

主辦機構
Organiser :



合作伙伴
Collaborative Partner :



School of Energy and Environment

香港城市大學
City University of Hong Kong

「碳中和進展與挑戰」業界調查 — 調查結果

Industry Survey on Carbon Neutrality Progress and Challenges – Survey Result



MAKE SMART
SMARTER

Copyright @ 2023 HKPC All rights reserved

此調查由香港生產力促進局和香港城市大學協理學務副校長（學術事務）暨能源及環境學院教授梁國熙教授協作完成。
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

「碳中和進展與挑戰」 業界調查

Industry Survey on Carbon Neutrality
Progress and Challenges

72%

受訪者並不熟悉碳中和

of the respondents not familiar with Carbon Neutrality

最大挑戰 Top Challenges

低碳的作業模式成本較高
Low carbon business model costs higher

較高的財務資本需求
High financial capital requirement

缺乏消費者及客戶的需求
Lack of demand from consumers & clients

主要需求 Top Needs

資金/資助支援
Financial / Funding Support

技術支援 Technical Support

1. 評估工具 Assessment Tools
2. 培訓 Trainings
3. 顧問服務 Consultancy Services
4. 綠色技術 Green Technologies

背景資料 Background

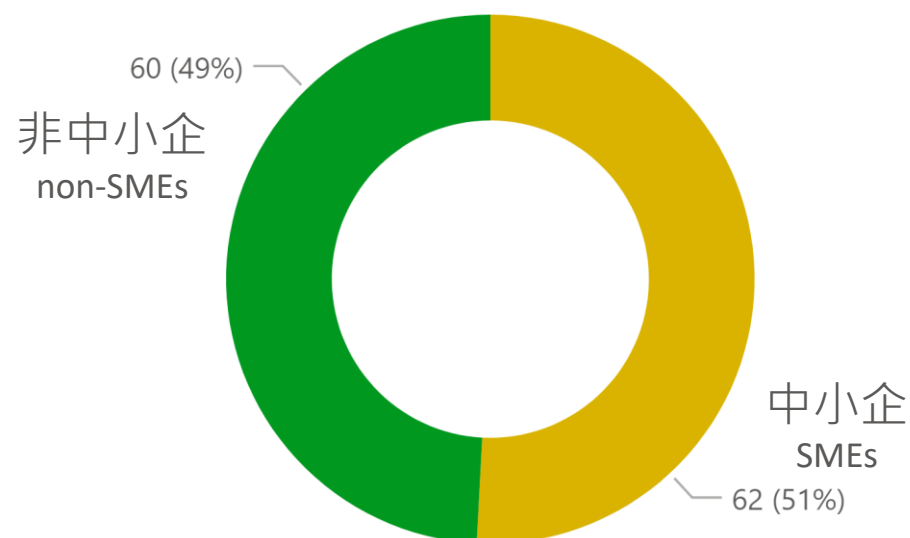
- 香港承諾於 2050 年前實現碳中和，並制定了具體的減碳策略。要於 2050 年前實現碳中和非常具挑戰性，需要各界攜手參與。 Hong Kong pledged to **achieve carbon neutrality before 2050** and outlined decarbonisation strategies. Achieving carbon neutrality before 2050 is challenging and **requires community-wide participation**.
- 繼業界諮詢會議《邁向碳中和：機遇與挑戰》及中小企環境、社會及管治調查，香港生產力促進局（生產力局）與香港城市大學協作進行了是次「**碳中和進展與挑戰**」業界調查。
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”**.
- 本次調查於2022年10月至12月進行，以**工商及建築物相關業界**作為調查對象，旨在了解業務發展中**如何朝減碳邁進及所面對的挑戰**。
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**.
- 本文件闡述了調查結果的主要重點。
This document presents key highlights from the survey results.

鳴謝以下支持機構 Special thanks to our Supporting Organisations



共計 **122** 名受訪者 Total **122** Respondent Organisations

機構規模 Sizes of organisations



受訪者所屬之行業包括 Industries of respondents include



地產業、酒店業、
建造業...
Real Estate, Hospitality,
Construction...



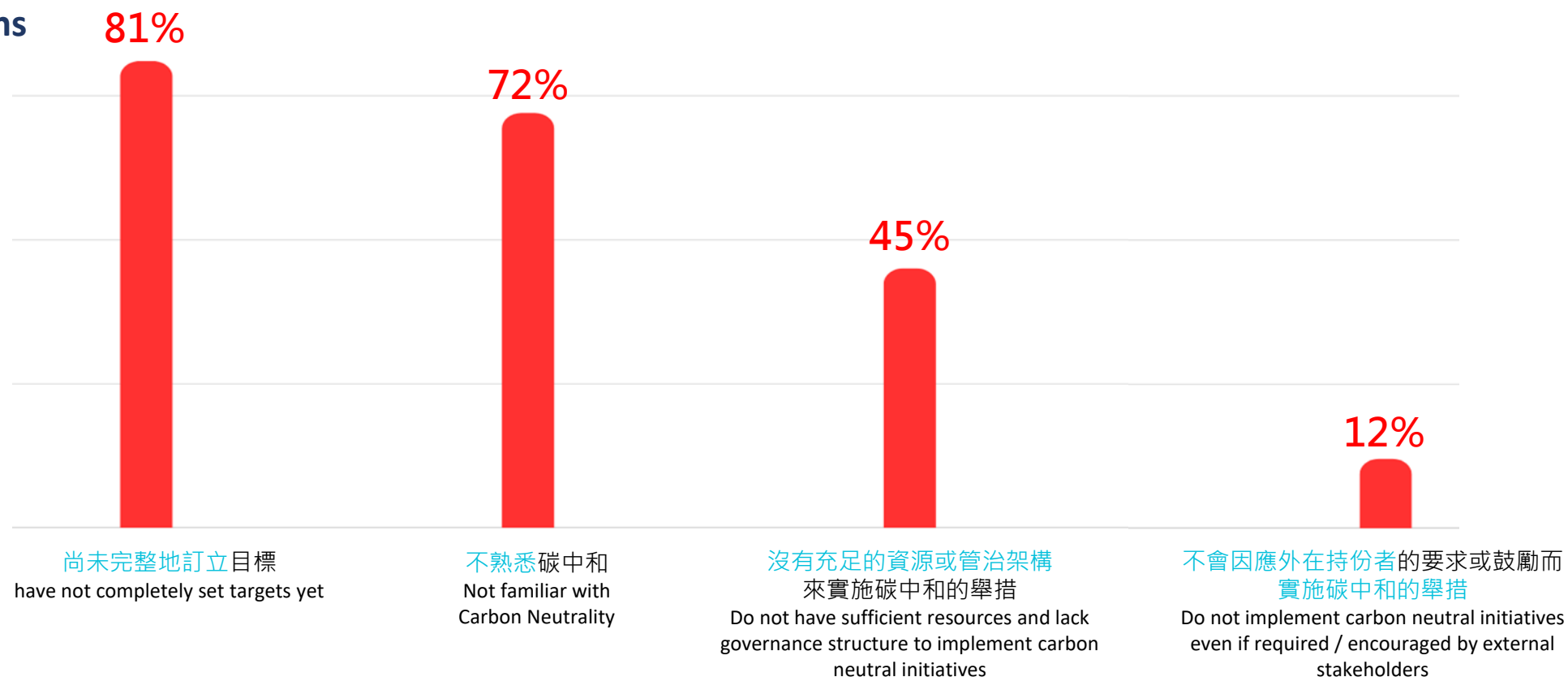
Commercial & Industrial Sectors

製造業、電力及氣體供應、
化工業、零售業、貿易...
Manufacturing, Electricity & Gas Supply,
Chemical, Retail, Trading...

摘要 Executive Summary (1)

觀察重點

Key Observations



摘要 Executive Summary (2)

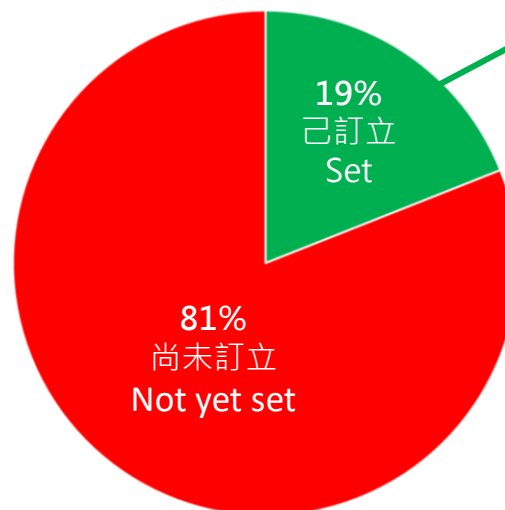
碳中和目標訂立的進展 Progress on Carbon Neutrality Target Setting

最重要的驅動因素
The most important driver

90%

「品牌形象、
名聲及競爭力」
“Brand image, reputation
and competitiveness”

碳中和目標的訂立
Setting of
Carbon Neutrality Targets



觀察重點 Observations:

仍有改善的空間
Still have room for improvement

專業知識不足
Insufficient professional knowledge

- 57% 沒有參考國際標準
DO NOT made reference to international standards
- 52% 沒有涵蓋範圍3供應鏈的碳排放
DO NOT cover their supply chains under Scope 3 carbon emission

沒有訂立的原因 Reasons of not setting the targets:

- 76% 缺乏外部支持
Lack of external support
- 73% 尚未與機構之運作相關
No relation to the organisation's operation yet
- 71% 意識/認知不足
Lack of awareness / knowledge

摘要 Executive Summary (3)

邁向碳中和的挑戰及需求

Challenges and Needs in Transition to Carbon Neutrality

最大挑戰 Top Challenges

較高的財務資本需求
High financial capital requirement



低碳的作業模式
成本較高
Low carbon business
model costs more

缺乏消費者
及客戶的需求
Lack of demand from
consumers & clients

主要需求 Top Needs



資金/資助支援
Financial / Funding Support



技術支援 Technical Support

1. 評估工具 Assessment Tools
2. 培訓 Trainings
3. 顧問服務 Consultancy Services
4. 綠色技術 Green Technologies

調查結果

Survey Result

碳中和現況 — 目標訂立的進展
Current State in Carbon Neutrality –
Progress on Carbon Neutrality Target Setting

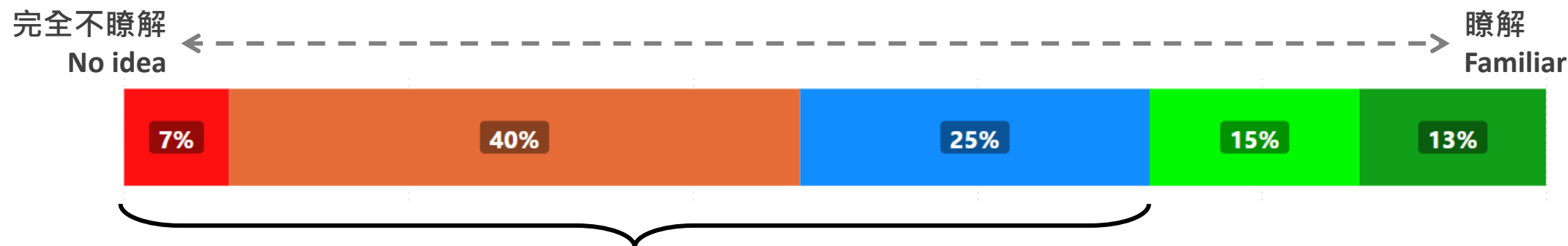


碳中和現況 Current State in Carbon Neutrality

共計122名受訪者
Total 122 respondents

受訪者對碳中和的瞭解程度如何（如《香港氣候行動藍圖2050》及科學基礎目標倡議）？

How familiar respondents are with Carbon Neutrality (e.g. Hong Kong's Climate Action Plan 2050 and The Science Based Targets initiative)?



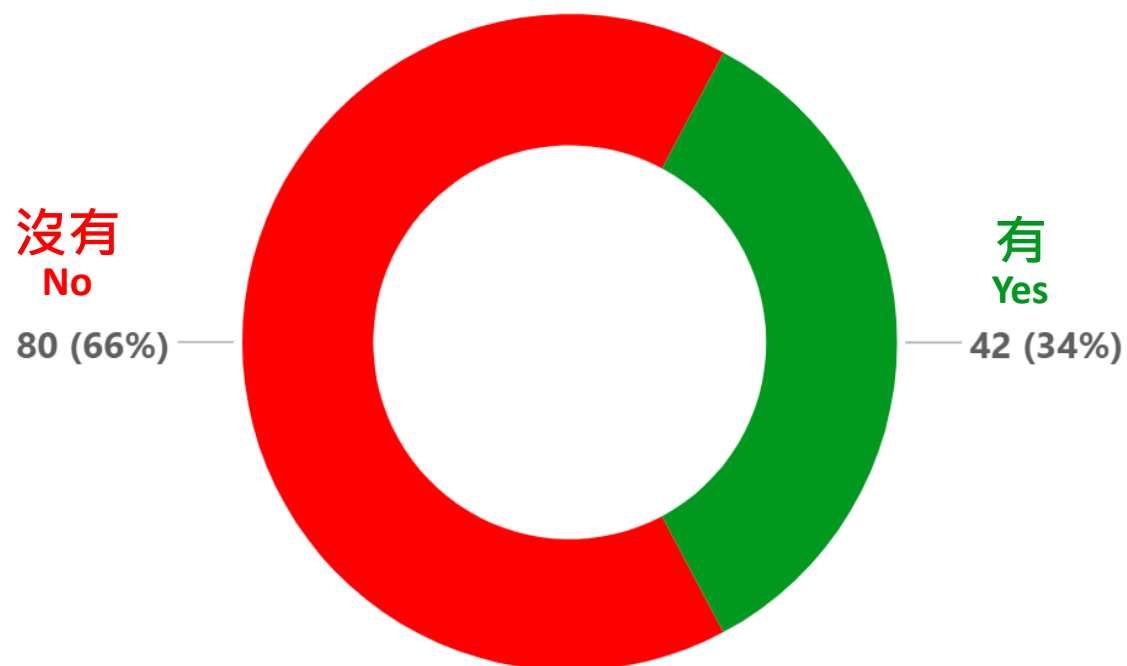
72%的受訪者不熟悉碳中和
72% respondents are not familiar with Carbon Neutrality

碳中和現況 Current State in Carbon Neutrality

共計122名受訪者
Total 122 respondents

受訪者是否曾進行碳審計，並計劃定期進行？

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



66% 的受訪者未曾進行過碳審計
並定期評估其溫室氣體的排放

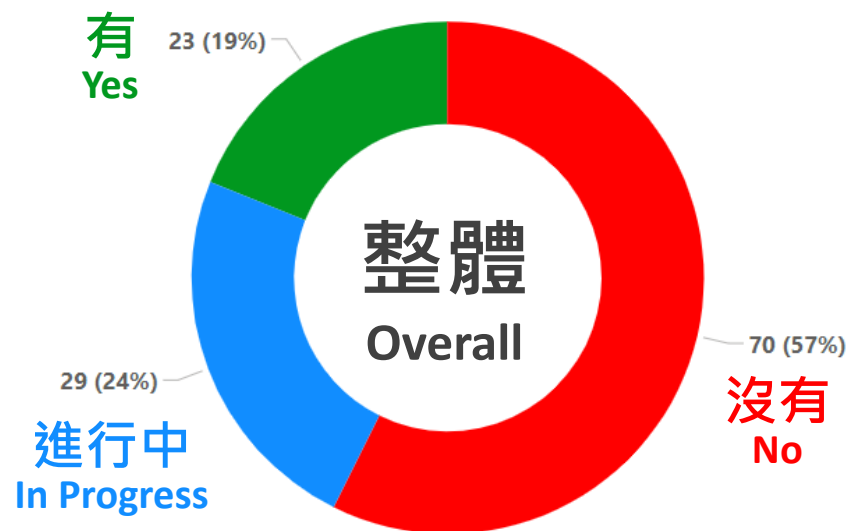
66% of respondents have not yet conducted carbon accounting
and evaluated their greenhouse gas emissions regularly

碳中和目標訂立的進展 Progress on Carbon Neutrality Target Setting

共計122名受訪者
Total 122 respondents

有否訂立碳中和目標

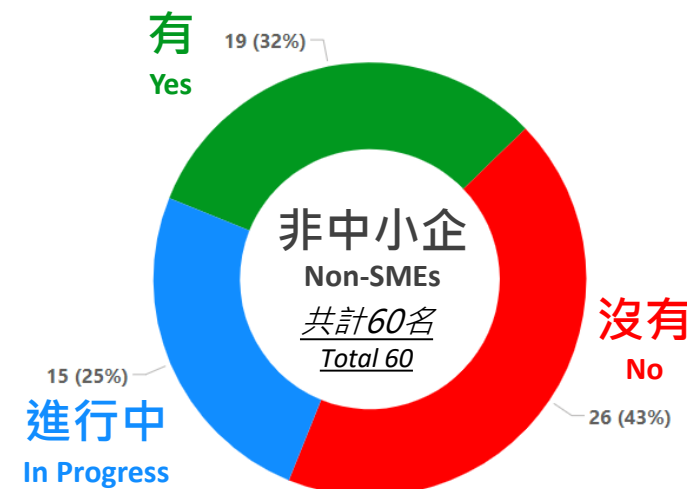
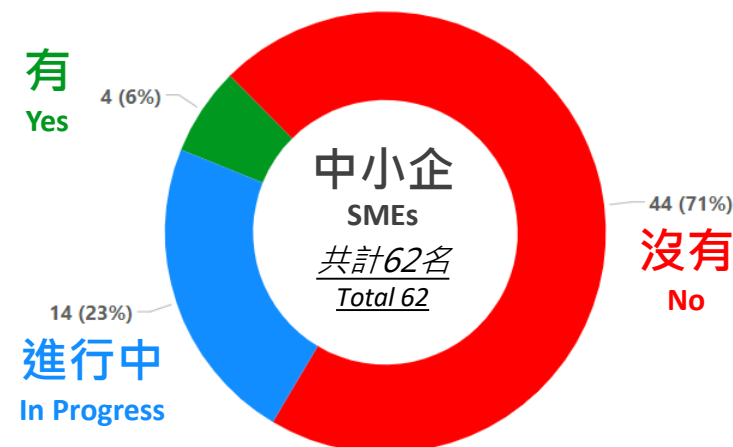
Have Carbon Neutrality Targets been set?



81%的受訪者及 94%的中小企受訪者

尚未完整地訂立目標

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



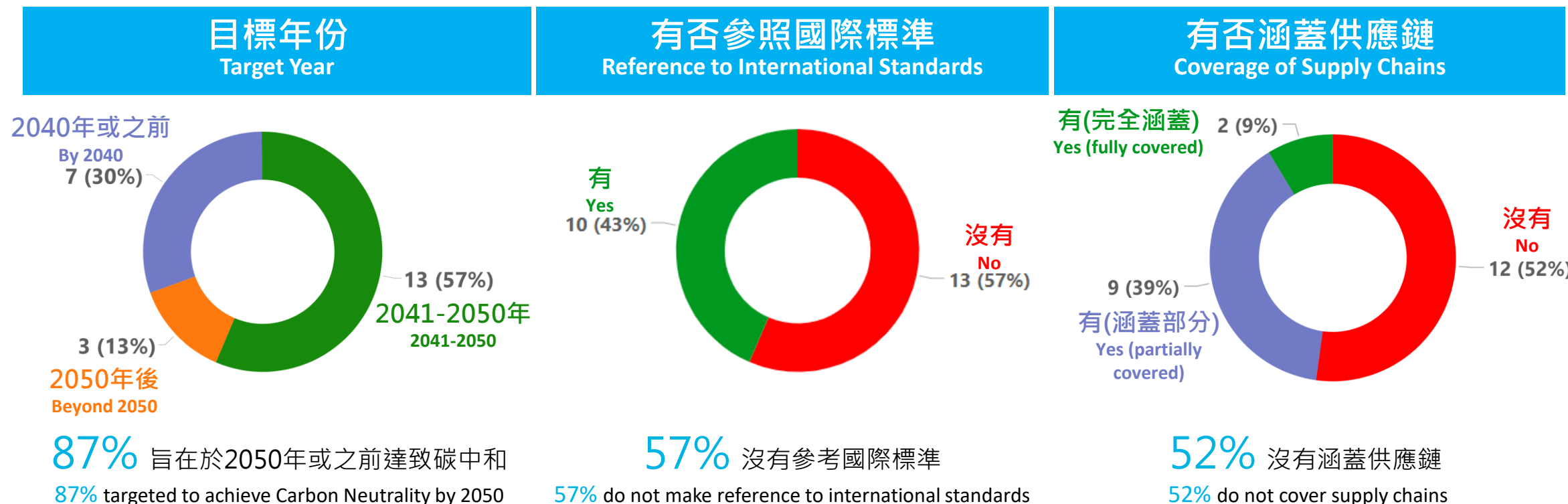
碳中和目標訂立的進展 Progress on Carbon Neutrality Target Setting

共計23名受訪者
Total 23 respondents

在已訂立目標的受訪者當中 For those who **HAVE SET** targets

他們就碳中和目標之訂立細節

Settings of their Carbon Neutrality Targets



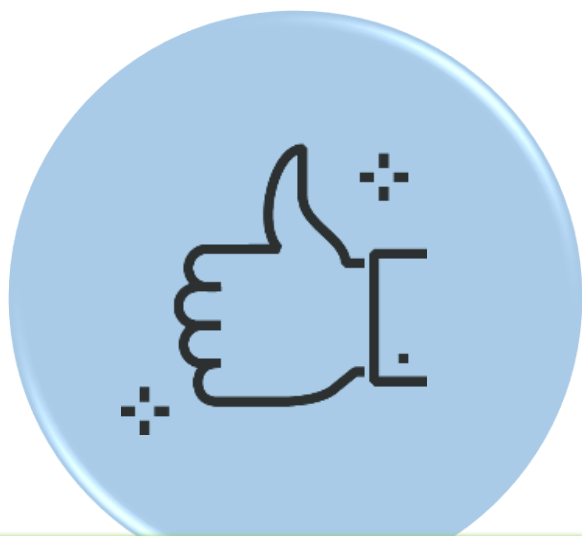
碳中和目標訂立的進展 Progress on Carbon Neutrality Target Setting

共計52名受訪者
Total 52 respondents

在已訂立/ 正在訂立目標的受訪者當中 For those who HAVE SET / ARE IN PROGRESS TO SET targets

訂立碳中和目標的驅動因素

Driver(s) of Setting Carbon Neutrality Targets



90%

品牌形象、名聲及競爭力

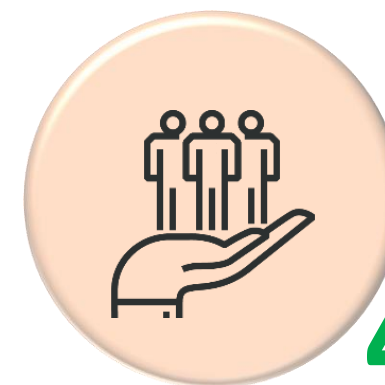
Brand image, reputation and competitiveness



48%

規管要求

Regulatory mandates



44%

滿足客戶要求

Meeting clients' requirements

碳中和目標訂立的進展 Progress on Carbon Neutrality Target Setting

共計70名受訪者
Total 70 respondents

在尚未訂立目標的受訪者當中 For those who have NOT set targets yet

三大因素 Top 3 Reasons

尚未訂立碳中和目標的因素

Reason(s) of Not Setting Carbon Neutrality Targets

- 缺乏外部支持 76%
Lack of external support
- 尚未與機構之運作相關 73%
No relation to the organisation's operation yet
- 意識/認知不足 71%
Lack of awareness / knowledge

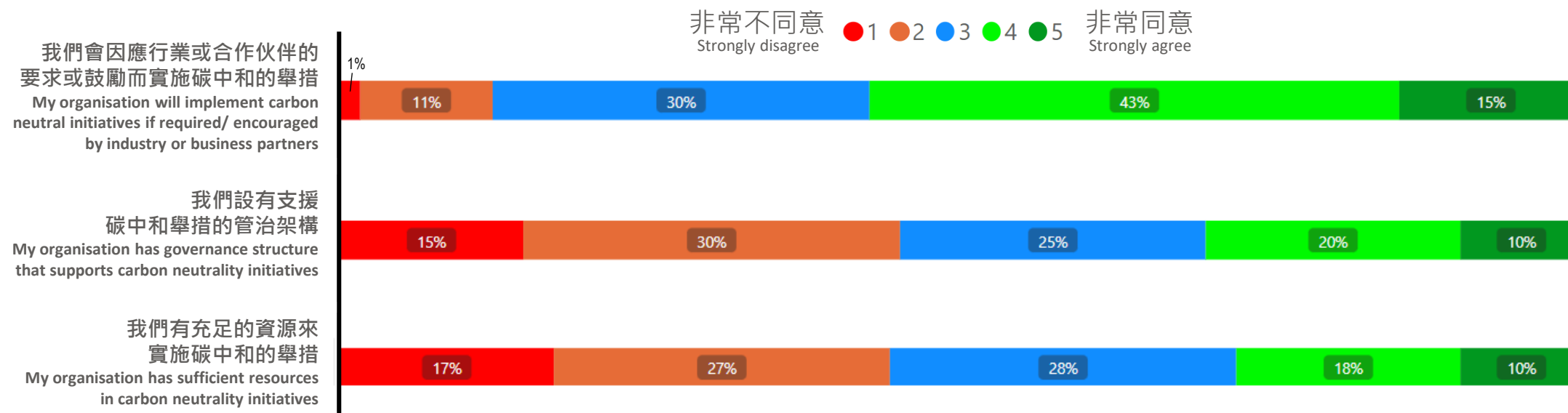
調查結果

Survey Result

碳中和現況 — 挑戰及支援
Current State in Carbon Neutrality –
Challenge and Support

碳中和現況 Current State in Carbon Neutrality

共計122名受訪者
Total 122 respondents



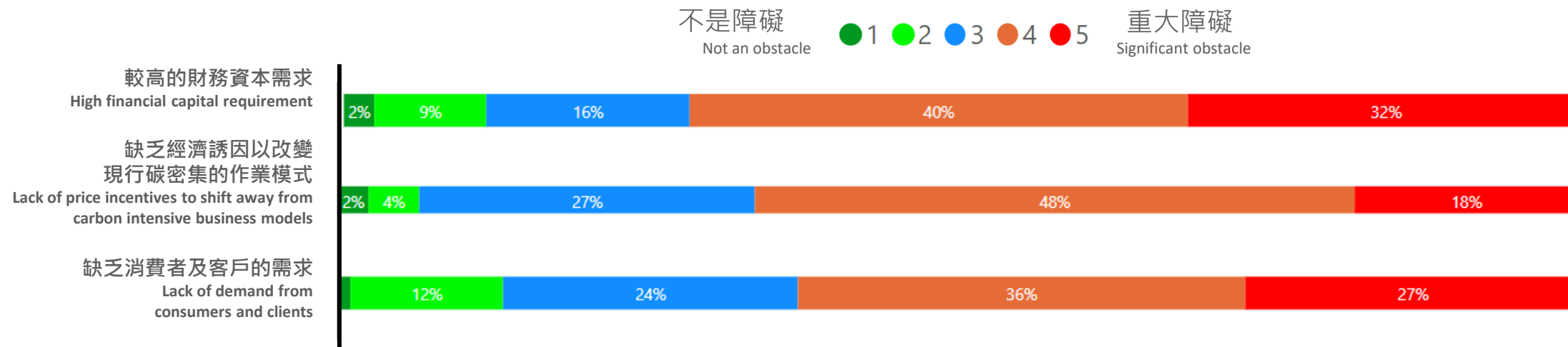
- 只有12%的受訪者不同意會因應行業或合作伙伴的要求或鼓勵而實施碳中和的舉措
Only 12% respondents disagree that they would implement carbon neutral initiatives if required / encouraged by the industry or business partners

- 然而，約45%的受訪者不同意他們具有充足的資源或管治架構來實施碳中和的舉措
However, approximately 45% respondents disagree that they have sufficient resources nor governance structure for carbon neutrality initiatives

註：中小企的趨勢相近並沒有顯著差異
Note: For SMEs, the trend is similar with no significant difference

邁向碳中和的挑戰 Challenges in Carbon Neutrality Transition

共計122名受訪者
Total 122 respondents



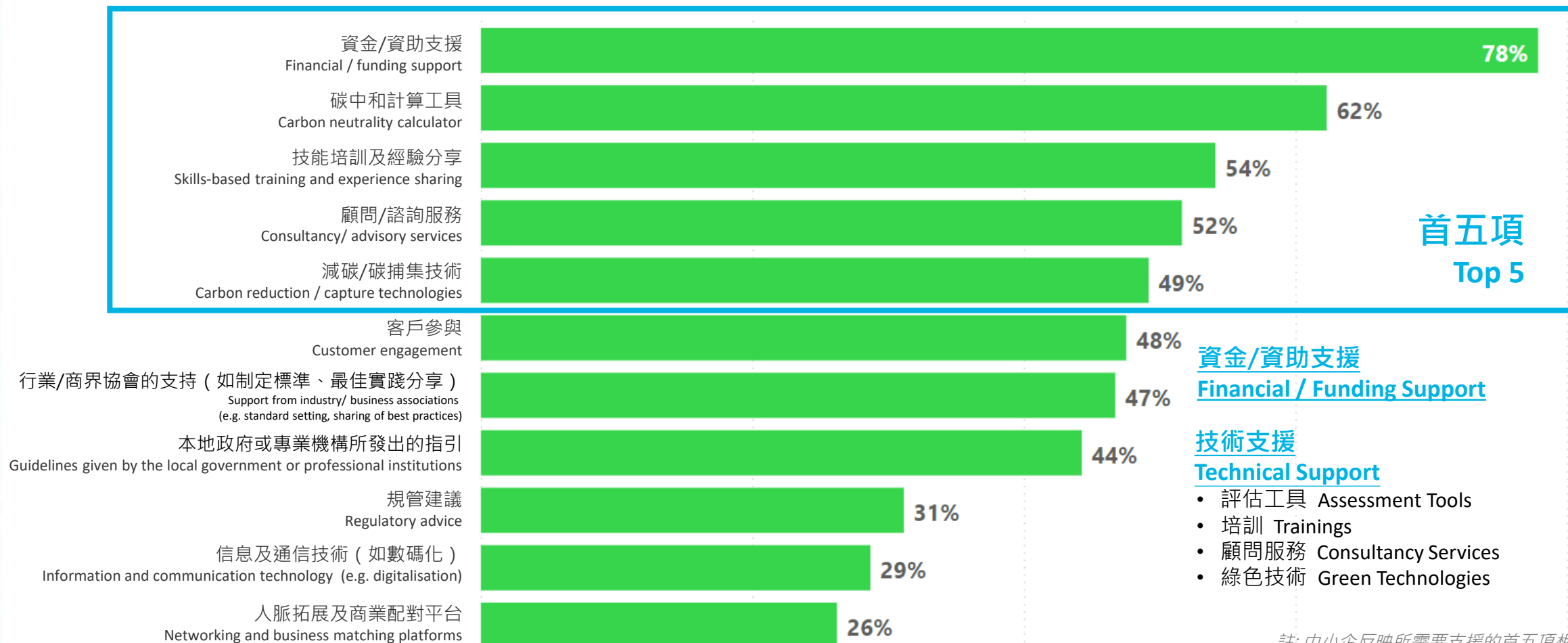
>60%的受訪者認為以下是淨零轉型的障礙：
>60% respondents considered the followings are obstacles
along net zero transition:

- 較高的財務資本需求
High financial capital requirement
- 缺乏經濟誘因以改變現行碳密集的作業模式
Lack of price incentives to shift away from carbon intensive business models
- 缺乏消費者及客戶的需求
Lack of demand from consumers and clients

註：中小企的趨勢相近並沒有顯著差異
Note: For SMEs, the trend is similar with no significant difference

未來所需的支援 Future Support Needs

共計122名受訪者
Total 122 respondents



註: 中小企反映所需要支援的首五項相同
Note: SMEs have the same Top 5 support needed

我們提供給業界的支援 Our Support to the Industry

通過是次調查，我們瞭解到不同企業在低碳進程上的現狀、挑戰和需求。我們將就以下範疇與政府及業界緊密合作，以協助各界跟上碳中和的趨勢：

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

研發碳評估工具

Develop carbon
assessment tools

2

提供更多能力提升和
相關顧問服務

Offer more capacity building
and relating consultancy
services

3

推廣和研發低碳技術

Promote and develop low
carbon technologies

4

為行業提供技術支援以
尋求政府或其他
相關資助

Provide technical support for
industry to seek government
or related funding

問答環節

Q&A



香港生產力促進局

Hong Kong Productivity Council

Tel: +852 2788 5678 Whatsapp: +852 5283 4131

www.hkpc.org



香港城市大學能源及環境學院

School of Energy and Environment

City University of Hong Kong

<https://www.cityu.edu.hk/>

免責聲明 Disclaimer:

本文件內容及資料均屬香港生產力促進局所有。未經本局授權不得對文件及資料作出任何修改或將其出售。對於本文件內容及資料中出現的任何錯誤、偏頗、疏漏或延誤，或據此而採取之任何行動，本局概不負上任何責任。對於因使用本文件內容及資料而產生的任何特殊的、附帶或相應的損失，本局概不負上任何責任。

The content and data in this document is owned by Hong Kong Productivity Council (HKPC). Without the authorisation of HKPC, any changes to the document content and data, as well as selling of the document, are not permitted. HKPC shall not have any liability, duty or obligation for or relating to the content and data contained herein, any errors, inaccuracies, omissions or delays in the content and data, or for any actions taken in reliance thereon. In no event shall HKPC be liable for any special, incidental or consequential damages, arising out of the use of the content and data.