

主办机构  
Organiser :



合作伙伴  
Collaborative Partner :



School of Energy and Environment

香港城市大學  
City University of Hong Kong

# 「碳中和进展与挑战」业界调查 — 调查结果

## Industry Survey on Carbon Neutrality Progress and Challenges – Survey Result



MAKE SMART  
SMARTER

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此调查由香港生产力促进局和香港城市大学协理学术副校长（学术事务）暨能源及环境学院教授梁国熙教授协作完成。  
This survey is a collaborative effort by Hong Kong Productivity Council and Prof. Michael LEUNG, Associate Provost (Academic Affairs) & Professor of the School of Energy and Environment, City University of Hong Kong

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# 「碳中和进展与挑战」 业界调查

Industry Survey on Carbon Neutrality  
Progress and Challenges

# 72%

## 受访者并不熟悉碳中和

of the respondents not familiar with Carbon Neutrality

## 最大挑战 Top Challenges

低碳的作业模式成本较高  
Low carbon business model costs higher

较高的财务资本需求  
High financial capital requirement

缺乏消费者及客户的需求  
Lack of demand from consumers & clients

## 主要需求 Top Needs

资金/资助支持  
Financial / Funding Support

技术支持 Technical Support

1. 评估工具 Assessment Tools
2. 培训 Trainings
3. 顾问服务 Consultancy Services
4. 绿色技术 Green Technologies



## 背景资料 Background

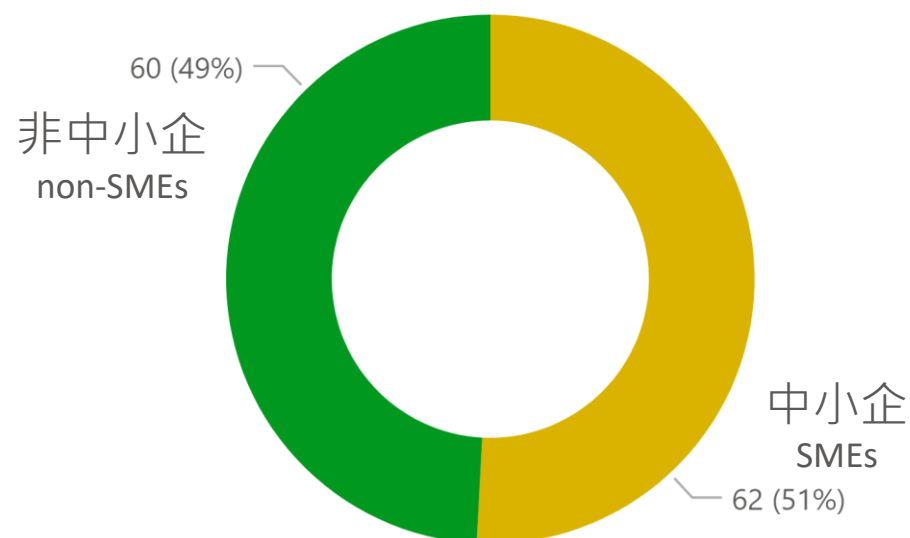
- 香港承诺于 2050 年前实现碳中和，并制定了具体的减碳策略。要于 2050 年前实现碳中和非常具挑战性，需要各界携手参与。 Hong Kong pledged to achieve carbon neutrality before 2050 and outlined decarbonisation strategies. Achieving carbon neutrality before 2050 is challenging and requires community-wide participation.
- 继业界咨询会议《迈向碳中和：机遇与挑战》及中小企环境、社会及管治调查，香港生产力促进局（生产力局）与香港城市大学协作进行了是次「碳中和进展与挑战」业界调查。  
With inspiration from the industry consultation session themed “Advancing to Carbon Neutrality: Opportunities and Challenges” and SME surveys on ESG, Hong Kong Productivity Council (HKPC) has collaborated with the City University of Hong Kong to conduct an **“Industry Survey on Carbon Neutrality Progress and Challenges”**.
- 本次调查于2022年10月至12月进行，以工商及建筑物相关业界作为调查对象，旨在了解业务发展中如何朝减碳迈进及所面对的挑战。  
The survey conducted between October and December 2022 targets commercial & industrial and building sectors and aims to understand how businesses are progressing towards decarbonisation and the challenges encountered.
- 本文件阐述了调查结果的主要重点。  
This document presents key highlights from the survey results.

### 鸣谢以下支持机构 Special thanks to our Supporting Organisations



共计 **122** 名 受访者 Total **122** Respondent Organisations

### 机构规模 Sizes of organisations



### 受访者所属之行业包括 Industries of respondents include



地产业、酒店业、  
建造业...  
Real Estate, Hospitality,  
Construction...



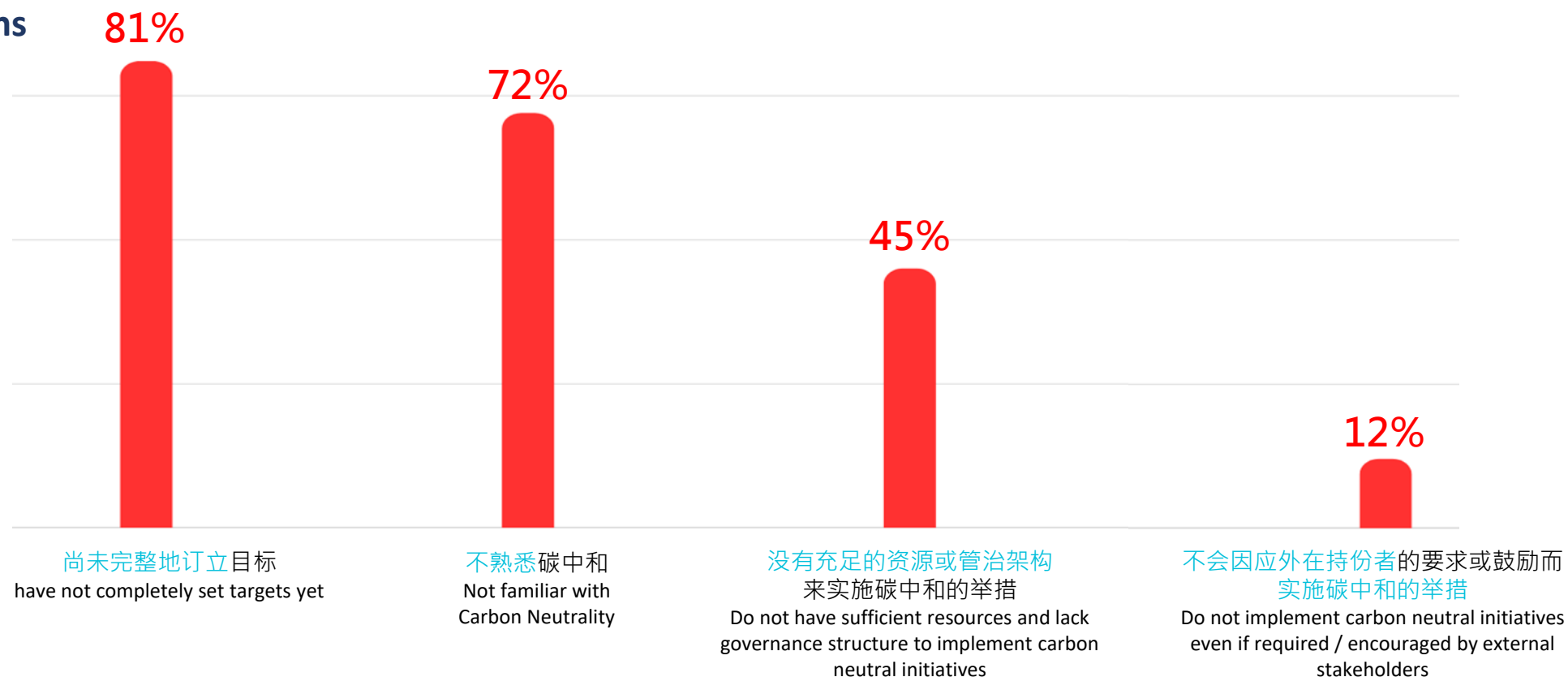
#### Commercial & Industrial Sectors

制造业、电力及气体供应、  
化工业、零售业、贸易...  
Manufacturing, Electricity & Gas Supply,  
Chemical, Retail, Trading...

## 摘要 Executive Summary (1)

### 观察重点

#### Key Observations



## 摘要 Executive Summary (2)

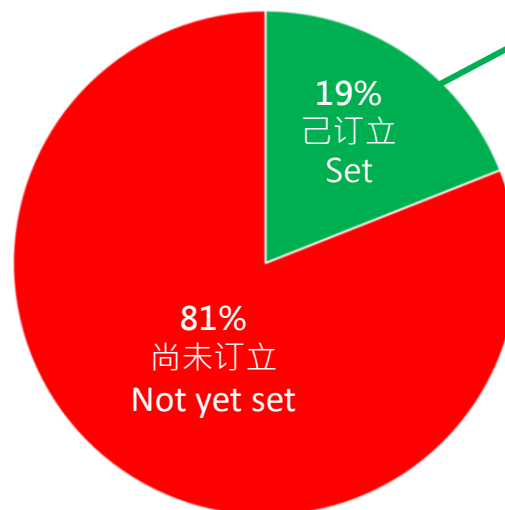
### 碳中和目标订立的进展 Progress on Carbon Neutrality Target Setting

最重要的驱动因素  
The most important driver

90%

「品牌形象、  
名声及竞争力」  
“Brand image, reputation  
and competitiveness”

碳中和目标的订立  
Setting of  
Carbon Neutrality Targets



#### 观察重点 Observations:

仍有改善的空间  
Still have room for improvement

专业知识不足  
Insufficient professional knowledge

- 57% 没有参考国际标准  
DO NOT made reference to international standards
- 52% 没有涵盖范围3供应链的碳排放  
DO NOT cover their supply chains under Scope 3 carbon emission

#### 没有订立的原因 Reasons of not setting the targets:

- 76% 缺乏外部支持  
Lack of external support
- 73% 尚未与机构之运作相关  
No relation to the organisation's operation yet
- 71% 意识/认知不足  
Lack of awareness / knowledge



## 摘要 Executive Summary (3)

### 迈向碳中和的挑战及需求

#### Challenges and Needs in Transition to Carbon Neutrality

##### 最大挑战 Top Challenges

较高的财务资本需求  
High financial capital requirement



低碳的作业模式  
成本较高  
Low carbon business  
model costs more

缺乏消费者  
及客户的需求  
Lack of demand from  
consumers & clients

##### 主要需求 Top Needs



资金/资助支持  
Financial / Funding Support



技术支持 Technical Support

1. 评估工具 Assessment Tools
2. 培训 Trainings
3. 顾问服务 Consultancy Services
4. 绿色技术 Green Technologies



# 调查结果

## Survey Result

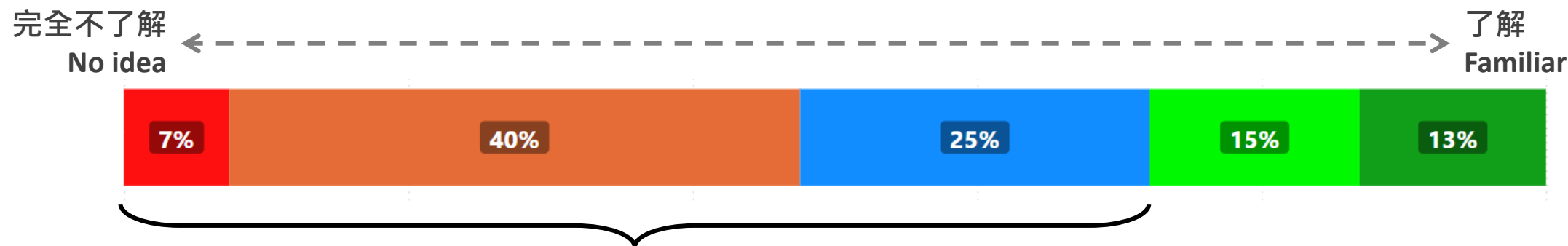
碳中和现况 — 目标订立的进展  
Current State in Carbon Neutrality –  
Progress on Carbon Neutrality Target Setting



## 碳中和现况 Current State in Carbon Neutrality

共计122名受访者  
Total 122 respondents

受访者对碳中和的了解程度如何（如《香港气候行动蓝图2050》及科学基础目标倡议）？  
How familiar respondents are with Carbon Neutrality (e.g. Hong Kong's Climate Action Plan 2050 and The Science Based Targets initiative)?



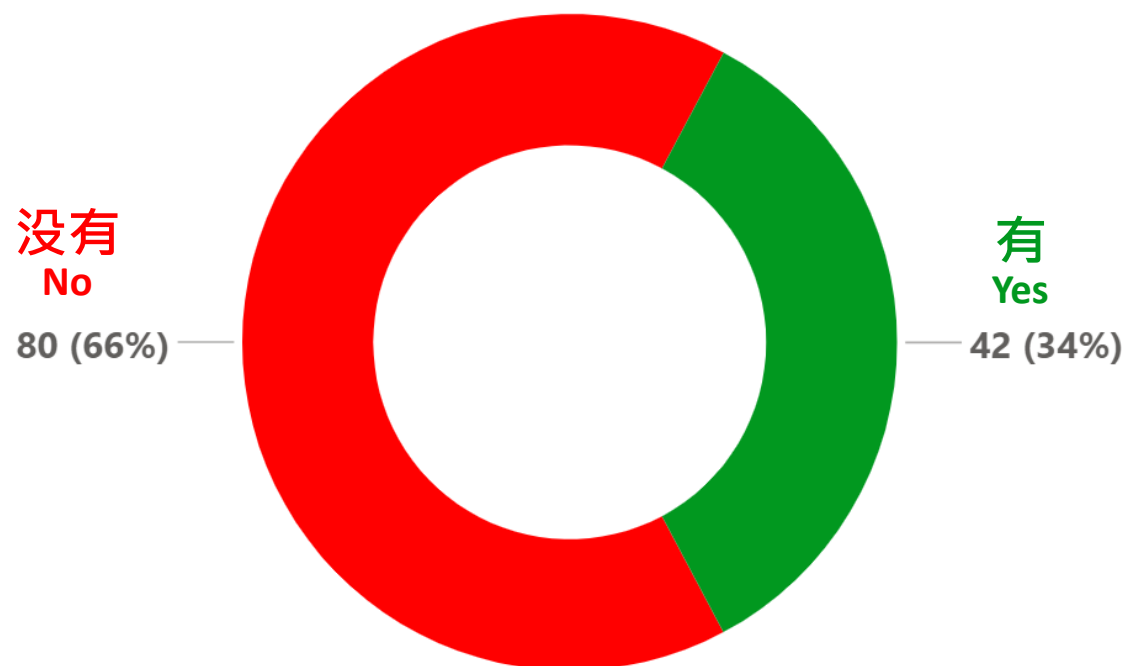
**72%**的受访者不熟悉碳中和  
72% respondents are not familiar with Carbon Neutrality

## 碳中和现状 Current State in Carbon Neutrality

共计122名受访者  
Total 122 respondents

受访者是否曾进行碳审计，并计划定期进行？

Have respondents conducted Carbon Audit and with plans to conduct regularly?



**66%** 的受访者未曾进行过碳审计  
并定期评估其温室气体的排放

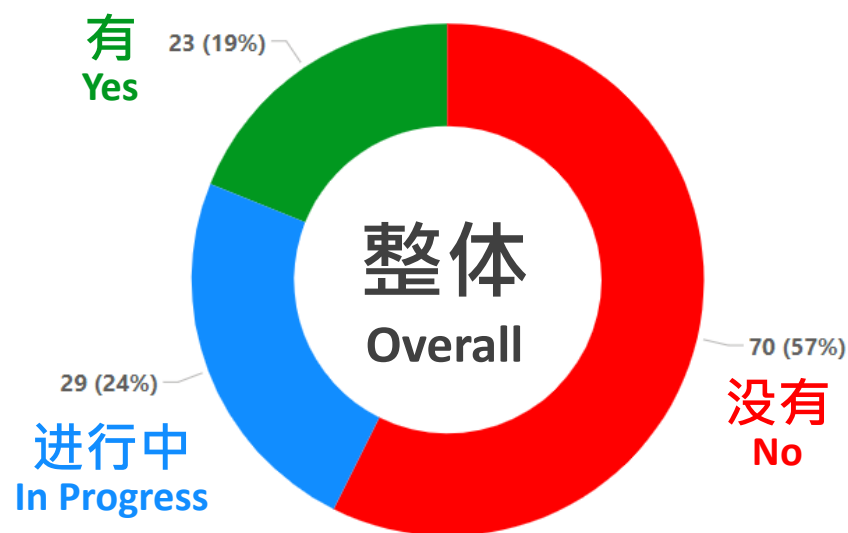
**66%** of respondents have not yet conducted carbon accounting  
and evaluated their greenhouse gas emissions regularly

## 碳中和目标订立的进展 Progress on Carbon Neutrality Target Setting

共计122名受访者  
Total 122 respondents

### 有否订立碳中和目标

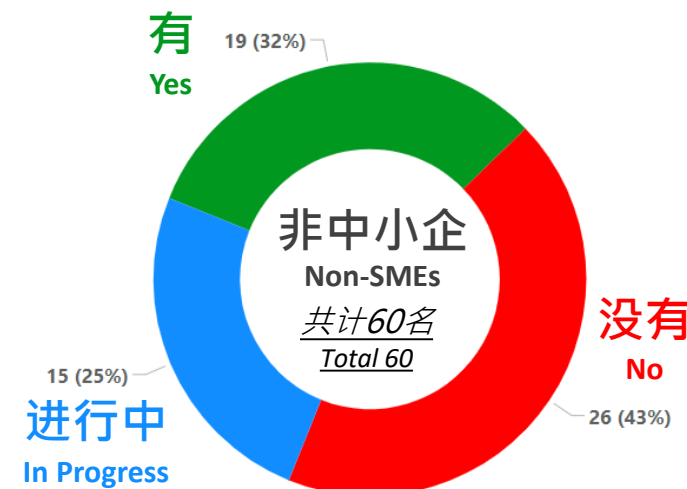
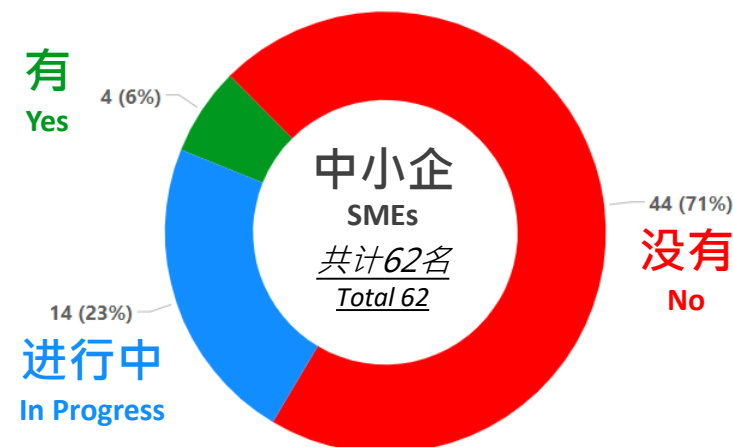
Have Carbon Neutrality Targets been set?



81%的受访者及 94%的中小企受访者

尚未完整地订立目标

81% respondents and 94% of SME respondents have not completely set targets yet





## 碳中和目标订立的进展 Progress on Carbon Neutrality Target Setting

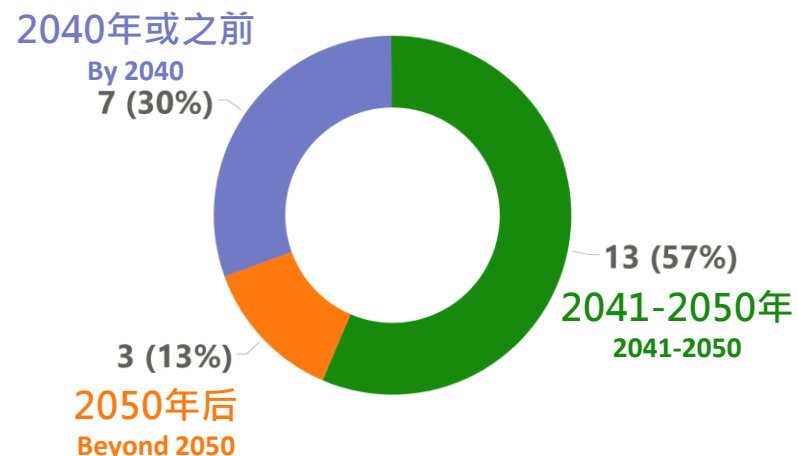
共计23名受访者  
Total 23 respondents

在已订立目标的受访者当中 For those who **HAVE SET** targets

### 他们就碳中和目标之订立细节

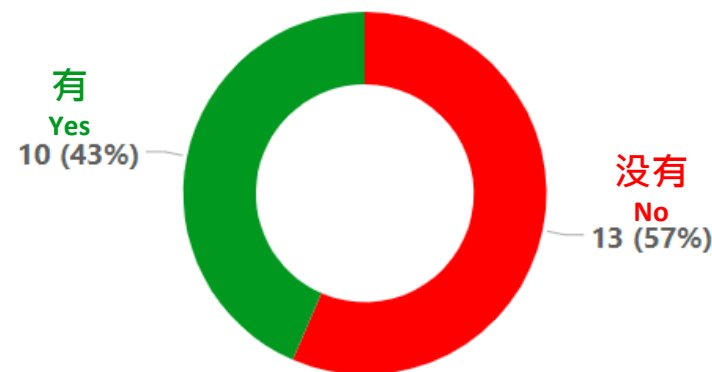
Settings of their Carbon Neutrality Targets

#### 目标年份 Target Year



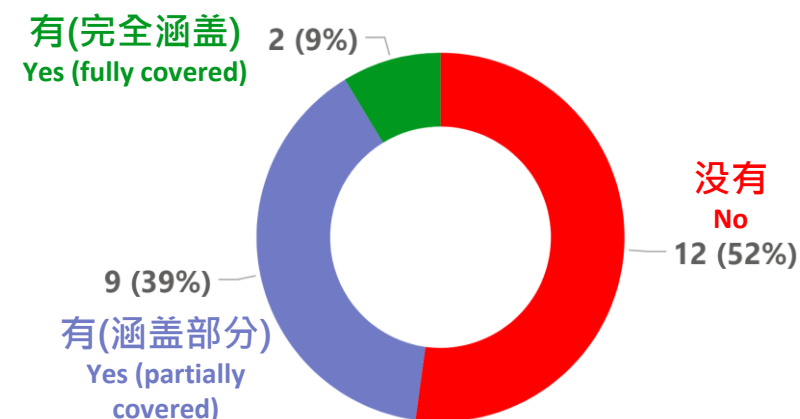
**87%** 旨在于2050年或之前达致碳中和  
**87%** targeted to achieve Carbon Neutrality by 2050

#### 有否参照国际标准 Reference to International Standards



**57%** 没有参考国际标准  
**57%** do not make reference to international standards

#### 有否涵盖供应链 Coverage of Supply Chains



**52%** 没有涵盖供应链  
**52%** do not cover supply chains

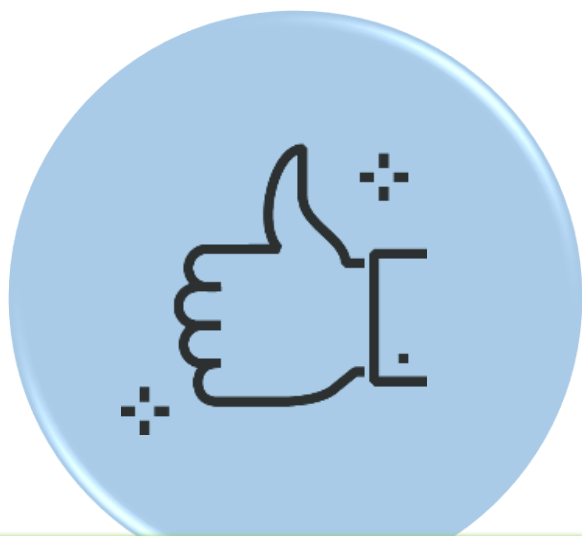
## 碳中和目标订立的进展 Progress on Carbon Neutrality Target Setting

共计52名受访者  
Total 52 respondents

在已订立/ 正在订立目标的受访者当中 For those who HAVE SET / ARE IN PROGRESS TO SET targets

### 订立碳中和目标的驱动因素

Driver(s) of Setting Carbon Neutrality Targets



90%

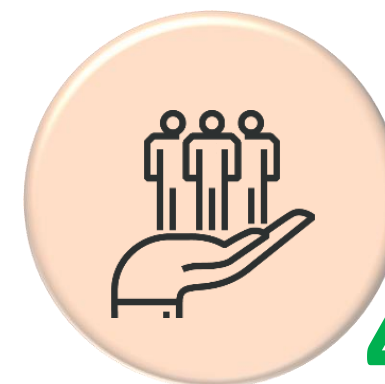
品牌形象、名声及竞争力

Brand image, reputation and competitiveness



48%

规管要求  
Regulatory mandates



44%

满足客户要求  
Meeting clients' requirements

## 碳中和目标订立的进展 Progress on Carbon Neutrality Target Setting

共计70名受访者  
Total 70 respondents

在尚未订立目标的受访者当中 For those who have NOT set targets yet

### 三大因素 Top 3 Reasons

#### 尚未订立碳中和目标的因素

Reason(s) of Not Setting Carbon Neutrality Targets

- 缺乏外部支持 76%  
Lack of external support
- 尚未与机构之运作相关 73%  
No relation to the organisation's operation yet
- 意识/认知不足 71%  
Lack of awareness / knowledge

# 调查结果

## Survey Result

碳中和现况 — 挑战及支援  
Current State in Carbon Neutrality –  
Challenge and Support





## 碳中和现状 Current State in Carbon Neutrality

共计122名受访者  
Total 122 respondents

非常不同意 Strongly disagree 1 2 3 4 5 非常同意 Strongly agree

我们会因应行业或合作伙伴的要求或鼓励而实施碳中和的举措  
My organisation will implement carbon neutral initiatives if required/ encouraged by industry or business partners



我们设有支持碳中和举措的管治架构  
My organisation has governance structure that supports carbon neutrality initiatives



我们有充足的资源来实施碳中和的举措  
My organisation has sufficient resources in carbon neutrality initiatives



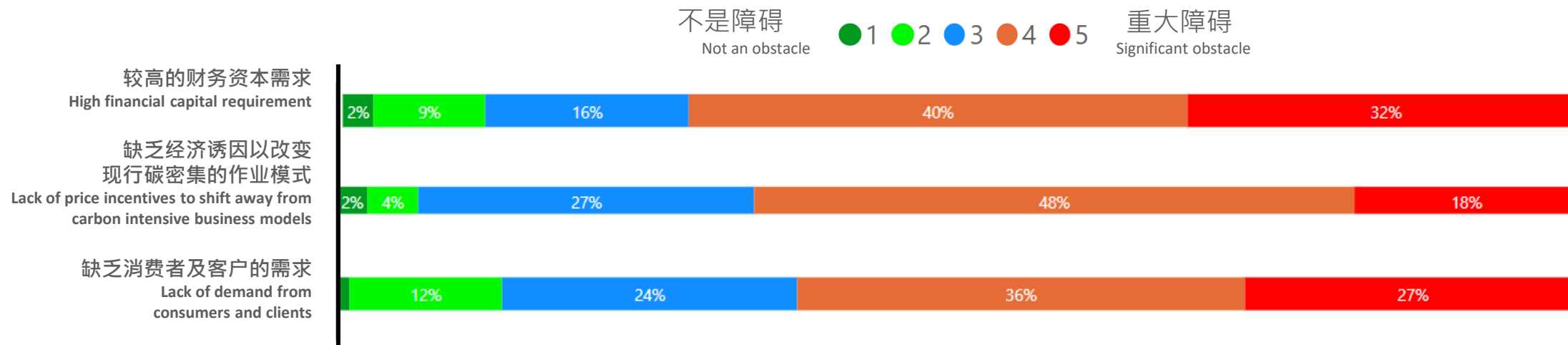
只有12%的受访者不同意会因应行业或合作伙伴的要求或鼓励而实施碳中和的举措  
Only 12% respondents disagree that they would implement carbon neutral initiatives if required / encouraged by the industry or business partners

然而，约45%的受访者不同意他们具有充足的资源或管治架构来实施碳中和的举措  
However, approximately 45% respondents disagree that they have sufficient resources nor governance structure for carbon neutrality initiatives

注: 中小企的趋势相近并没有显著差异  
Note: For SMEs, the trend is similar with no significant difference

## 迈向碳中和的挑战 Challenges in Carbon Neutrality Transition

共计122名受访者  
Total 122 respondents



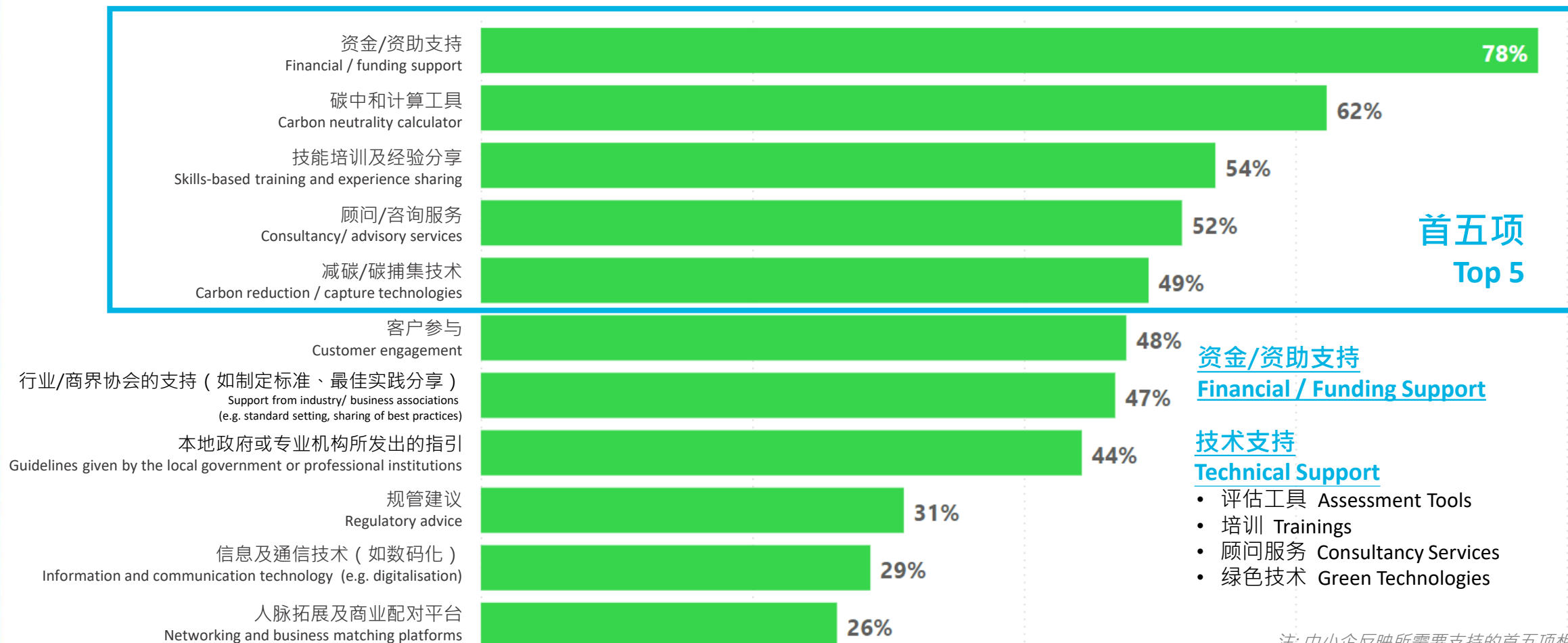
>60%的受访者认为以下是净零转型的障碍：  
>60% respondents considered the followings are obstacles  
along net zero transition:

- 较高的财务资本需求  
High financial capital requirement
- 缺乏经济诱因以改变现行碳密集的作业模式  
Lack of price incentives to shift away from carbon intensive business models
- 缺乏消费者及客户的需求  
Lack of demand from consumers and clients

注：中小企的趋势相近并没有显著差异  
Note: For SMEs, the trend is similar with no significant difference

## 未来所需的支持 Future Support Needs

共计122名受访者  
Total 122 respondents



注: 中小企反映所需要支持的首五项相同  
Note: SMEs have the same Top 5 support needed

## 我们提供给业界的支持 Our Support to the Industry

通过是次调查，我们了解到不同企业在低碳进程上的现状、挑战和需求。我们将就以下范畴与政府及业界紧密合作，以协助各界跟上碳中和的趋势：

Through the survey, we have understood enterprises' status, challenges and needs along their low carbon journeys. We will closely work with government and the industry on the followings in the near future with an aim to help them catching up with the carbon neutrality trend:

1

研发碳评估工具

Develop carbon  
assessment tools

2

提供更多能力提升和  
相关顾问服务

Offer more capacity building  
and relating consultancy  
services

3

推广和研发低碳技术

Promote and develop low  
carbon technologies

4

为行业提供技术支持以  
寻求政府或其他  
相关资助

Provide technical support for  
industry to seek government  
or related funding



# 问答环节

## Q&A



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