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Press Release

**CILTHK's 2025 ESG Perception Survey Reveals Critical Success Factors
for Transport and Logistics Industry in Hong Kong**

Environmental, social and governance (ESG) practices continue to shape the global business landscape, with significant implications for Hong Kong's position as an international logistics hub. Building on previous research in 2023, the Logistics Policy Committee (LPC) of The Chartered Institute of Logistics and Transport in Hong Kong (CILTHK) has conducted a comprehensive follow-up survey to assess the current state of ESG implementation in the transport and logistics industry.

The findings of this study strongly echo the content of the "Roadmap for ESG Development for Logistics Industry" recently announced by the Transport and Logistics Bureau (TLB), confirming the urgent need for ESG transformation in the industry while also reflecting the practical challenges and opportunities that companies encounter during this transformation process. The research findings align with the government's proposed three-stage implementation strategy, providing an important empirical foundation for the industry that will help both the government and industry stakeholders to jointly advance the sustainable development of Hong Kong's logistics sector.

Between January and April 2025, the research team collected questionnaires from 213 industry professionals. Respondents included CILTHK members, industry managers, practitioners, and scholars, with half having more than 15 years of industry experience. Nearly half work in large organisations with over 500 employees, while the top five industry segments represented were air-related services, freight forwarding, supporting services, land-related services, and e-commerce logistics.

The survey revealed a significant gap in formal ESG management within the industry, with less than half of organisations having dedicated ESG personnel or departments. This finding is particularly relevant as the TLB's recently announced Roadmap highlights that ESG adoption is "no longer an option but an essential step for survival and maintenance of global competitiveness" for Hong Kong logistics SMEs.

Health and safety measures showed the highest implementation rate, reflecting both regulatory requirements and business priorities. Energy and waste management followed closely, likely driven by clear cost-saving opportunities. Cybersecurity initiatives were implemented by more than half of respondents, while sustainable sourcing showed lower adoption.

The research identified several key challenges to ESG implementation. Regulatory complexity was cited by more than two-thirds of respondents as a major barrier, reflecting the fragmented global ESG regulatory landscape. Insufficient government support, difficulties in supplier engagement, and limited data access were also significant obstacles. Financial resources, lack of qualified staff and expertise, and the complex regulatory environment were identified as the top barriers across all respondents.

The study found significant disparities in ESG implementation based on several factors. Large organisations demonstrated much higher implementation scores than smaller companies. Organisations with dedicated ESG departments achieved significantly better results than those without dedicated resources. Professionals with ESG training demonstrated much higher implementation success compared to those without training. European-based organisations showed the highest implementation success, significantly outperforming those based in China and the Middle East. Publicly listed companies significantly outperformed non-listed companies across all ESG dimensions, particularly in governance practices.

Despite implementation challenges, the business case for ESG is widely recognised. Three-quarters of respondents agreed that ESG implementation can increase business opportunities, while more than two-thirds believed it can reduce business risks. Looking ahead, more than half of respondents expressed optimism about ESG development in the industry, with brand reputation enhancement and technological innovation identified as the most significant benefits.

Based on these findings and in alignment with the TLB's three-stage ESG Roadmap, the research team offers the following recommendations:

1. **Awareness and Education Programmes:** Develop comprehensive awareness campaigns and educational workshops specifically designed for logistics SMEs to understand ESG principles and international requirements. These should align with the first stage of the TLB's Roadmap. In addition, TLB should provide guideline for the Programme and its content and syllabus.
2. **Data Collection Capability Building:** Establish industry-specific training programmes focused on ESG data collection methodologies, leveraging the TLB's upcoming ESG data collection tools. This supports the second stage of the TLB's Roadmap by enabling logistics companies to effectively gather and record relevant ESG metrics.
3. **SME Collaborative Networks:** Create industry-facilitated consortiums that allow smaller companies to pool resources, share implementation costs, and collectively develop ESG expertise. These networks can serve as knowledge-sharing platforms where best practices and implementation strategies can be exchanged.
4. **Financial Support Mechanisms:** Advocate for expanded government funding specifically for ESG implementation, including grants or low-interest loans scaled to company size. Such financial support is critical for SMEs to overcome the identified resource barriers.
5. **Industry-Specific ESG Standards:** Work with the TLB to develop logistics-specific ESG metrics and benchmarks that reflect the unique operational characteristics of the industry while meeting international disclosure requirements.
6. **Supply Chain Integration:** Create frameworks for larger companies to support their smaller suppliers in ESG implementation, recognising that supply chain resilience depends on all participants meeting increasingly stringent international standards.

7. **Technology Adoption Support:** Facilitate access to affordable ESG management technologies for SMEs, potentially through shared service models or government-subsidised platforms.
8. **Reporting Preparation:** Develop standardised reporting templates and guidelines specifically for logistics SMEs to prepare for the third stage of the TLB Roadmap, and provide consulting services on ESG disclosure to SMEs.

Dr. John YU and Dr. Simon SUEN, who led the research, emphasised that "our findings show that strategic resource allocation, targeted training, and clear corporate vision can substantially improve ESG implementation outcomes regardless of organisational scale. With the TLB's new Roadmap providing a clear direction, Hong Kong's logistics industry now has both the data on current challenges and a structured path forward. The strong correlation between ESG implementation and business benefits suggests that ESG should be viewed not merely as a compliance requirement, but as a strategic imperative for long-term competitiveness in the global logistics market."



About The Chartered Institute of Logistics and Transport in Hong Kong

The Chartered Institute of Logistics and Transport in Hong Kong (CILTHK) is a major branch of The Chartered Institute of Logistics and Transport (CILT). The Chartered Institute of Logistics and Transport (www.ciltinternational.org) is an organisation with an established international pedigree with over 30,000 members working in over 100 countries. It was formed in the United Kingdom in 1919 and granted a Royal Charter in 1926.

CILTHK (www.cilt.org.hk) was set up in 1968 and is one of the CILT global chapters. CILT is presented worldwide and we all share the common cause to promote and advance the art and science of supply chain, logistics and transport. Currently, the membership of CILTHK is around 2,000 and broadly ranges from experienced senior manager to junior staff in the industries of shipping, logistics, airline, railway, road, public transport, government, educational institutes and consultancy. The Institute regularly organises professional programmes and activities for members, such as seminars, forums, conferences, technical visits; formulates and implements professional codes to ensure and uphold the professional standards in the industry.

Further Enquiry

Please feel free to contact 2866-6336 or by email at info@cilt.org.hk for any areas of our suggestions that we can amplify further.

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2025 年 7 月 3 日

新聞稿

香港運輸物流學會 2025 年 ESG 認知調查 揭示運輸物流業成功關鍵因素

隨著全球對可持續發展日益重視，**環境、社會和管治（ESG）**已成為評估企業社會責任和長期價值的重要指標。香港作為國際物流樞紐，運輸物流業在 ESG 的實踐對提升行業競爭力和可持續性至關重要。結合 2023 年的研究成果，香港運輸物流學會物流政策委員會進行了全面的後續調查，評估運輸物流業 ESG 實施的現狀。

是次研究結果高度呼應早前由運輸及物流局（TLB）公布的《物流業 ESG 發展路線圖》的內容，證實業界正面臨 ESG 轉型的迫切需求，同時也反映出企業在這一轉型過程中所遇到的實際挑戰和機遇。研究發現與政府提出的三階段實施策略相符，為業界提供了重要的實證基礎，有助於政府和業界共同推進香港物流業的可持續發展進程。

研究團隊於 2025 年 1 月至 4 月進行調查，收集了來自 213 位業界專業人士的問卷。受訪者包括香港運輸物流學會會員、行業管理層、從業人員和學者，其中一半擁有超過 15 年的行業經驗。近半數受訪者在員工超過 500 人的大型機構工作，調查涵蓋的前五大行業領域包括航空相關服務、貨運代理、支援服務、陸地相關服務和電子商務物流。

調查顯示，業內在正式 ESG 管理方面存在顯著差距，不到一半的機構設有專責 ESG 人員或部門。這一發現與 TLB 最近公布的路線圖特別相關，該路線圖強調 ESG 採納「不再是一個選擇，而是香港物流中小企業生存和維持全球競爭力的必要步驟」。

健康與安全措施顯示最高的實施率，反映了監管要求和業務優先事項。能源和廢物管理緊隨其後，可能是由於明確的成本節約機會所驅動。超過一半的受訪者實施了網絡安全措施，而可持續採購的採用率較低。

研究識別了 ESG 實施的幾個關鍵挑戰。超過三分之二的受訪者將監管複雜性列為主要障礙，反映了全球 ESG 監管環境的分散性。政府支持不足、供應商參與困難和數據獲取有限也是重要障礙。所有受訪者都將財務資源、缺乏合資格員工和專業知識，以及複雜的監管環境識別為主要障礙。

研究發現 ESG 實施在多個因素上存在顯著差異。大型機構的實施分數比小型公司高出許多。擁有專責 ESG 部門的機構比沒有專責資源的機構取得明顯更好的結果。接受過 ESG 培訓的專業人士比未接受培訓的人士表現出更高的實施成功率。歐洲總部的機構顯示最高的實施成功率，顯著優於中國和中東總部的機構。上市公司在所有 ESG 維度上都顯著優於非上市公司，尤其在管治實踐方面。

儘管面臨實施挑戰，ESG 的商業價值被廣泛認可。四分之三的受訪者同意 ESG 實施可以增加商業機會，超過三分之二認為它可以減少商業風險。展望未來，超過一半的受訪者對行業 ESG 發展表示樂觀，品牌聲譽提升和技術創新被確定為最重要的益處。

基於這些發現，並配合 TLB 的三階段 ESG 路線圖，研究團隊提出以下建議：

1. **意識和教育項目：**舉辦專為物流中小企業設計的宣傳活動和工作坊，幫助他們理解 ESG 原則和國際要求。這些應與 TLB 路線圖的第一階段保持一致，並為相關活動和課程的內容提供指引。
2. **數據收集能力建設：**建立專注於 ESG 數據收集方法的行業特定培訓計劃，利用 TLB 即將推出的 ESG 數據收集工具。這支持 TLB 路線圖的第二階段，使物流公司能夠有效收集和記錄相關 ESG 指標。
3. **中小企協作網絡：**創建由行業促進的聯盟，使較小型公司能夠匯集資源，分擔實施成本，並共同發展 ESG 專業知識。這些網絡可作為知識共享平台，交流最佳實踐和實施策略。
4. **財務支援機制：**倡導擴大專門用於 ESG 實施的政府資金，包括根據公司規模調整的補助金或低息貸款。這種財務支持對中小企業克服已識別的資源障礙至關重要。

5. **行業特定 ESG 標準：**與 TLB 合作開發物流特定的 ESG 指標和基準，反映行業獨特的運營特性，同時滿足國際披露要求。
6. **供應鏈整合：**為大型公司創建支持其較小供應商實施 ESG 的框架，認識到供應鏈韌性取決於所有參與者滿足日益嚴格的國際標準。
7. **技術採用支持：**為中小企業提供獲取負擔得起的 ESG 管理技術的途徑，可能通過共享服務模式或政府補貼平台實現。
8. **報告準備：**專為物流中小企業開發標準化報告模板和指南，為 TLB 路線圖的第三階段做準備，並向中小企業提供 ESG 披露的諮詢服務。

領導研究的于承忠博士和孫嘉來博士強調：「我們的研究顯示，戰略資源分配、有針對性的培訓和明確的企業願景可以大幅改善 ESG 實施結果，無論組織規模如何。隨著 TLB 的新路線圖提供明確方向，香港物流業現在既有關於當前挑戰的數據，也有結構化的前進路徑。ESG 實施與商業效益之間的強相關性表明，ESG 不應僅被視為合規要求，而應被視為在全球物流市場中保持長期競爭力的戰略必要條件。」

香港運輸物流學會簡介

香港運輸物流學會 (CILTHK) 是國際運輸物流學會一個主要分會，而國際運輸物流學會 (CILT) (網址：<https://www.ciltinternational.org>) 是一國際性的非牟利專業組織，現時超過 30 個分會，全球超過 30,000 名會員，遍佈 100 多個國家及地區。學會於 1919 年在英國成立，並於 1926 年獲頒皇家特許狀。

香港運輸物流學會則於 1968 年成立。學會成立宗旨是推廣及提升供應鏈、物流以及運輸等各範疇的藝術和科學。學會涵蓋多個不同行業，包括海陸空的客運和貨運。現時香港學會由約 2,000 名會員組成，當中包括資深行政人員、政府公務員、公私營機構及顧問公司的專業人士。學會定期為會員舉辦專業認可培訓及專業活動，例如研討會、論壇、大型會議、參觀活動及持續專業發展計劃；並制定及推行專業守則，確保並維護業內的專業水準。

進一步查詢

如需進一步瞭解我們的建議，請致電 2866-6336 或發送電郵至 info@cilt.org.hk 與本會聯繫。

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