产品生产地变为如今举足轻重的目标市场。例如, 中国是现在世界上最大的汽车制造国, 其产品大多直接供给中国市场。瑞士企业哈特贝尔的中国部总经理 Reinhard Bühler 认为, 由于世界上半的轿车均在中国、日本和韩国制造, 中国市场对哈特贝尔来说至关重要。哈特贝尔在高产能锻压机床和工具的发展及市场营销上走在世界前沿。“我们选择来中国制造工具产品的原因, 显然与中国在汽车行业的重要性及其未来的增长预期息息相关” Bühler 解释道。

Bobst 公司同样感受到了客户群上的变化。“出口仍是我们在华的重要业务”, Badoux 说, “但是, 我们将会逐渐致力于服务当前亟待高质量及高性能自动化的本土市场。”

过去薪资水平和生产力比现在低得多, 自2001年起时薪每年上涨12%, 上升幅度远高于通胀率, 然而与此同时, 生产商和工人的竞争力都有所提升。“我们的竞争准则从成本转变为质量,” 生产运动装的 Transpacific Far East 公司的 Tunik 总结道。不过, 哈特贝尔的 Bühler 仍然认为, 上海周边区



Rolf Keller
Franke Asia

has been an upgrade in the competence of both producers and workers. “We have moved from a compete-on-cost basis to one where we are now competing on quality,” says Transpacific Far East’ Tunik, whose company produces sports related clothing. Still, Hatebur’s Bühler says that, in the areas around Shanghai, costs of facilities and labour are reaching dizzying heights. “I definitely get the feeling that the competitiveness of China for the production of industrial products is decreasing compared to, say, Eastern Europe,” he says.

The changing ‘Made in China’ brand

Although, every company has different experiences based on its industry and its unique niche within it, what is becoming increasingly apparent is that quality is now an important element of manufacturing in China. “Today, we are able to produce high quality products in our Chinese factories for all markets in the world,” says Franke’s Keller. The sheer scale of Chinese manufacturing also means that there are certain processes, technologies and industries that are no longer easily available elsewhere. An example is Swisstribe’s watch display case business. “Some savoir faire is slowly disappearing in Switzerland. For example, spray painting has now been replaced by laminate, so it’s very difficult to obtain spray painting finishes in Switzerland for an affordable price, which we can still get in China,” says Swisstribe director, Patrick Mottet.

Another very important factor is ease of access to the complex cluster of suppliers needed in modern manufacturing. China has built up an integrated chain of manufacturers and suppliers with a symbiotic relationship. “In China, you have clusters where people are specialised, which means you can have a short turnaround because everybody is on the spot,” says Tunik. “In the garment industry in which we operate, materials, accessories and printer suppliers are all available close together.”

There are also other difficulties apart from rising labour costs. With an increasing focus on quality, companies are competing for the higher-skilled and talented workers, and this is leading to more upward pressure on wages. Coupled with this is limited staff loyalty and frequent job hopping that adds to the challenge of effective human resourcing.

Another problem is if a company requires parts in smaller quantities. Most Chinese companies are geared up for large scale production. “Finding suppliers able to produce parts with European standard quality in such small quantities is a challenge because many of them prefer to get bigger batch orders,” says Badoux. This is important, as many Swiss companies are very focused niche players. “The majority of Swiss companies are SMEs that are highly specialized in their field of business,” says Bühler. “Production volume often is too low and the involved know-how too complex, or in many cases based on long-term experienced employees.” While Hatebur has managed to produce the relatively high volume tool part of its business in China, automated forging equipment is too specialised, with too low volume to work in the country. Where China excels is with higher volume standardised production.



Frédéric Badoux
Bobst Shanghai

域的设备及劳动力成本过高。“我绝对感觉到中国在生产工业产品方面的竞争力相比东欧而言正在逐渐下降。”

转型中的“中国制造”品牌

尽管每家企业由于自身产业及定位的差异，会有不同的体会，但是愈发显而易见的是如今在华生产，质量已成为第一准则。“现在，中国工厂能够生产高质量的产品，并服务全球市场。” Franke 公司的 Keller 这样说道。中国制造业的宏大规模意味着有些流程、科技和产业只有中国具备，例如：Swisstribe 的手表展示业务。“瑞士正在慢慢地丧失一些工艺，比如：现在喷漆已经被层压材料所取代，因此在瑞

士很难找到价格适中的喷漆成品，在中国却并非难事”，Swisstribe 总监 Patrick Mottet 如此说道。

还有一个至关重要的考量因素是和复杂供应商群对接的难易程度。中国已然建立起了制造商和供应商的共生链。“在中国，专业人员集聚抱团，各个环节精准到位，周转时间大大缩短”，Tunik 说，“在我所从事的服装行业，材料、配饰和印制供应商配合都十分密切。”

除了劳动力成本的上升，其他挑战同样并存。随着人们越来越关注质量，企业正在积极争取更有才干的工人，这也愈加放大了薪资上涨所带来的影响。同时，有限的员工忠诚度和频繁的跳槽也是有效管理人力资源所面临的挑战。

另一个问题与企业是否需要小规模生产零部件相关；多数中国企业是为大规模而生的。“寻找能够小规模生产，并达到欧洲标准的零部件供应商是有一定难度的，因为很多企业都更倾向于接大额订单”，Badoux 这样说道。这点对于瞄准利基市场的瑞士企业至关重要。“大多数瑞士企业均为中小型，且十分精于其专长领域，”Bühler 说。“它们的产量往往很低，涉及到的专业技术太复杂，时常需要依赖资深员工的丰富经验。”

哈特贝尔虽然能够在华大规模生产其生产工具零部件，但自动锻压设备由于过于专业、生产量太小而不适合在华制造——中国擅长的是大批量的标准化生产。

将产品快速投放进市场也是一道难题。如果大部分客户均在华或身处亚洲其他地方，在华生产无可非议；然而，如果多数客户都身处瑞士或欧洲其他国家，在离欧洲近的地方生产将会更有裨益。因此，一些快时尚零售商已然把生产厂家迁回土耳其和东



Reinhard Bühler
Hatebur

Getting the goods quickly to market is also an issue. If many of the customers are in China or elsewhere in Asia, this is not a problem, but if they are back in Switzerland or Europe, near-shore locations have an advantage over China. Some fast fashion retailers have moved manufacturing back to countries like Turkey and Eastern Europe as a result. “Franke has three factories in China producing items like stainless steel sinks for residential use, professional kitchen equipment and stainless steel taps,” says Keller. “But it is difficult to meet the short lead times required by some world markets from here.”

Rising Asian competition

There is no doubt that some other Asian countries have a lower cost base and emerging economies such as India, Vietnam and Cambodia are becoming attractive to certain sectors. “Their competitive edge only extends currently to certain industries, such as garment manufacture and low tech industries,” says Dezan Shira’s Liddle. Even then, the risks involved by moving may outweigh the benefits for China based players. When Transpacific Far East was looking to increase capacity four years ago it looked at other countries including Vietnam, Cambodia, Indonesia and Myanmar, but Tunik ended up setting up in Jiangxi Province as he knew that China was reliable, and he had had all his experience in the country, and there was the cluster of already established suppliers which didn’t exist in the other countries.

Need to look forward

For alternative countries, there is also the need to assess what the long term outlook for the country’s development will be. Swiss family firm Rehau specialises in polymer-based solutions in the construction and automotive industries. “Some of these countries such as Indonesia and India have much higher inflations rates than China which poses an additional challenge in the long run,” says Rehau CEO for greater China and co-CEO for Asia Pacific, Nils Wagner. He also represents the third generation of the Wagner family, who are the owners of company. “In addition, China continues to excel in transportation infrastructure, which is a major advantage compared to other emerging markets in Asia.”

Rising labour costs may also be offset going forward by increased efficiency and automation. The falling cost of robots is helping with this process. “With labour costs continuously rising year after year, process automation and lean manufacturing principles are the key success factor to our business in China,” says Xia Xubing, China Managing Director, Datwyler, a major global industrial supplier.

Handling global uncertainty

With the recent change of political administration in the US, there is also the prospect of a shift to more protectionist policies. Although the Trump administration has yet to action any of its rhetoric in this area some companies are already noticing a change. “Supply chains are becoming more regional and that



Patrick Mottet
Swissstribе

欧之类的区域。“Franke 公司在华拥有三家生产家用不锈钢水槽、专业厨具和不锈钢水龙头的工厂，” Keller 说，“不过，如果远离这里的其他市场给公司提出较短的交货时间要求，我们很难满足。”

亚洲竞争加剧

当然，一些其他亚洲国家的成本更低；部分新兴经济体，例如：印度、越南和柬埔寨，正越来越吸引某些产业的投资。“不过，这些地方的竞争优势仅仅局限于服装生产业及低科技含量领域，”协力咨询管理公司的 Liddle 这样说道。

即便如此，使用以上国家作为生产地的风险可能依旧大于中国制造商能带来的裨益。四年前，当 Transpacific Far East 公司由于计划扩大生产能力而考虑过包括越南、柬埔寨、印度尼西亚和缅甸在内的国家，但是最终 Tunik 仍然选择在江西建厂；因为他明白中国值得信赖，和中国打交道他也更有经验，同时既存的在华供应商无可替代。

前瞻的必要性

对于备选的国家，同样需要进行针对其长期发展前景的评估。瑞士家族企业瑞好公司致力于为建筑和汽车行业提供聚合物相关方案。“一些国家，比如印度尼西亚和印度的通胀率比中国高得多，所以长远来看，并不划算，”瑞好的大中华地区首席执行官兼亚太区共同执行官 Nils Wagner 如此评论；他是企业所有人——Wagner 家族的第三代传人。“除此之外，中国继续在运输基础设施建设上飞黄腾达，这是亚洲其他新兴市场所没有的优势。”

劳动力成本上升的遗憾应该也可以被高效率 and 自动化所填补，此时机器人成本的下降非常应景。“随着劳动力成本逐年上升，流程自动化和生产精益化是我们在华产业成功的关键，”全球主流工业供应商德特威勒的中国常务董事夏旭兵总结道。

应对全球不确定性

随着日前美国政局的波动，贸易保护主义政策有抬头迹象。虽然川普团队尚未兑现其在相关领域演讲中所作出的承诺，但是一些企业已经感受到变化了。“供应链变得愈发区域化，公司欧洲单元的产量也在上升，”工业邮政特快专递服务的世界领导者之一，艾尼克斯总经理 Kaapo Liede 说道；与此同时，中国政府也在改变着经济



Xia Xubing 夏旭兵
Datwyler

is also increasing our volumes of our European units,” says Kaapo Liede, General Manager, Enics China, one of the world’s leading Industrial EMS providers. The Chinese government is also changing what it wants the economy to focus on. “China has been making efforts to shift its economy away from heavy manufacturing on which it built its previous economic success. Now, the country looks towards innovation, high tech industries, and services as a new driving force,” says Liddle. This should favour a shift in manufacturing to electronics and high precision engineering - the latter a sector that is a traditional Swiss strength.

As such, it is likely that the lure of China manufacturing will remain for some time, despite the ever-growing costs of labour, particularly among those firms with an established China market for their goods. In a time of rapidly changing and unpredictable geopolitics, the security and reliability of China’s unequaled breadth and expertise in all areas of the production value chain is also likely to be appealing. ○



Kaapo Liede
Enics China

方面的侧重点。“中国正努力将经济带离已经颇有成就的重工业，逐步走向创新、高科技产业及服务行业，” Liddle 展望道。如此看来，中国应该会把关注点从制造业移至电子工业和高精度工程学——而瑞士在后者上具备着传统优势。

因此，尽管劳动力成本不断上升，中国制造业的诸多诉求——尤其对产品已扎根中国市场的企业而言——很有可能仍将维持一段时间。

在当前地缘政治日新月异、扑朔迷离的境遇下，中国——可覆盖整条生产价值链之广度及深度，加上其举世无双的安全性和可靠性——将继续吸引全球的目光。○

Sources quoted in the article

文章中引用的出处

Roland Schmid, Managing Director, Vela Eurasia

Jake Liddle, Associate at Dezan Shira & Associates

Alex Tunik, Owner and CEO, Transpacific Far East

Frédéric Badoux, R&D Director, Bobst

Reinhard Bühner, General Manager, Hatebur China

Rolf Keller, CFO, Franke Asia

Patrick Mottet, Director, Swisstribe

Nils Wagner, CEO for greater China and co-CEO for Asia Pacific, Rehau

Xia Xubing, China Managing Director, Datwyler

Kaapo Liede, General Manager, Enics China



我们不仅保护大熊猫

WWF及其合作伙伴的各方努力,已使藏羚羊种群数量重现增长。了解我们,支持我们,请至www.wwfchina.org