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能源及環境學院

香港城市大學
City University of Hong Kong

「2024/25 碳中和進展與挑戰」業界調查 — 調查結果

2024/25 Industry Survey on Carbon Neutrality Progress and Challenges – Survey Result



創新 · 綠色 · 新質生產力
Innovation · Green · New Productive Forces

此調查由以下機構共同協作完成：

This survey is a collaborative effort by the following organisations:

香港生產力促進局
The Hong Kong Productivity Council

信興教育及慈善基金教授 (能源及環境)暨香港城市大學能源及環境學院可再生能源講座教授梁國熙教授
Prof. Michael LEUNG, Shun Hing Education and Charity Fund Professor of Energy and Environment & Chair Professor of Renewable Energy,
School of Energy and Environment, City University of Hong Kong.

對比 Compare with
2022/23

10% ↑ 意識
Awareness

62%

受訪者並不熟悉碳中和
of the respondents not familiar with Carbon Neutrality

主要挑戰 Main Challenges

可持續發展合規性
Sustainability Compliance

供應鏈期望及管理
Supply Chain Expectations and Management

主要需求 Top Needs



資金/資助支援
Financial / Funding Support



技術支援 Technical Support

1. 評估方法及工具 (例如範圍3及產品碳足跡)
Assessment Methods and Tools
(e.g., Scope 3 and Product Carbon Footprint)
2. 綠色技術 (例如新能源及碳捕獲技術)
Green Technologies (e.g., New Energy and Carbon Capture)
3. 外部支援及顧問服務
External Support & Consultancy Services
4. 培訓 Trainings

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**.

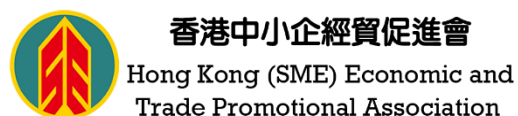
- 生產力局與香港城市大學於2022/23年成功合作進行了「**碳中和進展與挑戰**」業界調查，以研究企業對碳中和的看法、實踐和推動碳中和的方法，並確定影響企業實現碳中和和促進價值鏈變革的因素【[新聞稿](#)】【[調查結果](#)】。考慮到業界對環境、社會及管治日益增強的關注、不斷變化的環境和嶄新的減碳策略，新一輪業界調查已在2024/25年進行，以追蹤企業的最新狀況和進展，本次發佈的新聞稿可參閱【[新聞稿](#)】。

HKPC has collaborated with the City University of Hong Kong to successfully conduct “**Industry Survey on Carbon Neutrality Progress and Challenges**” in Year 2022/23 to examine businesses’ perceptions, practices, and approaches to advancing carbon neutrality, and to identify factors affecting businesses’ incentives and abilities to achieve carbon neutrality and promote changes along the value chain [[Press Release](#)] [[Survey Result](#)]. With consideration of growing focus on Environmental, Social, and Governance issues of industry, evolving landscape and the new decarbonisation strategies, a new round of surveys had been conducted to track the latest status and progress of businesses in 2024/25. The press release for this announcement can be referred to in [[Press Release](#)].

- 本次調查以**工商及建築物相關業界企業**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 targets **enterprises of commercial & industrial and building sectors** and aims to understand **how businesses are progressing towards decarbonisation and the challenges encountered**.

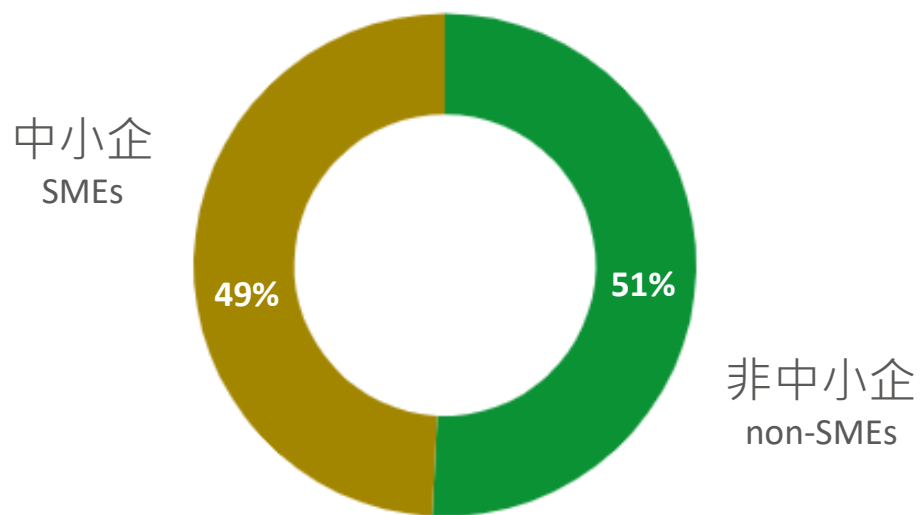
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共計 **126** 名受訪企業 Total **126** Respondent Enterprises

機構規模 Sizes of organisations



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

建築物相關業界
Building Sector

建造業、酒店業、
物業管理...
Construction, Hospitality,
Property Management...

工商業界
Commercial & Industrial Sectors

製造業、進出口貿易、零售業...
Manufacturing, Import & Export
Trading, Chemical, Retail...

重點 Highlights (1)

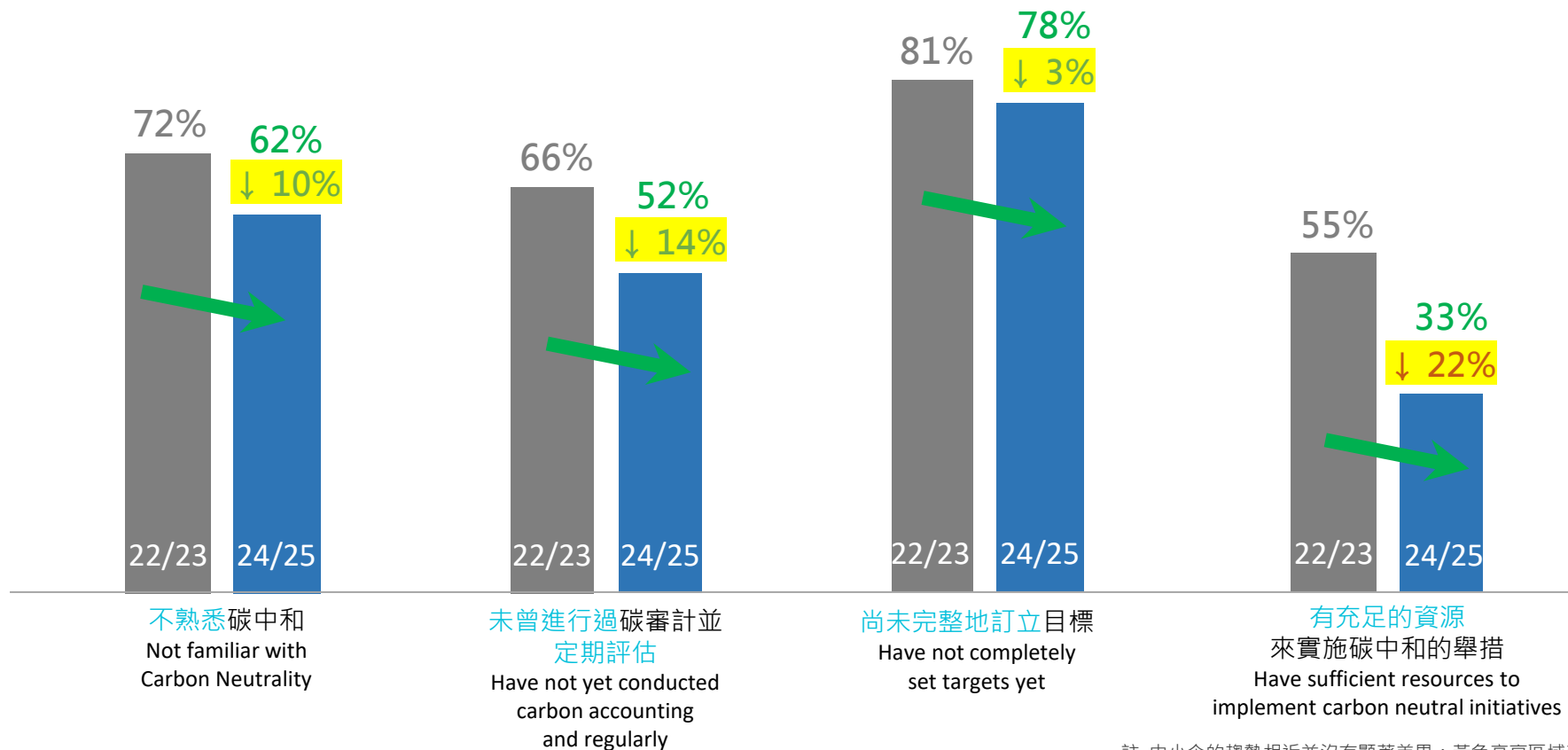
觀察重點 Key Observations

↑ 意識與行動

Awareness & Actions

↑ 減碳資源的需求

Demand for Decarbonisation Resources



註：中小企的趨勢相近並沒有顯著差異；黃色高亮區域表示與2022/23調查結果相比的變化。

Note: For SMEs, the trend is similar with no significant difference; Yellow highlighted area indicates the difference compared to the 2022/23 survey results

重點 Highlights (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

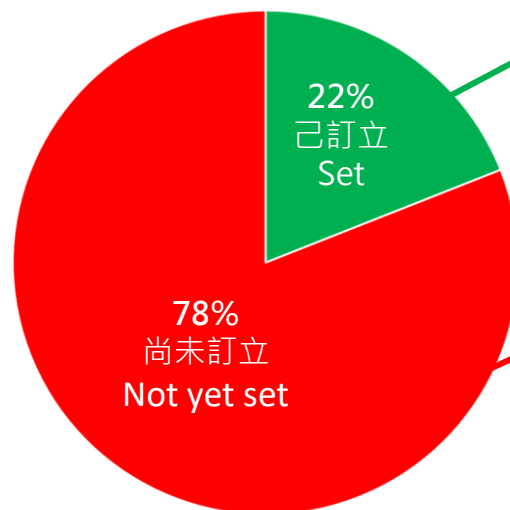
The most important driver

89%

「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:

有更多企業設立目標

More organisations have set targets

目標設立專業度方面，仍有提升空間

There is room to integrate more professional knowledge

- 超過一半沒有參考國際標準或涵蓋所有範圍3供應鏈的碳排放
DO NOT made reference to international standards or cover all their supply chains under Scope 3 carbon emission

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

>80%

缺乏外部支持

Lack of external support

意識及認知不足

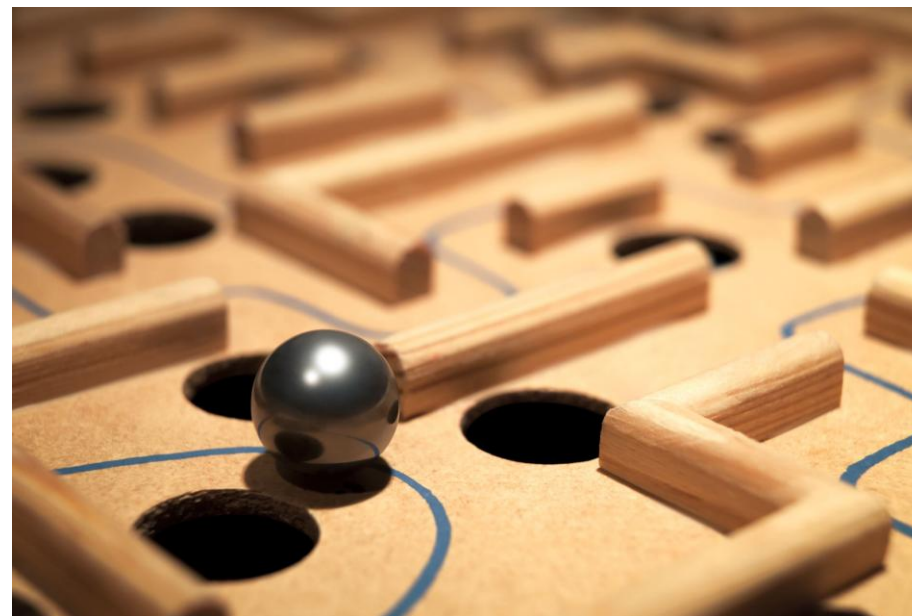
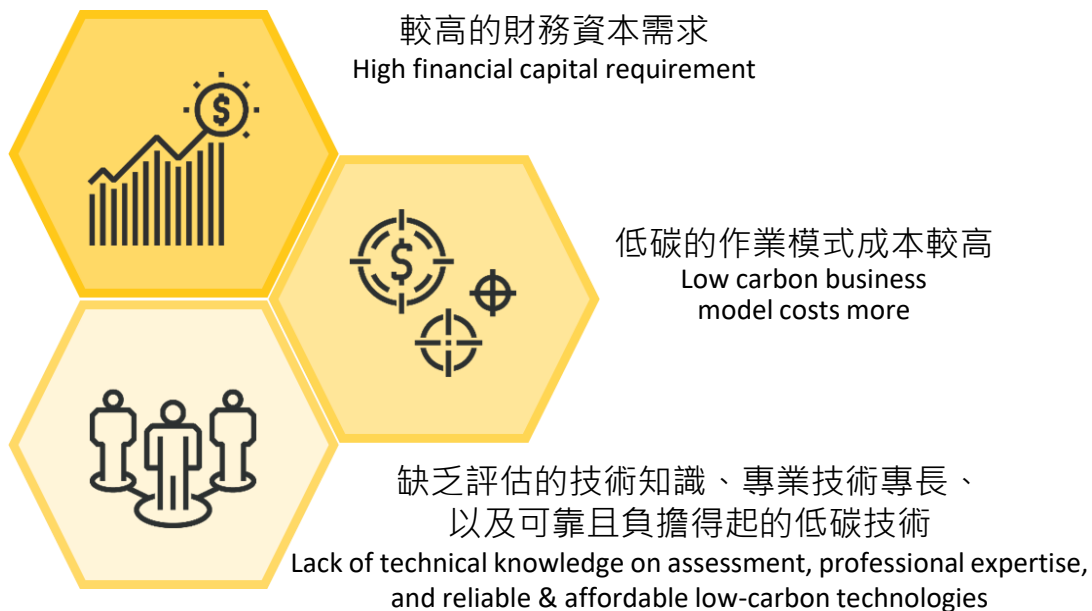
Lack of awareness and knowledge

重點 Highlights (3)

邁向碳中和的挑戰

Challenges in Transition to Carbon Neutrality

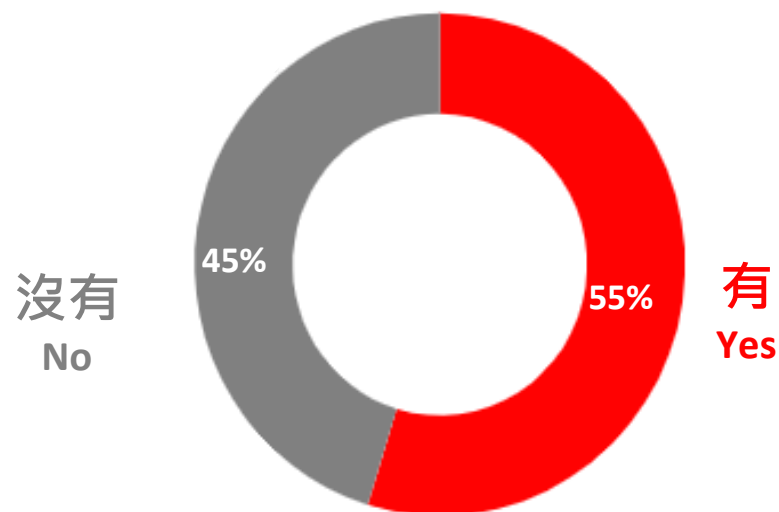
重大障礙 Significant Obstacles



重點 Highlights (4)

- 超過一半的受訪者曾要求，或作為供應商被要求，提供與生產相關的碳管理信息（例如碳排放水平和減排目標/計劃）。

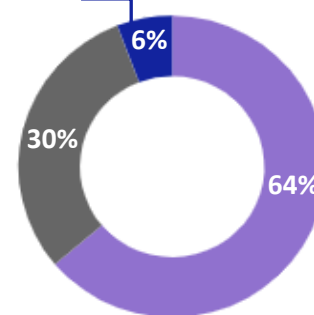
More than half of respondents have asked, or been asked as supplier, to provide production-related carbon management information (such as carbon emission level and reduction targets/plans).



目的 Purpose

根據歐盟的碳邊境調整機制（CBAM）進行報告
Reporting under EU's Carbon Border Adjustment Mechanism (CBAM)

不確定
Not sure



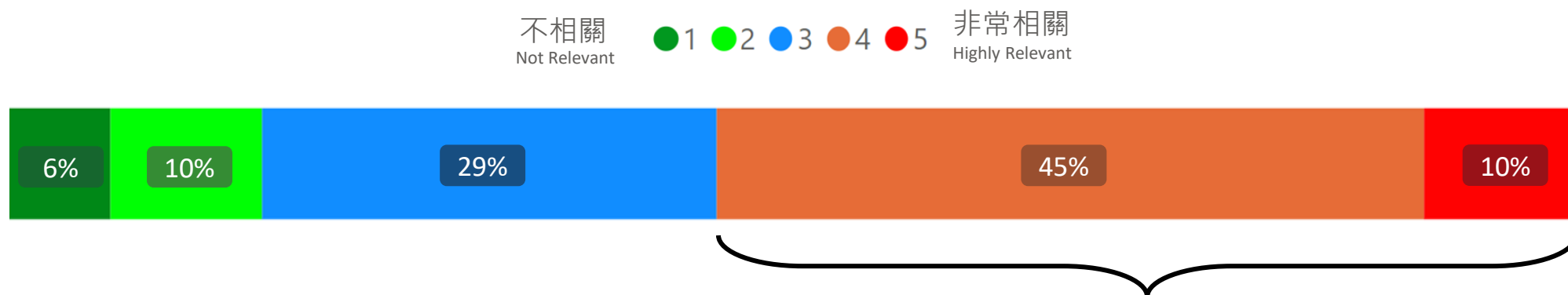
範圍三碳排放核算
Scope 3 emission
accounting



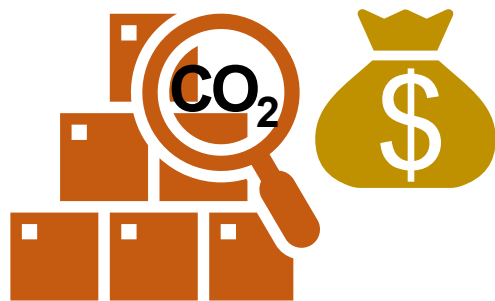
註：中小企的趨勢相近並沒有顯著差異

Note: For SMEs, the trend is similar with no significant difference

重點 Highlights (5)



Carbon Tariff



- 超過一半的製造業和進出口行業的受訪者發現碳關稅與他們的出口產品相關或非常相關。
More than half of respondents in Manufacturing and Import & Export sectors have found carbon tariff relevant or highly relevant to their exported products.

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

調查結果

Survey Result

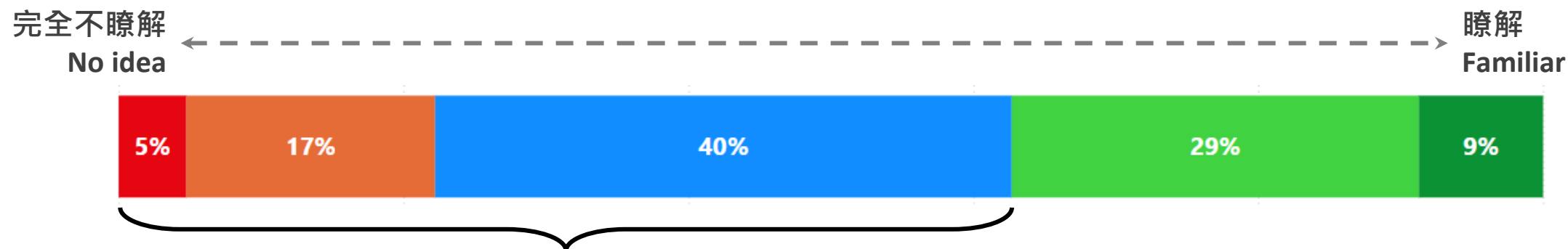
碳中和現況 — 目標訂立的進展
Current State in Carbon Neutrality –
Progress on Carbon Neutrality Target Setting



碳中和現況 Current State in Carbon

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)?



62% ↓ 10% 的受訪者不熟悉碳中和
respondents are not familiar with Carbon Neutrality

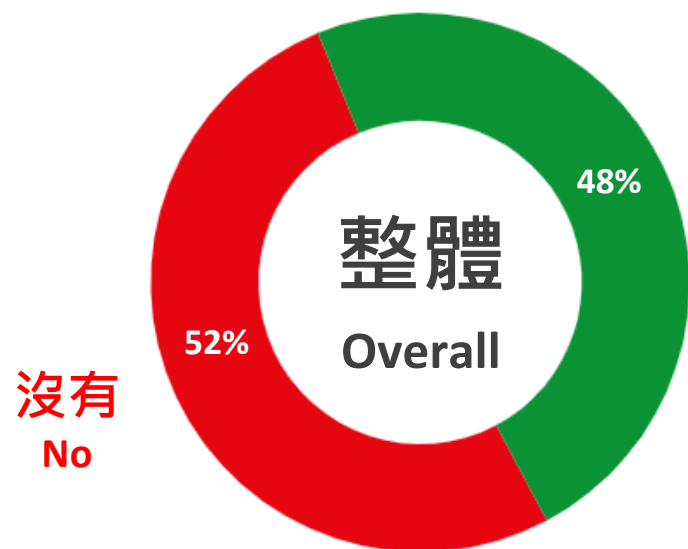
註：中小企的趨勢相近並沒有顯著差異；黃色高亮區域表示與2022/23調查結果相比的變化。

Note: For SMEs, the trend is similar with no significant difference; Yellow highlighted area indicates the difference compared to the 2022/23 survey results

碳中和現況 Current State in Carbon Neutrality

受訪者是否曾進行碳審計，並計劃定期進行？

Have respondents conducted Carbon Audit and planned to conduct regularly?



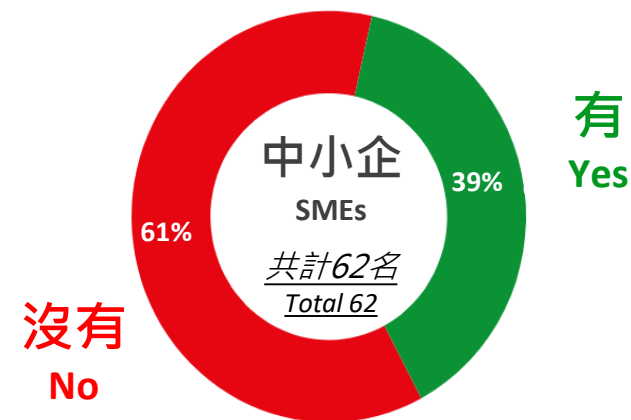
有
Yes

52% ↓ 14%

受訪者未曾進行過碳審計並定期評估其溫室氣體的排放
Respondents have not yet conducted carbon accounting and evaluated their greenhouse gas emissions regularly

中小企 SME :

61% ↓ 2%



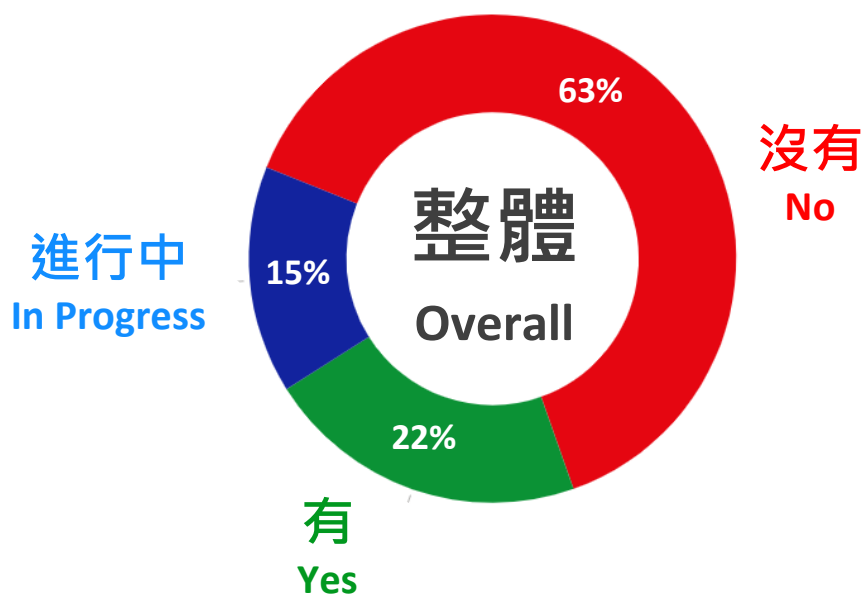
有
Yes

註: 黃色高亮區域表示與2022/23調查結果相比的變化。
Note: Yellow highlighted area indicates the difference compared to the 2022/23 survey results

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

有否訂立碳中和目標

Has your organisation set Carbon Neutrality Targets?



78% 受訪者尚未完整地訂立目標
↓ 3% respondents have not completely set targets yet

中小企 SME
82% ↓ 12%

非中小企 Non-SMEs
75% ↑ 7%

在有訂立目標的受訪者中，超過一半沒有參考國際標準或涵蓋所有範圍3供應鏈的碳排放

For respondents that set target, more than half do not made reference to international standards or cover all their supply chains under Scope 3 carbon emission

註：中小企的趨勢相近並沒有顯著差異；黃色高亮區域表示與2022/23調查結果相比的變化。

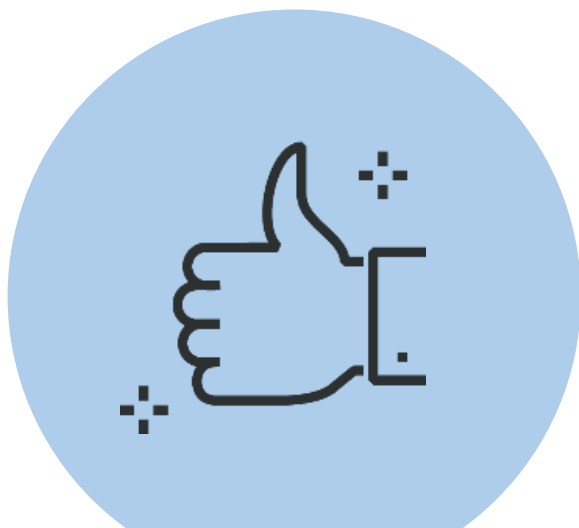
Note: For SMEs, the trend is similar with no significant difference; Yellow highlighted area indicates the percentage difference compared to the 2022/23 survey results

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

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



89%

品牌形象、名聲及競爭力

Brand image, reputation and competitiveness



65%

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

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

主要因素 Top 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
Lack of external support
- 意識/認知不足
Lack of awareness / knowledge

>80%

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

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

- 只有 30% 的受訪者不同意將碳中和視為最重要的優先事項之一
Only 30% respondents disagree that they see carbon neutrality as one of the most important priorities

我們將碳中和視為
最重要的優先事項之一
My organisation sees carbon neutrality as one
of the most important priorities



我們有充足的資源來
實施碳中和的舉措
My organisation has sufficient resources
in carbon neutrality initiatives

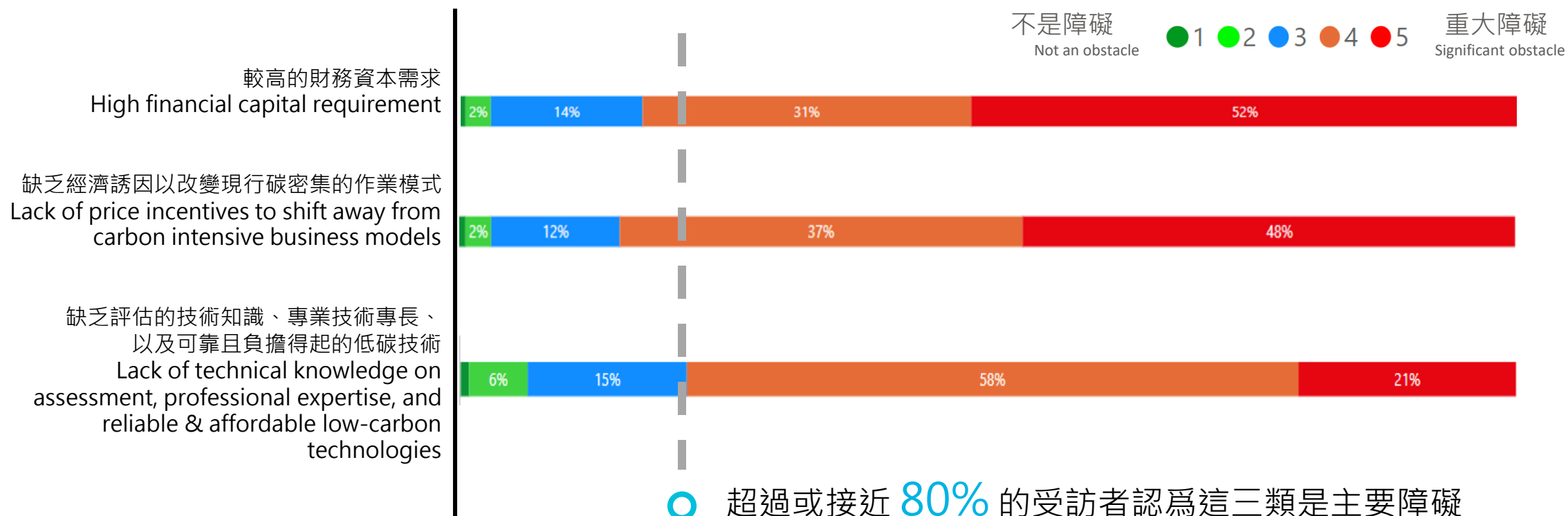


- 約 67% ^{↑22%} 的受訪者不同意他們具有充足的資源來實施碳中和的舉措
However, approximately 67% ^{↑22%} respondents disagree that they have sufficient resources for carbon neutrality initiatives

註：中小企的趨勢相近並沒有顯著差異；黃色高亮區域表示與2022/23調查結果相比的變化。

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



○ 超過或接近 80% 的受訪者認為這三類是主要障礙
More than or close to 80% respondents considered these three categories to be significant obstacles

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

邁向碳中和的需求 Needs in Carbon Neutrality Transition

評估工具 (碳中和、行業專用或範疇三排放)
Assessment tool (for carbon neutral or industry-specific or scope 3 emissions)

94%

資金/資助支援 (例如應用綠色科技及碳評估)
Financial / funding support (e.g., green technologies and carbon assessment)

89%

綠色技術 (例如新能源及碳捕獲技術)
Green Technologies (e.g., new energy and carbon capture)

63%

外部支援及顧問服務
External Support & Consultancy Services

48%

技能培訓及經驗分享
Skills-based training and experience sharing

45%

與2022/23年
度比更迫切
More intense
than 2022/23



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

聯絡我們 Contact us



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

www.cityu.edu.hk/