Environmental, Social, and Governance (ESG) Perception Survey: Transport and Logistics Industry in Hong Kong 2025

Logistics Policy Committee,
The Chartered Institute of Logistics and Transport in Hong Kong (CILTHK)

Hon Frankie YICK GBS, JP

Dr. John YU

Dr. Simon SUEN

The Chartered
Institute of Logistics
and Transport

Executive Summary

Market Status: The Hong Kong transport & logistics industry shows moderate ESG awareness (4.9/7) but significantly lower implementation (4.3/7), indicating substantial execution challenges.

Key Findings: Company size and resource allocation are the strongest predictors of ESG implementation success, with large organizations achieving 74% higher implementation rates.

Strategic Implications: Despite implementation challenges, 74% of industry leaders recognize ESG's potential to increase business opportunities. Consumer-facing segments show highest adoption rates.

Key Recommendations: Prioritize ESG training (43% implementation improvement), develop industry-specific frameworks scaled to company size, and establish cost-sharing models across supply chains.

213	50%	44%	56%
Industry professionals surveyed	Have 15+ years of experience	Have dedicated ESG resources	Optimistic about ESG's future

Research Methodology

Study Parameters

- Comprehensive survey conducted Q1 2025

- 213 respondents across transport & logistics segments

- Primarily mid-to-senior management (60%)

- Statistical analysis using ANOVA, Chi-square, and correlation tests

- Focus on implementation status, barriers, and success factors

Industry Context

- Increasing regulatory pressure (Hong Kong Carbon Neutrality 2050)

- Growing investor scrutiny on ESG performance

- Rising customer expectations for sustainable logistics

- Regional leadership positioning amid growing competition

- Market valuation increasingly tied to ESG metrics

Respondent Profile

Organization Characteristics

- 48% represent large enterprises (500+ employees)
- 44% have dedicated ESG resources
- Top 5 segments represent 68.4% of respondents

ESG Resource Allocation

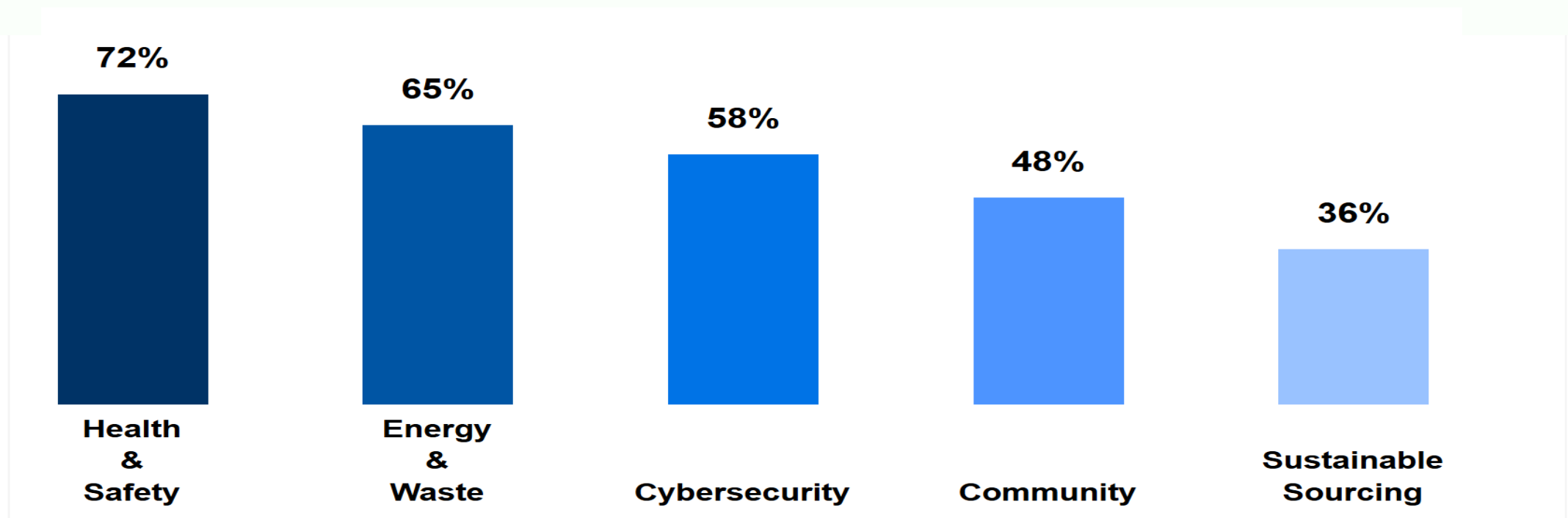| Resource Structure	Percentage
Dedicated ESG Department	22%
Dedicated Personnel Only	22%
No Dedicated Resources	45%
Unsure	11%

Respondent Profile

- 50% have 15+ years of industry experience
- 41% are managers, 19% directors/VPs

Industry Segment Distribution

Air 17.3% | Freight 16.4% | Support 16.4% | Land 11.7% | E-Comm 6.6%
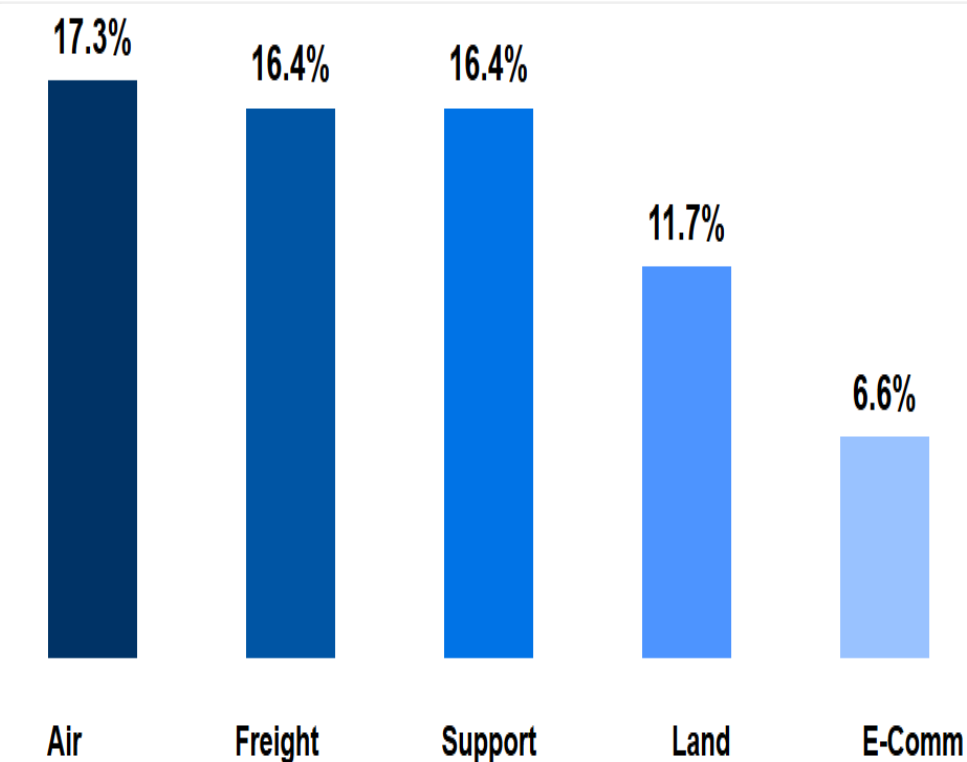
Current ESG Implementation Status

Implementation Disparity

- Regulatory-driven areas show highest implementation (Health & Safety)

- Cost-saving initiatives show strong adoption (Energy & Waste)

- Data security prioritized due to regulatory and business risk (Cybersecurity)

- Complex, multi-stakeholder initiatives show lowest adoption (Sustainable Sourcing)

Knowledge Sources

- Industry events are the dominant information source (58%)

- Social media plays a surprisingly important role (53%)

- Company training utilized by less than half (48%)

- Limited use of government resources (38%)

- Academic sources least utilized (32%)

Implementation Barriers & Challenges
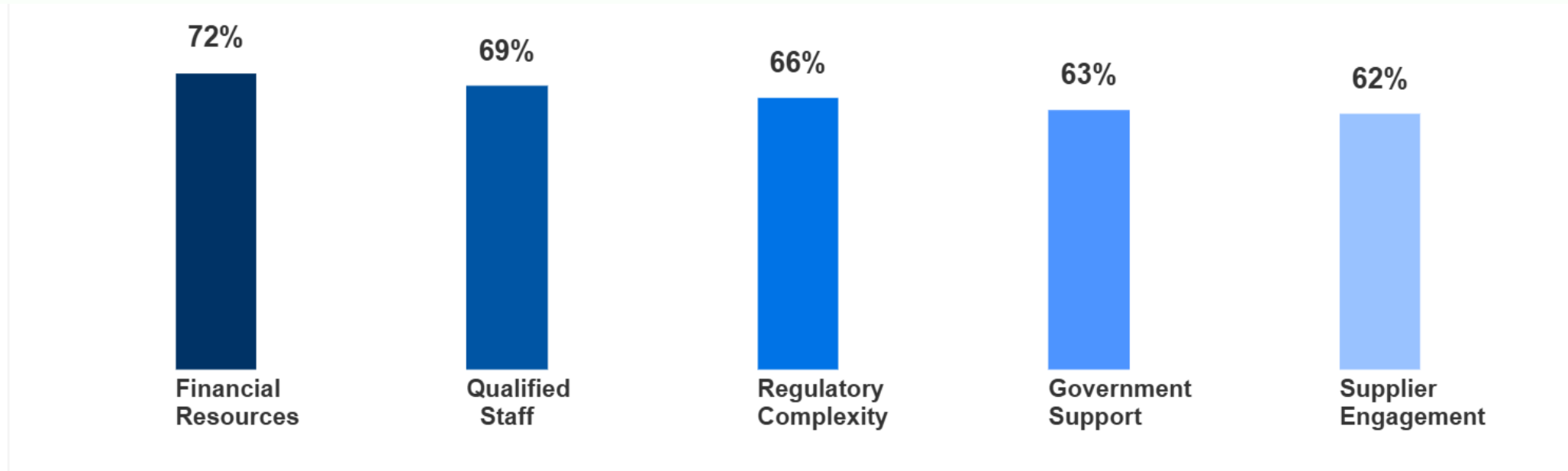
Resource Constraints

- Financial resources cited as top barrier across all company sizes
- Expertise gap particularly acute in specialized areas (emissions measurement, sustainable sourcing)
- Significant correlation between resource availability and implementation success (r = 0.61, p < 0.001)

External Challenges

- Regulatory fragmentation creates compliance uncertainty across jurisdictions
- Government support perceived as insufficient by majority (63%)
- Supplier engagement difficulties highlight extended value chain challenges
- Data accessibility problems affect measurement quality (59%)

Business Impact & Success Factors

Perceived Business Impact

74%
Believe ESG increases business opportunities

71%
See ESG as reducing business risks

Top Expected Benefits

Benefit	Rating (1-7)
Brand reputation enhancement	5.7
Technological innovation	5.5
Operational efficiency improvements	5.3
Talent attraction & retention	5.1
Risk reduction	5.0

Critical Success Factors

Success Factor	Rating (1-7)
Corporate mission/vision toward ESG	5.8
Corporate-level ESG investment	5.6
Client requirements	5.5
Engagement from top management	5.4
Regulatory compliance	5.4
Employee engagement	5.2
Technology infrastructure	5.1

Key Conclusions

1 **Resource Disparity Determines Success**

Large organizations (>500 employees) demonstrate 74% higher implementation rates compared to small companies (<50 employees), with company size and dedicated resources showing the strongest correlations to implementation success (r = 0.67).

2 **Implementation Gap Persists**

Despite moderate awareness (4.9/7), actual implementation remains significantly lower (4.3/7), indicating a persistent execution gap consistent across organizational types and highlighting that knowledge alone is insufficient.

3 **Training Creates Substantial Advantage**

Organizations providing ESG training demonstrate 43% higher implementation success rates (p < 0.001, Cohen's d = 0.76), suggesting that investing in employee capabilities may be one of the most cost-effective ESG strategies.

4 **Regulatory Environment Drives Adoption**

Regulatory requirements rank as a top barrier (66%) but also as a primary driver (5.4/7 importance), indicating that many organizations are taking a reactive rather than proactive approach to ESG implementation.

5 **Strategic Value Recognition is Widespread**

The majority of respondents recognize ESG's potential to increase business opportunities (74%) and reduce business risks (71%), indicating broad acceptance of the business case despite execution challenges.

Recommendations

Based on the survey results and aligned with the three-phase ESG roadmap, we propose the following integrated recommendations to help enhance ESG implementation effectiveness in the transport and logistics industry.

SME Support Strategies

Awareness Raising and Capacity Building

→Organize promotional activities and workshops designed for logistics SMEs, provide phased training programs to help companies understand ESG requirements and build fundamental capabilities.

Resource Sharing Platform

→Establish industry alliance mechanisms to promote resource sharing and economies of scale, enabling SMEs to pool resources and jointly develop ESG expertise.

Resource Allocation Optimization

Financing Mechanism Innovation

→Establish business-driven and government-supported diversified financing channels, including grants or preferential loan schemes based on company size.

Professional Support Network

→Form industry-funded ESG expert teams to provide cost-effective professional consulting services, helping companies overcome technical barriers.

Capability Development System

Professional Training Certification

→ Establish a comprehensive ESG training system, covering position-specific training to industry certification, enhancing overall professional standards.

Knowledge Transfer Mechanism

→ Promote regional knowledge sharing, establish standardized data collection methods, and drive the dissemination of industry best practices.

Implementation Guidelines Development

→ Develop industry-specific implementation guidelines and performance evaluation systems to help companies systematically advance ESG initiatives.

Regulatory Collaborative Development

Policy Integration

→ Align with Hong Kong's 2050 carbon neutrality target, establish industry-specific ESG policy frameworks, ensuring alignment with international standards.

Compliance Guidance

→ Develop ESG regulatory navigation tools to help companies understand current and future regulatory requirements and enhance compliance capabilities.

Rating System

→ Establish a voluntary ESG rating system to encourage continuous corporate improvement and foster a positive competitive environment.

Thank You

For more information, please contact:

Logistics Policy Committee (LPC)

The Chartered Institute of Logistics and Transport in Hong Kong (CILTHK)