The Chartered Institute of Logistics and Transport

12 Aug 2025

For Immediate Release

Transport and Logistics Policy Suggestions to the Policy Address 2025 from The Chartered Institute of Logistics and Transport in Hong Kong (CILTHK)

Executive Summary

This proposal outlines strategic recommendations for enhancing Hong Kong's position as a premier international logistics hub, as well as preparation for the deployment of new energy vehicles and autonomous vehicles.

The proposal addresses six critical areas in logistics: (1) Northern Metropolis (NM) logistics development opportunities, (2) Strategic commodities trade facilitation through intermodal transport, (3) Low Altitude Economy (LAE) development, (4) Environmental Social and Governance (ESG) advancement, (5) Smart logistics transformation, and (6) Shipping ecosystem enhancement. These initiatives are designed to strengthen Hong Kong's competitive advantages while addressing emerging challenges in the global trade environment, particularly considering evolving geopolitical tensions and technological disruptions. In the transport aspects, we suggest (1) Accelerating the transition to new energy vehicles in Hong Kong requires addressing infrastructure limitations, policy and funding gaps, and urban planning. A cross-departmental task force is needed to streamline approval processes, facilitate collaboration, and support private investment. (2) Deploying autonomous vehicles (AVs) faces regulatory barriers and funding challenges. Streamlined approval processes, targeted incentives, and a regulatory sandbox are essential for broader AV integration. These measures will enable Hong Kong to achieve clean energy goals and advance smart mobility solutions, ensuring sustainable transport infrastructure and enhancing urban transport landscapes.

1. NM Logistics Development Opportunities

The development of the NM modern logistics cluster presents significant strategic opportunities for Hong Kong's logistics industry transformation. Based on the "Modern Logistics Development Action Plan," the approximately 36-hectare logistics land in the Hung Shui Kiu/Ha Tsuen New Development Area will serve as a crucial platform for upgrading Hong Kong's logistics sector. The region's proximity to Shenzhen Bay Port, combined with its 20–30-minute access to Hong Kong International Airport (HKIA) and Kwai Tsing Container Terminals, creates optimal conditions for modern logistics facilities development. The planning parameters of 110-metre building height limits and a plot ratio of 5.0 provide substantial space for vertical logistics infrastructure and innovative facility design.

LAE logistics applications will position the NM as a vital node for cross-border unmanned aerial vehicle (UAV) logistics corridors, enabling efficient cargo delivery throughout the Greater Bay

Area (GBA). The region can develop cross-border e-commerce express services, emergency medical supply delivery networks, and smart warehousing systems integrated with UAV coordination capabilities. This strategic location allows for the establishment of same-day delivery networks connecting Shenzhen and Hong Kong, particularly for high-value, lightweight commodities requiring rapid transportation.

E-commerce logistics transshipment hub development will leverage the region's strategic positioning to establish cross-border e-commerce consolidation centres, overseas product import distribution facilities, returns processing centres, and quality inspection and certification services. The region can fully utilise Hong Kong's free port status and "One Country, Two Systems" advantages to provide flexible trading arrangements for e-commerce enterprises. Combined with strategic commodities intermodal transport facilitation policies, the area will handle broader product categories including high-tech products and strategic commodities transshipment operations. Through industrial cluster synergy effects, the NM logistics cluster will become a vital gateway connecting mainland China with global markets, driving Hong Kong's logistics industry toward high-value-added and intelligent development while strengthening the city's position as the premier logistics hub for the GBA.

2. Strategic Commodities Intermodal Transport Facilitation

The extension of the Air Transshipment Cargo Exemption Scheme for Specified Strategic Commodities (SCRTEX) to intermodal transport modes represents a critical opportunity to enhance Hong Kong's trade facilitation capabilities while maintaining robust security controls. Currently, SCRTEX operates exclusively within HKIA's cargo transshipment area, limiting the flexibility of capturing transshipment trade opportunities. When strategic commodities cargo lacks proper import licenses, vessels are forced to bypass Hong Kong ports entirely, redirecting to neighbouring hubs like Singapore or Incheon, resulting in significant lost business opportunities.

Our recent study indicates that Hong Kong accounts for approximately 20% of global semiconductor exports, primarily through re-exports, while China's semiconductor market shows substantial trade volumes with annual imports ranging from USD 300-500 billion and exports reaching USD 500-600 billion. This massive market presents an unprecedented opportunity for Hong Kong to strengthen its position as a strategic commodities transshipment hub. The recommended "Approved Warehouse Programme Model" emerges as the most balanced approach, offering reasonable control while maintaining operational efficiency and business benefits. This model leverages existing warehouse infrastructure, requires moderate legal amendments, and provides sufficient flexibility for stakeholders while ensuring comprehensive security measures including real-time cargo tracking, sealed trucking with Global Positioning System (GPS) capabilities, and robust documentation controls.

The implementation should begin with amendments to the Import and Export (Strategic Commodities) Regulations (Cap. 60G) to expand exempted transshipment activities beyond air-to-air operations. The framework must define authorised locations, security protocols, and monitoring requirements across transport modes, with particular attention to custody transfer points, documentation requirements, and liability allocation during modal transfers. A phased

implementation approach should commence with detailed stakeholder consultations, followed by Information Technology (IT) system development and security protocol establishment, culminating in a pilot programme with selected operators to validate the approach before full-scale deployment.

3. LAE Development for Logistics Innovation

The development of Hong Kong's LAE represents a transformative opportunity to revolutionise urban logistics and create new economic growth drivers. Following the Chief Executive's 2024 Policy Address announcement on developing economic activities within 1,000 metres altitude, the logistics sector stands to benefit significantly from UAV cargo delivery and express services, both locally and across the GBA. The high-density urban environment of Hong Kong presents unique challenges for traditional delivery methods, including traffic congestion, complex building access, and rising labour costs, all of which can be addressed through innovative low altitude logistics solutions.

Electric vertical take-off and landing (eVTOL) technology breakthroughs are creating new possibilities for urban air transportation, while Hong Kong's established strengths in intelligent navigation and autonomous flight research, particularly through institutions like The Hong Kong Polytechnic University, provide a solid foundation for technological advancement. The development of LAE is expected to catalyse new industry opportunities including drone maintenance, flight training, aerial photography, and environmental monitoring, while creating diverse employment opportunities ranging from drone operators and maintenance technicians to system development engineers and data analysts.

The implementation strategy should focus on establishing cross-border UAV logistics corridors within the GBA, developing pilot programmes for medical supplies and emergency goods delivery, and creating comprehensive regulatory frameworks that balance innovation with safety and export and import regulatory requirements.

4. ESG Development and Green Logistics Transformation

Recently, CILTHK has been conducting the ESG Perception Survey, among 213 transport and logistics professionals reveals significant opportunities and challenges in advancing sustainability within Hong Kong's logistics sector. The research demonstrates that while 74% of respondents recognise ESG's potential to increase business opportunities and 71% believe it can reduce business risks, there remains a substantial implementation gap with awareness levels compared to actual implementation success. This gap highlights the critical need for targeted policy interventions to bridge the knowledge-to-action divide.

The survey findings reveal that company size significantly determines ESG success, with organisations employing over 500 people demonstrating implementation rates 46% higher than smaller companies. This disparity necessitates the development of scaled support mechanisms, including Small and Medium Enterprises (SME) ESG consortium programmes that allow smaller companies to pool resources and achieve economies of scale. The establishment of an industry-specific ESG policy framework is essential to provide clear

direction and targets for the logistics industry in achieving Hong Kong's 2050 carbon neutrality commitment.

Key barriers to ESG implementation include limited financial resources (72%), lack of qualified expertise (69%), and complex regulatory environments (66%). Addressing these challenges requires a comprehensive approach including government-backed funding mechanisms, subsidised access to ESG specialists, and the creation of standardised training curricula with a practical implementation focus. The research indicates that organisations with ESG training demonstrate 43% higher implementation success rates, suggesting that investing in capability building represents one of the most cost-effective policy interventions.

Some of the actionable proposals are as follows:

- Industry-specific ESG Policy Framework: Provide clear direction and targets for the logistics industry to achieve Hong Kong's 2050 carbon neutrality commitment.
- Comprehensive ESG Training Curriculum: Develop standardised, multi-level ESG training programmes with modules tailored to different organisational roles, focusing on practical implementation rather than theory.
- Industry ESG Certification Programme: Establish a recognised ESG implementation certification to validate expertise and create clear career development pathways.

At the same time, a comprehensive Action Plan for Promoting the use of Sustainable Aviation Fuel (SAF) shall be made available by 2025, representing a critical component of Hong Kong's aviation decarbonisation strategy. Given HKIA’s position as one of the world's busiest air cargo hubs handling over 4.9 million tonnes annually, this SAF initiative is essential for achieving meaningful environmental impact while maintaining the city's logistics leadership in the global context.

On the other hand, the SAF Action Plan should establish progressive adoption targets beginning with 2% SAF blending by 2026, increasing to 10% by 2030 and 50% by 2050, aligning with international aviation industry commitments. The plan must encompass four critical pillars: supply chain development, infrastructure enhancement, regulatory frameworks, and financial incentives.

Supply chain development should position Hong Kong as a regional SAF blending and distribution hub through partnerships with Southeast Asian and Australian producers, the development of local waste-to-SAF conversion capabilities, and the establishment of quality assurance systems. Infrastructure enhancement requires dedicated SAF storage facilities with 30-day supply capacity, advanced blending systems, and upgraded fuel delivery infrastructure at Hong Kong International Airport.

The regulatory framework must establish SAF quality standards, sustainability criteria, and chain-of-custody tracking systems while maintaining aviation safety standards. Financial incentives should include carbon tax exemptions for SAF usage, landing fee reductions for compliant airlines, and establishment of a SAF development fund to bridge the current 2- 5x cost premium over conventional jet fuel.

Integration with the LAE initiative creates opportunities for sustainable fuel usage across commercial aviation, cargo operations, and emerging UAV logistics services. International collaboration with regional aviation hubs and participation in global SAF certification schemes will facilitate market development and standardisation.

The plan should include workforce development programmes, research initiatives through local universities, and comprehensive monitoring mechanisms with clear performance indicators for SAF adoption rates, carbon emission reductions, and economic impact. This SAF Action Plan, combined with broader logistics policy reforms, positions Hong Kong as a regional leader in sustainable aviation solutions while reinforcing its competitive advantages in international trade and logistics.

5. Smart Logistics and Automation Enhancement

The development of a comprehensive Port Community System (PCS) represents a strategic priority for enhancing Hong Kong's digital infrastructure and maintaining its competitive edge as a global logistics hub. This integrated digital platform should serve as the central nervous system connecting all port stakeholders, including shipping lines, freight forwarders, customs authorities, terminal operators, and logistics service providers, enabling seamless information exchange and operational coordination.

The PCS should integrate advanced technologies including blockchain for immutable transaction records, artificial intelligence for predictive analytics, and Internet of Things (IoT) sensors for real-time cargo monitoring. Integration with customs authorities will enable automated documentation processing, real-time compliance verification, and streamlined clearance procedures, significantly reducing processing times and administrative burdens while supporting end-to-end supply chain visibility.

Smart port technologies represent a natural extension of the PCS framework, encompassing automated cargo handling equipment with machine learning capabilities, real-time vessel tracking systems with predictive scheduling, and predictive maintenance systems that optimise equipment uptime. These technologies will enhance operational efficiency through reduced manual interventions and optimised resource allocation while reducing environmental impact through improved energy efficiency.

Furthermore, the PCS shall strategically integrate with the Hong Kong Monetary Authority's Project Cargo[x`], creating a revolutionary convergence of logistics data and financial services. This integration will leverage real-time cargo data, shipping documentation, and supply chain visibility to streamline trade finance processes, transforming traditional paper-based procedures into efficient digital workflows. Banks will access verified cargo information and delivery confirmations in real-time, significantly reducing risk assessment timeframes for trade finance applications.

The integration with Project Cargo[x] will develop digital solutions specifically designed to improve trade finance accessibility for SMEs, who traditionally face challenges securing financing due to limited credit history. By providing banks with comprehensive, real-time cargo

data and automated compliance verification, the system will enable more efficient risk assessment and faster approval processes for SME trade finance applications.

6. Shipping Ecosystem and Maritime Services Enhancement

Hong Kong's transformation from a simple container handling port to a high-value international shipping service centre requires comprehensive ecosystem development encompassing ship management, maritime insurance, international maritime arbitration, and ship financing services. The presence of over 900 shipping-related enterprises operating in Hong Kong demonstrates the city's established foundation in maritime services, but continued development is essential to maintain competitiveness against regional rivals like Singapore.

Collaboration within the GBA presents opportunities for synergistic development, with Hong Kong focusing on high-value maritime services while leveraging the manufacturing and logistics capabilities of neighbouring ports. The establishment of coordinated development strategies that optimise the complementary strengths of different ports within the region can enhance overall competitiveness against other global maritime clusters.

7. Accelerating the Transition to New Energy Vehicles facing the Infrastructure Challenges

With a commitment to achieving 100% clean energy by 2045. The rapid adoption of new energy vehicles (NEVs)—including electric vehicles (EVs) and hydrogen-powered vehicles—is central to this transition. However, several infrastructural, financial, and operational challenges must be addressed to fast-track this shift effectively.

Infrastructure Limitation – While the electrification of vehicles in Hong Kong is progressing steadily, the expansion of charging infrastructure for private cars, especially for commercial vehicles remains a critical bottleneck. Whilst CLP Power Hong Kong Ltd. has launched fast and super-fast EV charging services tailored for commercial fleets, including taxis and light goods vehicles, many urban districts still face electricity supply constraints, limiting the feasibility of widespread charging station deployment for EV and hydrogen vehicles. The pace of infrastructure development must be accelerated to meet the growing demand, especially for commercial vehicle as this significantly affects the business plan for logistics and transport companies to plan their fleet arrangements.

Policy and Funding Support - The government has introduced several initiatives to support NEV adoption. However, funding gaps remain significant. For instance, electric minibuses cost nearly twice as much as their diesel counterparts, creating financial barriers for operators. Clearer guidelines on funding sources and public-private partnerships are essential to bridge this gap.

Urban Planning and Energy Supply – While certain private sector entities have expressed interest in investing in NEV charging infrastructure, they are encountering substantial obstacles related to statutory planning and regulatory approval processes. These procedural complexities often deter the timely implementation and scale-up of essential infrastructure.

To address these challenges and unlock private sector potential, it is recommended that the government establish a cross-departmental task force. This task force would serve as a centralised coordination body to streamline planning approvals, facilitate inter-agency collaboration, and provide strategic guidance. Its role should include expediting statutory procedures, offering technical and regulatory support, and fostering a conducive environment for private investment in sustainable transport infrastructure.

8. AV Deployment and Regulatory Barriers

The recent expansion of AV operations in Tung Chung, particularly for ride-hailing services, marks a promising step toward integrating smart mobility solutions into Hong Kong's urban transport landscape. However, despite this progress, the broader deployment of AV services remains constrained by a lack of enabling incentives and overly complex regulatory frameworks.

Private developers and AV operators face significant hurdles in navigating the intricate statutory application procedures and operational restrictions associated with expanding service zones. These regulatory burdens not only delay implementation but also undermine the commercial viability of AV initiatives. As a result, the business case for wider adoption is weakened, and a substantial funding gap persists, deterring further investment and innovation in this sector.

To catalyse broader AV integration, it is imperative that the government consider streamlining approval processes, introducing targeted incentives, and establishing a dedicated regulatory sandbox. Such measures would facilitate pilot programmes, reduce entry barriers, and encourage private sector participation in scaling autonomous mobility solutions across Hong Kong.

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 Chartered 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 managers 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, and 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.

- End -

2025 年 8 月 12 日

新聞稿

香港運輸及物流學會
對《2025 年施政報告》的關於運輸及物流政策建議

摘要

這建議概述了提升香港作為主要國際物流樞紐地位的戰略建議，並為部署新能源汽車和自動駕駛汽車做準備。

這提議涉及物流的六個關鍵領域：（1）北部都會區物流發展機遇，（2）通過多式聯運促進戰略性商品貿易，（3）低空經濟發展，（4）提昇環境社會和治理（ESG），（5）智慧物流轉型，以及（6）航運生態系統增強。這些舉措旨在加強香港的競爭優勢，同時應對全球貿易環境中新出現的挑戰，特別是考慮到不斷變化的地緣政治緊張局勢和技術顛覆。在交通方面，我們建議（1）香港加快向新能源汽車轉型，需要解決基礎設施限制、政策和資金缺口以及城市規劃。需要一個跨部門工作組來簡化審批流程、促進協作並支援私人投資。（2） 自動駕駛汽車的部署面臨監管障礙和資金挑戰。簡化的審批流程、有針對性的激勵措施和監管沙箱對於更廣泛的自動駕駛汽車集成至關重要。這些措施將使香港能夠實現清潔能源目標並推進智慧出行解決方案，確保可持續的交通基礎設施並改善城市交通景觀。

1. 北部都會區物流發展機遇

北部都會區現代物流集群的發展為香港物流業轉型提供了重要的戰略機遇。根據《現代物流發展行動計劃》，洪水橋/廈村新發展區約 36 公頃的物流用地，將成為提升香港物流業的重要平台。該地區毗鄰深圳灣口岸，加上 20 至 30 分鐘即可到達香港國際機場和葵青貨櫃碼頭，為現代物流設施的發展創造了最佳條件。110 米的建築高度限制和 5.0 的容積率的規劃參數為垂直物流基礎設施和創新設施設計提供了大量空間。

低空經濟物流應用將使北部都會區成為跨境無人機物流走廊的重要節點，實現整個大灣區的高效貨物運輸。區域可發展跨境電商快遞服務、應急醫療物資配送網路、集成無人機協同能力的智慧倉儲系統。這一戰略位置可以建立連接深圳和香港的當日送達網路，特別是對於需要快速運輸的高價值、輕重量商品。

電子商務物流轉運樞紐發展將利用該地區的戰略定位，建立跨境電子商務集運中心、海外產品進口配送設施、退貨處理中心以及品質檢驗和認證服務。區內可充分利用香港的自由港地位和「一國兩制」優勢，為電商企業提供靈活的貿易安排。結合戰略性商品多式聯運便利化政策，該地區將處理更廣泛的產品類別，包括高科技產品和戰略性商品轉運業務。通過產業集群的協同效應，北部都會區物流集群將成為連接中國內地與全球市場的重要門戶，推動香港物流業邁向高增值和智慧化發展，同時鞏固香港作為大灣區首選物流樞紐的地位。

2. 戰略性商品多式聯運便利化

「特定戰略物品航空轉運貨物豁免許可證方案」擴展至多式聯運模式，是提升香港貿易便利化能力的重要機遇，同時維持穩健的保安控制。目前，「特定戰略物品航空轉運貨物豁免許可證方案」僅在香港國

際機場的貨物轉運範圍內運營，限制了捕捉轉運貿易機會的靈活性。當戰略性商品貨物缺乏適當的進口許可證時，船舶被迫完全繞過香港港口，轉向新加坡或仁川等鄰近樞紐，從而導致大量商機損失。

我們最近的研究顯示，香港約佔全球半導體出口的20%，主要通過轉口，而中國的半導體市場則表現出可觀的貿易額，每年進口額在 3000-5000 億美元之間，出口額達到 5000-6000 億美元。這個龐大的市場為香港提供了前所未有的機遇，以鞏固其作為戰略物品轉運樞紐的地位。推薦的「批准倉庫計劃模式」成為最平衡的方法，提供合理的控制，同時保持運營效率和業務利益。該模式利用現有的倉庫基礎設施，需要適度的法律修改，並為利益相關者提供足夠的靈活性，同時確保全面的安全措施，包括即時貨物跟蹤、具有全球定位系統功能的密封貨車運輸以及嚴緊的文件控制。

實施工作應首先修訂《進出口（戰略物品）規例》（第 60G 章），將獲豁免的轉運活動擴展至空對空業務以外。該框架必須定義跨運輸方式的授權地點、安全協議和監控要求，特別注意貿易交接點、文件要求和模式交接期間的責任分配。分階段實施方法應從詳細的利益相關者諮詢開始，然後是資訊技術系統開發和安全協定，最終與選定的運營商一起開展試點計劃，以在全面部署之前驗證該方法。

3.低空經濟發展的物流創新

香港低空經濟的發展代表著徹底改變城市物流和創造新的經濟增長動力的變革機遇。隨著行政長官發表《2024 年施政報告》關於發展海拔 1,000 米範圍內的經濟活動，物流業將可從本地和大灣區的無人機貨物運送和快遞服務中獲益匪淺。香港高密度的城市環境給傳統配送方式帶來了獨特的挑戰，包括交通擠塞、複雜的建築物通道和不斷上升的人力成本，所有這些都可以通過創新的低空物流解決方案來解決。

電動垂直起降（eVTOL）技術的突破正在為城市航空運輸創造新的可能性，而香港在智慧導航和自主飛行研究方面的成熟優勢，特別是通過香港理工大學等機構，為技術進步提供了堅實的基礎。低空經濟的發展預計將催化新的行業機會，包括無人機維護、飛行訓練、航空攝影和環境監測，同時創造從無人機操作員和維護技術人員到系統開發工程師和數據分析師的多樣化就業機會。

實施策略應側重於在大灣區內建立跨境無人機物流走廊，制定醫療物資和應急物資運送試點計劃，並建立平衡創新與安全和進出口監管要求的綜合監管框架。

4. ESG 發展與綠色物流轉型

最近，香港運輸及物流學會進行了 ESG 認知調查，訪問了 213 名運輸和物流專業人士，揭示了香港物流業在推動可持續發展方面的重大機遇和挑戰。研究表明，雖然 74% 的受訪者認識到 ESG 增加商機的潛力，71% 的受訪者認為它可以降低商業風險，但與實際實施成功相比，在實施意識水準方面仍然存在巨大差距。這一差距凸顯了迫切需要採取有針對性的政策干預措施來彌合知識與行動的鴻溝。

調查結果顯示，公司規模在很大程度上決定了 ESG 的成功，擁有 500 多名員工的組織的實施率比小型公司高出 46%。這種差異需要制定規模化的支持機制，包括中小企業 ESG 聯盟計劃，允許小公司彙集資源並實現規模經濟。建立針對特定行業的 ESG 政策框架對於為物流業實現香港 2050 年碳中和承諾提供明確的方向和目標至關重要。

實施 ESG 的主要障礙包括有限的財務資源（72%）、缺乏合格的專業知識（69%）和複雜的監管環境（66%）。應對這些挑戰需要採取綜合方法，包括政府支援的資助機制、獲得 ESG 專家的補貼，以及

創建以實際實施為重點的標準化培訓課程。研究表明，接受過 ESG 培訓的組織的實施成功率提高了 43%，這表明投資於能力建設是最具成本效益的政策干預措施之一。

一些可採取行動的建議如下：

- 針對特定行業的 ESG 政策框架：為物流業提供明確的方向和目標，以實現香港 2050 年碳中和承諾。
- 全面的 ESG 培訓課程：開發標準化、多層次的 ESG 培訓計劃，其模組針對不同的組織角色量身定製，側重於實際實施而不是理論。
- 行業 ESG 認證計劃：建立公認的 ESG 實施認證，以驗證專業知識並創建清晰的職業發展路徑。

同時，建話在 2025 年推出全面的《促進使用可持續航空燃料行動計劃》，這是香港航空減碳策略的重要組成部分。香港國際機場是全球最繁忙的航空貨運樞紐之一，每年處理超過 490 萬公噸貨運量，因此，這項可持續航空燃料計劃對於實現有意義的環境影響至關重要，同時保持香港在全球物流中的領先地位。

另一方面，可持續航空燃料行動計劃應制定逐步採用目標，從 2026 年到 2% 的 SAF 混合開始，到 2030 年增加到 10%，到 2050 年增加到 50%，以符合國際航空業的承諾。該計劃必須涵蓋四個關鍵支柱：供應鏈發展、基礎設施增強、監管框架和財政激勵措施。

供應鏈發展應透過與東南亞和澳洲生產商合作、發展本地廢物轉化為可持續航空燃料的能力，以及建立品質保證體系，將香港定位為區域可持續航空燃料混合和分銷中心。基礎設施的提升需要香港國際機場的專用可持續航空燃料儲存設施、先進的混合系統以及升級的燃料輸送基礎設施。

監管框架必須建立可持續航空燃料品質標準、可持續性標準和監管鏈跟蹤系統，同時保持航空安全標準。財政激勵措施應包括對可持續航空燃料使用的碳稅豁免、為合規航空公司降低著陸費以及建立可持續航空燃料發展基金，以彌補目前比傳統噴氣燃料 2-5 倍的成本溢價。

與低空經濟計劃的整合為商業航空、貨運業務和新興無人機物流服務的可持續燃料使用創造了機會。與區域航空樞紐的國際合作以及參與全球可持續航空燃料認證計劃將促進市場開發和標準化。

該計劃應包括勞動力發展計劃、通過當地大學開展的研究計劃以及全面的監測機制，並在可持續航空燃料採用率、碳減排量和經濟影響方面提供明確的績效指標。該《可持續航空燃料行動計劃》與更廣泛的物流政策改革相結合，使香港成為可持續航空解決方案的區域領導者，同時加強其在國際貿易和物流方面的競爭優勢。

5. 智慧物流及自動化提升

發展全面的港口社區系統（PCS）是加強香港數位基礎設施和保持其作為全球物流樞紐的競爭優勢的戰略重點。這個綜合數位平台應作為連接所有港口利益相關者（包括航運公司、貨運代理、海關當局、碼頭運營商和物流服務提供者）的中樞神經系統，實現無縫資訊交換和運營協調。

PCS 應整合先進技術，包括用於不可變交易記錄的區塊鏈、用於預測分析的人工智慧以及用於即時貨物監控的物聯網感測器。與海關當局的集成將實現自動化文件處理、即時合規驗證和簡化清關程式，顯著減少處理時間和管理負擔，同時支援端到端供應鏈可見性。

智慧港口技術代表了 PCS 框架的自然延伸，包括具有機器學習功能的自動化貨物裝卸設備、具有預測調度功能的即時船舶跟蹤系統以及優化設備正常運行時間的預測性維護系統。這些技術將通過減少人工干預和優化資源分配來提高運營效率，同時通過提高能源效率來減少對環境的影響。

此外，PCS 將與香港金融管理局的「Cargoˣ」戰略整合，創造物流數據和金融服務的革命性融合。這種集成將利用即時貨物數據、運輸文件和供應鏈可見性來簡化貿易融資流程，將傳統的紙質程序轉變為高效的數位工作流程。銀行將即時獲取經過驗證的貨物資訊和交貨確認，從而大大縮短貿易融資申請的風險評估時間。

與 Cargoˣ 的整合將開發數位解決方案，專門用於改善中小企業的貿易融資可及性，這些中小企業傳統上因信用記錄有限而面臨融資挑戰。該系統為銀行提供全面、即時的貨物數據和自動化合規驗證，為中小企業貿易融資申請提供更有效的風險評估和更快的審批流程。

6. 航運生態系統和海事服務提升

香港從簡單的集裝箱裝卸港轉變為高價值的國際航運服務中心，需要全面的生態系統發展，包括船舶管理、海事保險、國際海事仲裁和船舶融資服務。香港有超過 900 家航運相關企業在運營，這表明香港在海運服務方面擁有悠久的基礎，但持續發展對於保持與新加坡等區域競爭對手的競爭力至關重要。

大灣區內部的合作提供了協同發展的機會，香港專注於高價值的海運服務，同時利用鄰近港口的製造和物流能力。制定協調發展戰略，優化區域內不同港口的互補優勢，可以增強相對於其他全球航運集群的整體競爭力。

7. 加速向新能源汽車轉型，面臨基礎設施挑戰

承諾到 2045 年實現 100% 清潔能源。新能源汽車的快速採用——包括電動汽車和氫能汽車——是這一轉變的核心。然而，必須解決一些基礎設施、財務和運營方面的挑戰，才能有效地快速跟蹤這一轉變。

基礎設施限制 – 雖然香港汽車電動化正在穩步推進，但私家車充電基礎設施的擴展，尤其是商用車，仍然是一個嚴重的瓶頸。雖然中華電力有限公司已為商業車隊（包括的士和輕型貨車）推出快速和超快速的電動汽車充電服務，但許多市區仍然面臨電力供應限制，限制了電動汽車和氫能汽車廣泛部署充電站的可行性。必須加快基礎設施發展的步伐，以滿足不斷增長的需求，尤其是商用車的需求，因為這極大地影響了物流和運輸公司規劃車隊安排的商業計劃。

政策和資金支援 - 政府推出了多項舉措來支援新能源汽車的採用。然而，資金缺口仍然很大。例如，電動小巴的成本幾乎是柴油小巴的兩倍，給運營商帶來了財務障礙。關於資金來源和公私夥伴關係的更明確的指導方針對於彌合這一差距至關重要。

城市規劃與能源供應 – 儘管某些私營部門實體表示有興趣投資新能源汽車充電基礎設施，但他們在法定規劃和監管審批流程方面遇到了重大障礙。這些程序的複雜性往往阻礙了重要基礎設施的及時實施和擴大。

為了應對這些挑戰並釋放私營部門的潛力，建議政府成立一個跨部門工作組。該工作隊將作為一個集中協調機構，以簡化規劃審批、促進機構間協作並提供戰略指導。其作用應包括加快法定程式、提供技術和監管支援，以及為可持續交通基礎設施的私人投資營造有利環境。

8. 自動駕駛汽車部署和監管障礙

最近東涌自動駕駛汽車試驗的擴張，特別是網約車服務，標誌著將智慧移動解決方案融入香港城市交通格局邁出了充滿希望的一步。然而，儘管取得了這些進展，但自動駕駛汽車服務的更廣泛部署仍然受到缺乏扶持激勵措施和過於複雜的監管框架的限制。

私人開發商和自動駕駛汽車運營商在應對與擴大服務區相關的複雜法定申請程序和運營限制方面面臨重大障礙。這些監管負擔不僅延遲實施，還破壞了自動駕駛計劃的商業可行性。結果，更廣泛採用的商業案例被削弱，巨大的資金缺口持續存在，阻礙了該領域的進一步投資和創新。

為了促進更廣泛的自動駕駛集成，政府必須考慮簡化審批流程、引入有針對性的激勵措施並建立專門的監管沙盒。這些措施將促進試點計劃，降低進入壁壘，並鼓勵私營部門參與在香港推廣自動駕駛出行解決方案。

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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