香港物流業持續發展研究
Sustainable Development Study For The Hong Kong Logistics Industry

(行政摘要)
（Executive Summary）

本研究項目由持續智庫倡議
A Study initiated by SD Advocates

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要點和建議

一般人對物流的印象，皆認為物流不過是單純的貨物運輸。其實，物流體系的運作涉及廣闊的範疇，當中更包含各類複雜和先進的服務。現代物流主要是**貨物、資金流以及信息流的管理**，而管理過程中應用了不少創新的概念和科技。

2012年，物流體系產生的直接經濟附加價值，佔本地生產總值(GDP)的3.3%，高於零售業、住宿服務和餐飲服務的直接經濟附加價值總和。若加上間接和衍生的經濟貢獻，**整體的物流體系活動所帶來的經濟貢獻相等於香港本地生產總值5.3%**。此外，**物流業亦促進了香港進出口貿易的發展，兩者的總經濟貢獻佔本地生產總值 24.6%**。

本研究向物流界主要持份者進行了廣泛採訪，受訪者包括：航空公司、海運公司、港口營運商、倉庫及儲存服務供應商、貨運代理、物流協會和政府部門，他們對於維持香港物流業的競爭優勢均抱有信心，但同時也表示了若干憂慮。

面臨的挑戰

香港地理位置優越，且為自由港，是其明顯的優勢，但是營運成本遞增，基建發展緩慢等因素使物流業的發展走到瓶頸位置。香港物流體系所面對的挑戰可以歸納為以下幾點：

- 缺乏基建投資—過去十年沒有新的大型基建項目，導致物流作業的設備到達產能的極限；
- 成本增加—房地產價格持續飆升，並且缺乏物流專用地；
- 勞工短缺—低技術工人和高技能專業人才皆不足；
- 欠缺政策支持—沒有足夠的政策支持物流體系發展；
- 對手崛起—新加坡、深圳、上海等發展迅速。

建議

為應對上述挑戰，香港物流體系需要政府的大力支持，方能讓行業持續發展和提高競爭力。本研究分析了行業的競爭優勢和增長機會後，向特區政府提出以下建議：

- 重新界定政府架構內有關物流業的政策責任，以配合物流業作為推動香港經濟發展重要動力的策略性地位；
- 制訂有關物流業持續發展及提高競爭力的政策，包括提供物流業專用土地、協助培訓物流業人才、促進與珠三角物流業合作等範疇；
- 重新啟動物流園計劃，借鏡香港科技園公司的模式，設立物流園的管理機構/公司；
- 長遠而言，應研究搬遷葵青貨櫃碼頭，以提升物流業操作效率；
- 建造機場第三跑道，維護香港國際機場的區域領導地位。

Highlights and Recommendations

Often presumed as simple services of physical freight movements, the Logistics Cluster has, in fact, a far wider scope including complex and sophisticated service areas. Modern logistics focuses on the **management of cargo and associated finance and information flows** where innovative services, technologies and concepts are widely developed and applied.

In 2012, the Logistics Cluster generated a direct economic contribution of value added equivalent to 3.3% of Hong Kong GDP, an amount greater than the contributions of retail, accommodation and F&B services combined. Combining direct, indirect and induced economic contribution, **the logistics cluster contributed totalled 5.3% of the Hong Kong GDP**. It also supported our trading industry. The joint contribution of value added by the **trading and logistics industries totalled a significant 24.6%.**

Interviews with key stakeholders revealed the confidence of the industry in upholding the competitiveness of the Hong Kong logistics sector. These stakeholders include airlines, shipping lines, port operators, warehousing & storage service providers, freight forwarders, logistics associations and government entities. However, they were not without concerns.

Challenges

Despite the clear advantages of geographic location and its free port status, Hong Kong encounters bottlenecks such as increasing operational costs and sluggish infrastructure development. Specifically, the logistics cluster in Hong Kong faces the following challenges:

- Capacity bottleneck due to the pause of major infrastructure investments in the last decade;
- Increasing cost pressure as the price of real estate continues to surge and lack of dedicated land for logistics use;
- Labour shortage of both low-skilled workers and high-skilled professionals;
- Insufficient policy support for the logistics cluster; and
- Increasingly sophisticated competitors such as Singapore, Shenzhen and Shanghai.

Recommendations

An effective response to the challenges above hinges on strong support from the public sector – it is vital to driving sector growth and improved competitiveness. The study, having analysed competitive advantages and growth opportunities, recommends the following for the SAR Government to pursue:

- To re-define the policy responsibility in the Government structure to reflect the strategic position of the logistics industry as a key economic driver of Hong Kong;
- To develop policies for the sustainable development and competitive growth of the logistics industries, relating to issues including dedicated land, manpower development and collaborations with the PRD;
- To revive the Logistics Park Plan and to establish a management authority/corporation making reference to the business model of the Hong Kong Science and Technology Park;
- To investigate the feasibility of relocation of the Kwai Tsing Container Terminals in the long-term to improve efficiencies;
- To construct the third runway at Hong Kong International Airport to maintain its leading position as the aviation hub of the region.

1. 研究目的

貿易及物流是香港四大支柱產業之一，在塑造香港未來經濟面貌上擔當著重要的角色，因此有必要對香港物流體系及其服務範圍有透徹的了解。

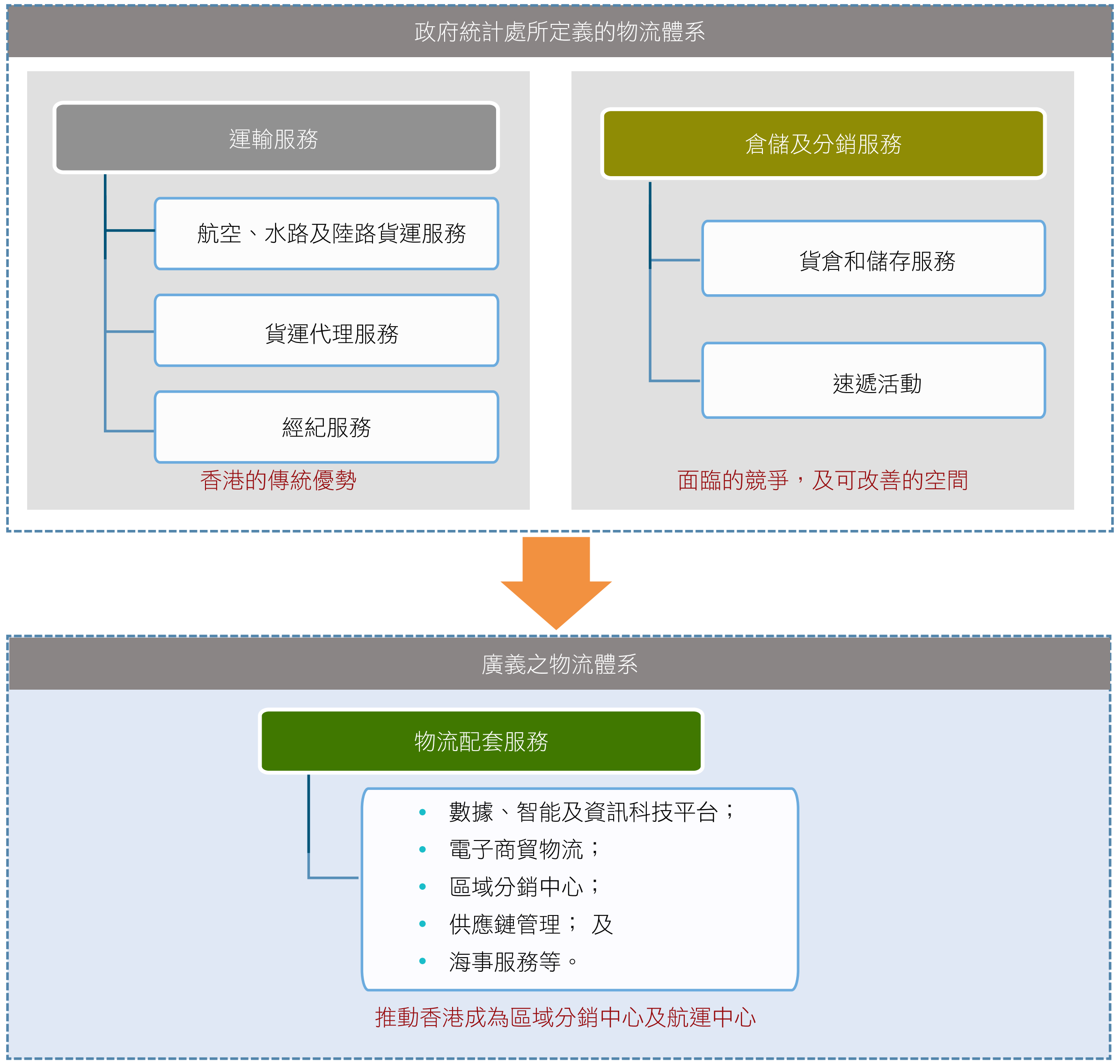
本研究旨在對香港物流業進行深入探討和分析，並提出一系列建議，以確保香港物流業有機會優化其獨特優勢和發揮最大潛力，能夠繼續成為本港經濟的重要支柱。

2. 香港物流體系

現代物流重視供應鏈信息流的管理和提供增值服務，過程中應用不少創新的概念，亦發展出各項革新的科技和技術。

本研究內的香港物流業涵蓋三類作業活動（圖 1），包括：i ）**運輸服務** - 在這方面香港 一直表現出色；ii ）**倉儲及分銷服務** - 這方面香港正面對新對手的挑戰；iii ）**物流配套服務** - 在這方面香港將有新的機遇，能夠大展拳腳。

圖1 物流體系



1. Study Objective

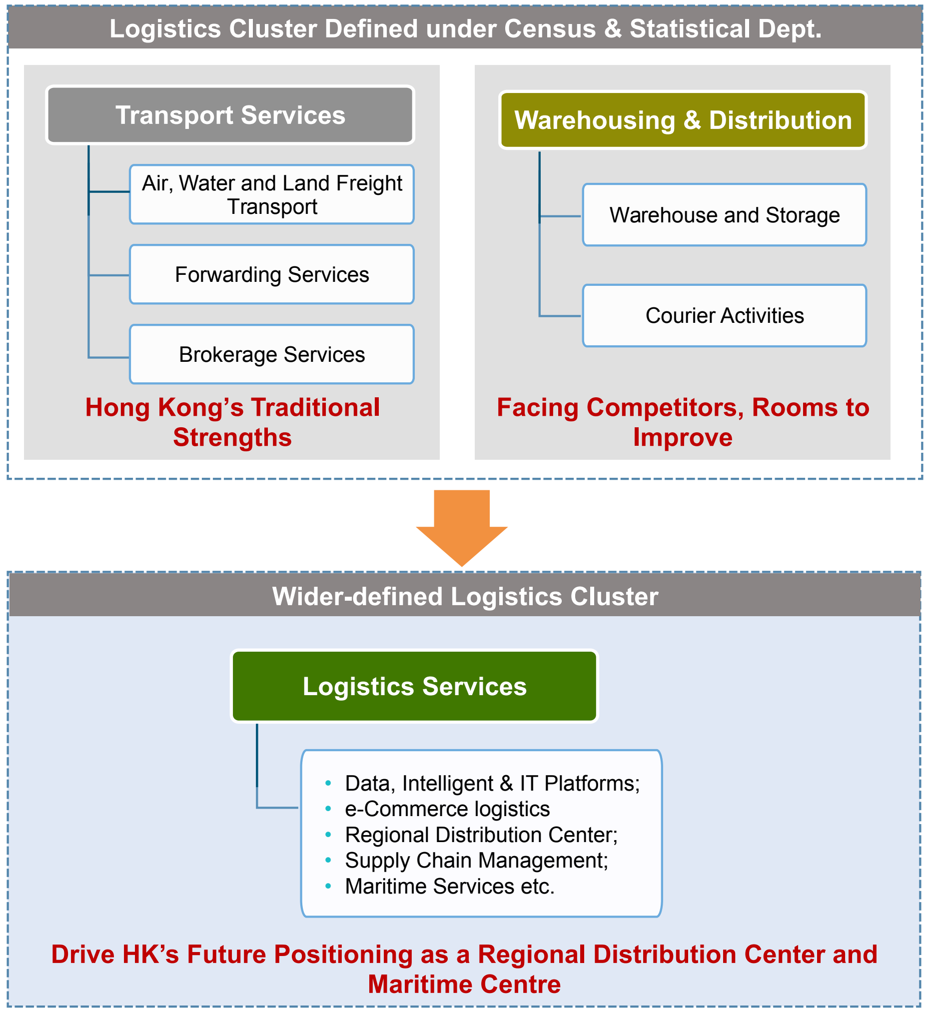
As one of the Four Pillar Industries in Hong Kong, the Trading and Logistics play a vital role in shaping the outlook of Hong Kong's future economy. There is an imperative need to establish a clear understanding of the logistics cluster and its service areas. The Study aims to provide a compelling argument for a set of reforms which will enable Hong Kong's logistics industry to remain an important economic pillar and ensure that the industry will be given the opportunity to optimise its unique strengths and maximise its potential contributions.

2. The Hong Kong Logistics Cluster

Modern logistics concentrates on the management of information flows in the supply chain and the provision of value-added services, where new concepts, technology, and innovative skills evolve.

In this Study, Hong Kong logistics industries cover three groups of activities (See Figure 1), namely, i) **Transport Services,** which have traditionally performed well in Hong Kong; ii) **Warehousing & Distribution**, for which Hong Kong is facing challenges by newcomers; and iii) **Logistics Supporting Services**, where Hong Kong is presented with new opportunities to thrive and prosper.

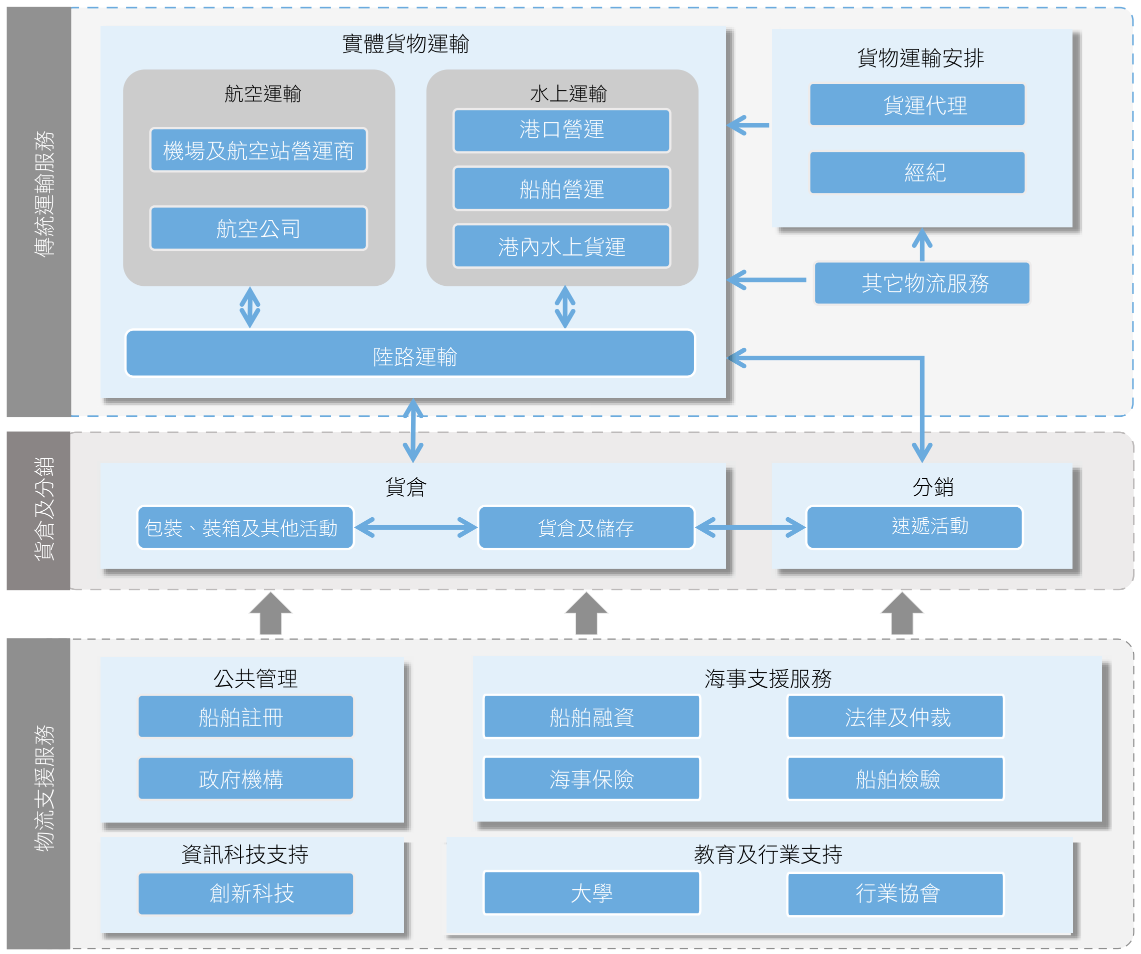
Figure 1 Logistics Cluster in Hong Kong



香港物流體系的連繫

如圖 2 所示，物流體系包含多種行業，這些行業在同一體系內緊密連繫，其中不少運作往往與其他功能相關的經濟活動結合在一起，例如：採購、生產計劃和程序安排、包裝和組裝，以及海關服務。在香港，創新科技已被廣泛應用於加強物流管理之上，特別是運輸和倉儲服務。

圖 2 香港物流體系及其連繫



香港物流支援服務

海事上的支援服務

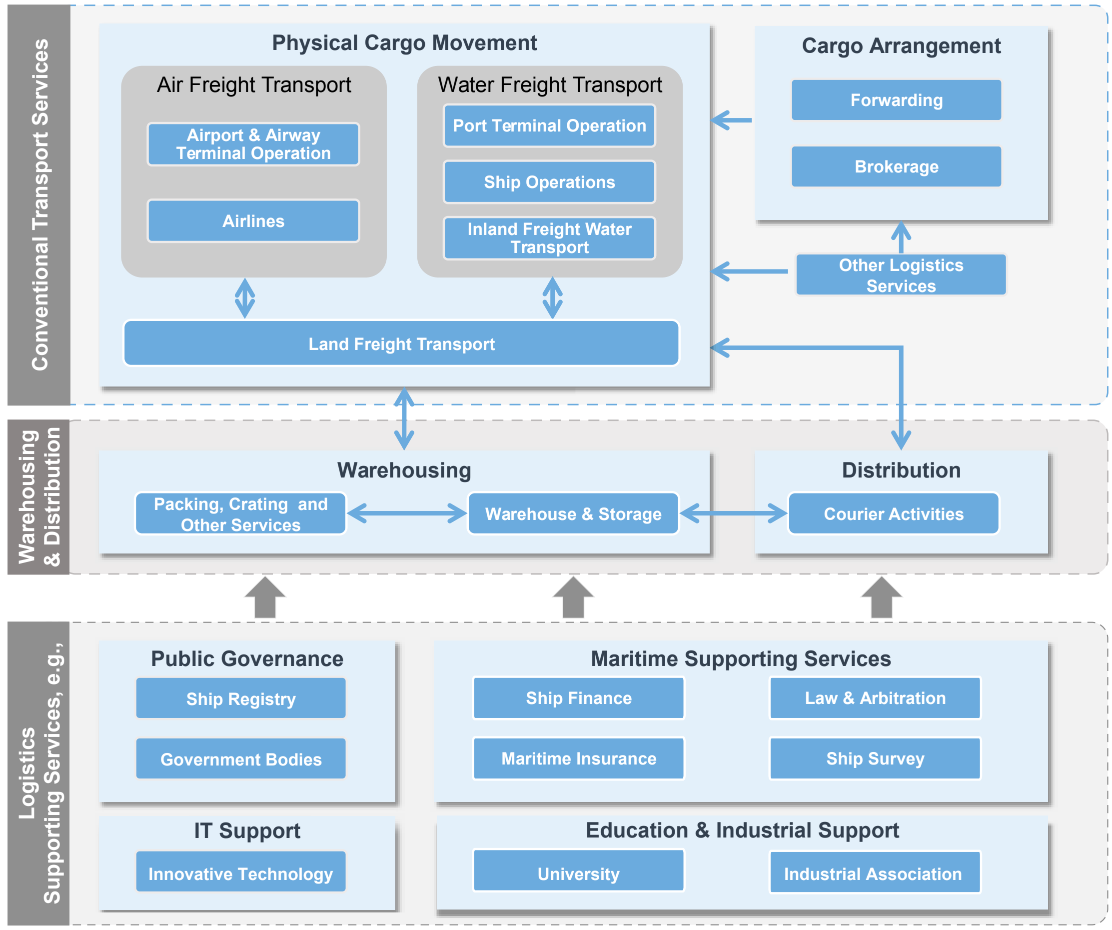
船舶融資：航運是資本密集型的行業，融資是行業運作的重要環節。香港的船舶融資市場發展成熟及極富競爭力，世界上許多主要的船舶融資銀行均在香港運作。

海事保險：海事保險也是航運業重要的一環，主要為船體和其他相關資產提供保障。香港有很多國際海事保險服務公司，提供各種的海事保險產品。截至 2013 年 9 月，香港共有 84 間獲授權的海事保險公司，其中 32 間是外資保險商。香港也是很多國際保賠協會的基地，協會的會員（包括船東、租用者和營運商），相互承保彼此的責任風險，如意外，污染和貨物索償等。

Linkage of the Hong Kong Logistics Cluster

As shown in Figure 2, different industries are closely linked to each other within the logistics cluster. Many may functionally integrate with other economic activities such as sourcing and procurement; production planning and scheduling; packaging and assembly; and customs service. In particular, innovative technology has been widely applied to enhance logistics management functions in Hong Kong, particularly for transportation and warehousing services.

Figure 2 Hong Kong Logistics Cluster and its Linkages



Logistics Supporting Services in Hong Kong

Maritime Supporting Services

Ship Finance: The shipping industry is capital intensive, in which the finance function is particularly important. The ship finance market in Hong Kong is well-established and highly competitive. Many of the world's major shipping banks have a presence in Hong Kong.

Marine Insurance: Marine insurance is vital to the shipping industry. It covers the loss and damage of ships and cargoes during a voyage and assets such as terminals. Hong Kong has a wide range of international marine insurance service providers, offering various types of marine insurance. As of September 2013, there were 84 authorised ship insurers in Hong Kong, of which 32 were foreign insurers. Hong Kong is home to many international P&I Clubs (co-operative insurance associations), where members (e.g. ship owners, charterers and operators) mutually insure each other for liabilities caused by personal injury, pollution and cargo claims.

海事法律及仲裁：海事法律服務覆蓋海上傷亡事故及商業航運活動。香港是區內的主要海事仲裁中心。香港國際仲裁中心的海事仲裁組，可在特定情況下以仲裁協議在庭外調解海事糾紛個案。

船舶和貨物檢驗：香港有很多獨立的驗船公司，驗船員為船隻的承租者、貨主及存貨人提供獨立的船隻及貨物檢驗服務。這些檢驗是為了避免雙方的爭執，如有需要，驗船員可提供專業意見。

公共管理

運輸及房屋局：運輸及房屋局對香港的運輸和房屋負有政策上的責任。在運輸方面，該局負責制訂香港對外和對內的交通政策事宜，包括航空服務、陸路及水上交通和物流業。

海事處：海事處負責香港的海港事務，主要職能有二：一、確保港口運作和全港水域安全；二、管理香港船舶註冊。海事處負責香港內所有航海事宜及保障各類船隻的安全。

船舶註冊：海事處負責管理香港船舶註冊服務，截至2013年1 月，香港船舶註冊總噸位為 8 千萬噸，位列全球第四。

民航處：民航處是香港的民航監督。除了監管民航業務外，同時亦提供航空交通及導航服務，為出入香港國際機場及所有飛越香港飛行情報區內的航班，提供航管服務。

教育及行業支持

海事培訓：香港各所高等院校，為學員提供各種專業的海事培訓，包括航運、海事法，供應鏈管理，運輸物流等。

行業協會：各協會代表特定的持份者，促進業內的交流討論，擔當業界和政府的溝通橋樑。例如：香港貨運物流協會有限公司，香港付貨人委員會，香港運輸物流學會和香港船東會。

創新科技 （IT）

創意和科技能推動經濟增長和提高行業（包括物流業）的競爭力。在物流運作上，科技能夠促進貨品、服務和信息流轉暢通，同時整合供應鏈上的業務流程。圖3展示了科技在運輸和倉儲的應用。

Maritime Law & Arbitration: Maritime legal services cover both commercial shipping activities and maritime casualty. Hong Kong is a major maritime arbitration centre in the region. The Hong Kong International Arbitration Centre (HKIAC) resolves shipping disputes outside the courts through maritime arbitration under specific terms set out in an arbitration agreement.

Ship and Cargo Surveying: The surveyors' clients include ship owners, charterers of ships, insurers and shippers. These surveys are conducted to safeguard all parties from avoidable disputes and provide comfort to all parties involved. Where appropriate, the surveyors will offer professional advice.

Public Governance

Transport and Housing Bureau: The Transport and Housing Bureau (THB) has policy responsibility for Hong Kong's transportation and housing. In terms of transport, THB is responsible for the formulation of policies on matters relating to Hong Kong's internal and external transportation, including air services, land transport, maritime transport and logistics.

Marine Department: The Hong Kong Marine Department (MD) is the marine authority in Hong Kong. It has two principal functions; the administration of the port and the administrative control of all ships on the Hong Kong Shipping Register. It is responsible for all navigational matters in Hong Kong and the safety standards of all classes and types of vessels.

Ship Register: MD is responsible for maintaining the Hong Kong Shipping Register, which is now the world's 4th top ship register with gross registered tons of 80 million at the end of January 2013.

Civil Aviation Department (CAD) is the civil aviation authority in Hong Kong. Apart from the regulatory role, CAD also act as an air navigation service provider and provides air traffic control services to all aircraft operating in and out of Hong Kong International Airport and within the Hong Kong Flight Information Region (FIR).

Education & Industrial Support

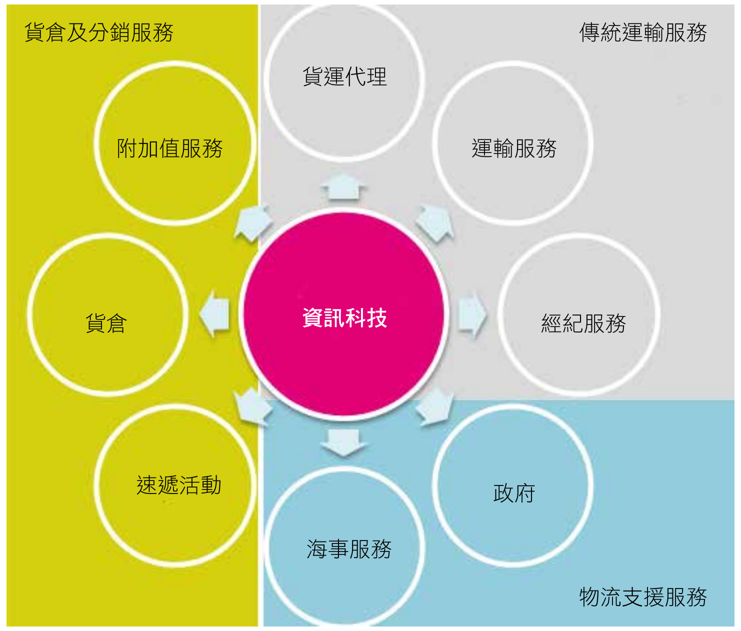
Maritime Education: In Hong Kong, specialised courses in different maritime areas such as shipping, law, supply-chain management, and transport logistics, are provided by various institutions of higher education.

Industry Associations: Industry associations represent the interests of specific stakeholders, facilitate discussion within the trade and act as a communication channel between the trade and the government. Examples of associations include Hong Kong Association of Freight Forwarding and Logistics Ltd (HAFFA), the Hong Kong Shippers' Council (HKSC), the Chartered Institute of Logistics and Transport in Hong Kong (CILTHK) and Hong Kong Shipowners Association (HKSOA).

Innovative Technology (IT)

Innovation and Technology are drivers for economic growth and industrial competitiveness, including that of the logistics industry. Technology facilitates the smooth flow of goods, services and information, as well as integrates business processes across the supply chain. Figure 3 shows the technology applications in transportation and warehousing.

圖3物流體系



3. 物流政策支持

自2000年起，與物流相關的政策方案可以分為三個時期，即：**2000-2004，2005-2010 及 2010 後**（圖 4）。直至近年為加強香港的競爭力，政府才把目光放回物流業。目前，政府正考慮把某些土地（當中包括填海而來的土地）作物流用途。

然而，目前香港支持物流業的政策欠缺戰略性定位，不但仍未落實詳細的計劃和具體的發展項目，而且經過一段長時間暫停發展物流和開發土地後，現在支持物流業的整體政策仍然不足以滿足行業的需求，政策對行業的支持度遠遠落後於競爭對手如上海和新加坡。

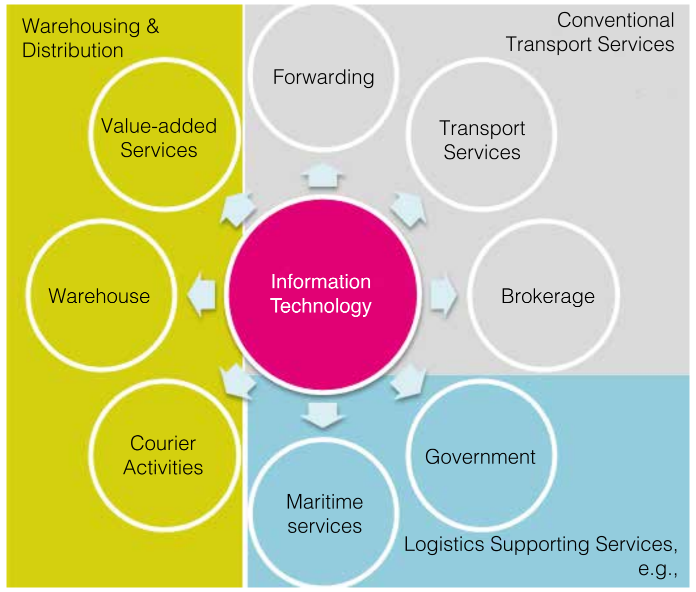
圖 4 與物流行業相關的政策 (自 2000 年)

	2000 — 2004年	2005 — 2010年	2010年後
定位	物流被定義為推動香港經濟發展的引擎之一	計劃開展十個大型基礎設施建設項目，其中包括屯門至赤鱲角連接路及屯門西繞道、高速鐵路、港珠澳大橋及洪水橋新發展區	加強香港作為區域及國際航空中心的位置 鞏固香港作為國際航運中心的地位 定位香港為高增值物流服務的區域分銷中心
可行性	展開大嶼山物流園的規劃 完成香港港口規劃總綱2020研究，並展開十號貨櫃碼頭規劃 提議建造西部通道及港珠澳大橋 提議建造港口鐵路線	在葵青區選取發展物流業的地點 推廣數碼貿易運輸網絡	在青衣區選取三個適合物流發展的地點 完成香港國際機場2030規劃大綱，並展開第三條跑道規劃的相關評估 進行洪水橋新發展物流區的大綱規劃 評估於屯門西發展物流設施的可行性
執行	簽訂《內地與香港關於建立更緊密經貿關係的安排》促進跨境貿易 香港內河碼頭項目開始運作	進一步加強雙邊民用航空運輸協定	國泰航空貨運站於2014年開始運作 完成港珠澳大橋的規劃並展開相關工程

指引及推廣　基礎設施發展　經濟及貿易支持　土地事宜

資料來源：立法會會議及施政報告

Figure 3 Connection between Modern Logistics and IT Services



3. Logistics Policies Support

Policies relating to the Hong Kong logistics cluster can be classified into three periods (i.e., **2000-2004, 2005-2010** and **after 2010**) as set out in Figure 4. It was not until recent years that the government regained its interest in developing the logistics industries with an aim to enhance Hong Kong's overall competitiveness. The momentum persists and at present, some potential lands for logistics use, including the possible reclamation sites, are currently under consideration.

However, existing policy support has not been focused on realising the full potential of the logistics cluster as a key driver to Hong Kong's economy. Detailed planning and specific development projects are yet to be confirmed, and after a long period of suspension on logistics and land development, overall policy support for logistics in Hong Kong has been far from sufficient to meet the industry needs, compared to that of other regional competitors, such as Shanghai or Singapore.

Figure 4 Summary of Policies Relating to the Logistics Sector since 2000

	Around 2000 to 2004	Around 2005 – 2010	After 2010
Positioning	Defined logistics as one of the key drivers to HK's economy	Determined to build Ten Major Infrastructure Projects, incl. TMCLKL & TMWB, XRL, HZBM and Hung Shui Kiu NDA	Enhance HK's position as an regional & intl aviation hub Reinforce HK's position as an International Maritime Centre Position HK to promote high VA logistics services as a RDC
Feasibility	Initiated planning of a logistics centre in Lantau Completion of HKP2020, initiated planning for CT10 Proposed to build West Corridor and HZMB Proposed to build a Port Rail Line (PRL)	Identified sites for logistics development in Kwan Tsing Area Promoted Digital Trade Transport Network	Identified three sites for logistics development in Tsing Yi Area Completion of HKIA Masterplan 2030, to assess 3rd runway plan Conduct outline plan of HSK NDA Logistics Quarter Assess feasibility of logistics facilities in Tuen Mun West
Implement-ation	Signed CEPA to stimulate cross-boarder trades River Trade Terminal (RTT) commenced operation	Further enhanced Bilateral Civil Aviation Agreements	Cathay Pacific Cargo Terminal starts operation in 2014 Completed planning and initiated construction of HZMB

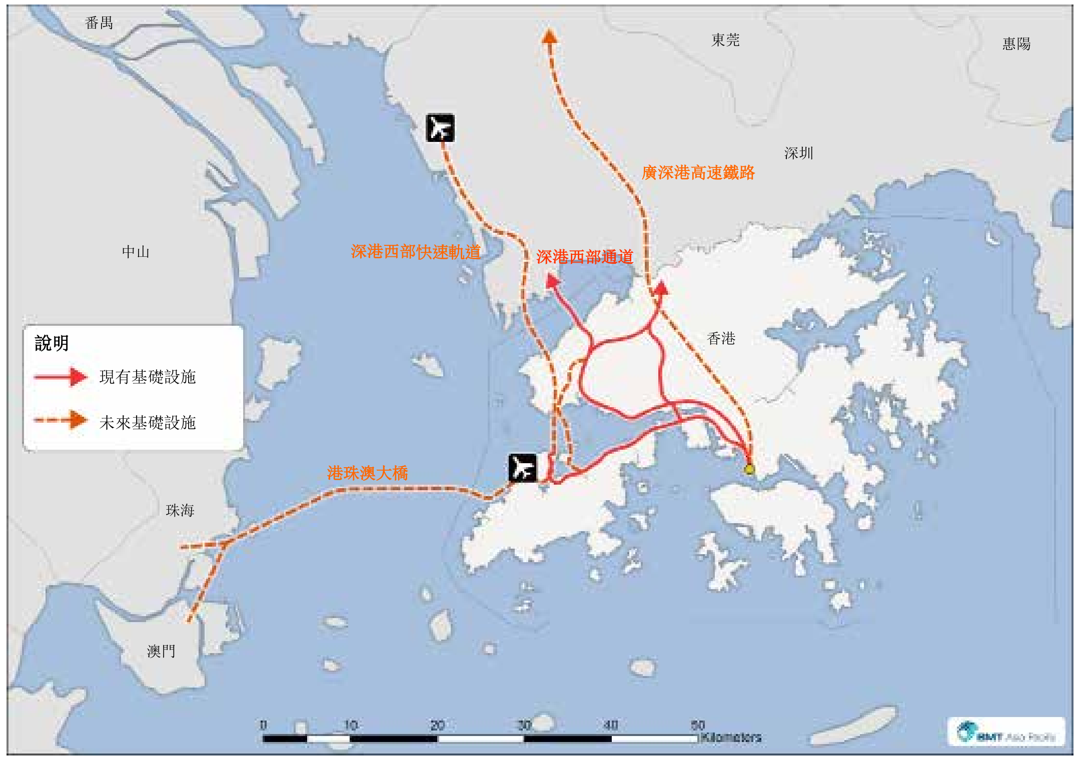
Guideline and Promotion　Infrastructure Development　Economic and Trading Support　Land Issues

Source: Legislative Council meetings & Annual Policy Address

基礎建設發展

圖 5 概括了香港現存和規劃中的主要基礎建設發展。為配合空運及海運的增長，物流活動的集中點正移向西邊。

圖 5 現時及規劃中的香港主要基建



4. 物流體系在香港的經濟貢獻

表 1 根據 2012 年的數據，列出物流體系對香港整體經濟的貢獻。物流業的直接、間接及衍生的經濟貢獻估算總值約為港幣 1079 億元，佔香港本地生產總值的 5.3%，以及 提供了 269,780 個就業機會。

表 1 香港物流體系的經濟貢獻

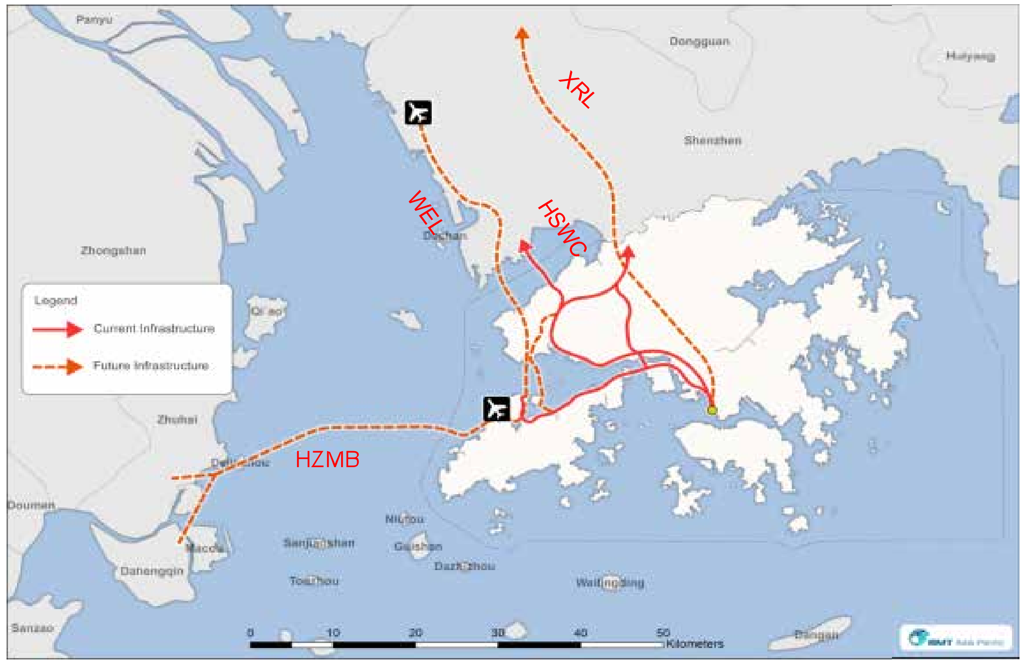
經濟貢獻（2012 數據）	就業人數	附加值 (百萬港元)
直接貢獻	183,200	67,100
香港經濟(%)	5.0%	3.3%
間接貢獻	46,354	22,219
衍生貢獻	40,226	18,555
總貢獻	269,780	107,874
香港經濟(%)	7.4%	5.3%

資料來源: 香港統計處及研究小組估算

infrastructure developments

Figure 5 summarises the existing and planned major infrastructure developments in Hong Kong. It parallels the market trends of logistics concentration shifting towards the western part of the territory, mainly for synergising the growth of air and sea cargo volumes.

Figure 5 Existing and Planned Key Infrastructure in Hong Kong



Note: HSWC: Hong Kong-Shenzhen Western Corridor; XRL: Guangzhou-Shenzhen-Hong Kong Express Rail Line; HZMB: Hong Kong-Zhuhai-Macau Bridge; WEL: Hong Kong-Shenzhen Western Express Line; TMCLKL: Tuen Mun - Chek Lap Kok Link; TMWB: Tuen Mun West Bypass

4. Economic Contribution of the Logistics Cluster in Hong Kong

Table 1 summarises the total economic contribution generated by the Hong Kong Logistics Cluster based on the 2012 data. The total economic contribution generated, including direct, indirect and induced activities was an estimated HKD 107.9 billion, accounting for 5.3% of the total GDP. It also helped provide 269,780 job opportunities.

Table 1 Economic Contributions of Hong Kong's Logistics Cluster

Economic Contributions, 2012 Data	Number of Persons Engaged	Value Added(HKD Million)
Direct Contribution	183,200	67,100
% of Hong Kong Economy	5.0%	3.3%
Indirect Contribution	46,354	22,219
Induced Contribution	40,226	18,555
Total Contribution	269,780	107,874
Percentage in Hong Kong Economy	7.4%	5.3%

Source: Census and Statistical Department & Study Team Estimations

5. 區域內各物流中心的競爭力

亞洲的其他主要物流中心對香港有著潛在的威脅，這些地方包括新加坡、深圳、上海、台灣和首爾。其中，**深圳**是香港的直接競爭者，同樣服務珠三角進出口的貨源；**上海**與香港則同樣定位為中國的貿易中心和金融中心；**新加坡**則是亞洲區內的貿易和轉運中心，與香港同樣定位為物流區域樞紐。

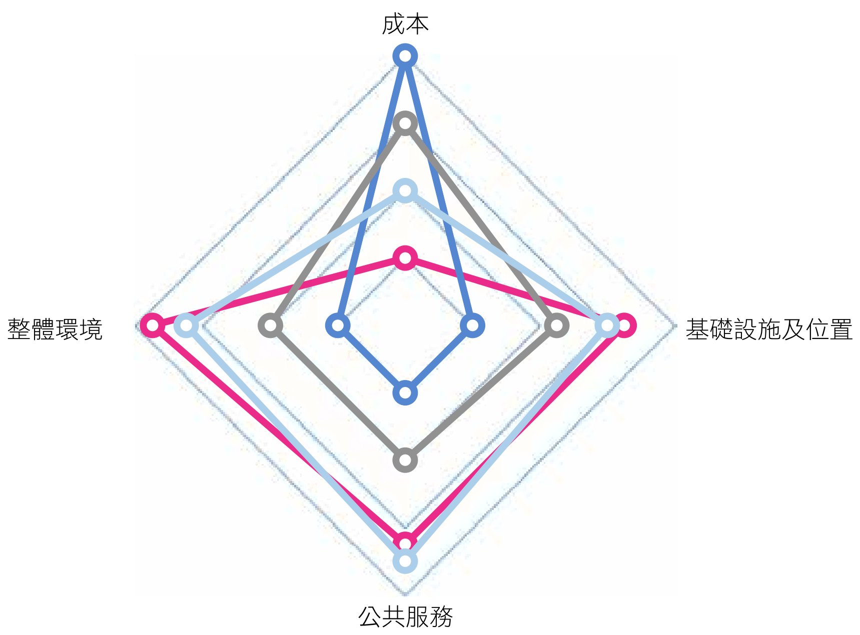
香港是一個城市經濟體，土地和勞工的供應有限，這明顯地局限了香港的發展。隨着香港發展為一個成熟的經濟體系，土地和勞工的成本變得非常高。雖然香港物流業需要保持它的臨界規模，但是香港和深圳之間的競爭，不再單純地在於貨運量和成本。物流服務供應商應該逐漸轉向提供高度靈活性、可靠性、安全性和精良加工的服務組合。香港面臨的挑戰是要維持高效率，同時與深圳合作，以便可充分利用珠三角的土地和勞工資源，為物流市場提供更完善、更全面的供應鏈方案。

物流樞紐的關鍵績效指標(KPI)比較

經過廣泛的持份者諮詢後，共得出 15 個物流業的關鍵績效指標，可用以衡量前文所提的物流區域樞紐的競爭力。這些關鍵績效指標可分為四個組別，包括：**成本，公共服務，基礎設施及位置**，和**整體環境**。

總括而言，香港和新加坡是整體競爭力較強的物流樞紐中心，而上海和深圳的營運質素則較低。香港最明顯的劣勢就是成本較高，減低了香港的吸引力，對新進者尤甚。深圳對香港的威脅，主要是海運出口，海運運送的貨品價值比空運貨品較低，因此對成本較為敏感；另一方面，香港和新加坡正在高價值的空運貨品市場互相競爭。上海雖未對香港產生即時的威脅，但隨着它的金融和物流服務逐漸成熟，也可能與香港展開競爭。見圖 6。

圖 6 關鍵績效指標(KPI)比較



依次從最不具競爭力至最具競爭力

○ 香港 ○ 深圳 ○ 上海 ○ 新加坡

5. Competitiveness of Various Logistics Hubs in the Region

Major logistics hubs in Asia such as Singapore, Shenzhen, Shanghai, Taiwan and Seoul are posing a potential threat to Hong Kong. Direct competition is from **Shenzhen**, which shares with Hong Kong the same cargo hinterland, i.e., cargo generation to/ from the Pearl River Delta region (PRD); **Shanghai,** which has positioned as the trading hub and financial centre for Mainland China; and **Singapore**, which shares the same positioning as the regional hub for intra-Asia trades and as a transhipment centre.

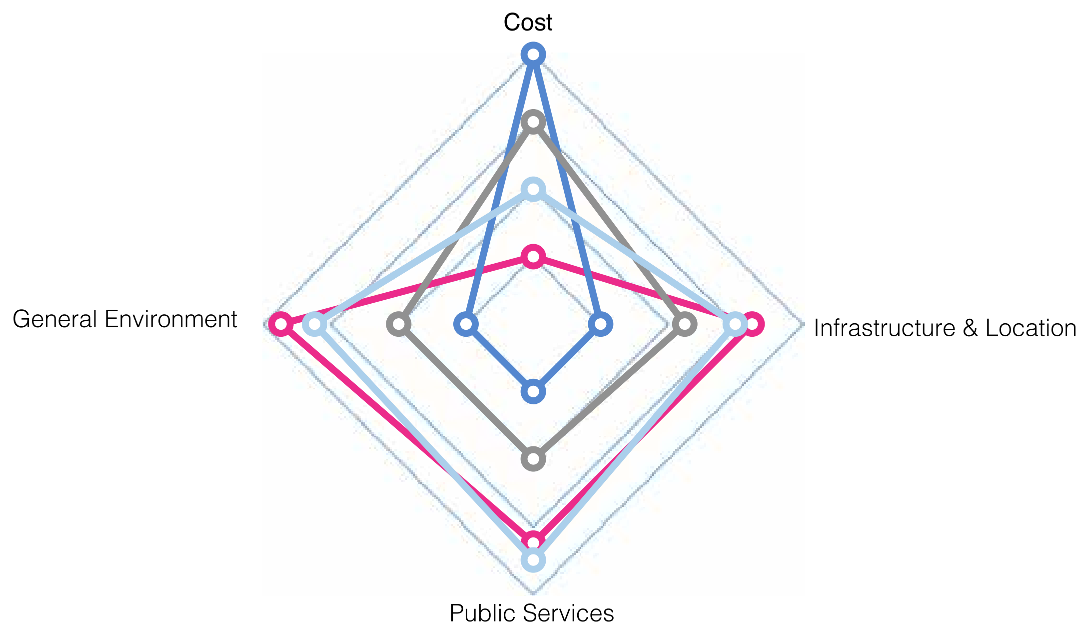
Hong Kong being a city economy has an obvious limitation in terms of land and labour supply. As Hong Kong develops into a mature economy the costs of land and labour are becoming remarkably high. While the Hong Kong logistics industries need to uphold a critical mass to stay competitive, the comparison between Hong Kong and Shenzhen should not be based merely on volume and/or costs. Logistics service providers should gradually move into service mix that requires high level of flexibility, reliability, safety, and processing sophistication. The challenge for Hong Kong has been how to remain efficient whilst at the same time collaborate with Shenzhen for optimising the use of land and labour in the PRD in order to provide more complex or comprehensive supply chain solutions to the market.

Key Performance Indicators (KPI) Comparison of the Logistics Hubs

A total of fifteen (15) Key Performance Indicators (KPIs) of the logistics sector were identified based on extensive stakeholder consultations to measure the competitiveness of the aforementioned logistics hubs. These KPIs are categorised into four groups, namely **Cost, Public Services, Infrastructure & Location** and **General Environment.**

In summary, Hong Kong and Singapore are generally considered as highly competitive logistics hubs; while Shanghai and Shenzhen are operating at a lower quality level. In particular, Hong Kong has an apparent disadvantage in costs, making it less attractive especially to new comers. As such, Shenzhen may pose a threat to Hong Kong for sea exports which are mostly lower value cargo compared to air and hence more sensitive to costs. On the other hand, Hong Kong and Singapore face competition in high value added air cargo. Shanghai may not be an immediate threat to Hong Kong at present, but with its financial and logistics services getting more mature, it could become a serious contender in the future.

Figure 6 Summary of the KPI Comparison



Ranged from least competitive to most competitive

○ Hong Kong ○ Shenzhen ○ Shanghai ○ Singapore

香港物流業的優劣機危 (SWOT)

表 2 中詳細列出香港物流業的優劣機危(SWOT)分析，及影響香港物流業發展的關鍵問題。

表 2 香港物流業的優劣機危

Strengths 優勢	Weaknesses 劣勢
* 處於亞洲心臟的優越地理位置，亦是通往中國大陸的關口 * 自由港 * 世界第一的空運機場和第四的海運港 * 靈活性 — 結合自由港，機場和港口。 * 高效的海關程序 * 簡單稅制及低稅率，16.5% 的公司利得稅 * 清廉政風和健全的法律制度，提供良好的知識產權保障 * 資金和信息的自由流動 * 高質素的物流專業人才	* 沒有足夠土地發展倉儲服務 * 高租賃成本，通常是短期租約和高首期 * 高勞工成本 * 缺乏倉務員(相對中國) * 缺乏適當的物流設施 * 缺乏應用資訊科技(相對新加坡) * 缺乏推廣物流業的政策
Opportunities 機會	**Threats 威脅**
* 亞洲和中國大陸的內需增長 * 蓬勃的亞洲區內貿易增長 * 財富增長—高價值貨品的需求增加 * 透過建設中的港珠澳大橋開通珠三角西部	* 熾熱的房地產市場，增加土地成本 * 新加坡物流競爭力提高 * 中國大陸樞紐中心提供平價土地，及改善海關程序和倉庫品質 * 新競爭對手湧現，如航空，廣州機場；貿易，上海自貿區

持份者的意見

諮詢

本研究向行業持份者進行了諮詢，持份者包括：航空公司、海運公司、港口營運商、倉庫及儲存服務供應商、貨運代理、物流協會和政府部門。

物流業的瓶頸

成本增加的壓力：土地/租金成本在近年激增，使到香港成為物流經營成本最高的城市之一。據持份者所述，香港的租金成本是深圳的三倍。高地價/租金大大地加重行業的營運成本。

短期租約：市場上大部分租約均屬短期租約，令到倉庫營運商難以制定長遠的發展計劃。結果，營運商更加不願意投資在設施和業務上。

人力資源不足：物流業界普遍反映，行內低技術員工和專業人才都出現短缺。一般來說，在香港無論是教育機構，還是業界提供的專業物流培訓都不足夠應付行業發展需要，與競爭對手新加坡和上海相比，情況相形見拙。香港的生活成本不斷上升，也可能是讓國際人才不願留在香港物流業工作的原因。

SWOT of Hong Kong Logistics

Table 2 sets out the detailed SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis of Hong Kong as a logistics hub and identifies the key issues that affect the development of Hong Kong's logistics industries.

Table 2 SWOT of Hong Kong Logistics

Strengths	Weaknesses
* Strategic location at the heart of Asia and the gateway to the Chinese mainland * Freeport * No 1 airport for air cargo and No. 4 for sea cargo * Flexibility – Combination of free port, airport and seaport * Efficient customs procedures * Simple and low tax regime with a corporate profits tax of 16.5% * Clean government and sound legal system, which offer good protection to intellectual property right * Free flow of capital and information * Highly qualified logistics professionals	* Insufficient land for warehouse development * High rental costs, typically with short-term tenancy and high down payments * High labour costs * Lack of warehouse workers (relative to China) * Lack of appropriate logistics facilities * Insufficient IT adoption (relative to Singapore) * Lack of industry specific policies to promote the logistics industry
Opportunities	**Threats**
* Growing domestic demand in Asia and mainland China * Prominent intra-Asia trade * Growing affluence – higher demand for high-value goods * Would be accessible to western PRD through Hong Kong-Zhuhai-Macao Bridge (HZMB) under construction	* Heated property market, surging land costs * Increasing competitiveness of Singaporean logistics * Mainland China hubs offer cheaper land, and are improving customs and warehouse quality * Rising of new competitors with regards to aviation e.g. Guangzhou Airport and trading e.g. Shanghai FTZ

Stakeholders' Feedbacks

Consultations

Consultations with the industry stakeholders were conducted, which covered airlines, shipping lines, port operators, warehouse operators, freight forwarders, logistics associations and government units.

Bottlenecks of the Logistics Industries

Increasing Cost Pressure: The surge of land / rental costs in recent years has resulted in Hong Kong becoming one of the most expensive cities for logistics businesses. As commented by the stakeholders, rental costs in Hong Kong were about 3 times as high as those in Shenzhen. The high land / rental costs largely resulted in high operating costs.

Short-term Lease Contracts: Most of the leases tendered in the market were for short-term use. This makes it difficult for warehouse operators to plan for a long-term development. As a result, warehouse operators are more reluctant to invest in facilities for operating businesses.

Insufficient Labour Pool: It was commonly reflected by the logistics stakeholders that labour shortage existed in both low skilled workforce and professional talents. In general, professional logistics-related trainings in Hong Kong provided by educational institutes and trade organisations were considered insufficient, especially when compared to Singapore and Shanghai. Hong Kong's high costs of living might have also discouraged international talents from entering the territory's logistics industries.

缺乏政策支持 ：過去十年極少有支持物流業的政策，令到持份者對行業的長遠發展缺乏信心。觀乎其他物流樞紐中心均有具體的發展計劃和擴展規劃，但香港於過去十年卻沒有建設任何重要的物流基建，如物流園/港口/機場路道，這自然令業界人士對行業的長遠發展失去信心。

低效的政府架構 ：目前在香港負責物流事務的是運輸及房屋局。業界的持份者普遍認為在現時的政府架構下，各個相關的貿易部門和物流部門之間並沒有密切的互動。因此，有必要設立一個專責的局/處/法定機構，負責管理和推廣香港整體的物流業。

6. 前瞻

為了長期的可持續增長，物流業界(特別是中小企)需要一個有足夠空間容納不同附加值服務的現代物流園。

物流用地的可能選址

圖 7 列出了六個政府曾提出過可能作物流發展用途的選址。為了促進香港物流業的持續發展，一個面積夠大的物流專用地是關鍵。選址的主要考量有：(1) 相當大的規模*，(2)補地價金額低廉，(3) 鄰近海港和機場便於聯運，(4) 便捷通達主幹道和高速公路，(5) 遠離市中心或商業區，以免造成市區的交通阻塞，及(6) 便利往來住宅區，以吸引中、低技術員工。

**最近香港大學的一份調查研究建議這相當大規模的物流專用地最少要有70公頃*1。這個數字只是根據問卷中業界認為較合適的各處物流用地綜合估算的面積，僅作為一個專用地需求的參考。事實上，物流園的用地很可能大過70公頃，因為除了彌補目前的短缺外，很多目前正在設備落後的工廈經營的貨運代理和倉庫營運商將來也會搬到新物流園。故此，我們只是以70公頃作為參考，真正的需求還是要有一個更全面和深入的研究計算。*

1 「香港物流用地發展規劃業界問卷調查」，香港大學及威裕環球集團，2014年7月

Lack of Policy Support: The industry did not have strong confidence in the long-term prospects of Hong Kong's logistics industries, which was in part due to the lack of policy support witnessed in the past decade. Contrary to the substantial development and expansion plans proposed in other competing hubs, Hong Kong had no major logistics parks / ports / airport runways addition / expansion completed in the past decade, which resulted in weakening confidence of the stakeholders, especially among the small and medium enterprises (SMEs).

Inefficient Government Structure: In Hong Kong, the government currently responsible for logistics issues is the Transport and Housing Bureau (THB). It was widely commented by the stakeholders that under the current government structure, various trade and/or logistics related departments do not frequently interact with each other. Therefore, establishing a dedicated department / office / statutory body was requested to manage and promote the Hong Kong logistics industries as a whole.

6. The Way Forward

For the purpose of long-term sustainable growth, the logistics community, especially the SMEs requires a modernised logistics park with sufficient and adequate space to accommodate comprehensive value added logistics services.

Potential Land for Logistics Use

To facilitate sustainable development of the logistics industries, a sizable and dedicated land for logistics use is crucial. Figure 7 details the six potential sites recommended by the government for logistics purposes. The main considerations for land selection are (1) considerable size*, (2) low land premium, (3) close proximity to sea ports and the airport for intermodal arrangement, (4) easy access to major truck routes and highways, (5) away from city centres or commercial districts to avoid urban traffics, and (6) easy access from residential districts for attracting medium to low skill labours. Another reclamation site at Sunny Bay in North Lantau currently under investigation with details yet to be known may also present another opportunity for logistics use.

**The considerable land size for logistics use is recommended to beat least 70 ha*1 in are centre port byHKU. The size was estimated by pooling the preferred locations and sizes indicated by industry stakeholders through a survey. The potential land for the logistics park would likely be more than 70ha as, in addition to meeting the current shortage, freight forwarders and warehouse operators now operating in old industrial buildings with obsoleted facilities will also move into the new dedicated site. The figure of 70ha is merely for reference and a more thorough study is needed to determine the actual need.*

1 "Hong Kong's Logistics Industry and Land Supply – An opinion Survey", HKU & bpsglobal, Jul 2014

圖 7 物流用地的可能選址

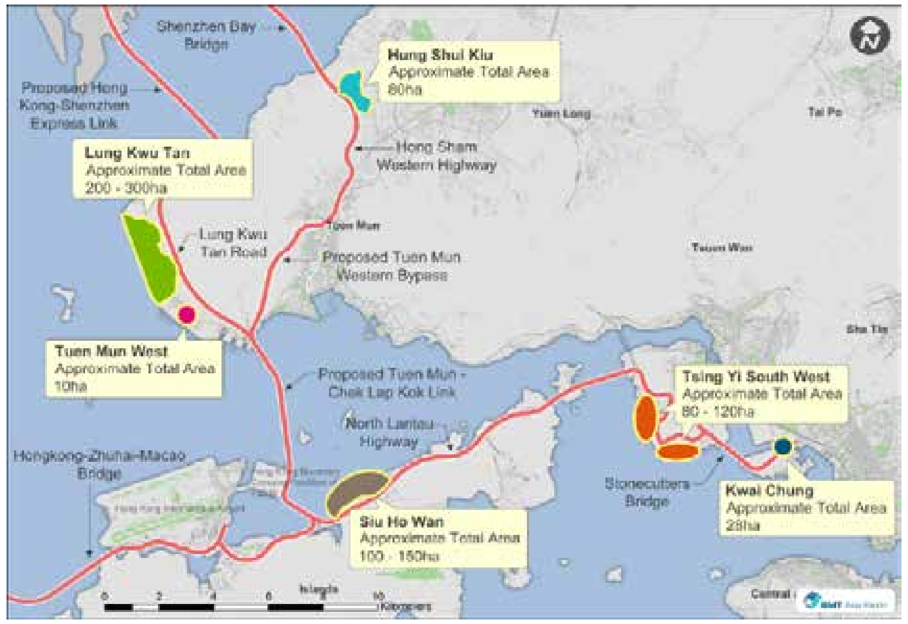
有意見認為洪水橋所劃分的62公頃物流用地最終應該用作市區發展；而其他選址不是因為面積太小，不足以滿足行業長遠發展需要，就是已經規劃為別的用途。因此，最可行的選擇是龍鼓灘/屯門西和小蠔灣。龍鼓灘/屯門西的好處是靠近內河碼頭。小蠔灣雖有中華白海豚出沒，但若政府可將小蠔灣污水處理廠及公眾設施搬到地底，便能縮小填海規模，大大減低對生態的潛在影響，則可以充分利用小蠔灣因其地理位置而在海陸空多式聯運上具有的優勢。除了上圖六個可能的選址之外，我們建議政府還應探討其他可能用作發展物流園的地點，為選址作深入研究。

物流專責機構的商業模式

為了釋除對租金成本持續增加、以及租賃期過短的的憂慮，一個有政府高度參與的商業模式是首選(政府角色應類似監管者)。在這個商業模式下，政府可以擴大其功能，成為 (1)**開拓者** - 負責資源投放，如供應土地，和/或投入資金作前期資本；(2)**管理人** - 通過加強其監管地位，監察發展之目的和策略，同時確保此機構不只為牟利，亦須兼顧公共社會利益。

我們期望這樣的物流建設/機構可效法香港科技園，訂定法例以設立一管理公司負責規劃、發展和管理資產。就長遠而言，這家公司應遵循審慎的商業原則管理其業務，並自負盈虧。政府應在公司發展初期提供足夠的資源，支持其營運開支，直至公司能夠達到收支平衡。

Figure 7 Potential Land for Logistics Use



Source: BMT & Enhancing Land Supply Strategy, Hong Kong Transport and Housing Bureau

There are views that the 62 hectares earmarked for logistics use in Hung Shui Kiu should eventually give way for urban development while other sites are either too small for providing long-term solutions, or currently occupied by other uses. Therefore, the most likely choice would be Lung Kwu Tan/Tuen Mun West and Siu Ho Wan. Lung Kwu Tan/Tuen Mun West has an advantage of being close to River Trade Terminal. Siu Ho Wan has widespread concerns of Chinese White Dolphins to overcome, but if the Government are able to move the Siu Ho Wan Sewage Treatment Works and its utilities underground, the scale of reclamation needed and therefore the potential environmental impact would be minimised significantly. This would then be a location with obvious advantages in intermodal operations. Besides the aforementioned six potential sites, it is recommended that the government conducts further in-depth studies to search for other possible sites to develop a logistics park.

A Business Model for Logistics Facilities

To alleviate the concerns of increasing rental costs and inadequate duration of lease, a business model with higher government involvement (probably as a regulator) is preferred. Under the business model, the government may expand its role to become (1) **a developer** – by investing resources in the form of land supply and/or upfront capital expenses injection; and/or (2) **a manager** – by enhancing its regulatory position and monitoring the development goals and strategies, taking care of not only profit-making (as a private corporation) but also public interests and social benefits.

We envisage such a logistics infrastructure / facility may follow a similar business model to that of the Hong Kong Science Technology Parks Corporation (HKSTPC). A management corporation should be established by law to plan, develop and manage the assets. In the long run, this corporation should be able to conduct its business according to prudent commercial principles and to become self-sustained. The government would need to provide sufficient resources for the business to meet its operating expenses at the initial stage before reaching its break-even point.

遷移葵青貨櫃碼頭的可能性

遷移目前的葵青貨櫃碼頭，也被認為是一個長遠發展的可行策略，提出這個想法是建基於以下因素:

- 香港港口已經過了快速增長的時期。搬遷地點的面積不必太大，只要足以維持香港作為主要物流樞紐中心的需要即可。
- 葵青碼頭的設計主要是為處理直達貨物，但目前碼頭處理的貨物超過65%是轉口貨物，故此對碼頭之間的流動需求大幅增加。業界期望能有因應現時需要而設計的新港口。
- 將來會有更多的貨物是以多式聯運方法運作，例如，空一海，陸一海，河一海等。因此香港港口最理想的位置，是更靠近各種基建(如機場，貨倉，物流園等)的地方。
- 多年過去，葵青已發展為人口密集的地區，香港港口應該建立在遠離都會或市中心的地方。
- 葵涌鄰近地區已不再是香港主要的製造/生產中心。

當然，遷移碼頭的第一個考慮是找個合適的遷移地點。在決定選址前，還需要進一步的深入研究分析及向業界進行全面諮詢。在碼頭遷離葵涌和青衣後，目前的土地，可配合地區的社區發展，重建為商業和居住用途。

增加人力資源

勞工供應問題：香港物流業的勞工短缺問題非常嚴峻，無論是低技術員工，還是專業人才都出現人手不足的情況。

改善行業形象：為了吸引人才入行，物流業必需改善行業形象，及增加公眾對行業的認知。這方面需要政府政策配合，包括：(1)支持教育機構和貿易機構提供物流培訓；(2) 促進先進科技的研究開發；(3) 推廣物流業為高附加值服務供應商，以改善公眾的對行業的印象和認知。

政策支持

如上文所述，政府現時對物流業的支持政策並不足夠。目前正是香港面對着嚴峻競爭和商業瓶頸的重要關頭，也是香港在長遠發展過程中，必須要經歷的關鍵時刻。

除了土地供應和人力問題外，以下的「願望清單」具體提出持份者所需要的政策支持：

- 清晰界定政府架構內有關物流業的政策責任，以配合物流業作為推動香港經濟發展重要動力的策略性地位；
- 制訂有關物流業持續發展及提高競爭力的政策，包括：
  * 提供物流專用土地；
  * 在人力發展方面的推廣、培訓和教育；
  * 清關和進出口相關的單一窗口；
  * 推廣電子物流，為中小企提供電子平台，和鼓勵採用電子文書；
  * 藉港珠澳大橋開通的契機，積極尋求與珠海、澳門的合作機會。
- 務須建造機場第三跑道，維護香港國際機場的區域領導地位。

Potential Relocation of the Kwai Tsing Container Terminals (KTCT)

The relocation of the current KTCT is also considered as a possible strategy for the long-term development. The idea of relocation is based on the following:-

- The rapid growing period of Hong Kong Port was over. The relocation may not require much land but simply enough to meet the critical mass for Hong Kong as a key logistics hub.
- The design of KTCT was primarily for handling direct cargoes but over 65% of cargo served at the terminals now was transhipment, which resulted in increasing inter-terminal movements. The industry longs for a new port design that can better accommodate its current needs.
- It is envisaged that more and more cargo will be handled by multi-transport (logistics) modes (e.g. air-sea, land-sea, river-sea, etc.). The HKP should ideally be close to various infrastructures (e.g. airport, warehouses, depots, logistics parks, etc.).
- Over the year, Kwai Tsing has developed into a populated district. HKP should be located away from the cosmopolitan areas or city centre.
- The nearby Kwai Chung is no longer a key production centre for Hong Kong.

Notwithstanding, the immediate challenge of relocating KTCT is to find a suitable site. This requires further investigations and consultations comprehensively with the industry. Besides, the current terminal sites at Kwai Chung and Tsing Yi Basin could be redeveloped for commercial and residential use, integrated with the community development in this district.

Manpower Enhancement

Issues on Labour Supply: The labour shortage in Hong Kong's logistics industries has been rather significant. The shortage is taking place in both low skill workers and professionals.

Improving Industry Image: It is essential to improve the image and the public awareness of the logistics industries in order to attract new talents. This may requires government policies to (1) support educational institutes and trade organisations to provide logistics training; (2) foster R&D in technology advancement; and (3) promote the logistics industries as high value added service providers in order to improve the public image of the industries and the public awareness.

Policy Support

As discussed earlier, the government policy support for the Hong Kong logistics industries is insufficient. At the juncture of facing severe competition and encountering business bottlenecks, Hong Kong is now experiencing a critical stage for its long-term development.

In addition to the land provision and manpower issues, the following "Wish List" helps specify the sorts of policy support needed for the stakeholders:

- To clearly define the policy responsibility in the Government structure to reflect the strategic position of the logistics industry as one of Hong Kong's key drivers of economy;
- To develop policies for the sustainable development and competitive growth of the logistics industries, relating to
  o Dedicated lands for logistics use;
  o Manpower development including promotion, training and education;
  o A single window for customs clearance and related import/export practices;
  o To promote e-logistics by providing an e-platform especially for SMEs and enabling paper-less documentation; and
  o To seek potential cooperation with Zhuhai and Macao facilitated by the HZMB.
- To see to the completion of the third runway at the Hong Kong International Airport and to maintain Hong Kong's leading position as the air hub of the Region.