

## 摘要

台灣眼鏡製造業發展至今已有近 260 家廠商，其中大台南市佔達 6 成，有明顯空間聚集的現象，形成台灣主要的眼鏡產業聚落。基此，本文藉由台灣眼鏡製造業發展脈絡、國內眼鏡產業經營現況、大台南市眼鏡製造業空間布局與本市廠商競爭策略，探討「大台南市成為台灣眼鏡製造業聚落」的原因，並說明當前業者發展所具有之利基、威脅及可行的調適與因應之道。

透過歷史文獻、工商普查等資料發現，台灣當代眼鏡產業的發展，遲至 1970 年代始趨成熟，而大台南市亦具有足以支援製造業發展的基礎條件。經濟部等相關統計說明，目前廠商以「薄利多銷」的生產模式為主，內銷比重逐年提升，同時中國與日本為最重要的貿易夥伴；再者，大台南市廠家空間分布甚少聚集於編定工業區內，「都市發展」、「聚集經濟」及「家族企業帶領」才是影響企業主擇址設廠最主要的原因。

研究最後以 Porter「鑽石理論」為架構，進行廠家深度訪談。結果顯示該業在台灣生產面臨成本過高，廠商、技術外流嚴重與惡性削價競爭等衝擊，唯有持續轉型升級，強化 MIT 品牌優勢，及善用政府經貿、產業之相關政策提供的契機，才可能「引鳳築巢」、吸引企

業持續投資，達到促進大台南市眼鏡製造聚落永續發展的目標。

## Abstract

In Taiwan's spectacles industry history, there are nearly 260 manufacturers, more than 60% of which are located in Tainan. Based on it, Tainan is labeled as "spectacles industrial settlement", which created a supply chains. The report here is to clarify the spectacles industry development and adversity in Tainan, and to explain how the manufacturers adjust themselves to the highly competitive markets.

To understand the spectacles present development and property in Tainan, three ways are discussed. First, both the historical documents and the report of "Industry-Commercial Investigation" from 1971 to 2006 are offered. Second, the Map Overlaying Analysis has us understand the industry structure in Tainan. Third, Porter's 'Diamond Theory' is applied to analyze the strategies of the manufacturers to the unstable markets after deeper interviews. My investigation shows that Taiwan's spectacles industry reached a mature stage in 1970 because of their sale strategy—selling by large volume, gaining at low profit, and of items they sold only on sunglasses and industrial glasses. Although the process of spectacles industry in Tainan is similar to that of other industries—both started from northwest areas and then gathered in southwest areas, the manufacturers are seldom located in industrial district; rather, they tend to aggregate in convenient transportation network on the basis of one assembly line. The interviews with the manufacturers tell us the common problems: higher and higher cost, risky of losing techniques and vicious competition. The only solution to the impact for them is to improve their products, invent new items and make use of MIT (Made in Taiwan) mark. By doing so, they can sustain their business and attract the Taiwan manufacturer in mainland China back to Taiwan.