

# 台灣石材產業經營困境與未來發展方向之研究

研究生：黃日進

指導教授：黃玉霖博士

國立交通大學工學院營建技術與管理學程碩士班

## 摘要

台灣石材產業開始於民國 50 年代花蓮大濁水白色大理石，經過 60 年代的成長期，70 年代的成熟期及進口擴張期，80 年代的轉型期，在世界石材產業創造出輝煌的成就。根據 STONE2001 的統計資料顯示，民國 89 年台灣石材產業的原石進口量占世界第 7 位，及石材機械進口量占世界第 7 位，由此可顯示台灣石材產業在國際上的重要地位。惟經過 40 多年來的蛻變與發展，如今正面臨轉型期，由原來純粹內需型的產業，發展到必須面對國際競爭的階段，目前發現國內石材產業遭遇不少瓶頸。

本研究主要目的是探討台灣石材產業目前所遭遇的問題，及台灣石材產業未來發展轉型的可能模式與挑戰。

藉由相關機關，如內政部營建署、石材工業發展中心與經濟部礦業司等石材相關統計資料，及相關研究報告與論文等，以作為統計分析的參考資料。

本研究係利用蒐集的相關文獻與資料，回顧分析來了解台灣石材產業發展的沿革，石材產業的概況及石材產業的特性。藉由相關資料的整理與統計分析，了解台灣石材產業的相關問題之探討。並由專家訪談，資料的整理，歸納分析來探討台灣石材產業經營困境，相關解決方案。以登錄在民國 95 年台灣區礦製品工業會員為訪談對象，針對現階段台灣石材產業經營瓶頸及未來轉型可能模式之相關問題探討。

在 WTO 架構下，石材市場將更加開放，中國大陸廉價石材大量進入台灣，競爭將更加激烈。台灣石材產業如何突破經營瓶，轉型應是選項之一，如轉型為涉入石材工程端的消費產業模式，或是企業朝多角化經營模式，如結合觀光與休憩等。所以參考他人轉型成功的模式，選擇自己可行的方式相信必能有所突破，因此，台灣石材業的未來仍能有榮景可期待。

關鍵字：石材業，石材產業，石材產值分析

# **Business Predicaments and Future Perspective of Stone Industry in Taiwan**

Student : Jih-Chin Huang

Advisor : Dr. Yu-Lin Huang

Degree Program of Construction Technology and Management

College of Engineering

National Chiao Tung University

## ***Abstract***

Stone Industry in Taiwan can be traced back to mining and working of white marbles in Da-Zhou-shui of Hua-lian County in 60s'. After the development in 70s', the growing up and import expansion in the 80s', the transformation in the 90's, the industry booms and becomes famous globally in early 90s'. According to Stone2001's statistics, the imported amount of stone materials and the assorted machineries in Taiwan in year 2000 are at the world rank of seventh place, respectively. Such data determines that Taiwan's stone industry plays a significant role in the international stone industry. However, after 40 years of development, Taiwan's stone industry is now facing critical predicaments as the domestic market can no longer support such a huge industry, and they are now forced to compete, internationally.

The study is mainly to discuss the problems of Taiwan's stone industry nowadays, the possible models and associated problems of the industry transformation in the future.

The data in this study are from Construction and Planning Agency, Ministry of the interior, Stone Industry Development Center, Mines Department of ministry of Economic Affairs, ROC, and other researches concerned .

Collected literacy and data are analyzed and studied for the historical development, characteristics and current situation of Taiwanese stone industry. Along with the secondary studies, interviews with industry experts were conducted to comprehend the current situation, and predicaments of Taiwanese stone industry, and the subsequent solutions. The interviewees are selected from the enlisted member of Taiwan Marble Association.

Discussion about the facing obstacles of many established stone businesses and the possible models to transform in the future are as follows.

After entering WTO, the market in our country will be open and the cheap stone material from China will enter Taiwan; the competition in the industry will become fiercer. It is believed that transforming the business model may be one of answers about how to overcome the conducting difficulties of Taiwanese stone industry. Such as transforming into consuming industry model by direct access to the stone construction business, establishing the exporting model for stone industry, or conglomerate model by combining tourism, and leisure business. Consulting the successful models of others and choose the practicable way. In the way, a promising prospective of Taiwan stone industry can be anticipated.

**Key Words:** *Stone Industry, Assorted stone Businesse, analysis of stone output value*