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Press Release

**CILTHK's Smart Logistics Perception Survey Reveals Critical Digital Divide in Hong Kong's
Transport and Logistics Industry**

Survey highlights urgent need for policy review as 71.2% of industry professionals believe Hong Kong lags behind regional competitors

Hong Kong's position as an international logistics hub faces unprecedented challenges as smart logistics technologies reshape the global supply chain landscape. The Logistics Policy Committee (LPC) of the Chartered Institute of Logistics and Transport in Hong Kong (CILTHK) has conducted a comprehensive survey to assess the current state of smart logistics adoption in the transport and logistics industry, revealing a critical digital divide that threatens the sector's competitiveness.

Between September 2025 and January 2026, the research team collected responses from 201 industry professionals. Respondents included CILTHK members, industry managers, practitioners, and scholars, with over half having more than 10 years of industry experience. The survey covered 13 business segments including third-party logistics providers, freight forwarders, e-commerce logistics, port/shipping companies, and air freight operators.

The survey revealed a severe maturity gap in smart logistics implementation within the industry. Only 39.3% of organisations have achieved partial or majority implementation, while **60.7% remain at no adoption, planning, or pilot stages**. Nearly one-quarter of respondents reported zero technology adoption, highlighting the urgency of digital transformation.

Small and medium-sized enterprises face particularly acute challenges. Among companies with fewer than 50 employees, 75.9% remain in pre-implementation stages, compared to only 13.4% of large enterprises with 500 or more employees. This stark disparity reveals a structural digital divide that risks excluding small and medium-sized enterprises (SMEs) from the evolving logistics ecosystem.

The research identified several critical barriers to smart logistics adoption. **Professional talent shortage was cited by 65.2%** of respondents as a significant or critical limitation, reflecting the complex skills required for modern logistics technology. Insufficient government support was identified by 58.7% as a major obstacle. Land scarcity constraints and warehouse contractual period limitations were each cited by over half of respondents, highlighting Hong Kong's unique urban density challenges. Financial resources and long return on investment periods were significant barriers for 49.3% and 55.7% of respondents respectively.

Among respondents, transportation management systems (TMS) / warehouse management systems (WMS) showed the highest implementation rate at 77.2%, followed by automation infrastructure including automated storage and retrieval systems (AS/RS) (63.8%) and automated guided vehicles (AGVs) / autonomous mobile robots (AMRs) (62.8%). Green technologies such as carbon footprint monitoring (66.4%) and electric vehicle (EV) fleets (61.7%) demonstrated strong adoption among implementing companies. However, emerging technologies showed minimal penetration, with blockchain traceability at only 16.2% and drone delivery systems at 13.8%.

The study found that organisational capacity gaps compound technical barriers. Less than half of organisations have dedicated smart logistics department or personnel, with 44.3% lacking any



specialised resources. This organisational deficit suggests many firms approach smart logistics as ad-hoc technology purchases rather than strategic transformation programmes.

Despite implementation challenges, the business case for smart logistics is widely recognised. Over three-quarters of respondents identified cost reduction (76.6%) and operational efficiency enhancement (72.6%) as very or extremely influential drivers. Supply chain visibility strengthening was cited by 66.7% as a critical factor. Environmental and economic benefits were acknowledged by over 60% of respondents, who perceived smart logistics as making significant or critical contributions to operational efficiency, pollutant reduction, and environmental compliance.

The competitive context revealed concerning trends. **A striking 71.2% of industry professionals believe Hong Kong lags behind Chinese Mainland and other Asian markets in smart logistics development**, with only 3.5% viewing Hong Kong as ahead. This perception crisis threatens Hong Kong's traditional logistics hub status and signals urgent need for accelerated transformation.

Investment intentions remain strong despite current barriers. Nearly three-quarters of respondents plan to increase smart logistics investment over the next one to three years, with 38.8% planning significant or strategic-priority investments. However, the gap between investment intention and actual implementation underscores the need for policy interventions to unlock this latent demand.

Based on these findings, the research team offers the following recommendations:

- 1. Land/warehouse infrastructure solutions:** Establish a flagship smart logistics demonstration zone (such as Hung Shui Kiu / Ha Tsuen New Development Area Logistics Cluster), with enterprise-oriented policies and flexibility towards industry-proposed innovations. This cluster should showcase integrated automation, green technologies, and data management systems to serve as a testing ground for the industry.
- 2. Streamlined Funding Mechanisms:** Reform the “Pilot Subsidy Scheme for Third-party Logistics Service Providers” by expanding supplier eligibility from Hong Kong-only to international suppliers and increasing the subsidy cap to HK\$3 million. Simplified application processes and accelerated approval timelines are essential to support SME adoption.
- 3. Logistics Technology Talent Pool Expansion:** Establish partnerships between government, universities, and vocational training institutions (Vocational Training Council and The Hong Kong Institute of Vocational Education) to create specialized training programs in TMS/WMS, robotics process automation, AS/RS operations, internet of things sensors, data analytics, and emerging technologies including low altitude economy applications.
- 4. Flagship Demonstration Projects:** Continue promoting awareness and updates on government-led smart logistics initiatives including the Port Community System, Environmental, Social, and Governance development roadmap for the logistics industry, Trade Single Window, and other digital infrastructure programs. Organise site visits and knowledge-sharing sessions to showcase implementation best practices.

Dr. John YU, Chair of the Logistics Policy Committee of CILTHK, who led the research, emphasised that "our findings reveal a critical paradox: while 72.6% of logistics firms plan to increase smart logistics investment and over 60% recognise its transformative benefits, only 39.3% have achieved operational implementation. The dominant barriers—talent shortage, land scarcity, and insufficient policy support—are structural issues requiring coordinated government-industry response. Hong Kong's falling behind perception versus regional peers creates both urgency and opportunity. With targeted interventions addressing the specific constraints identified in this survey, Hong Kong can accelerate its smart logistics transformation and maintain its competitive position as an international logistics hub."



**The Chartered
Institute of Logistics
and Transport**

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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2026年3月30日

新聞稿

香港運輸物流學會智慧物流認知調查 揭示運輸物流業嚴重數碼鴻溝

調查顯示 **71.2%** 業界專業人士認為香港落後於區域競爭對手，迫切需要政策檢視

隨著智慧物流技術重塑全球供應鏈格局，香港作為國際物流樞紐的地位正面臨前所未有的挑戰。香港運輸物流學會物流政策委員會進行了一項全面調查，評估運輸物流業智慧物流採納的現狀，揭示了威脅行業競爭力的嚴重數碼鴻溝。

研究團隊於 2025 年 9 月至 2026 年 1 月期間收集了來自 201 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，其中超過一半擁有 10 年以上的行業經驗。調查涵蓋 13 個業務領域，包括協力廠商物流供應商、貨運代理、電子商務物流、港口/航運公司和航空貨運營運商。

調查顯示，業內在智慧物流實施方面存在嚴重的成熟度差距，只有 39.3% 的機構已達到部分或大部分實施，而 60.7% 仍處於未採用、規劃或試點階段，近四分之一的受訪者表示完全未採用任何技術，突顯數碼轉型的迫切性。

中小型企業面臨特別嚴峻的挑戰。在員工少於 50 人的公司中，75.9% 仍處於實施前階段，而在擁有 500 名或以上員工的大型企業中，這一比例僅為 13.4%。這種顯著差異揭示了一種結構性數碼鴻溝，可能將中小企業排除在不斷演變的物流生態系統之外。

研究識別了智慧物流採納的幾個關鍵障礙 — 65.2% 的受訪者將專業人才短缺列為重大或極度限制，反映了現代物流技術所需的複雜技能。58.7% 的受訪者將政府支持不足視為主要障礙。超過一半的受訪者提及土地稀缺限制和倉庫租期限限制，突顯了香港獨特的城市密度挑戰。49.3% 和 55.7% 的受訪者分別將財務資源和投資回報期長視為重大障礙。

在受訪者中，運輸管理系統(TMS)/倉儲管理系統(WMS)系統顯示最高的實施率，達 77.2%。其次是自動化基礎設施，包括自動存取系統 (AS/RS) (63.8%) 和無人搬運車/自主移動機器人(AGV/AMR) (62.8%)。綠色技術如碳足跡監測 (66.4%) 和電動車隊 (61.7%) 在實施公司中顯示強勁的採用率。然而，新興技術的普及率極低，區塊鏈溯源技術僅為 16.2%，無人機配送系統僅為 13.8%。

研究發現，組織能力差距加劇了技術障礙。不到一半的機構設有專責智慧物流部門或人員，44.3% 缺乏任何專門資源。這種組織缺陷表明，許多公司將智慧物流視為臨時性技術採購，而非戰略轉型計劃。

儘管面臨實施挑戰，智慧物流的商業價值被廣泛認可。超過四分之三的受訪者將成本降低 (76.6%) 和營運效率提升 (72.6%) 視為非常或極度重要的驅動因素。66.7% 的受訪者將強化供應鏈可視性列為關鍵因素。超過 60% 的受訪者認同環境和經濟效益，認為智慧物流對營運效率、污染減排和環保合規作出重大或關鍵貢獻。



競爭環境揭示了令人擔憂的趨勢。高達 **71.2%**的業界專業人士認為香港在智慧物流發展方面落後於中國內地和其他亞洲市場，只有 **3.5%**認為香港領先。這種認知危機威脅香港傳統物流樞紐地位，並顯示加速轉型的迫切需要。

儘管面對當前障礙，投資意向依然強勁。近四分之三的受訪者計劃在未來一至三年內增加智慧物流投資，**38.8%**計劃進行重大或戰略優先投資。然而，投資意向與實際實施之間的差距突顯了政策介入釋放這一潛在需求的必要性。

基於這些發現，研究團隊提出以下建議：

- 1. 土地/倉庫基礎設施解決方案：**建立旗艦智慧物流示範區（如洪水橋/廈村新發展區現代物流圈），採用以企業為本的政策，並對業界提出的創新方案保持彈性。這個集群應展示綜合自動化、綠色技術和數據管理系統，作為業界的創新試驗田。
- 2. 優化資助機制：**優化「第三方物流服務供應商資助先導計劃」，將供應商資格從僅限香港擴展至國際供應商，並將資助上限提高至 **300** 萬港元。簡化申請流程和加快審批時間對支援中小企業採用至關重要。
- 3. 擴大物流技術人才庫：**建立政府、大學和職業培訓機構（職業訓練局和香港專業教育學院）之間的合作夥伴關係，創建專門培訓課程，涵蓋 **WMS/TMS**、機器人流程自動化、**AS/RS** 應用、物聯網傳感器、數據分析以及包括低空經濟在內的新興技術。
- 4. 旗艦示範項目：**繼續推廣智慧物流的重要性和最新進展，包括港口社區系統、物流業環境、社會和治理發展路線圖、貿易單一窗口等。組織實地考察和知識分享會議，展示實施最佳實踐。

領導研究的于承忠博士（香港運輸物流學會物流政策委員會主席）強調：「我們的研​​究揭示了一個關鍵悖論：雖然 **72.6%**的物流公司計劃增加智慧物流投資，超過 **60%**認識到其變革性效益，但只有 **39.3%**實現了營運實施。主要障礙 — 人才短缺、土地稀缺和政策支援不足 — 是需要政府與業界協調應對的結構性問題。香港落後於區域競爭對手的認知既帶來緊迫性也帶來機遇。通過針對本調查中識別的具體限制進行有針對性的干預，香港可以加速其智慧物流轉型，並維持其作為國際物流樞紐的競爭地位。」



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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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