



Transport Logistics Training Board  
物流業訓練委員會

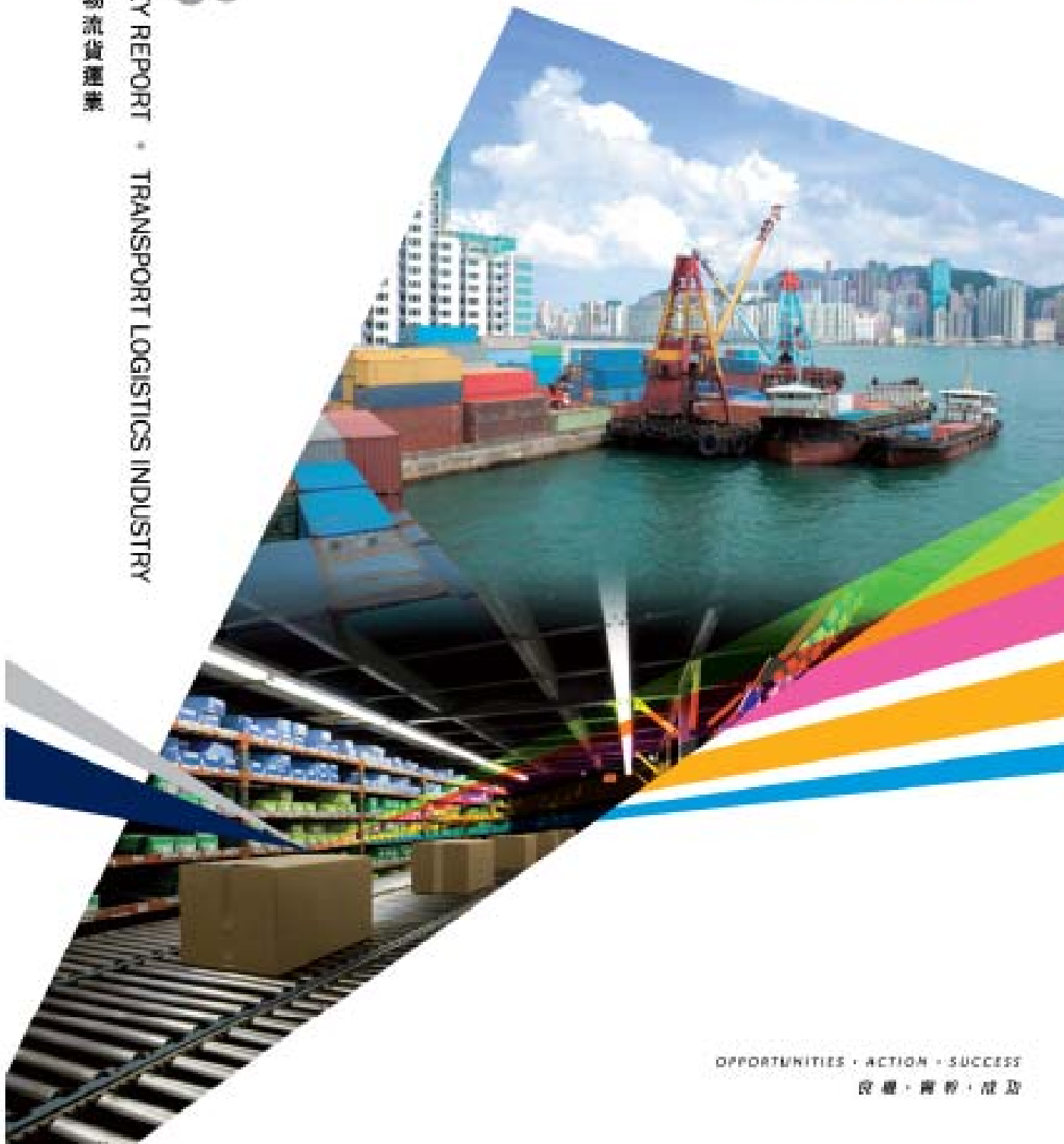
2008

MANPOWER SURVEY REPORT • TRANSPORT LOGISTICS INDUSTRY

人力調查報告書 • 物流業

MANPOWER SURVEY REPORT 2008 TRANSPORT LOGISTICS INDUSTRY

香港運輸業2008年度人力調查報告書



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# 2008 MANPOWER SURVEY OF THE TRANSPORT LOGISTICS INDUSTRY

MANPOWER SURVEY REPORT

Transport Logistics Training Board  
Vocational Training Council

# 2008 Manpower Survey Report of the Transport Logistics Industry

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# **2008 Manpower Survey of the Transport Logistics Industry**

## **Manpower Survey Report**

### **Background**

1. The Transport Logistics Training Board of the Vocational Training Council was set up by the HKSAR Government to be responsible for, among other duties, determining the manpower situation and training needs in the Transport Logistics Industry (TLI). In third quarter 2008 the Training Board conducted a manpower survey of the TLI covering 9 branches of the Industry.

### **Scope and Coverage of the Survey**

2. The survey had covered all employees whose responsibilities were related to the transport logistics business and operations. Those working in computing, accounting, personnel and other administrative and supporting areas were not surveyed.

3. The nine branches of the TLI surveyed were:

- a. Warehousing & Cold Storage
- b. Cargo Handling Terminals
- c. Trucking & Container Haulage
- d. Air Freight Transport
- e. Forwarding Agents
- f. Stevedoring Services
- g. Couriers (International)
- h. Other Transport Logistics Services Providers
- i. Sea Freight Transport

### **Method of the Survey**

4. The survey adopted a mixed approach in deciding the sampling frame, making use of the Hong Kong Standard Industrial Classification (HSIC) and other means. The HSIC Scheme is a three-tier system managed by the Census & Statistics Department (C&SD). The HSIC groups establishments of similar business nature in Hong Kong into specific sectors/branches. Industrial sectors are identified by 3 digits, 4 digits and 6 digits respectively.

5. For HSIC based sampling, a stratified random sampling method was adopted. Data collected were statistically grossed up where applicable to give an overall picture of the manpower situation of these sectors/branches. No grossing up of data was done for the supplementary samples.

## Branches Surveyed and Samples

6. The branches surveyed and the numbers of samples per respective branches are:

<u>Branch</u>	<u>Sample Size</u>
I. <u>Warehousing &amp; Cold Storage</u>	
1. General Cargo Warehouses & Other Storage Services (HSIC 721200)	
2. Cold Storage (HSIC 721100)	179
3. Packing and Crating Services & Cargo Inspection, Sampling and Other Storage Services (HSIC 7185 – 7186)	
II. <u>Cargo Handling Terminals</u>	
4. Supplementary Samples - Cargo Handling Terminals	8
III. <u>Trucking &amp; Container Haulage</u>	
5. Land Freight Transport by Good Vehicles and Land Freight Transport, n.e.c. (HSIC 7121, 7129)	494
6. Haulage of Containers & Container Leasing (HSIC 716101)	
7. Supplementary Samples - Large Vehicle Fleet Owner Companies	
IV. <u>Air Freight Transport</u>	
8. Airline Companies and Supporting Services to Air Transport (HSIC 7171, 7172)	65
V. <u>Forwarding Agents</u>	
9. Air Cargo Forwarding Services (HSIC 7182)	311
10. Sea Cargo Forwarding Services (HSIC 7183)	
VI. <u>Stevedoring Services</u>	
11. Stevedore and Supporting Services to Water Transport, n.e.c. (HSIC 7169)	37
VII. <u>Couriers (International)</u>	
12. Supplementary Samples - Couriers (International)	12
VIII. <u>Logistics (In-house)</u>	
13. Supplementary Samples - Logistics (In-house)	31
IX. <u>Logistics (Third Party)</u>	
14. Supplementary Samples - Logistics (Third Party)	
X. <u>Sea Freight Transport</u>	
15. Ship Agents & Managers (HSIC 7141)	
16. Operators of Sea - Going Vessels (HSIC 7143)	
XI. <u>Ship Management &amp; Chartering</u>	
17. Ship Owners of Sea - Going Vessel (HSIC 7142)	222
18. Shipbrokers (HSIC 7184)	
19. Inland Water Freight Transport (HSIC 7154)	
XII. <u>Shipbrokers and Shipowners</u>	
20. Supplementary Samples - Shipbrokers and Shipowners	
<b>Grand Total</b>	<b>1,359</b>

## Main Survey Findings

### Responses to the Survey

7. The summary of responses to the survey is as follows:

	<u>Result</u>	<u>Total</u>	<u>%</u>
Closed		10	0.74%
Door-locked		5	0.37%
Merged with other establishment		13	0.96%
Moved, address cannot be located/untraceable		36	2.65%
Non-contact		75	5.52%
Not engaged in specific trade		19	1.40%
No technical manpower		44	3.24%
Not yet start operation		10	0.74%
Partial response		41	3.02%
Refusal		27	1.99%
Registered office/Corresponding address		7	0.52%
Response		1,012	74.47%
Temporary ceased		59	4.34%
Vacant		1	0.07%
	<b>Total</b>	<b>1,359</b>	<b>100.00%</b>

### Total Establishment

8. The total number of establishments is found to be:

	<u>Branch</u>	<u>Establishments</u>
(a)	Warehousing & Cold Storage	489
(b)	Cargo Handling Terminals	8
(c)	Trucking & Container Haulage	9,962
(d)	Air Freight Transport	93
(e)	Forwarding Agents	2,829
(f)	Stevedoring Services	94
(g)	Couriers (International)	13
(h)	Other Transport Logistics Services Providers	22
(i)	Sea Freight Transport	422

## Manpower

9. The findings of the total manpower and the distribution in terms of industry-related employees (i.e. excluding administrative and supporting employees) in the TLI are listed below:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
(a) Warehousing & Cold Storage	351	881	1,561	3,742	<b>6,535</b>
(b) Cargo Handling Terminals	140	900	1,018	3,345	<b>5,403</b>
(c) Trucking & Container Haulage	891	4,515	7,320	30,791	<b>43,517</b>
(d) Air Freight Transport	187	534	602	2,907	<b>4,230</b>
(e) Forwarding Agents	3,844	6,507	16,627	3,124	<b>30,102</b>
(f) Stevedoring Services	78	239	217	1,312	<b>1,846</b>
(g) Couriers (International)	235	448	1,008	1,971	<b>3,662</b>
(h) Other Transport Logistics Services Providers	50	103	122	1,009	<b>1,284</b>
(i) Sea Freight Transport	838	1,077	1,916	259	<b>4,090</b>
<b>All Branches</b>	<b>6,614</b>	<b>15,204</b>	<b>30,391</b>	<b>48,460</b>	<b>100,669</b>

10. The distribution of manpower by job level by percentage of total manpower at the same branch is as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>
(a) Warehousing & Cold Storage	5.37%	13.48%	23.89%	57.26%
(b) Cargo Handling Terminals	2.59%	16.66%	18.84%	61.91%
(c) Trucking & Container Haulage	2.05%	10.38%	16.82%	70.76%
(d) Air Freight Transport	4.42%	12.62%	14.23%	68.72%
(e) Forwarding Agents	12.77%	21.62%	55.24%	10.38%
(f) Stevedoring Services	4.23%	12.95%	11.76%	71.07%
(g) Couriers (International)	6.42%	12.23%	27.53%	53.82%
(h) Other Transport Logistics Services Providers	3.89%	8.02%	9.50%	78.58%
(i) Sea Freight Transport	20.49%	26.33%	46.85%	6.33%
<b>All Branches</b>	<b>6.57%</b>	<b>15.10%</b>	<b>30.19%</b>	<b>48.14%</b>

### Number of Employees and Vacancies

11. At the time of survey, the numbers of employees and vacancies are found to be:

	<u>Number of Employee</u>	<u>Number of Vacancy</u>	<u>Manpower</u>	<u>Vacancies as % of Total Manpower</u>
(a) Warehousing & Cold Storage	6,389	146	<b>6,535</b>	2.23%
(b) Cargo Handling Terminals	5,387	16	<b>5,403</b>	0.30%
(c) Trucking & Container Haulage	42,788	729	<b>43,517</b>	1.68%
(d) Air Freight Transport	4,222	8	<b>4,230</b>	0.19%
(e) Forwarding Agents	29,680	422	<b>30,102</b>	1.40%
(f) Stevedoring Services	1,846	0	<b>1,846</b>	0.00%
(g) Couriers (International)	3,615	47	<b>3,662</b>	1.28%
(h) Other Transport Logistics Services Providers	1,248	36	<b>1,284</b>	2.80%
(i) Sea Freight Transport	4,060	30	<b>4,090</b>	0.73%
<b>All Branches</b>	<b>99,235</b>	<b>1,434</b>	<b>100,669</b>	<b>1.42%</b>

### Preferred Education and Qualifications of Employees

12. Employers indicated the preferred education and qualifications of their employees as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
First Degree and Above	3,805	2,225	171	0	<b>6,201</b>
Post Secondary	2,176	7,767	9,561	1,054	<b>20,558</b>
Upper Secondary	196	4,324	18,688	17,908	<b>41,116</b>
Lower Secondary and Below	0	3	124	25,965	<b>26,092</b>
Unspecified	419	757	1,383	2,709	<b>5,268</b>
<b>Total</b>	<b>6,596</b>	<b>15,076</b>	<b>29,927</b>	<b>47,636</b>	<b>99,235</b>

13. The preferred education and qualifications of employees by percentage at the same job level is as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
First Degree and Above	57.69%	14.76%	0.57%	0.00%	<b>6.25%</b>
Post Secondary	32.99%	51.52%	31.95%	2.21%	<b>20.72%</b>
Upper Secondary	2.97%	28.68%	62.45%	37.59%	<b>41.43%</b>
Lower Secondary and Below	0.00%	0.02%	0.41%	54.51%	<b>26.29%</b>
Unspecified	6.35%	5.02%	4.62%	5.69%	<b>5.31%</b>



Average Income

14. The average income is the monthly income including basic salary, overtime pay, cost of living allowance, meal allowance, commission and bonus. It is an average figure among employees in the same job. The distribution of average income is found to be:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
\$5,000 or below	0	0	36	119	<b>155</b>
\$5,001 - \$10,000	0	97	12,837	18,051	<b>30,985</b>
\$10,001 - \$15,000	8	5,528	11,259	22,104	<b>38,899</b>
\$15,001 - \$20,000	1,283	5,276	2,015	2,650	<b>11,224</b>
\$20,001 - \$30,000	2,481	2,324	80	244	<b>5,129</b>
\$30,001 - \$40,000	1,331	30	0	0	<b>1,361</b>
\$40,001 or above	572	6	0	0	<b>578</b>
Unspecified	921	1,815	3,700	4,468	<b>10,904</b>
<b>Total</b>	<b>6,596</b>	<b>15,076</b>	<b>29,927</b>	<b>47,636</b>	<b>99,235</b>

15. The average income of employees by total number of employees surveyed is as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
\$5,000 or below	0.00%	0.00%	0.04%	0.12%	<b>0.16%</b>
\$5,001 - \$10,000	0.00%	0.10%	12.94%	18.19%	<b>31.22%</b>
\$10,001 - \$15,000	0.01%	5.57%	11.35%	22.27%	<b>39.20%</b>
\$15,001 - \$20,000	1.29%	5.32%	2.03%	2.67%	<b>11.31%</b>
\$20,001 - \$30,000	2.50%	2.34%	0.08%	0.25%	<b>5.17%</b>
\$30,001 - \$40,000	1.34%	0.03%	0.00%	0.00%	<b>1.37%</b>
\$40,001 or above	0.58%	0.01%	0.00%	0.00%	<b>0.58%</b>
Unspecified	0.93%	1.83%	3.73%	4.50%	<b>10.99%</b>

16. The average income of employees by percentage at same job level is as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
\$5,000 or below	0.00%	0.00%	0.12%	0.25%	<b>0.16%</b>
\$5,001 - \$10,000	0.00%	0.64%	42.89%	37.89%	<b>31.22%</b>
\$10,001 - \$15,000	0.12%	36.67%	37.62%	46.40%	<b>39.20%</b>
\$15,001 - \$20,000	19.45%	35.00%	6.73%	5.56%	<b>11.31%</b>
\$20,001 - \$30,000	37.61%	15.42%	0.27%	0.51%	<b>5.17%</b>
\$30,001 - \$40,000	20.18%	0.20%	0.00%	0.00%	<b>1.37%</b>
\$40,001 or above	8.67%	0.04%	0.00%	0.00%	<b>0.58%</b>
Unspecified	13.96%	12.04%	12.36%	9.38%	<b>10.99%</b>

### Principal/Transport Logistics Related Jobs

17. The survey focused on employees whose principal jobs were related to the business/operation/technical aspects of the TLI. Non-principal/transport logistics related manpower will be surveyed by other training boards/general committees. The numbers of principal/transport logistics related jobs against non-principal/transport logistics related jobs are found to be:

	<u>Non-technical/ Transport Logistics Related Staff</u>	<u>Technical/ Transport Logistics Related Staf</u>	<u>Total</u>
(a) Warehousing & Cold Storage	1,105	6,389	<b>7,494</b>
(b) Cargo Handling Terminals	0	5,387	<b>5,387</b>
(c) Trucking & Container Haulage	2,457	42,788	<b>45,245</b>
(d) Air Freight Transport	18,049	4,222	<b>22,271</b>
(e) Forwarding Agents	6,946	29,680	<b>36,626</b>
(f) Stevedoring Services	137	1,846	<b>1,983</b>
(g) Couriers (International)	0	3,615	<b>3,615</b>
(h) Other Transport Logistics Services Providers	0	1,248	<b>1,248</b>
(i) Sea Freight Transport	4,515	4,060	<b>8,575</b>
<b>All Branches</b>	<b>33,209</b>	<b>99,235</b>	<b>132,444</b>

### Turnover and Wastage

18. Turnover is the number of staff left in the past 12 months at the date of survey for whatever reasons. The findings are as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
Taking up/starting own business in freight/transport/logistics related jobs	145	596	3,671	5,426	<b>9,838</b>
Taking up/starting own business in non freight/transport/logistics related jobs; Emigration, retirement, further studies and others ( <i>including unknown</i> )	168	299	2,123	2,752	<b>5,342</b>
<b>Total</b>	<b>313</b>	<b>895</b>	<b>5,794</b>	<b>8,178</b>	<b>15,180</b>

19. The turnover (No. of staff left in the past 12 months) by percentage of total manpower at same job level is as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
Taking up/starting own business in freight/transport/logistics related jobs	2.19%	3.92%	12.08%	11.20%	<b>9.77%</b>
Taking up/starting own business in non freight/transport/logistics related jobs; Emigration, retirement, further studies and others ( <i>including unknown</i> )	2.54%	1.97%	6.99%	5.68%	<b>5.31%</b>
<b>Total</b>	<b>4.73%</b>	<b>5.89%</b>	<b>19.06%</b>	<b>16.88%</b>	<b>15.08%</b>

**Expansion in the Scope and Coverage of the Manpower Survey**

20. It should be noted that the scope of the manpower survey had been expanded on several occasions, with coverage of new branches or sub-branches as follows:

1996	New Branch	International Couriers
2002	New Branch	Other Transport Logistics Service Providers
2006	New Sub-Branch of: Warehousing & Cold Storage Companies	Packing and Crating Services & Cargo Inspection; Sampling & Other Storage Services (HSIC 7185 - 7186)
	New Sub-Branch of: Trucking & Container Haulage	Land Freight Transport n.e.c. (HSIC 7129)
	New Sub-Branch of: Sea Freight Companies	Inland Water Freight Transport (HSIC 7154)
2008	New Sub-Branch of Airfreight Transport	Support Services to Air Transport (HSIC 7172)

21. The findings of the 2008 manpower survey without the new sub-branches are as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
(a) Warehousing & Cold Storage	267	701	1,435	3,217	<b>5,620</b>
(b) Cargo Handling Terminals	140	900	1,018	3,345	<b>5,403</b>
(c) Trucking & Container Haulage	891	4,515	7,320	30,791	<b>43,517</b>
(d) Air Freight Transport	143	225	412	406	<b>1,186</b>
(e) Forwarding Agents	3,844	6,507	16,627	3,124	<b>30,102</b>
(f) Stevedoring Services	78	239	217	1,312	<b>1,846</b>
(g) Couriers (International)	235	448	1,008	1,971	<b>3,662</b>
(h) Other Transport Logistics Services Providers	50	103	122	1,009	<b>1,284</b>
(i) Sea Freight Transport	792	914	1,677	71	<b>3,454</b>
<b>All Branches</b>	<b>6,440</b>	<b>14,552</b>	<b>29,836</b>	<b>45,246</b>	<b>96,074</b>

22. New branches had been added in 1996 and 2002 respectively. The findings of the 2008 manpower survey without the new branches and new sub-branches are as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
(a) Warehousing & Cold Storage	267	701	1,435	3,217	<b>5,620</b>
(b) Cargo Handling Terminals	140	900	1,018	3,345	<b>5,403</b>
(c) Trucking & Container Haulage	891	4,515	7,320	30,791	<b>43,517</b>
(d) Air Freight Transport	143	225	412	406	<b>1,186</b>
(e) Forwarding Agents	3,844	6,507	16,627	3,124	<b>30,102</b>
(f) Stevedoring Services	78	239	217	1,312	<b>1,846</b>
(g) Couriers (International)	-	-	-	-	-
(h) Other Transport Logistics Services Providers	-	-	-	-	-
(i) Sea Freight Transport	792	914	1,677	71	<b>3,454</b>
<b>All Branches</b>	<b>6,155</b>	<b>14,001</b>	<b>28,706</b>	<b>42,266</b>	<b>91,128</b>

## Supplementary Survey

23. The survey had explored several aspects of the Industry with respect to the labour market and this part of the survey is described as supplementary survey because it is done irregularly. The findings of the supplementary survey are shown in the following paragraphs.

### Preferred Competency

24. Employers indicated the preferred competency of employees and the numbers of employees requiring training in specified competency areas, as follows:

<u>Types of training</u>	<u>Managerial Level</u>	<u>Supervisory Level</u>	<u>Clerical Level</u>	<u>Operative Level</u>	<u>All Job Level</u>
<b><u>Managerial Skills/Subject Areas</u></b>					
1 Automation Strategy Planning, Implementation and Evaluation	185	102	46	0	<b>333</b>
2 Customer Relationship and Service Strategy Planning, Implementation and Evaluation	297	241	56	0	<b>594</b>
3 Budgetary Control	307	105	7	33	<b>452</b>
4 Business Strategy Planning, Implementation and Evaluation	324	122	46	0	<b>492</b>
5 Environmental Protection Strategy Planning, Implementation and Evaluation	63	82	15	0	<b>160</b>
6 Financial Planning, Implementation and Evaluation	96	39	20	0	<b>155</b>
7 Human Resources Planning, Implementation and Evaluation	138	109	7	0	<b>254</b>
8 Legal Affairs	98	64	18	0	<b>180</b>
9 Pricing Strategy	100	58	20	0	<b>178</b>
10 Quality Assurance and Control	125	157	53	14	<b>349</b>
11 Risk Assessment	138	89	7	0	<b>234</b>
12 Sales and Marketing Strategy Planning, Implementation and Evaluation	209	125	80	0	<b>414</b>
13 Supervisory Techniques	297	329	11	33	<b>670</b>
14 Workflow Analysis	159	190	95	14	<b>458</b>
15 Occupational Health Planning & Insurance Planning	118	252	9	0	<b>379</b>
16 Others	0	2	20	0	<b>22</b>
<i>All Managerial Skills</i>	<i>2,654</i>	<i>2,066</i>	<i>510</i>	<i>94</i>	<i>5,324</i>
<b><u>Specific Skills/Subject Areas</u></b>					
16 Others	74	19	22	0	<b>115</b>
17 Benchmarking of Transport and Distribution Operations	55	180	331	20	<b>586</b>
18 Distribution Operations	23	76	152	255	<b>506</b>

<u>Types of training</u>	<u>Managerial Level</u>	<u>Supervisory Level</u>	<u>Clerical Level</u>	<u>Operative Level</u>	<u>All Job Level</u>
19 Automation of Material Handling	27	47	128	23	<b>225</b>
20 Multi-modal Transportation	44	111	95	0	<b>250</b>
21 Routing Optimization	67	139	97	0	<b>303</b>
22 Transport Operations	126	549	653	871	<b>2,199</b>
23 Warehousing and Storage Operations / Inventory Control	52	141	202	369	<b>764</b>
24 Brokering	21	20	22	0	<b>63</b>
25 Marine/P & I Insurance	31	9	36	0	<b>76</b>
26 Marine Surveying	31	54	102	0	<b>187</b>
27 Transport of Dangerous Cargo	105	236	429	105	<b>875</b>
28 International Trading Practices	106	75	76	0	<b>257</b>
29 Application of Supply Chain Concepts	73	191	102	2	<b>368</b>
30 Customer Relation and Services	140	633	1,307	223	<b>2,303</b>
31 Documentation Processing	65	142	763	11	<b>981</b>
32 Material Handling Techniques	20	48	109	593	<b>770</b>
<i>All Specific Skills</i>	<i>1,060</i>	<i>2,670</i>	<i>4,626</i>	<i>2,472</i>	<i>10,828</i>
<u>Technical Skills/Subject Areas</u>					
16 Others	6	24	19	104	<b>153</b>
33 Forklift Truck Operation	0	18	10	1,095	<b>1,123</b>
34 Container Crane Operation	0	3	0	906	<b>909</b>
35 Material Handling Equipment Operation	1	5	0	359	<b>365</b>
36 Packing/Storage of Goods	0	41	65	198	<b>304</b>
37 Dangerous Goods Handling	116	127	290	887	<b>1,420</b>
<i>All Technical Skills</i>	<i>123</i>	<i>218</i>	<i>384</i>	<i>3,549</i>	<i>4,274</i>
<u>Generic Skills/Subject Areas</u>					
16 Others	7	74	79	638	<b>798</b>
38 Multi-lingual Business Communication	157	406	1,365	258	<b>2,186</b>
39 e-Business/e-Commerce Concepts	64	208	955	1	<b>1,228</b>
40 Information Systems Application	59	294	851	44	<b>1,248</b>
<i>All Generic Skills</i>	<i>287</i>	<i>982</i>	<i>3,250</i>	<i>941</i>	<i>5,460</i>
<b>All Types of Training/Subject Areas</b>	<b>4,124</b>	<b>5,936</b>	<b>8,770</b>	<b>7,056</b>	<b>25,886</b>

### Sub-Contract Out of Jobs

25. The findings on establishments having jobs sub-contracted out as follows:

	<u>No. of Establishments</u>	<u>No. of Establishments Having Jobs Contracted-Out</u>	<u>% of All Establishments</u>	<u>No. of Establishments With Unspecified Reply</u>
(a) Warehousing & Cold Storage	489	44	9.00%	1
(b) Cargo Handling Terminals	8	3	37.50%	1
(c) Trucking & Container Haulage	9,962	670	6.73%	35
(d) Air Freight Transport	93	7	7.53%	0
(e) Forwarding Agents	2,829	483	17.07%	9
(f) Stevedoring Services	94	22	23.40%	0
(g) Couriers (International)	13	3	23.08%	1
(h) Other Transport Logistics Services Providers	22	6	27.27%	0
(i) Sea Freight Transport	422	15	3.55%	0
<b>All Branches</b>	<b>13,932</b>	<b>1,253</b>	<b>8.99%</b>	<b>47</b>

## Recruitment Difficulties

26. The findings on the number of establishments having encountered recruitment difficulties as follows:

		Managerial <u>Level</u>	Supervisory <u>Level</u>	Clerical <u>Level</u>	Operative <u>Level</u>
(a) Warehousing & Cold Storage	Encountered Recruitment Difficulties	7	12	36	55
	Without Difficulties	10	27	55	61
	Have not recruited or tried to recruit Freight/Transport/ Logistics staff in the past 12 months	470	448	396	371
	Unspecified	2	2	2	2
	<i>Sub-total</i>	<i>489</i>	<i>489</i>	<i>489</i>	<i>489</i>
(b) Cargo Handling Terminals	Encountered Recruitment Difficulties	0	0	2	1
	Without Difficulties	3	3	2	2
	Have not recruited or tried to recruit Freight/Transport/ Logistics staff in the past 12 months	4	4	3	4
	Unspecified	1	1	1	1
	<i>Sub-total</i>	<i>8</i>	<i>8</i>	<i>8</i>	<i>8</i>
(c) Trucking & Container Haulage	Encountered Recruitment Difficulties	4	45	127	426
	Without Difficulties	46	39	294	1167
	Have not recruited or tried to recruit Freight/Transport/ Logistics staff in the past 12 months	9,875	9,841	9,504	8,332
	Unspecified	37	37	37	37
	<i>Sub-total</i>	<i>9,962</i>	<i>9,962</i>	<i>9,962</i>	<i>9,962</i>
(d) Air Freight Transport	Encountered Recruitment Difficulties	0	1	0	2
	Without Difficulties	2	7	5	8
	Have not recruited or tried to recruit Freight/Transport/ Logistics staff in the past 12 months	91	85	88	83
	Unspecified	0	0	0	0
	<i>Sub-total</i>	<i>93</i>	<i>93</i>	<i>93</i>	<i>93</i>



		Managerial <u>Level</u>	Supervisory <u>Level</u>	Clerical <u>Level</u>	Operative <u>Level</u>
(e) Forwarding Agents	Encountered Recruitment Difficulties	25	112	421	22
	Without Difficulties	72	225	527	78
	Have not recruited or tried to recruit Freight/Transport/ Logistics staff in the past 12 months	2,719	2,479	1,868	2,716
	Unspecified	13	13	13	13
	<i>Sub-total</i>	2,829	2,829	2,829	2,829
(f) Stevedoring Services	Encountered Recruitment Difficulties	0	0	0	3
	Without Difficulties	1	7	3	19
	Have not recruited or tried to recruit Freight/Transport/ Logistics staff in the past 12 months	93	87	91	72
	Unspecified	0	0	0	0
	<i>Sub-total</i>	94	94	94	94
(g) Couriers (International)	Encountered Recruitment Difficulties	1	1	1	4
	Without Difficulties	1	1	5	3
	Have not recruited or tried to recruit Freight/Transport/ Logistics staff in the past 12 months	10	10	6	5
	Unspecified	1	1	1	1
	<i>Sub-total</i>	13	13	13	13
(h) Other Transport Logistics Services Providers	Encountered Recruitment Difficulties	0	0	1	1
	Without Difficulties	7	7	8	4
	Have not recruited or tried to recruit Freight/Transport/ Logistics staff in the past 12 months	15	15	13	17
	Unspecified	0	0	0	0
	<i>Sub-total</i>	22	22	22	22

		Managerial <u>Level</u>	Supervisory <u>Level</u>	Clerical <u>Level</u>	Operative <u>Level</u>
(i) Sea Freight Transport	Encountered Recruitment Difficulties	4	10	16	0
	Without Difficulties	12	8	45	1
	Have not recruited or tried to recruit Freight/Transport/ Logistics staff in the past 12 months	406	404	361	421
	Unspecified	0	0	0	0
	<i>Sub-total</i>	422	422	422	422
All Branches	Encountered Recruitment Difficulties	41	181	604	514
	Without Difficulties	154	324	944	1,343
	Have not recruited or tried to recruit Freight/Transport/ Logistics staff in the past 12 months	13,683	13,373	12,330	12,021
	Unspecified	54	54	54	54
	<b>Total</b>	<b>13,932</b>	<b>13,932</b>	<b>13,932</b>	<b>13,932</b>

27. The findings on reasons of recruitment difficulties encountered in number of establishments as follows:

		Managerial <u>Level</u>	Supervisory <u>Level</u>	Clerical <u>Level</u>	Operative <u>Level</u>
(a) Warehousing & Cold Storage	General labour shortage in Hong Kong	3	5	9	22
	Insufficient graduates in relevant disciplines from tertiary institutions	0	0	0	0
	Candidates lacked the relevant experience/training	4	9	21	22
	Candidates found the working conditions/remuneration package not attractive	4	7	29	44
	Other reasons	0	0	0	0
(b) Cargo Handling Terminals	General labour shortage in Hong Kong	0	0	0	1
	Insufficient graduates in relevant disciplines from tertiary institutions	0	0	0	0
	Candidates lacked the relevant experience/training	0	0	1	0
	Candidates found the working conditions/remuneration package not attractive	0	0	1	0
	Other reasons	0	0	1	1
(c) Trucking & Container Haulage	General labour shortage in Hong Kong	1	1	7	117
	Insufficient graduates in relevant disciplines from tertiary institutions	0	0	0	4
	Candidates lacked the relevant experience/training	3	35	52	88
	Candidates found the working conditions/remuneration package not attractive	3	4	72	297
	Other reasons	0	8	16	4

		Managerial <u>Level</u>	Supervisory <u>Level</u>	Clerical <u>Level</u>	Operative <u>Level</u>
(d) Air Freight Transport	General labour shortage in Hong Kong	0	0	0	0
	Insufficient graduates in relevant disciplines from tertiary institutions	0	0	0	0
	Candidates lacked the relevant experience/training	0	1	0	2
	Candidates found the working conditions/remuneration package not attractive	0	1	0	1
	Other reasons	0	0	0	0
(e) Forwarding Agents	General labour shortage in Hong Kong	4	15	92	3
	Insufficient graduates in relevant disciplines from tertiary institutions	0	4	13	0
	Candidates lacked the relevant experience/training	15	102	246	6
	Candidates found the working conditions/remuneration package not attractive	12	19	179	19
	Other reasons	0	36	89	2
(f) Stevedoring Services	General labour shortage in Hong Kong	0	0	0	1
	Insufficient graduates in relevant disciplines from tertiary institutions	0	0	0	0
	Candidates lacked the relevant experience/training	0	0	0	1
	Candidates found the working conditions/remuneration package not attractive	0	0	0	1
	Other reasons	0	0	0	0
(g) Couriers (International)	General labour shortage in Hong Kong	1	1	0	0
	Insufficient graduates in relevant disciplines from tertiary institutions	0	0	0	0
	Candidates lacked the relevant experience/training	1	1	1	0
	Candidates found the working conditions/remuneration package not attractive	0	0	1	4
	Other reasons	0	0	0	0

		Managerial <u>Level</u>	Supervisory <u>Level</u>	Clerical <u>Level</u>	Operative <u>Level</u>
(h) Other Transport Logistics Services Providers	General labour shortage in Hong Kong	0	0	1	0
	Insufficient graduates in relevant disciplines from tertiary institutions	0	0	0	0
	Candidates lacked the relevant experience/training	0	0	0	1
	Candidates found the working conditions/remuneration package not attractive	0	0	0	1
	Other reasons	0	0	0	0
(i) Sea Freight Transport	General labour shortage in Hong Kong	0	0	2	0
	Insufficient graduates in relevant disciplines from tertiary institutions	0	1	1	0
	Candidates lacked the relevant experience/training	4	9	12	0
	Candidates found the working conditions/remuneration package not attractive	0	4	8	0
	Other reasons	1	1	1	0
All Branches	General labour shortage in Hong Kong	9	22	111	144
	Insufficient graduates in relevant disciplines from tertiary institutions	0	5	14	4
	Candidates lacked the relevant experience/training	27	157	333	120
	Candidates found the working conditions/remuneration package not attractive	19	35	290	367
	Other reasons	1	45	107	7

## Trend Analysis

28. The Training Board had conducted biennial manpower surveys since 1982. From the findings of these surveys, it is possible to construct a series of tables showing the past pattern of changes in manpower and related matters of the TLI. Comparison of like with like is done wherever possible to make the comparison appropriate.

### Past Trend in Changes in Manpower

29. The change in manpower from the findings of the past surveys is found to be:

	<u>1991</u>	<u>1993</u>	<u>1996</u>	<u>1998</u>	<u>2000</u>	<u>2002</u>	<u>2004</u>	<u>2006</u>	<u>2008</u>
i. Warehousing & Cold Storage Companies	3,074	4,954	6,125	4,711	4,016	4,607	4,136	4,861	5,620
ii. Cargo Handling Terminals	5,113	4,686	5,218	4,918	4,405	5,555	5,351	5,044	5,403
iii. Trucking & Container Haulage	44,952	48,059	46,523	43,373	42,958	39,874	39,819	42,807	43,517
iv. Air Freight Carriers	607	1,301	1,065	875	758	721	751	636	1,186
v. Forwarding Agents	13,064	15,637	18,681	17,612	17,673	17,507	21,897	26,095	30,102
vi. Stevedoring Companies	654	1,664	1,117	1,208	1,272	1,157	1,309	1,327	1,846
vii. Sea Freight Companies	7,183	7,692	6,746	6,051	4,876	3,912	3,873	3,753	3,454
<b>All Branches</b>	<b>74,647</b>	<b>83,993</b>	<b>85,475</b>	<b>78,748</b>	<b>75,958</b>	<b>73,333</b>	<b>77,136</b>	<b>84,523</b>	<b>91,128</b>
By index 2008 Findings=100%	81.91%	92.17%	93.80%	86.41%	83.35%	80.47%	84.65%	92.75%	100.00%

*Manpower of all branches after deducting the manpower of the new branches/sub-branches shown in Paragraph 20*

30. The change in manpower by job level from the findings of the past surveys is found to be:

	<u>1991</u>	<u>1993</u>	<u>1996</u>	<u>1998</u>	<u>2000</u>	<u>2002</u>	<u>2004</u>	<u>2006</u>	<u>2008</u>
Managerial	8,434	8,152	9,496	7,206	6,271	6,279	5,870	5,632	6,155
Supervisory	7,094	10,058	10,858	9,489	10,486	11,029	11,082	12,284	14,001
Clerical	14,510	16,916	18,171	20,789	16,957	15,904	20,812	25,068	28,706
Operative	44,609	48,867	46,950	41,390	42,244	40,121	39,372	41,539	42,266
<b>All Job Levels</b>	<b>74,647</b>	<b>83,993</b>	<b>85,475</b>	<b>78,874</b>	<b>75,958</b>	<b>73,333</b>	<b>77,136</b>	<b>84,523</b>	<b>91,128</b>

*Manpower of all branches after deducting the manpower of the new branches/sub-branches shown in Paragraph 20*

### Past Trend in Changes in Income Level

31. The change in income from the findings of the past surveys is found to be:

	<u>1998</u>	<u>2000</u>	<u>2002</u>	<u>2004</u>	<u>2006</u>	<u>2008</u>
\$5,000 or below	242	457	451	898	339	155
\$5,001 - \$10,000	18,443	25,870	25,545	28,839	34,392	30,985
\$10,001 - \$15,000	28,919	29,364	31,255	27,769	33,280	38,899
\$15,001 - \$20,000	14,733	12,790	10,268	13,006	11,966	11,224
\$20,001 - \$30,000	4,760	5,401	3,513	4,587	5,367	5,129
\$30,001 - \$40,000	1,394	2,002	1,256	1,457	1,774	1,361
\$40,001 or above	1,193	923	823	1,134	954	578
Unspecified	9,856	860	5,810	2,564	5,027	10,904

*Manpower of all branches after deducting the manpower of the new branches/sub-branches shown in Paragraph 20*

### Past Trend in Changes in Preferred Education

32. The change in preferred education from the findings of the past surveys is found to be:

	<u>1998</u>	<u>2000</u>	<u>2002</u>	<u>2004</u>	<u>2006</u>	<u>2008</u>
First Degree and Above	2,142	3,691	3,034	7,142	7,196	6,201
Post Secondary	11,653	7,214	7,540	9,454	17,230	20,558
Upper Secondary	23,773	29,362	32,664	32,264	36,454	41,116
Lower Secondary and Below	32,379	35,924	31,780	29,763	30,426	26,092
Unspecified	9,593	186	3,903	1,631	1,793	5,268

*Manpower of all branches after deducting the manpower of the new branches/sub-branches shown in Paragraph 20*

### Important Note

33. The findings of the manpower survey reflect the situation of the Industry in third quarter 2008. Considering that the Industry including its manpower experienced drastic and substantial changes from fourth quarter 2008 onwards, those changes are not reflected in this Report.

### **Training Requirement Analysis**

34. To cope with turnover of employees and before considering other alternatives, employers are to fill vacancies by promotion from within and recruitment from other firms of the same industry. This can be described as mobility of employees within the same pool of people knowing the trade. Part-time training and/or on-the-job training are involved but they do not change the quantity of people within the pool.

35. Mobility of an employee within a firm or among firms would trigger off a chain reaction in filling vacancies subsequently created. Employers might prefer to recruit from the same pool until there is a time when the opportunity to do so is exhausted and employers have to resort to recruiting people outside of the pool. These people are fresh graduates completing relevant full-time education/training or people engaged in full-time retraining. In the absence of necessary data and in order to simplify the analysis, the practice of engaging in-service people from other trades and industries is not analysed.

36. Training requirement, in this Report, is used to describe the number of full-time places required, usually quantified per annum, to train people outside of the pool to acquire the necessary competence to engage in the trade. It is assumed that the ‘wastage’ caused by an employee leaving the industry will be eventually filled by a pre-employment trained/retrained person entering the industry. If the industry is experiencing growth, the increase in the number of positions would create corresponding increased demand in the number of pre-trained people. Conversely, if the employment size of the industry is reducing, it would result in reduced or nil training requirement. Natural attrition is a mean to reduce employment size but not the sole method.

37. The training requirements is worked out based on the survey findings on the turnover; wastage and employers’ preferred education and qualification level of employees.

#### Preferred Education and Qualification Level of Employees

38. A job position is one that performs prescribed duties at prescribed responsibility level at prescribed skill/competence level. The application of the Qualifications Framework (QF) and all its associated concepts e.g. QF levels should best describe the elements of a job ought to have. Before the QF is finalized for the TLI, education and qualification level is used in the analysis. However, employers would have different decision on which education level that a job position should have. The survey tries to find out about it and it is expressed in the employers’ preferred education and qualification level of employees. This can be viewed as the minimum requirement for specific jobs. Statistics is available by job position but to simplify the analysis, it is shown by job level. The distribution by job level of employees is as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
First Degree and Above	3,805	2,225	171	0	<b>6,201</b>
Post Secondary	2,176	7,767	9,561	1,054	<b>20,558</b>
Upper Secondary	196	4,324	18,688	17,908	<b>41,116</b>
Lower Secondary and Below	0	3	124	25,965	<b>26,092</b>
Unspecified	419	757	1,383	2,709	<b>5,268</b>
<b>Total</b>	<b>6,596</b>	<b>15,076</b>	<b>29,927</b>	<b>47,636</b>	<b>99,235</b>

- Post secondary includes sub-degree (higher diploma, associate degree, diploma, higher certificate) and advanced level;
- Upper secondary refers to secondary 4 and secondary 5;
- Lower secondary and below refers to secondary 3 and below; craft level is included in this category



39. The preferred education and qualification level of employees with the unspecified number distributed pro-rata is as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
First Degree and Above	4,063	2,343	179	0	<b>6,585</b>
Post Secondary	2,324	8,178	10,024	1,118	<b>21,643</b>
Upper Secondary	209	4,553	19,593	18,988	<b>43,343</b>
Lower Secondary and Below	0	3	130	27,531	<b>27,664</b>
<b>Total</b>	<b>6,596</b>	<b>15,076</b>	<b>29,927</b>	<b>47,636</b>	<b>99,235</b>

40. To convert into percentage by job level of employees, the distribution is as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>
First Degree and Above	61.60%	15.54%	0.60%	0.00%
Post Secondary	35.23%	54.24%	33.50%	2.35%
Upper Secondary	3.17%	30.20%	65.47%	39.86%
Lower Secondary and Below	0.00%	0.02%	0.43%	57.79%
<b>Total</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>

### Turnover and Wastage

41. The survey also finds out the turnover which is the number of staff leaving the establishments in 12-month period for whatever reasons. The findings are as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
Taking up/starting own business in freight/transport/logistics related jobs	145	596	3,671	5,426	<b>9,838</b>
Taking up/starting own business in non freight/transport/logistics related jobs; Emigration, retirement, further studies and others	86	104	754	711	<b>1,655</b>
Unknown	82	195	1,369	2,041	3,687
<b>Total</b>	<b>313</b>	<b>895</b>	<b>5,794</b>	<b>8,178</b>	<b>15,180</b>

42. In the Report, 'wastage' is used to describe those employees taking up/starting own business in non freight/transport/logistics related jobs; emigration, retirement, further studies and others i.e. those leaving the industry 'permanently'. The wastage by job level with the unknown number distributed pro-rata is as follows:

<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
117	133	987	947	2,184

#### Training Requirements

43. The training requirements is worked out based on the survey findings on the turnover; wastage and employers' preferred education and qualification level of employees, as follows:

	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>All Job Levels</u>
First Degree and Above	72	21	6	0	<b>99</b>
Post Secondary	41	72	331	22	<b>466</b>
Upper Secondary	4	40	646	377	<b>1,068</b>
Lower Secondary and Below	0	0	4	547	<b>552</b>
<b>Total</b>	<b>117</b>	<b>133</b>	<b>987</b>	<b>947</b>	<b>2,184</b>

#### Supply of Graduates from Relevant Disciplines/Streams

44. The Training Board used to focus on the supply of graduates at the full-time degree and sub-degree levels. The Training Board finds that around 300 to 350 full-time places annually in sub-degree higher diploma (HD) courses are provided by The Hong Kong Polytechnic University (PolyU); Community College (CC) of the School of Professional and Continuing Education (SPACE) of The University of Hong Kong (HKU) and also Hong Kong Institute of Vocational Education (IVE), as follows:

- HD in International Transport Logistics
- HD in Logistics (Supply Chain & IT Management)
- HD in Logistics and Transport Operations
- HD in Business Logistics
- HD in Transport & Logistics Studies

45. Around 250 to 300 full-time places annually in first degree courses are provided by PolyU, Hong Kong University of Science and Technology (HKUST) and HKU, including but not exclusively, as follows:

- BBA/BSc (Hons) Scheme in Logistics
- BSc (Hons) in International Shipping & Transport Logistics
- BEng in Logistics Management and Engineering
- BEng/BBA in Logistics Management and Engineering and General Business Management
- BEng in Logistics Management
- BEng in Logistics Engineering and Supply Chain Management

## Demand and Supply Analysis

46. A summary of the demand for and supply of graduates of full-time relevant disciplines and streams is as follows:

	Supply of Graduates <u>Annually</u>	Demand on Training <u>Requirement Annually</u>
First Degree and Above	250-300	99
Sub-degree	300-350	466
<b>Total</b>	<b>550-630</b>	<b>565</b>

## Important Note

47. The demand and supply analysis is based on findings of the manpower survey and reflects the situation of the Industry in third quarter 2008, for example, the findings on the turnover/wastage refer to the situation for the 12 months preceding July 2008. The Industry had experienced drastic and substantial changes from fourth quarter 2008 onwards, those changes are not reflected in the findings and the analysis. Whereas the supply of graduates is expected to be relatively stable, the demand on training requirement is indicative and only relevant for the time the survey was undertaken.

## **Analysis of the Transport Logistics Industry**

48. In succession of manpower surveys conducted by the Training Board, the Training Board had tried to collate the findings of manpower with the past trend of the Transport Logistics Industry (TLI) with a view to project the outlook of its future trend and the implications on manpower.

49. Before the most recent worldwide economic downturn, it was possible to describe the trend of the TLI particularly its close link with the international trade. The Training Board acknowledged that the prime location; the world class infrastructure; the physical and information connectivity; a culture for excellence and the friendly business environment were the competitive edge of Hong Kong. Specifically for the TLI, the frequency of sailings and flights, the massive network, the concentration of import/export firms, the pool of well-educated, well-training and well-skilled manpower are mainstay in Hong Kong's achievement as the sea freight container hub and airfreight hub in the South China. However, Hong Kong's future status as multi-modal hub had been under tremendous pressure and challenges from Mainland ports/hubs. For the past decade, the Training Board found that Hong Kong's share in the country's business in trade had not been growing at the same rate as that of the country. Other indicators, such as infrastructure development, had also fallen behind Hong Kong's counterparts in the Mainland. A summary of observations on developments of recent years had been presented in the previous reports:

Diminishing importance of Hong Kong as seafreight container hub

- Declining status of Hong Kong as seafreight consolidation centre;
- Disadvantage in cost for transshipment;
- Aging container truck drivers

Emerging status of Hong Kong as airfreight hub

- More superior network;
- More efficient operation;
- Repeating the success story of the Hong Kong container hub but in the long run risk of threats from Mainland airports/hubs

50. The Training Board pointed out in past reports that the workforce in the TLI are mainly specialized in shipment business/operation, relatively few of them are specialized in logistics business/operation. This originated from the nature of operation of most operators. Throughout the years, a lot of people in the Industry had acquired the knowledge of concepts of logistics. Not all of them could put into practice. With passing of time, the knowledge would fade out and until the operators and their employees had the opportunity to really advance to genuine logistics operation/service, such knowledge learned had been of nice to know nature.

51. In this sense, Hong Kong is competing with the Mainland in terms of manpower development. The Training Board had the view that practitioners in the Mainland had the real opportunity to put theory into practice. It had been observed that courses/programmes related to TLI had become more popular in the Mainland from post-secondary to university levels. The Training Board concluded that it remained to be seen whether the quality of the courses/programmes including the quality of teaching staff were comparable with those in Hong Kong.

52. The Training Board further noted that the Government had announced and implemented various policies that might support the TLI. One direct/indirect move was the sponsorship of Continuing Education Fund (CEF) to courses/programmes related to TLI and other schemes such as the Skills Upgrading Scheme (SUS). At a time of prosperity, the Training Board concluded that, it should be seriously considered whether a loss of talents might happen to TLI when people were to compare the relatively slow growth of the industry to more rapid growth of other promising sectors.

53. Conclusions from the past analysis were that:

- Hong Kong was a multi-modal hub for Mainland imports and exports;
- Hong Kong's TLI was one of the key sectors to facilitate Hong Kong as a multi-modal hub;
- Hong Kong had to compete with Mainland ports/hubs;
- Hong Kong's TLI had to compete with Mainland TLIs;
- Hong Kong had no distinct advantage over Mainland ports/hubs in the long run;
- Infrastructure development and other improvements were key factors to the future of Hong Kong's TLI;
- Infrastructure development should be interpreted in the broad sense and should include human resources/manpower development;
- Human resource was one of the remaining superiority over Mainland ports/hub;
- Hong Kong had to enhance its human resources to compete with Mainland ports/hubs;
- The effects of human resources reflect in the competence, effectiveness and efficiency;
- Hong Kong's future population and thus labour force was reducing;

- The sectors that can maintain a balance to the human resources demand and supply can envisage a continuing growth;
- The TLI had to compete with other local sectors for human resources;
- The TLI was a moderately competitive/attractive sector;
- The TLI had to think of innovative ideas to attract talent;
- Employers and employees of TLI had to invest more in human resources

## **Outlook for the Future**

54. The Training Board had formed a Focus Group on Manpower of the Transport Logistics Industry to enhance the analysis of the manpower development of the TLI by means of consultation through the Focus Group. Through forum, interviews and mini-forums of Focus Group members sometimes with the participation of other guests, opinions and views had been collected for the consideration of the Training Board and its Working Party on Manpower Survey. The latest analysis of the Training Board is described below.

### Harder Time Ahead

55. The world is experiencing a period of instability that is unprecedented. The economic downturn triggered by the financial market turmoil is causing an avalanche of fundamental changes in the economic and social order worldwide. The symptoms too familiar to readers are, to list some:

- Less flexible money supply and interest rate;
- More conservative spending and buying in consumer behaviour of major importing countries;
- Less opportunities for globalization and expansion of international trades;
- Less demand and need for transport logistics services;
- Weakening labour market; and so on

56. Because of the profoundness of the past events and ongoing developments, it is impossible to offer logical explanations to analyse the changes and hence to predict the recovery of the global economy. The Training Board hold the view that such elements mentioned in paragraph 49 to 53 are still working for Hong Kong and also the view that the other developments and challenges not in the favour of Hong Kong should not be under-estimated. To name a few:

- The improvements in the infrastructure and network in the Mainland;
- The improvements in the cost elements in the Mainland;
- The improvements in the quality of manpower in the Mainland; and so on

57. Because of the inherent disadvantages in some factors, such as more expensive cost in use of land, infrastructure development and manpower, it is an uphill struggle for Hong Kong's enterprises. Government interventions in some areas are desirable especially those affairs on government to government level but it is debatable where and how much are required.

58. On enterprise level, the customary wisdom for period of contraction in economy is to reevaluate the resources/factors of production, quantitatively and qualitatively and to make corresponding adjustments.

59. From the views and opinions collected from industrialists and human resources specialists during interviews and mini-forums, the impression is that at last quarter of 2008, enterprises might have taken some precautionary actions on the employment, and the enterprises were to closely monitor the development of the worldwide and local economy in preparation of more drastic actions if considered necessary. Given the generally pessimistic outlook of the future in the beginning of 2009, such actions could not be ruled out in 2009 and beyond.

### Pool of Competence

60. The pool of manpower/human resources could be described as the pool of competence that is the cumulative result of education and training. Hong Kong has a sophisticated system of vocational education and training (VET) to keep the pool of competence alive and working.

61. The role of VET can be viewed as primarily for the preparatory stage of pre-service school leavers and for upgrading in-service employees. To cater for the needs of school leavers, the amount of pre-service training in terms of training places could hardly be reduced even in the period of contraction in the economy. The Training Board has the view that since multi-tasking is the norm in industries, a student should be trained in more than one discipline. Therefore the concern is, what are the competence to be acquired through pre-service training so that graduates could have more flexibility to join various closely related industrial sectors. The Training Board considers this aspect be a focus for further studies.

62. For existing workforce, cutback on employment means loss of the pool of competence, partially and temporarily or completely and permanently. For in-service training, it is more sensitive to rapid changes and employees might adapt the 'just-in-time' approach. From the course provider point of view, competence on training including what and how to teach is a continuous effort and the consequence of loss in the competence of teaching force is more serious. Assuming that the downsizing of any industrial sector would have an impact also on the teaching force, the concern is therefore the question of how to maintain and build up competent teaching force before or during a period of recovery.

63. Enterprises, policy-makers and other stake holders might be interested to know, how to cope with the current trend and the future recovery in the maintenance of a sizeable pool of competence. The Training Board and the Focus Group had discussed about this issue and have the following views:

- It is time to re-adjust the manpower resources of enterprises to ensure more efficient and effective operations;
- It is time to consolidate the knowledge and skills/competence of employees, by self-initiative or enterprises or social orientated

64. It is also a common feeling that the younger generation is less proficient in the language skills/competence when they join the workplace. The Training Board observes that this skill/competence is acquired during the education stage and the Training Board considers this an aspect for further studies.

## Opportunity in the Mainland

65. Following the likely deterioration of employment opportunity in Hong Kong, a logical move is to explore and to expand Hong Kong people's employment opportunity in the Mainland. Statistics from surveys of other industrial sectors indicate that the number of employees working in the Mainland is on a downward trend. In other words, the opportunity for working in Mainland might not be so obvious or abundant or sustainable.

66. However, Mainland knowledge and experience are essential for enterprises with Mainland operation and the Training Board considers this an area that requires enhancement.

## Competition for Talents

67. People are conscious on the prosperity of an industrial sector in deciding their career path such as whether to join a particular industrial sector. The previous analysis of the Training Board concluded that TLI is moderately competitive in attracting talents. Judging from the trend of falling number of new bloods joining the TLI, the TLI is at risk of an imbalance that might endanger the future well being of the TLI. The Training Board considers that whether the financial and economic turmoil might change the picture remains to be seen.

## **Conclusion**

68. Reader should exercise prudent in interpreting the findings and the analysis. The analysis is a static analysis, it is based on findings from a survey at a specific period of time, namely at third quarter of 2008. Between the survey and the release of the Report, drastic changes had happened globally and locally, within and beyond the Industry. For the reasons explained before, no attempt is made to do a dynamic analysis to predict the future change in the manpower of the Industry. In respect of the demand and supply of manpower, the forces of the market would dictate that a person with a certain qualifications if he/she is not successful in securing a job in the same field would look for job opportunities elsewhere, even though some conversions in the competence required. Conversely, employers might engage people with competence in other fields. Inadequate data is available to find out how many of the graduates are entering other industries and conversely, how many graduates from other not-so-directly-related disciplines and streams are entering the Industry. No analysis is done on this aspect. In addition, numerous part-time degree and sub-degree courses and programmes, self-financed or funded by the Continuous Education Fund (CEF) and other sources of funding are serving various purposes and needs. These are also not included in the analysis. This typifies the complexity and difficulty to work out a comprehensive analysis for industries in the commerce and service sectors, such as the Transport Logistics Industry.

69. The Training Board considers at a time of exceptionally drastic changes, it would be impractical to make analysis involving medium to long term projection because it would be rapidly overcome by events. Moreover, given the economic turbulence and instability, analysis would be short-lived. The Training Board is to review at a relevant time span, the developments and invite industry's views on its outlook to enable meaningful analysis and to disseminate findings and analysis if any.

- End of Report -

**VOCATIONAL TRAINING COUNCIL**  
**Terms of Reference of Training Boards**

1. To determine the manpower demands of the industry, including the collection and analysis of relevant manpower and student/trainee statistics and information on socio-economic, technological and labour market developments.
2. To assess and review whether the manpower supply for the industry matches with the manpower demand.
3. To recommend to the Vocational Training Council the development of vocational education and training facilities to meet the assessed manpower demand.
4. To advise the Hong Kong Institute of Vocational Education (IVE) and training & development centres on the direction and strategic development of their programmes in the relevant disciplines.
5. To advise on the course planning, curriculum development and quality assurance systems of the IVE and training & development centres.
6. To prescribe job specifications for the principal jobs in the industry defining the skills, knowledge and training required.
7. To advise on training programmes for the principal jobs in the industry specifying the time a trainee needs to spend on each skill element.
8. To tender advice in respect of skill assessments, trade tests and certification for in-service workers, apprentices and trainees, for the purpose of ascertaining that the specified skill standards have been attained.
9. To advise on the conduct of skill competitions in key trades in the industry for the promotion of vocational education and training as well as participation in international competitions.
10. To liaise with relevant bodies on matters pertaining to the development and promotion of vocational education and training in the industry, including employers, employers' associations, trade unions, professional institutions, training and educational institutions and government departments.
11. To organize seminars/conferences/symposia on vocational education and training for the industry.
12. To advise on the publicity relating to the activities of the Training Board and relevant vocational education and training programmes of the VTC.
13. To submit to the Council an annual report on the Training Board's work and its recommendations on the strategies for programmes in the relevant disciplines.
14. To undertake any other functions delegated by the Council in accordance with Section 7 of the Vocational Training Council Ordinance.



**VOCATIONAL TRAINING COUNCIL  
Transport Logistics Training Board  
Membership List**

**Nominated by:**

**Chairman**

Dr HO Chi-shing, David                      The Chartered Institute of Logistics and Transport in Hong Kong

**Member**

Mr CHAN Ming-leung                      The Harbour Transportation Workers General Union  
Mr CHU Huan, Hugo                      An air cargo terminal  
Mr CHENG Wui-yau, Stephen              The Hong Kong Logistics Association  
Mr CHEUNG Shun-man, Manson            The Institute of Seatrtransport  
Mr CHOW Chan-keung, Samson            The Hong Kong Godown Association  
Ms FUNG Po-yi, Shelby                    The Carrier Liaison Group  
Mr LAM Hing-man, Patrick                The Hong Kong Container Terminal Operators Association  
Ir TANG Wing-hong, Madison              The Goods Vehicle Fleet Owners Association  
Dr LEUNG Chi-hang, Stephen              A tertiary institution  
Mr LEE Yan-lam, Louis                    The Hong Kong Association of Freight Forwarding and Logistics  
Ms LI Wai-ching, Carmen                The MTR Corporation Ltd.  
Mr Patrick LO                              Ad personam  
Dr LOU Lai-Wah, Miranda                The Hong Kong Shipowners Association  
Ms TANG Fung-ming, Connie              The Hong Kong International Courier Association  
Mr WONG Chiu-kit, Terence                The Hong Kong Liner Shipping Association  
Dr WONG Hon-shu                        A tertiary institution  
Ms YING, Evon Lea                        (Representing) Executive Director, Vocational Training Council  
Mr LO Wing-yat, Alfred                  Advisor

**Secretary**

Mr LEE Hing-wai, Henry

**VOCATIONAL TRAINING COUNCIL**  
**Transport Logistics Training Board**  
**Working Party on 2008 Manpower Survey**

Dr HO Chi-sing, David (Convener)

Mr CHAN Yau-wing, Joseph

Mr CHENG Wui-yau, Stephen

Mr CHOW Chan-keung, Samson

Mr CHU Huan, Hugo

Miss FUNG Po-yi, Shelby

Mr LAM Hing-man, Patrick

Mr LEE Siu-kai, Kenneth

Dr LEUNG Chi-hang, Stephen

Ms LI Wai-ching, Carmen

Mr LO Wing-yat, Alfred

Dr WONG Hon-shu

Mr LEE Hing-wai, Henry (Secretary)

**VOCATIONAL TRAINING COUNCIL**  
**Transport Logistics Training Board**  
**Focus Group on Manpower of Transport Logistics Industry**

**Nominated by**

Mr Albert LO	The Carriers Liaison Group
Mr Tony TAN	The Chartered Institute of Logistics and Transport in Hong Kong
Mr Joseph LEUNG	The Federation of Hong Kong Industries
Mr Paul TSUI	The Federation of Hong Kong Industries
Mr Louis LEE	The Hong Kong Association of Freight Forwarding and Logistics
Mr Alan LEE	The Hong Kong Container Terminal Operators Association
Mr C.T. LO	The Hong Kong Container Tractor Owner Association
Mr Samson CHOW	The Hong Kong Godown Association
Ms Connie CHAN	The Hong Kong International Courier Association
Mr David CHEUNG	The Hong Kong International Courier Association
Mr Terence WONG	The Hong Kong Liner Shipping Association
Ms Ginda POON	The Hong Kong Liner Shipping Association
Mr Anthony WONG	The Hong Kong Logistics Association
Mr LEUNG Kong Yui	The Hong Kong Logistics Development Council
Dr Lawrence CHEUNG	The Hong Kong Productivity Council
Mr David CHAN	The Hong Kong Productivity Council
Mr Arthur BOWRING	The Hong Kong Shipowners Association
Mr Sunny HO	The Hong Kong Shippers' Council

## Hong Kong Standard Industrial Classification Version 1.1

1. The "Hong Kong Standard Industrial Classification" (HSIC), is an adoption of the United Nations' standards, to serve as a standard framework for the industrial classification of economic units in Hong Kong. The 1 to 9 series of the HSIC are as follows:

### Primary

Agriculture and fishing (HSIC 1 series)

### Secondary

Mining and quarrying (HSIC 2 series)

Manufacturing (HSIC 3 series)

Electricity, gas and water (HSIC 4 series)

Construction (HSIC 5 series)

### Tertiary

Wholesale, retail and import/export trades, restaurants and hotels (HSIC 6 series)

Transport, storage and communications (HSIC 7 series)

Financing, insurance, real estate and business services (HSIC 8 series)

Community, social and personal services (HSIC 9 series)

2. The manpower survey of the Transport Logistics Industry is largely HSIC-based 7 series but specific branches are picked for the survey, supplemented by selected samples that otherwise might not be covered by the survey.

### Transport, Storage and Communication Industry Code = 7

HSIC Code	Title
711100	Motor buses
711200	Tramways and railways
711301	Urban taxis
711302	New Territories taxis
711303	Lantau taxis
711400	Public light buses
711500	Maxicabs
711600	School hired car services
711700	Rental of passenger vehicles with drivers
711900	Land passenger transport, n.e.c.
712100	<i>Land freight transport by goods vehicles</i>
712900	<i>Land freight transport, n.e.c.</i>

HSIC Code	Title
713100	Car parks
713200	Vehicular tunnel
713901	Rental of passenger vehicles without driver
714101	Ship agents and managers
714102	Local representative offices of overseas shipping companies
714200	Ship owners of sea-going vessels
714300	Operators of sea-going vessels
714400	Ship owners or operators of Hong Kong-Macau vessels
715100	Harbour ferries
715200	Minor ferries
715300	Wala-walas and inland water passenger transport, n.e.c.
715400	Inland water freight transport
716101	Haulage of containers and container leasing
716102	Container terminals
716901	Stevedoring services
716999	Supporting services to water transport, n.e.c.
717101	Hong Kong based airline and helicopter companies
717102	Local representative offices of overseas airline companies
717200	Supporting services to air transport
718100	Travel agents and airline ticket agents
718200	Air cargo forwarding services
718300	Sea cargo forwarding services
718400	Shipbrokers
718500	Packing and crating services
718600	Cargo inspection, sampling and weighing services
721100	Cold storage
721200	General cargo warehouses and other storage services
732101	Wireline based fixed telecommunications network services
732199	Fixed telecommunications network services, n.e.c.
732200	Radio paging services
732901	Mobile communications services
732902	Internet access services
732903	Satellite communications services
732999	Telecommunications services, n.e.c.

HSIC Code	Title
733000	Miscellaneous communications services (excl. telecommunications services)

Supplementary Samples

HSIC Code	Title
	Cargo handling terminals
	Shipbrokers and shipowners
	Large vehicle fleet owner companies
	International couriers
	Other Logistics Service Providers

The scope of the manpower survey of the Transport Logistics Industry is in *italic*.

Source: Census and Statistics Department

## More Findings of the Manpower Survey

Table 1 No. of Employees, Vacancies and Manpower Demand

Job Code	<u>Jobs in All Branches</u>	Number of employees at the date of Survey	Number of Vacancy at the date of Survey	Manpower Demand
001	Managing Director / Chief Executive Officer / General Manager	922	1	923
101	Marketing / Sales / Commercial Manager	1,783	8	1,791
102	Freight / Customer Service / Documentation Manager	1,595	1	1,596
103	Distribution / Traffic / Operations Manager	1,340	3	1,343
104	Warehouse / Depot / Terminal Operations Manager	477	0	477
105	Shipping Lines / Liner / Fleet Manager	99	0	99
106	Stevedore / Onboard Manager	39	0	39
107	Technical / Engineering Manager	81	0	81
108	Ship Planner / Ships Technical Manager	80	0	80
109	Ship Sales & Purchase / Chartering / Brokering Manager	88	0	88
110	P & I / Insurance / Claims Manager	40	0	40
116	Marine-Cargo Surveyor	52	5	57
201	Marketing / Sales / Commercial / Pricing Supervisor / Executive	2,621	14	2,635
202	Freight / Customer Service / Documentation Supervisor / Executive	4,223	19	4,242
203	Distribution / Traffic / Operations Supervisor / Executive, Delivery Ganglender, Foreman	5,044	83	5,127
204	Warehouse / Depot / Terminal Operations Supervisor / Executive	2,183	6	2,189
206	Stevedoring / Onboard Supervisor / Executive, Boarding Officer	288	0	288
207	Technical / Engineering / Repair and Maintenance Supervisor /	356	0	356
209	Ship Sales & Purchase / Chartering / Brokering Supervisor	109	0	109
210	P & I / Insurance / Claims Supervisor / Executive	65	1	66
211	Container / Equipment Control Supervisor / Executive	81	0	81
216	Sworn Measurer	106	5	111
301	Marketing / Commercial Assistant / Clerk, Sales Representative	4,090	81	4,171
302	Freight / Customer Service / Documentation Assistant / Clerk	12,731	243	12,974
303	Operation / Traffic Clerk	9,140	115	9,255
304	Warehouse / Depot / Terminal Operations Assistant / Clerk	3,401	21	3,422
307	Technical Assistant / Clerk	191	0	191
309	Ship Sales & Purchase / Chartering / Brokering Assistant / Clerk	152	4	156
310	P & I / Insurance / Claims Assistant / Clerk	40	0	40
311	Container / Equipment Control Clerk	182	0	182
403	Delivery Man / Labourer	11,593	348	11,941
404	Warehouse / Depot / Terminal Operator, Tally Clerk, Checker	7,414	125	7,539
406	Stevedore	1,378	1	1,379

<u>Job Code</u>	<u>Jobs in All Branches</u>	<u>Number of employees at the date of Survey</u>	<u>Number of Vacancy at the date of Survey</u>	<u>Manpower Demand</u>
407	Technical / Engineering Technician / Operative	653	4	657
412	Container Haulage Driver	6,341	74	6,415
413	Truck Driver	14,114	204	14,318
414	Van Driver	2,779	36	2,815
415	Material Handling Equipment / Crane / Forklift Truck Operator	3,364	32	3,396
		<b>99,235</b>	<b>1,434</b>	<b>100,669</b>



Table 2 Manpower Demand by Branch and by Job

		(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	
<u>Job Code</u>	<u>Job Title</u>	Warehousing & Cold Storage	Cargo Handling Terminals & MTR	Trucking & Container Haulage	Air Freight Transport	Forwarding Agents	Stevedoring Services	Couriers (International)	Other Transport Logistics Services Providers	Sea Freight Transport	All Branches
001	Managing Director/Chief Executive Officer/General Manager	51	13	111	14	547	18	18	6	144	<b>922</b>
101	Marketing/Sales/Commercial Manager	41	23	261	48	1,118	8	76	4	204	<b>1,783</b>
102	Freight/Customer Service/Documentation Manager	26	12	78	68	1,230	5	46	8	122	<b>1,595</b>
103	Distribution/Traffic/Operations Manager	25	9	335	33	757	9	86	14	72	<b>1,340</b>
104	Warehouse/Depot/Terminal Operations Manager	143	43	100	21	118	14	7	18	13	<b>477</b>
105	Shipping Lines/Liner/Fleet Manager	0	2	0	1	26	4	0	0	66	<b>99</b>
106	Stevedore/Onboard Manager	1	6	1	0	8	18	0	0	5	<b>39</b>
107	Technical/Engineering Manager	6	30	2	2	1	2	0	0	38	<b>81</b>
108	Ship Planner/Ships Technical Manager	0	0	0	0	17	0	0	0	63	<b>80</b>
109	Ship Sales & Purchase/Chartering/Brokering Manager	0	0	0	0	4	0	0	0	84	<b>88</b>
110	P & I/Insurance/Claims Manager	0	2	0	0	14	0	0	0	24	<b>40</b>
116	Marine-Cargo Surveyor	51	0	0	0	0	0	0	0	1	<b>52</b>
201	Marketing/Sales/Commercial/Pricing Supervisor/Executive	85	32	890	64	1,175	16	126	6	227	<b>2,621</b>
202	Freight/Customer Service/Documentation Supervisor/Executive	45	74	541	141	3,030	18	98	12	264	<b>4,223</b>
203	Distribution/Traffic/Operations Supervisor/Executive, Delivery Ganglender, Foreman	94	127	2,563	79	1,732	37	182	44	186	<b>5,044</b>
204	Warehouse/Depot/Terminal Operations Supervisor/Executive	518	406	369	244	471	71	30	41	33	<b>2,183</b>

Job Code	Job Title	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	
		Warehousing & Cold Storage	Cargo Handling Terminals & MTR	Trucking & Container Haulage	Air Freight Transport	Forwarding Agents	Stevedoring Services	Couriers (International)	Other Transport Logistics Services Providers	Sea Freight Transport	All Branches
206	Stevedoring/Onboard Supervisor/Executive, Boarding Officer	4	57	30	0	21	87	0	0	89	<b>288</b>
207	Technical/Engineering/Repair and Maintenance Supervisor/Executive	21	183	8	5	4	6	0	0	129	<b>356</b>
209	Ship Sales & Purchase/Chartering/Brokering Supervisor	0	0	0	0	10	4	0	0	95	<b>109</b>
210	P & I/Insurance/Claims Supervisor/Executive	1	8	0	0	18	0	7	0	31	<b>65</b>
211	Container/Equipment Control Supervisor/Executive	0	13	42	0	12	0	0	0	14	<b>81</b>
216	Sworn Measurer	106	0	0	0	0	0	0	0	0	<b>106</b>
301	Marketing/Commercial Assistant/Clerk, Sales Representative	101	17	1,237	46	2,056	15	220	30	368	<b>4,090</b>
302	Freight/Customer Service/Documentation Assistant/Clerk	272	82	2,274	360	8,456	60	424	35	768	<b>12,731</b>
303	Operation/Traffic Clerk	266	294	3,058	116	4,623	100	324	24	335	<b>9,140</b>
304	Warehouse/Depot/Terminal Operations Assistant/Clerk	914	460	675	80	1,082	38	20	28	104	<b>3,401</b>
307	Technical Assistant/Clerk	0	41	18	0	7	4	0	0	121	<b>191</b>
309	Ship Sales & Purchase/Chartering/Brokering Assistant/Clerk	0	0	0	0	4	0	0	0	148	<b>152</b>
310	P & I/Insurance/Claims Assistant/Clerk	0	5	0	0	7	0	0	0	28	<b>40</b>
311	Container/Equipment Control Clerk	2	114	13	0	28	0	0	0	25	<b>182</b>
403	Delivery Man/Labourer	505	477	7,731	693	618	65	983	508	13	<b>11,593</b>
404	Warehouse/Depot/Terminal Operator, Tally Clerk, Checker	2,064	1,438	1,543	549	1,397	159	41	203	20	<b>7,414</b>
406	Stevedore	4	21	202	0	56	993	0	0	102	<b>1,378</b>
407	Technical/Engineering Technician/Operative	85	390	56	55	0	24	0	0	43	<b>653</b>

<u>Job Code</u>	<u>Job Title</u>	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	
		Warehousing & Cold Storage	Cargo Handling Terminals & MTR	Trucking & Container Haulage	Air Freight Transport	Forwarding Agents	Stevedoring Services	Couriers (International)	Other Transport Logistics Services Providers	Sea Freight Transport	All Branches
412	Container Haulage Driver	26	0	6,180	0	111	3	0	0	21	<b>6,341</b>
413	Truck Driver	260	4	12,027	1,035	373	2	205	203	5	<b>14,114</b>
414	Van Driver	39	0	1,581	340	90	0	722	7	0	<b>2,779</b>
415	Material Handling Equipment/Crane/Forklift Truck Operator	633	1,004	862	228	459	66	0	57	55	<b>3,364</b>
		<b>6,389</b>	<b>5,387</b>	<b>42,788</b>	<b>4,222</b>	<b>29,680</b>	<b>1,846</b>	<b>3,615</b>	<b>1,248</b>	<b>4,060</b>	<b>99,235</b>

Table 3 Preferred Level of Education and Qualifications

Branch	Job Level	University Degree or above	Membership of Professional Bodies	Sub-degree (Asso.Degree/ Higher Dip/ Higher Cert)	Diploma/ Certificate	Advanced Level (S6 to S7)	Senior Secondary (S4 to S5)	Junior Secondary (S1 to S3) or below	Craft Certificate	Unspecified	Total
(a) Warehousing & Cold Storage	Managerial	167	23	52	25	63	0	0	0	14	<b>344</b>
	Supervisory	42	0	140	168	201	288	0	0	35	<b>874</b>
	Clerical	2	0	10	5	286	1,225	10	0	17	<b>1,555</b>
	Operative	0	0	0	0	86	1,664	1,693	68	105	<b>3,616</b>
	All Job Level	211	23	202	198	636	3,177	1,703	68	171	<b>6,389</b>
(b) Cargo Handling Terminals & MTR	Managerial	71	0	0	51	0	0	0	0	18	<b>140</b>
	Supervisory	489	0	0	363	0	0	0	0	48	<b>900</b>
	Clerical	0	0	0	329	211	405	0	0	68	<b>1,013</b>
	Operative	0	0	0	89	145	2,820	157	0	123	<b>3,334</b>
	All Job Level	560	0	0	832	356	3,225	157	0	257	<b>5,387</b>
(c) Trucking & Container Haulage	Managerial	348	6	194	52	150	49	0	0	89	<b>888</b>
	Supervisory	128	0	345	395	1,191	2,169	0	0	215	<b>4,443</b>
	Clerical	0	0	0	0	2,258	4,685	69	0	263	<b>7,275</b>
	Operative	0	0	0	0	612	9,040	18,468	433	1,629	<b>30,182</b>
	All Job Level	476	6	539	447	4,211	15,943	18,537	433	2,196	<b>42,788</b>
(d) Air Freight Transport	Managerial	178	0	9	0	0	0	0	0	0	<b>187</b>
	Supervisory	43	2	26	403	59	0	0	0	0	<b>533</b>
	Clerical	0	0	0	0	365	237	0	0	0	<b>602</b>
	Operative	0	0	0	0	0	603	2,064	233	0	<b>2,900</b>
	All Job Level	221	2	35	403	424	840	2,064	233	0	<b>4,222</b>
(e) Forwarding Agents	Managerial	2,098	82	436	235	664	146	0	0	179	<b>3,840</b>
	Supervisory	1,079	24	1,029	978	1,480	1,606	0	0	277	<b>6,473</b>
	Clerical	94	0	64	8	4,687	10,796	0	0	614	<b>16,263</b>
	Operative	0	0	0	0	101	1,233	1,429	24	317	<b>3,104</b>
	All Job Level	3,271	106	1,529	1,221	6,932	13,781	1,429	24	1,387	<b>29,680</b>
(f) Stevedoring Services	Managerial	29	0	14	11	19	0	0	0	5	<b>78</b>
	Supervisory	2	12	4	31	89	79	3	0	19	<b>239</b>
	Clerical	0	0	0	0	47	151	0	0	19	<b>217</b>
	Operative	0	0	0	0	16	214	925	7	150	<b>1,312</b>
	All Job Level	31	12	18	42	171	444	928	7	193	<b>1,846</b>

Branch	Job Level	University Degree or above	Membership of Professional Bodies	Sub-degree (Asso.Degree/ Higher Dip/ Higher Cert)	Diploma/ Certificate	Advanced Level (S6 to S7)	Senior Secondary (S4 to S5)	Junior Secondary (S1 to S3) or below	Craft Certificate	Unspecified	Total
(g) Couriers (International)	Managerial	187	0	1	0	1	0	0	0	44	<b>233</b>
	Supervisory	148	0	186	11	3	12	0	0	83	<b>443</b>
	Clerical	0	0	41	0	262	456	0	0	229	<b>988</b>
	Operative	0	0	0	0	0	669	897	0	385	<b>1,951</b>
	All Job Level	335	0	228	11	266	1,137	897	0	741	<b>3,615</b>
(h) Other Transport Logistics Services Providers	Managerial	34	0	11	1	0	1	0	0	3	<b>50</b>
	Supervisory	2	0	54	17	12	15	0	0	3	<b>103</b>
	Clerical	0	0	0	0	69	42	0	0	6	<b>117</b>
	Operative	0	0	0	0	0	799	179	0	0	<b>978</b>
	All Job Level	36	0	65	18	81	857	179	0	12	<b>1,248</b>
(i) Sea Freight Transport	Managerial	579	3	140	25	22	0	0	0	67	<b>836</b>
	Supervisory	253	1	135	311	136	155	0	0	77	<b>1,068</b>
	Clerical	75	0	85	2	832	691	45	0	167	<b>1,897</b>
	Operative	0	0	0	0	5	87	153	14	0	<b>259</b>
	All Job Level	907	4	360	338	995	933	198	14	311	<b>4,060</b>
All Branches	Managerial	3,691	114	857	400	919	196	0	0	419	<b>6,596</b>
	Supervisory	2,186	39	1,919	2,677	3,171	4,324	3	0	757	<b>15,076</b>
	Clerical	171	0	200	344	9,017	18,688	124	0	1,383	<b>29,927</b>
	Operative	0	0	0	89	965	17,129	25,965	779	2,709	<b>47,636</b>
	All Job Level	<b>6,048</b>	<b>153</b>	<b>2,976</b>	<b>3,510</b>	<b>14,072</b>	<b>40,337</b>	<b>26,092</b>	<b>779</b>	<b>5,268</b>	<b>99,235</b>

Table 4 Income Level of Employees

Branch	Job Level	\$5,000 or below	\$5,001	\$10,001	\$15,001	\$20,001	\$30,001	\$40,001 or above	Unspecified	Total
			 \$10,000	 \$15,000	 \$20,000	 \$30,000	 \$40,000			
(a) Warehousing & Cold Storage	Managerial	0	0	8	113	128	63	26	6	<b>344</b>
	Supervisory	0	0	503	273	59	3	0	36	<b>874</b>
	Clerical	0	776	648	40	0	0	0	91	<b>1,555</b>
	Operative	0	2,497	827	120	0	0	0	172	<b>3,616</b>
	All Job Level	0	3,273	1,986	546	187	66	26	305	<b>6,389</b>
(b) Cargo Handling Terminals & MTR	Managerial	0	0	0	0	16	25	14	85	<b>140</b>
	Supervisory	0	0	0	113	316	0	0	471	<b>900</b>
	Clerical	0	0	310	12	0	0	0	691	<b>1,013</b>
	Operative	0	1,388	494	194	0	0	0	1,258	<b>3,334</b>
	All Job Level	0	1,388	804	319	332	25	14	2,505	<b>5,387</b>
(c) Trucking & Container Haulage	Managerial	0	0	0	281	433	56	26	92	<b>888</b>
	Supervisory	0	32	2,473	1,333	369	0	0	236	<b>4,443</b>
	Clerical	35	4,331	1,907	449	0	0	0	553	<b>7,275</b>
	Operative	119	11,200	15,011	2,092	181	0	0	1,579	<b>30,182</b>
	All Job Level	154	15,563	19,391	4,155	983	56	26	2,460	<b>42,788</b>
(d) Air Freight Transport	Managerial	0	0	0	1	20	107	42	17	<b>187</b>
	Supervisory	0	0	20	346	134	0	0	33	<b>533</b>
	Clerical	0	0	384	191	0	0	0	27	<b>602</b>
	Operative	0	214	2,280	0	0	0	0	406	<b>2,900</b>
	All Job Level	0	214	2,684	538	154	107	42	483	<b>4,222</b>
(e) Forwarding Agents	Managerial	0	0	0	754	1,583	722	262	519	<b>3,840</b>
	Supervisory	0	50	2,136	2,596	873	17	6	795	<b>6,473</b>
	Clerical	0	6,942	6,697	734	53	0	0	1,837	<b>16,263</b>
	Operative	0	1,463	1,129	74	0	0	0	438	<b>3,104</b>
	All Job Level	0	8,455	9,962	4,158	2,509	739	268	3,589	<b>29,680</b>

Branch	Job Level	\$5,000 or below	\$5,001   \$10,000	\$10,001   \$15,000	\$15,001   \$20,000	\$20,001   \$30,000	\$30,001   \$40,000	\$40,001 or above	Unspecified	Total
(f) Stevedoring Services	Managerial	0	0	0	12	24	26	5	11	<b>78</b>
	Supervisory	0	0	70	73	70	0	0	26	<b>239</b>
	Clerical	0	54	83	41	0	0	0	39	<b>217</b>
	Operative	0	120	959	13	0	0	0	220	<b>1,312</b>
	All Job Level	0	174	1,112	139	94	26	5	296	<b>1,846</b>
(g) Couriers (International)	Managerial	0	0	0	3	84	22	79	45	<b>233</b>
	Supervisory	0	0	1	241	117	0	0	84	<b>443</b>
	Clerical	0	387	284	85	0	0	0	232	<b>988</b>
	Operative	0	357	1,076	130	0	0	0	388	<b>1,951</b>
	All Job Level	0	744	1,361	459	201	22	79	749	<b>3,615</b>
(h) Other Transport Logistics Services Providers	Managerial	0	0	0	2	8	31	3	6	<b>50</b>
	Supervisory	0	0	27	71	1	0	0	4	<b>103</b>
	Clerical	0	30	75	0	0	0	0	12	<b>117</b>
	Operative	0	777	199	1	0	0	0	1	<b>978</b>
	All Job Level	0	807	301	74	9	31	3	23	<b>1,248</b>
(i) Sea Freight Transport	Managerial	0	0	0	117	185	279	115	140	<b>836</b>
	Supervisory	0	15	298	230	385	10	0	130	<b>1,068</b>
	Clerical	1	317	871	463	27	0	0	218	<b>1,897</b>
	Operative	0	35	129	26	63	0	0	6	<b>259</b>
	All Job Level	1	367	1,298	836	660	289	115	494	<b>4,060</b>
All Branches	Managerial	0	0	8	1,283	2,481	1,331	572	921	<b>6,596</b>
	Supervisory	0	97	5,528	5,276	2,324	30	6	1,815	<b>15,076</b>
	Clerical	36	12,837	11,259	2,015	80	0	0	3,700	<b>29,927</b>
	Operative	119	18,051	22,104	2,650	244	0	0	4,468	<b>47,636</b>
	All Job Level	<b>155</b>	<b>30,985</b>	<b>38,899</b>	<b>11,224</b>	<b>5,129</b>	<b>1,361</b>	<b>578</b>	<b>10,904</b>	<b>99,235</b>

Table 5 Whereabouts of Freight/Transport/Logistics Staff Left in the Past 12 Months

		<u>Reasons for Leaving</u>	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>Total</u>
(a) Warehousing & Cold Storage	1	Taking up/starting own business in freight/transport/logistics related jobs	13	11	159	568	<b>751</b>
	2	Taking up/starting own business in non freight/transport/logistics related jobs	4	0	13	82	<b>99</b>
	3	Emigration, retirement, further studies and others	2	8	10	24	<b>44</b>
		Unknown	1	1	52	177	<b>231</b>
		ALL	20	20	234	851	<b>1,125</b>
(b) Cargo Handling Terminals & MTR	1	Taking up/starting own business in freight/transport/logistics related jobs	1	2	12	11	<b>26</b>
	2	Taking up/starting own business in non freight/transport/logistics related jobs	0	0	42	4	<b>46</b>
	3	Emigration, retirement, further studies and others	1	9	4	8	<b>22</b>
		Unknown	4	49	26	277	<b>356</b>
		ALL	6	60	84	300	<b>450</b>
(c) Trucking & Container Haulage	1	Taking up/starting own business in freight/transport/logistics related jobs	1	67	597	4,195	<b>4,860</b>
	2	Taking up/starting own business in non freight/transport/logistics related jobs	0	4	41	194	<b>239</b>
	3	Emigration, retirement, further studies and others	32	40	131	355	<b>558</b>
		Unknown	1	11	374	1,476	<b>1,862</b>
		ALL	34	122	1,143	6,220	<b>7,519</b>
(d) Air Freight Transport	1	Taking up/starting own business in freight/transport/logistics related jobs	1	16	12	193	<b>222</b>
	2	Taking up/starting own business in non freight/transport/logistics related jobs	0	1	4	9	<b>14</b>
	3	Emigration, retirement, further studies and others	1	5	5	8	<b>19</b>
		Unknown	0	6	10	18	<b>34</b>
		ALL	2	28	31	228	<b>289</b>
(e) Forwarding Agents	1	Taking up/starting own business in freight/transport/logistics related jobs	122	453	2,732	343	<b>3,650</b>
	2	Taking up/starting own business in non freight/transport/logistics related jobs	8	17	266	8	<b>299</b>
	3	Emigration, retirement, further studies and others	14	8	196	0	<b>218</b>
		Unknown	66	116	864	22	<b>1,068</b>
		ALL	210	594	4,058	373	<b>5,235</b>
(f) Stevedoring Services	1	Taking up/starting own business in freight/transport/logistics related jobs	0	9	9	22	<b>40</b>
	2	Taking up/starting own business in non freight/transport/logistics related jobs	0	0	2	8	<b>10</b>
	3	Emigration, retirement, further studies and others	0	0	8	0	<b>8</b>
		Unknown	0	0	2	46	<b>48</b>
		ALL	0	9	21	76	<b>106</b>



		<u>Reasons for Leaving</u>	<u>Managerial</u>	<u>Supervisory</u>	<u>Clerical</u>	<u>Operative</u>	<u>Total</u>
(g) Couriers (International)	1	Taking up/starting own business in freight/transport/logistics related jobs	0	1	11	27	<b>39</b>
	2	Taking up/starting own business in non freight/transport/logistics related jobs	0	0	1	1	<b>2</b>
	3	Emigration, retirement, further studies and others	4	0	4	3	<b>11</b>
		Unknown	4	4	12	19	<b>39</b>
		ALL	8	5	28	50	<b>91</b>
(h) Other Transport Logistics Services Providers	1	Taking up/starting own business in freight/transport/logistics related jobs	1	0	17	67	<b>85</b>
	2	Taking up/starting own business in non freight/transport/logistics related jobs	0	1	2	5	<b>8</b>
	3	Emigration, retirement, further studies and others	0	0	0	2	<b>2</b>
		Unknown	0	3	2	0	<b>5</b>
		ALL	1	4	21	74	<b>100</b>
(i) Sea Freight Transport	1	Taking up/starting own business in freight/transport/logistics related jobs	6	37	122	0	<b>165</b>
	2	Taking up/starting own business in non freight/transport/logistics related jobs	2	7	6	0	<b>15</b>
	3	Emigration, retirement, further studies and others	18	4	19	0	<b>41</b>
		Unknown	6	5	27	6	<b>44</b>
		ALL	32	53	174	6	<b>265</b>
All Branches	1	Taking up/starting own business in freight/transport/logistics related jobs	145	596	3,671	5,426	<b>9,838</b>
	2	Taking up/starting own business in non freight/transport/logistics related jobs	14	30	377	311	<b>732</b>
	3	Emigration, retirement, further studies and others	72	74	377	400	<b>923</b>
		Unknown	82	195	1,369	2,041	<b>3,687</b>
		ALL	313	895	5,794	8,178	<b>15,180</b>

## More Analyses of the Manpower Survey

### Changes in Jobs

1. The findings of six manpower surveys have been compared to find out the trend in the changes in jobs of the Industry. Jobs/job positions have been clustered for all branches, as follows:

Management;  
Sales/marketing/commercial services;  
Operations; and  
Basic Skills Jobs

A small cluster representing specialized jobs for the Maritime Services is created, allowing the number of employees with their unique job nature to be revealed.

Table 1 Trend in Changes in Jobs of All Branches

Job Code	Jobs in All Branch	1998	2000	2002	2004	2006	2008
<b>Management</b>							
001	Managing Director / Chief Executive Officer / General Manager	1,533	1,527	1,540	1,133	1,074	923
<b>Sales / Marketing / Commercial Services</b>							
101	Marketing / Sales / Commercial Manager	2,090	1,786	1,533	1,707	1,703	1,791
102	Freight / Customer Service / Documentation Manager	694	1,079	812	1,239	1,170	1,596
201	Marketing / Sales / Commercial / Pricing Supervisor / Executive	1,646	2,785	2,913	2,329	2,803	2,635
202	Freight / Customer Service / Documentation Supervisor / Executive	1,583	2,600	1,902	2,822	3,045	4,242
301	Marketing / Commercial Assistant / Clerk; Sales Representative	4,707	1,817	1,552	3,073	5,161	4,171
302	Freight / Customer Service / Documentation Assistant / Clerk	9,103	6,096	5,866	9,611	9,442	12,974
		<i>19,823</i>	<i>16,163</i>	<i>14,578</i>	<i>20,781</i>	<i>23,324</i>	<i>27,409</i>
<b>Operations</b>							
103	Distribution / Traffic / Operations Manager	1,766	798	691	1,104	1,206	1,343
104	Warehouse / Depot / Terminal Operations Manager	436	401	667	474	493	477
107	Technical / Engineering Manager	165	86	79	111	120	81
203	Distribution / Traffic / Operations Supervisor / Executive, Delivery Gangleader; Foreman	4,310	3,163	2,818	3,822	4,902	5,127

<u>Job Code</u>	<u>Jobs in All Branch</u>	<u>1998</u>	<u>2000</u>	<u>2002</u>	<u>2004</u>	<u>2006</u>	<u>2008</u>
204	Warehouse / Depot / Terminal Operations Supervisor / Executive	1,291	1,558	2,575	1,848	1,822	2,189
207	Technical / Engineering / Repair and Maintenance Supervisor / Executive	265	356	231	289	335	356
211	Container / Equipment Control Supervisor / Executive	301	126	157	127	155	81
303	Operation / Traffic Clerk	4,144	8,620	6,100	5,747	8,916	9,255
304	Warehouse / Depot / Terminal Operations Assistant / Clerk	2,128	1,363	1,638	2,711	3,459	3,422
307	Technical Assistant / Clerk	72	124	16	64	152	191
311	Container / Equipment Control Clerk	1,063	122	353	357	268	182
		<i>15,941</i>	<i>16,717</i>	<i>15,325</i>	<i>16,654</i>	<i>21,828</i>	<i>22,704</i>
<b>Specialised Jobs for Maritime Services</b>							
105	Shipping Lines / Liner / Fleet Manager	114	149	76	96	83	99
106	Stevedore / Onboard Manager	46	18	35	55	74	39
108	Ship Planner / Ship's Technical Manager	72	68	20	55	112	80
109	Ship Sales & Purchase / Chartering / Brokering Manager	74	270	2	112	103	88
110	P&I / Insurance / Claims Manager	92	70	23	28	39	40
206	Stevedoring / Onboard Supervisor / Executive, Boarding Officer	111	318	163	263	282	288
208	Ship Planner / Ship's Technical Supervisor	0	0	0	0	19	0
209	Ship Sales & Purchase / Chartering / Brokering Supervisor	6	40	30	25	189	109
210	P&I / Insurance / Claims Supervisor / Executive	56	43	11	33	54	66
308	Ship Planner / Ship's Technical Clerk	0	0	0	0	6	0
309	Ship Sales & Purchase / Chartering / Brokering Assistant / Clerk	5	31	0	66	160	156
310	P&I / Insurance / Claims Assistant / Clerk	13	19	4	23	41	40
		<i>589</i>	<i>1,026</i>	<i>364</i>	<i>756</i>	<i>1,162</i>	<i>1,005</i>
<b>Basic Skills Jobs</b>							
403	Delivery Man / Labourer	10,183	8,620	10,189	8,989	11,830	11,941
404	Warehouse / Depot / Terminal Operator, Tally Clerk, Checker	2,931	4,381	5,005	5,458	5,634	7,539
406	Stevedore	81	1,050	169	650	1,048	1,379
407	Technical / Engineering Technician / Operative	989	611	910	743	607	657
412	Container Haulage Driver	8,489	8,078	9,763	8,378	8,606	6,415

<u>Job Code</u>	<u>Jobs in All Branch</u>	<u>1998</u>	<u>2000</u>	<u>2002</u>	<u>2004</u>	<u>2006</u>	<u>2008</u>
413	Truck Driver	15,479	16,324	13,437	13,613	13,610	14,318
414	Van Driver	2,109	2,506	1,427	1,506	1,989	2,815
415	Material Handling Equipment / Crane / Forklift a Truck Operator	2,586	2,972	2,550	2,658	3,554	3,396
		<i>42,847</i>	<i>44,542</i>	<i>43,450</i>	<i>41,995</i>	<i>46,878</i>	<i>48,460</i>
	<b>Unspecified</b>						
150+	Other unmatched managerial post/positions	231	233	198	4	32	57
250+	Other unmatched supervisory/executive post/positions	243	137	149	1	64	111
350+	Other unmatched clerical post/positions	121	149	379	0	0	0
450+	Other unmatched operative post/positions	0	444	273	0	0	0
		<i>595</i>	<i>963</i>	<i>999</i>	<i>5</i>	<i>96</i>	<i>168</i>
	<b>Total</b>	<b>81,328</b>	<b>80,938</b>	<b>76,256</b>	<b>81,324</b>	<b>94,362</b>	<b>100,669</b>

2. The trend is also presented as charts, as follows:

Figure 1 Trend in Changes in Jobs of All Branches

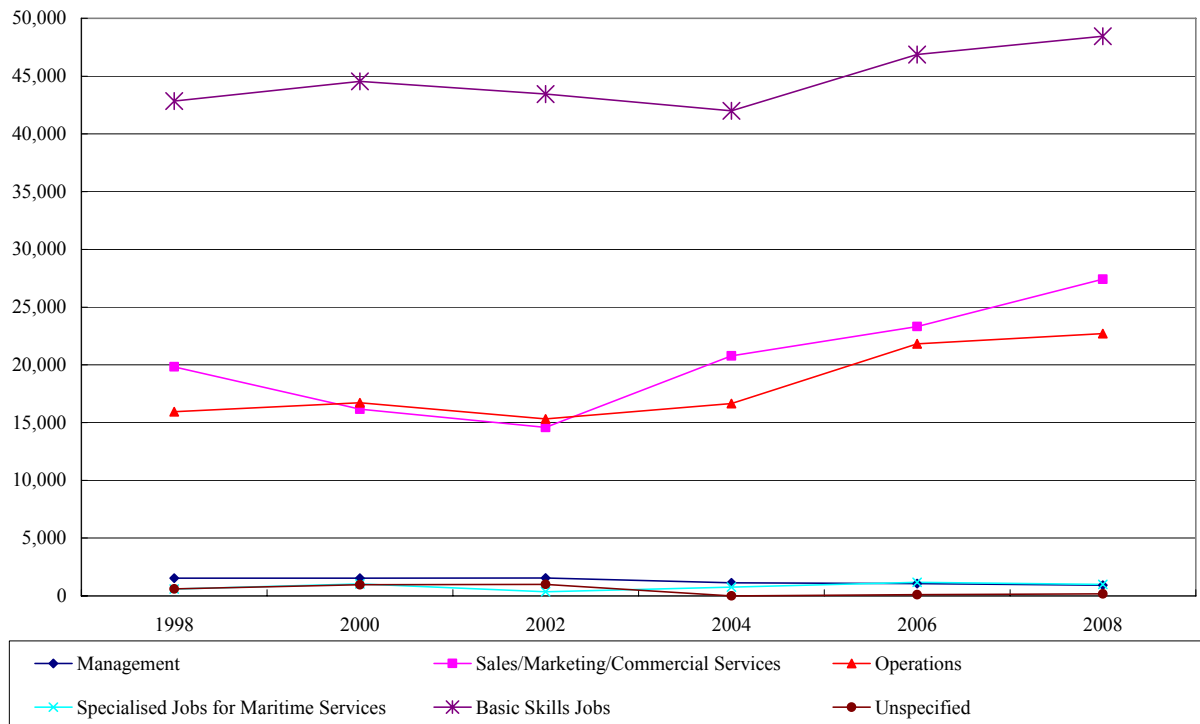
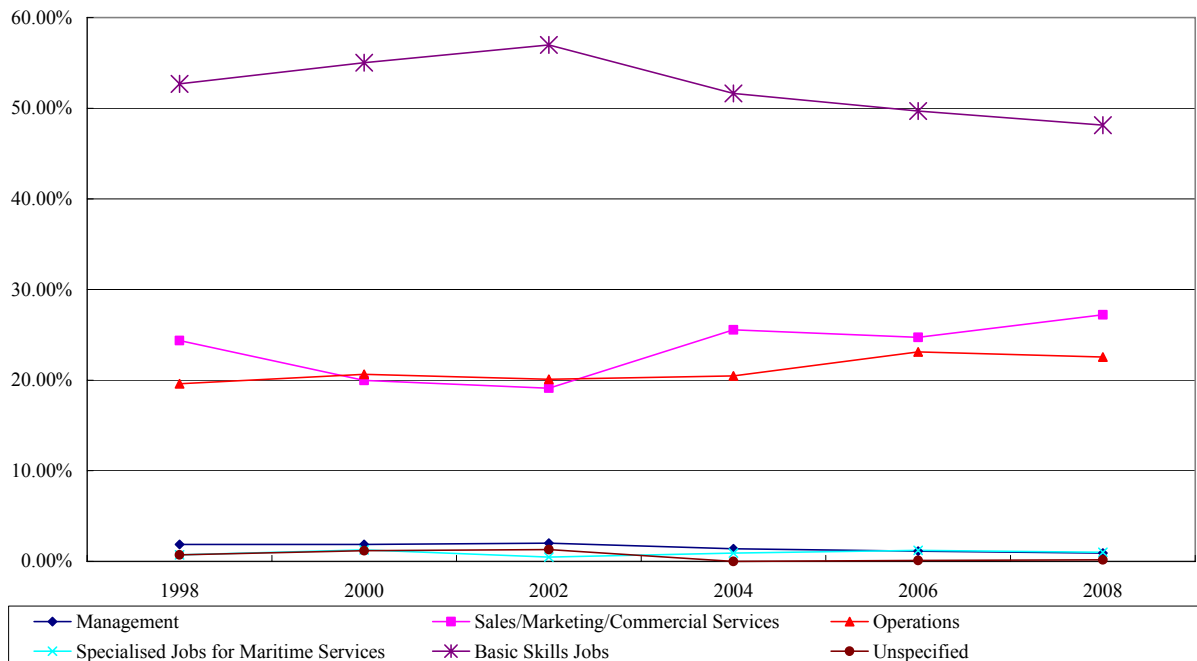


Figure 2 Trend in Changes in Jobs of All Branches by Percentage of Total Manpower



3. From the above figures, it is observed that the demand for higher skilled employees has been increasing steadily, while the demand for lower and basic skilled employees has been decreasing in recent years. The above observations are also in line with other findings, in which the demand for higher skilled employees was on the raise, reflected in number and in percentage of total manpower.

4. Moreover, the above figures revealed that there are no substantial changes in the demand for management grade staff in recent years.

### Changes in Preferred Competency

5. Comparison is also made to employers preferred competency for their employees.

Table 2 Preferred Competency

		Manpower Survey in 2006		Manpower Survey in 2008	
		<i>in no.</i>	<i>in %</i>	<i>in no.</i>	<i>in %</i>
Managerial Skills	1 Automation Strategy Planning, Implementation and Evaluation	715	1.38%	333	1.29%
	2 Customer Relationship and Service Strategy Planning, Implementation and Evaluation	1,378	2.66%	594	2.29%
	3 Budgetary Control	953	1.84%	452	1.75%
	4 Business Strategy Planning, Implementation and Evaluation	821	1.59%	492	1.90%
	5 Environmental Protection Strategy Planning, Implementation and Evaluation	617	1.19%	160	0.62%
	6 Financial Planning, Implementation and Evaluation	430	0.83%	155	0.60%
	7 Human Resources Planning, Implementation and Evaluation	538	1.04%	254	0.98%
	8 Legal Affairs	376	0.73%	180	0.70%
	9 Pricing Strategy	408	0.79%	178	0.69%
	10 Quality Assurance and Control	2,355	4.55%	349	1.35%
	11 Risk Assessment	506	0.98%	234	0.90%
	12 Sales and Marketing Strategy Planning, Implementation and Evaluation	678	1.31%	414	1.60%
	13 Supervisory Techniques	1,495	2.89%	670	2.59%
	14 Workflow Analysis	743	1.44%	458	1.77%
	15 Occupational Health Planning & Insurance Planning	753	1.45%	379	1.46%
	16 Other Managerial Skills	80	0.15%	22	0.08%
	<i>Subtotal</i>	<i>12,846</i>	<i>24.82%</i>	<i>5,324</i>	<i>20.57%</i>
Specific Skills	16 Other Specific Skills	691	1.33%	115	0.44%
	17 Benchmarking of Transport and Distribution Operations	1,339	2.59%	586	2.26%
	18 Distribution Operations	920	1.78%	506	1.95%
	19 Material Handling and Automation	346	0.67%	225	0.87%
	20 Multi-modal Transportation	610	1.18%	250	0.97%
	21 Routing Optimization	791	1.53%	303	1.17%
	22 Transport Operations	2,344	4.53%	2,199	8.49%
	23 Warehousing and Storage Operations / Inventory Control	1,330	2.57%	764	2.95%
	24 Brokering	117	0.23%	63	0.24%
	25 Marine/P & I Insurance	584	1.13%	76	0.29%
	26 Marine Surveying	238	0.46%	187	0.72%
	27 Transport of Dangerous Cargo	1,273	2.46%	875	3.38%
	28 International Trading Practices	570	1.10%	257	0.99%
	29 Application of Supply Chain Concepts	396	0.77%	368	1.42%
	30 Customer Relation and Services	4,175	8.07%	2,303	8.90%
31 Documentation Processing	1,424	2.75%	981	3.79%	
32 Material Handling Techniques	1,571	3.04%	770	2.97%	
	<i>Subtotal</i>	<i>18,719</i>	<i>36.16%</i>	<i>10,828</i>	<i>41.83%</i>
Technical Skills	16 Other Technical Skills	1,015	1.96%	153	0.59%
	33 Forklift Truck Operation	2,351	4.54%	1,123	4.34%
	34 Container Crane Operation	706	1.36%	909	3.51%
	35 Material Handling Equipment Operation	1,274	2.46%	365	1.41%
	36 Packing/Storage of Goods	878	1.70%	304	1.17%
	37 Dangerous Goods Handling	2,526	4.88%	1,420	5.49%
	<i>Subtotal</i>	<i>8,750</i>	<i>16.90%</i>	<i>4,274</i>	<i>16.51%</i>
General Skills	16 Other General Skills	597	1.15%	798	3.08%
	38 Multi-lingual Business Communication	6,132	11.85%	2,186	8.44%
	39 e-Business/e-Commerce Concepts	2,621	5.06%	1,228	4.74%
	40 Information Systems Application	2,096	4.05%	1,248	4.82%
	<i>Subtotal</i>	<i>11,446</i>	<i>22.11%</i>	<i>5,460</i>	<i>21.09%</i>
		<b>51,761</b>	<b>100%</b>	<b>25,886</b>	<b>100%</b>

6. The number of places indicated in the 2008 manpower survey have substantially decreased from that in 2006, but the percentage of the preferred competency for 2006 and 2008 is more or less the same. Amongst the four main categories, it is observed that the demand for specific skills is the highest.

Figure 3 Preferred Competency – Findings of Manpower Surveys

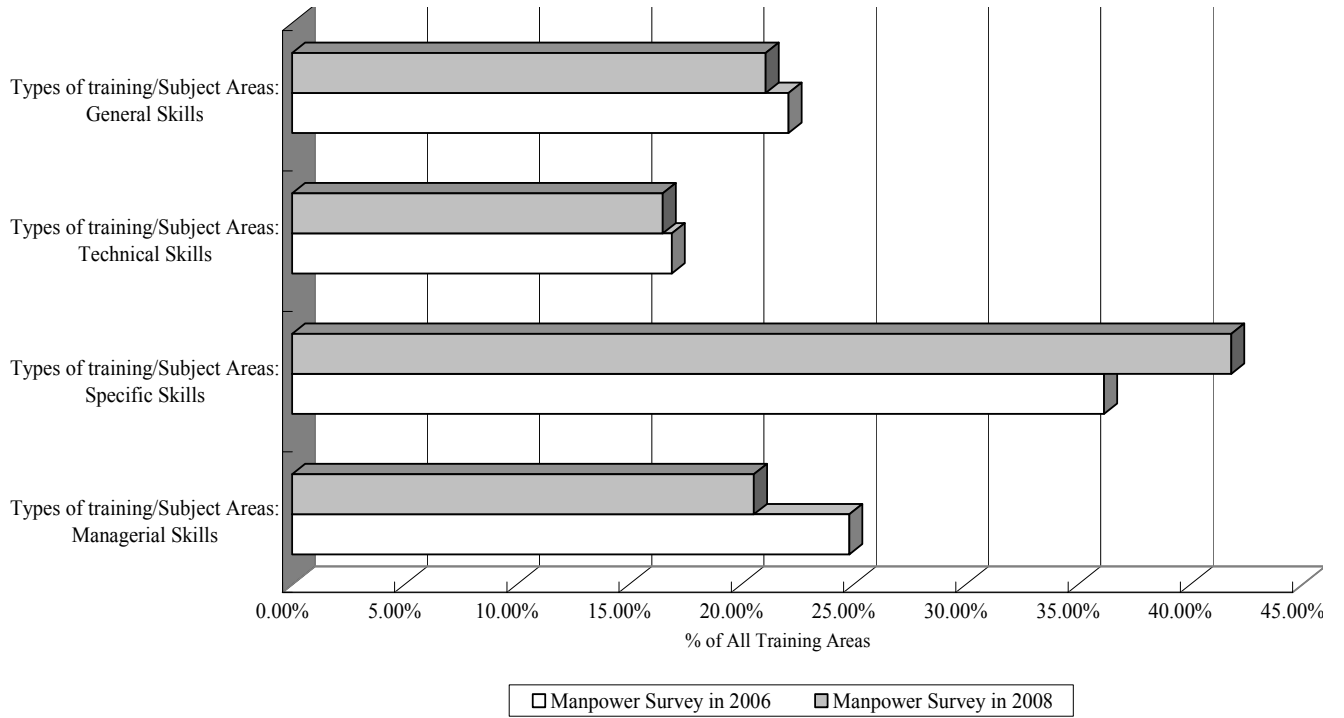


Figure 4 Preferred Competency – Findings of Manpower Surveys



## More Economic Statistics

1. The Government publishes statistics for the various economic activities of the economy. The economic activities can be viewed as components that form the gross domestic product (GDP). The following charts illustrate the situation that is grossly simplified and readers are advised to refer to the source of the data for details.

Figure 1 Percentage of Components of GDP in 2007

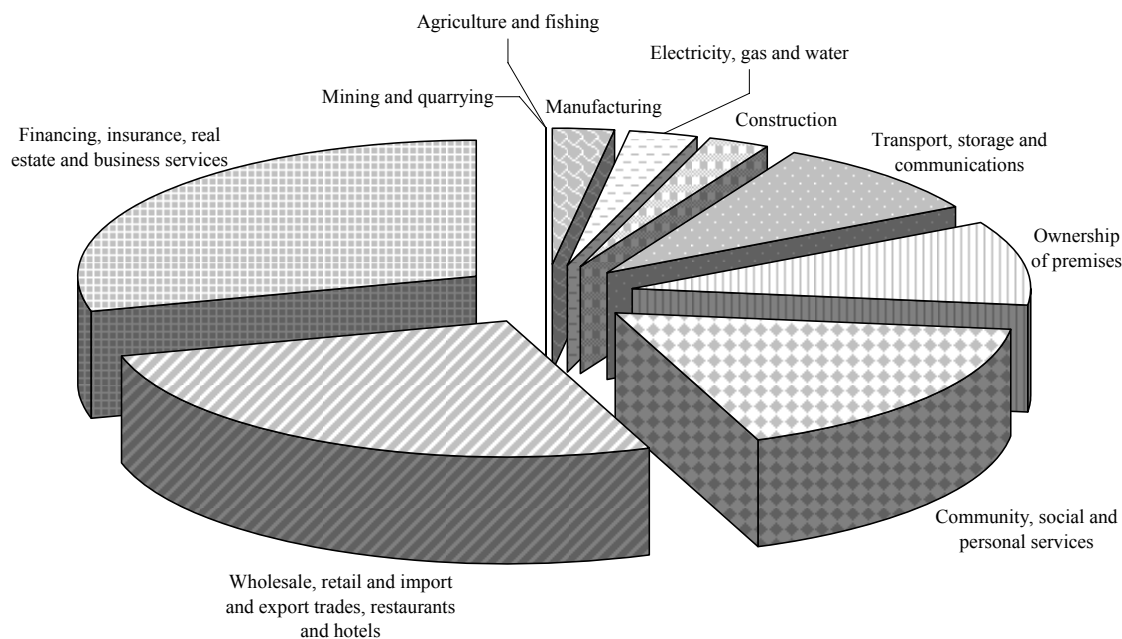
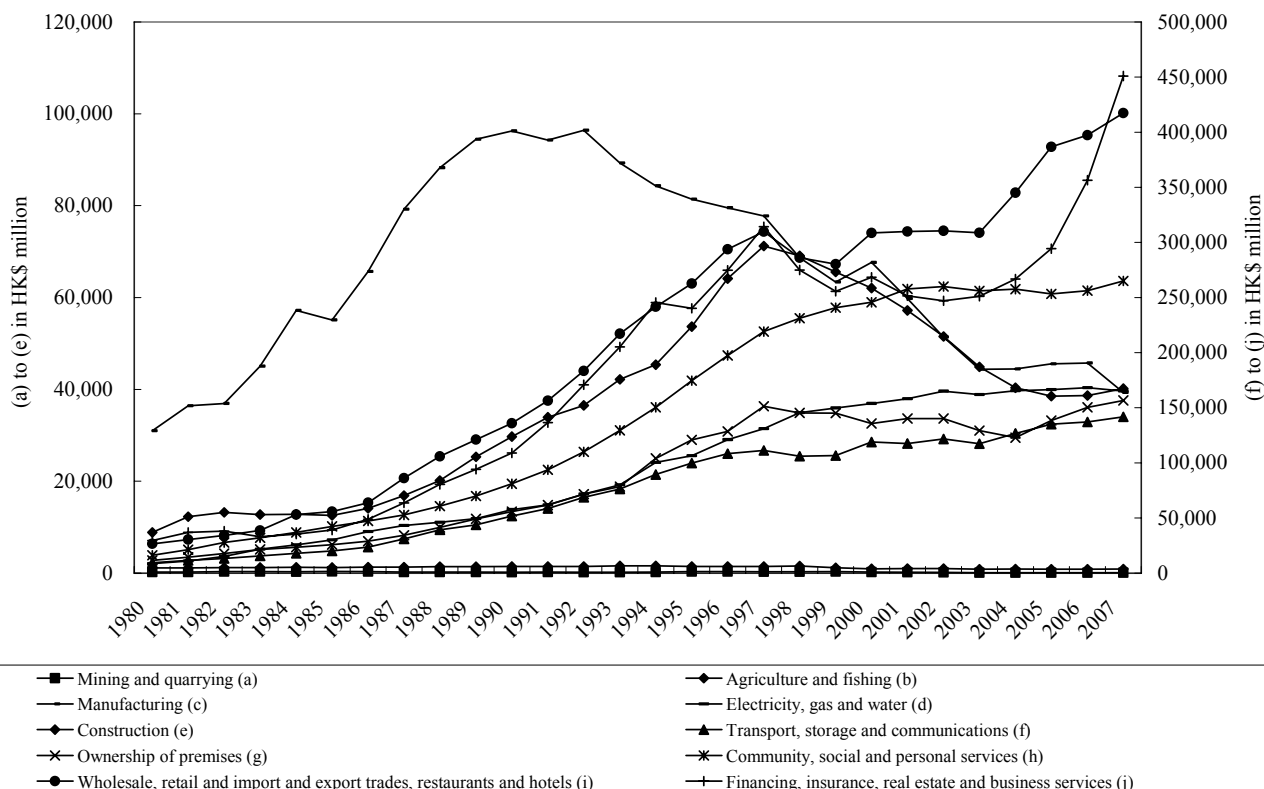


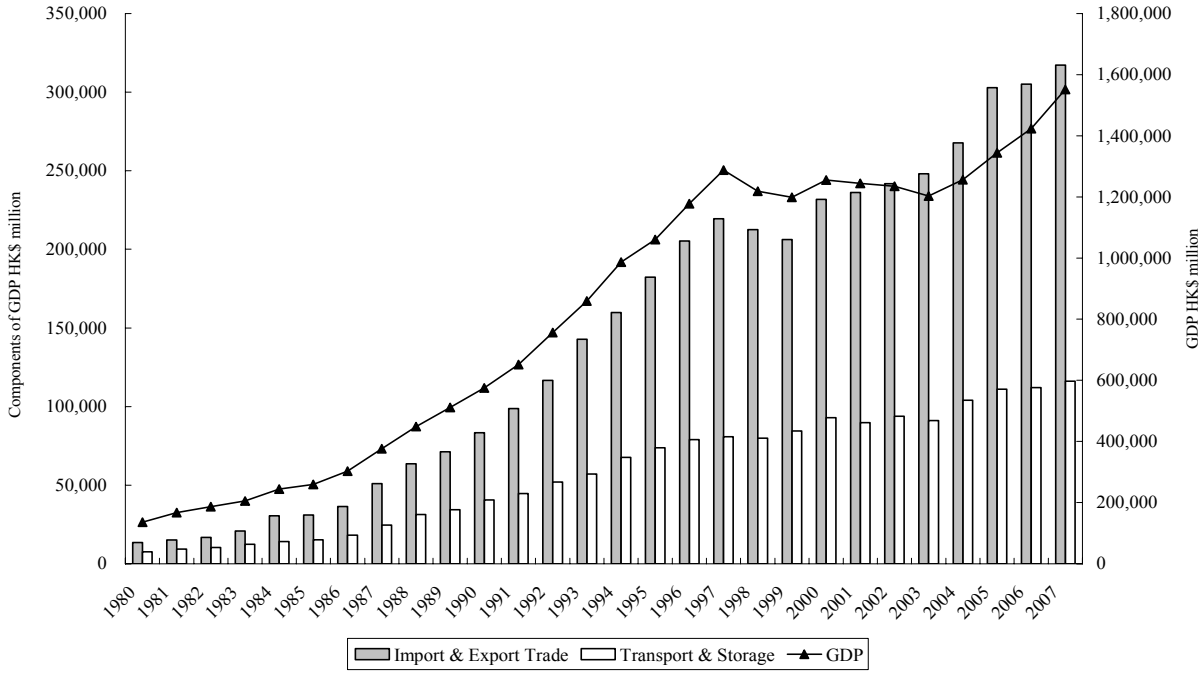
Figure 2 Gross Domestic Product by Economic Activity





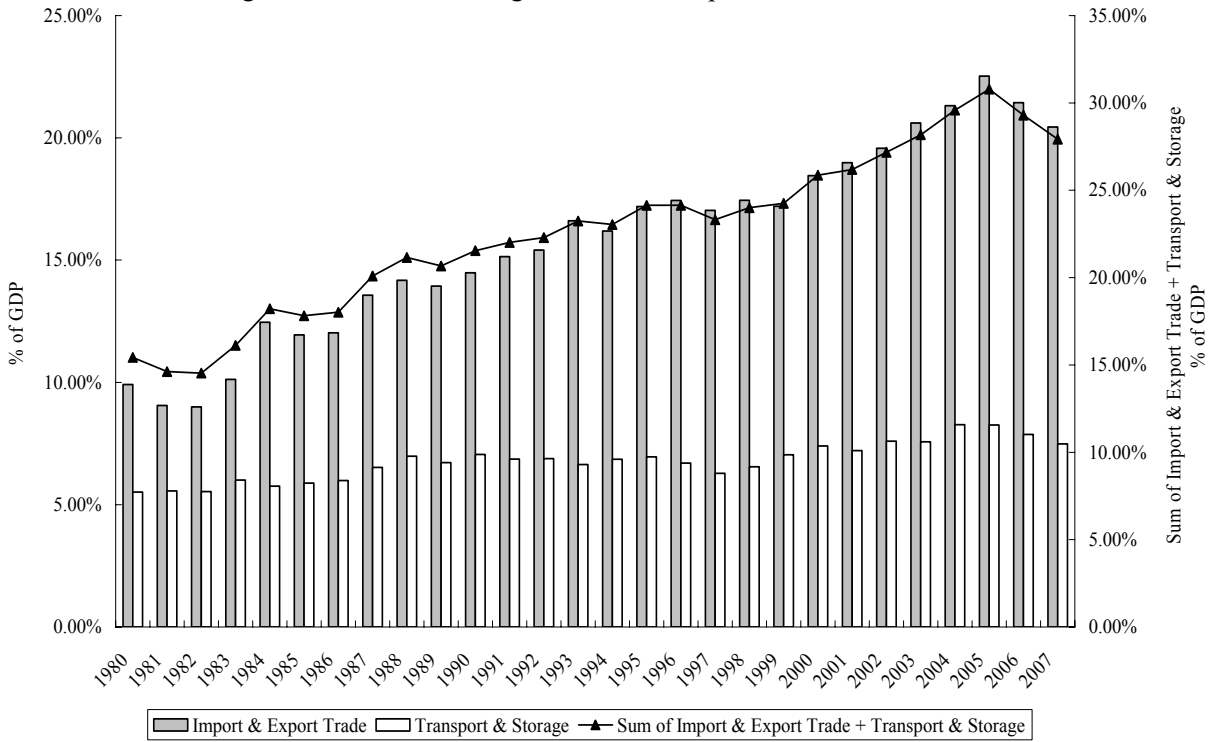
2. Statistics shows that the sub-components of 'Import & Export Trade' and 'Transport & Storage' are closely related and sometimes reaching almost one-third of the GDP. They contribute to the economy by earning foreign income and generate business for other sectors and they are heavily dependent on the business environment of importing/exporting countries and to say the least, the consumer behavior of such countries. Hong Kong is a hub physically connect the Mainland China and foreign countries.

Figure 3 GDP and some Components



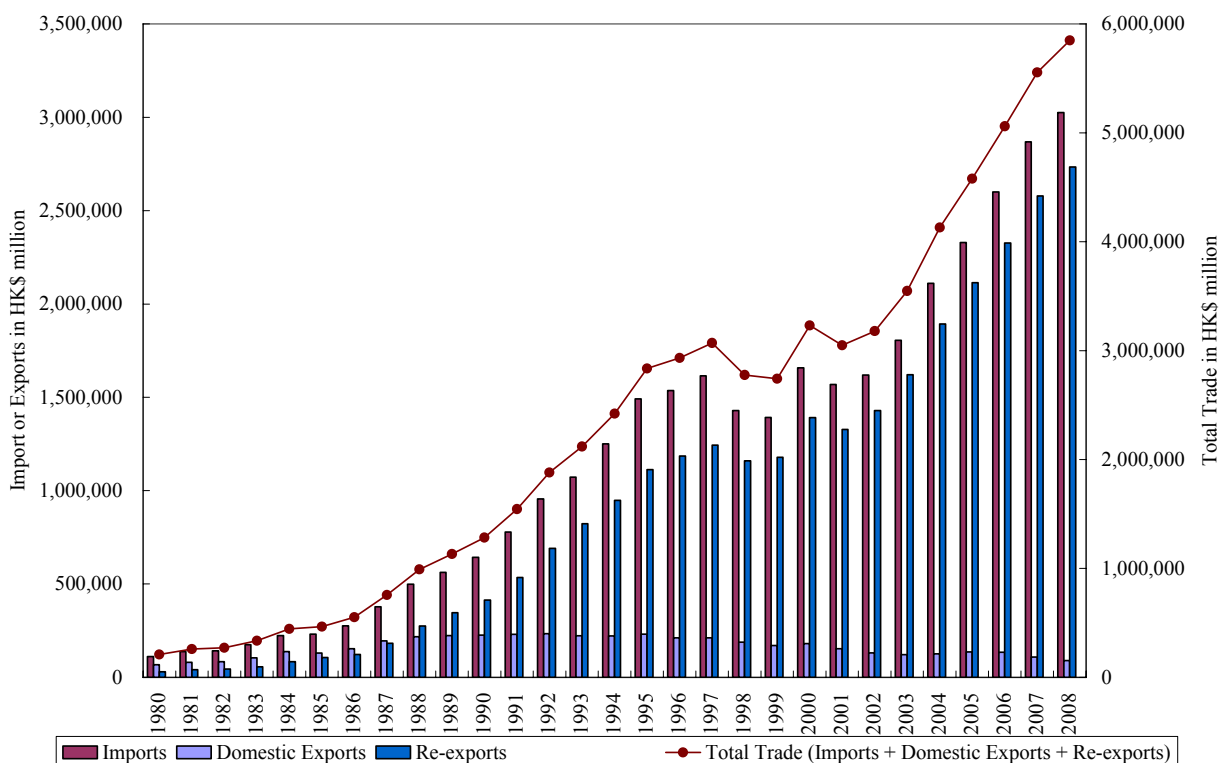
3. Statistics shows that the Transport & Storage did not grow in the same rate as the Import & Export Trade. It is partly explained by the fact that more and more goods are not physically moved via Hong Kong despite the business are conducted/concluded in Hong Kong.

Figure 4 Percentage of Some Components of GDP to GDP



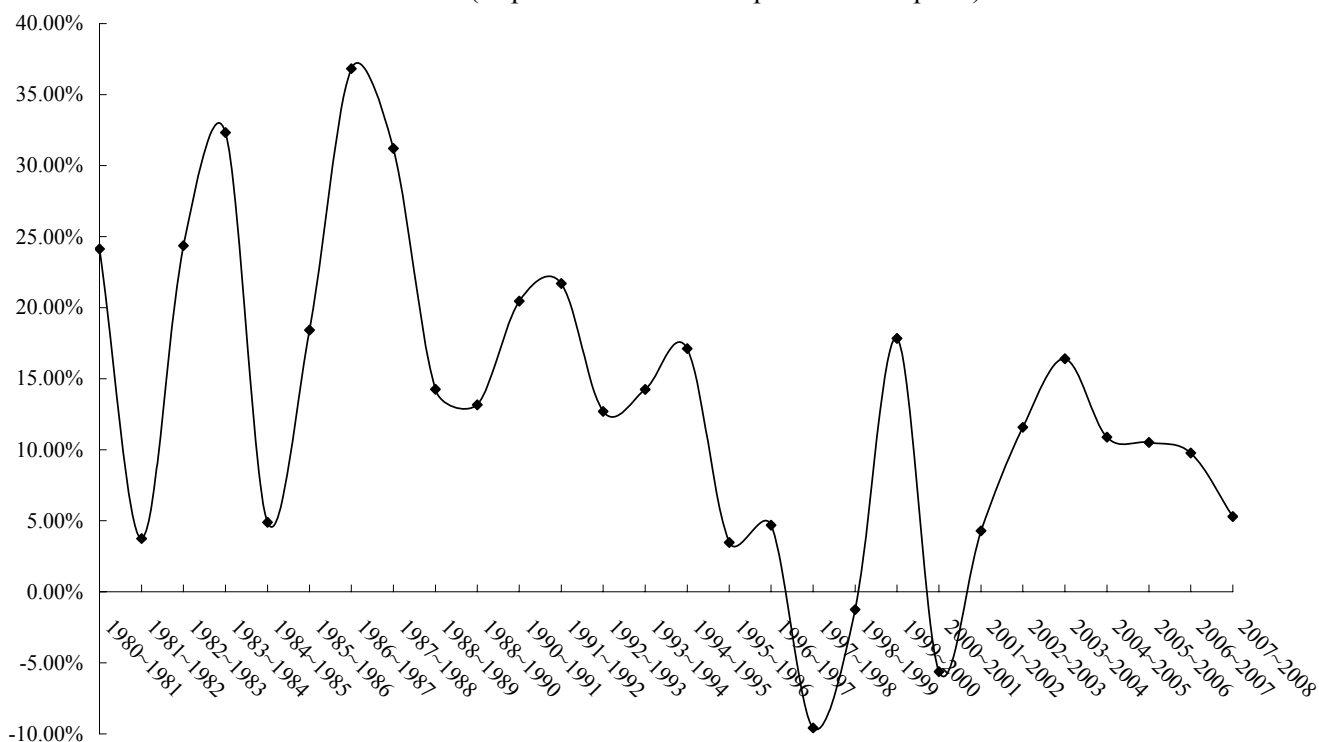
4. Statistics shows that the total trade are predominantly imports and re-exports. The domestic exports are now insignificant. There is no question on Hong Kong's dependence on the Mainland China in this area.

Figure 5 External Merchandise Trade Aggregate Figure

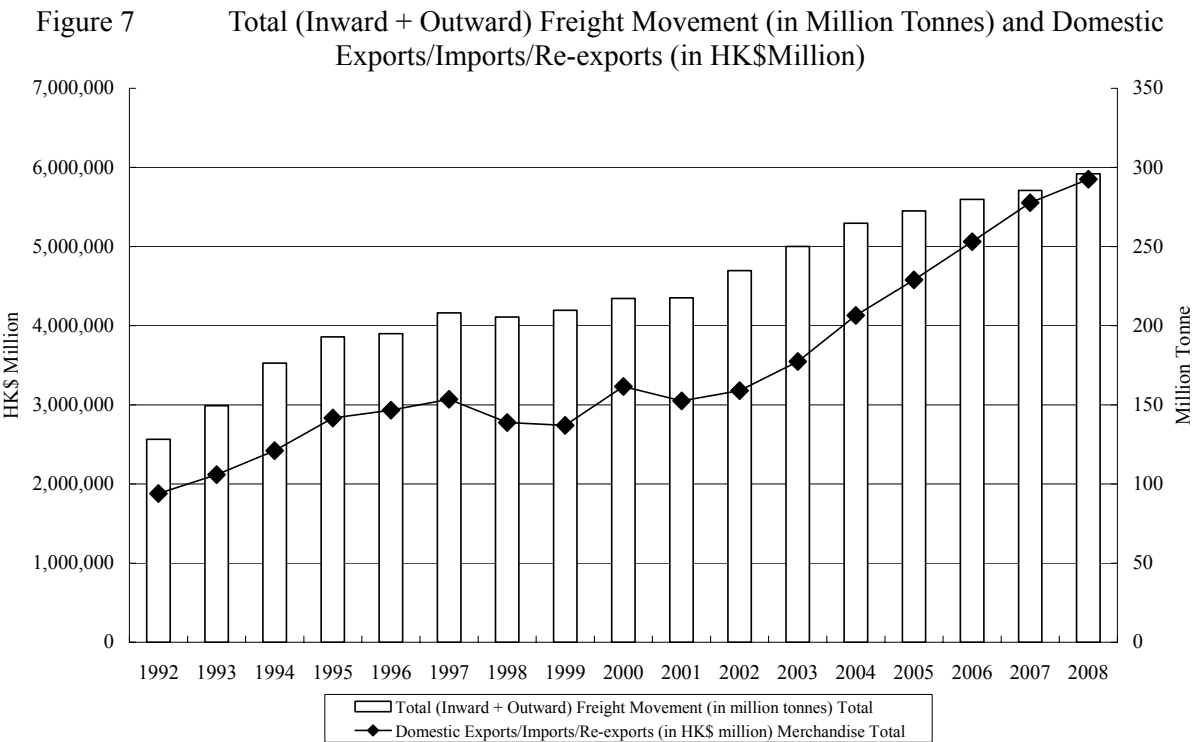


5. Since the 1980s, Hong Kong has witnessed double-digit growth in trades in most years, with a few exceptions. It is a shared view that even without the global economic downturn, the double-digit growth might not be sustained.

Figure 6 Annual Percentage Change in Total Trade (Imports + Domestic Exports + Re-exports)

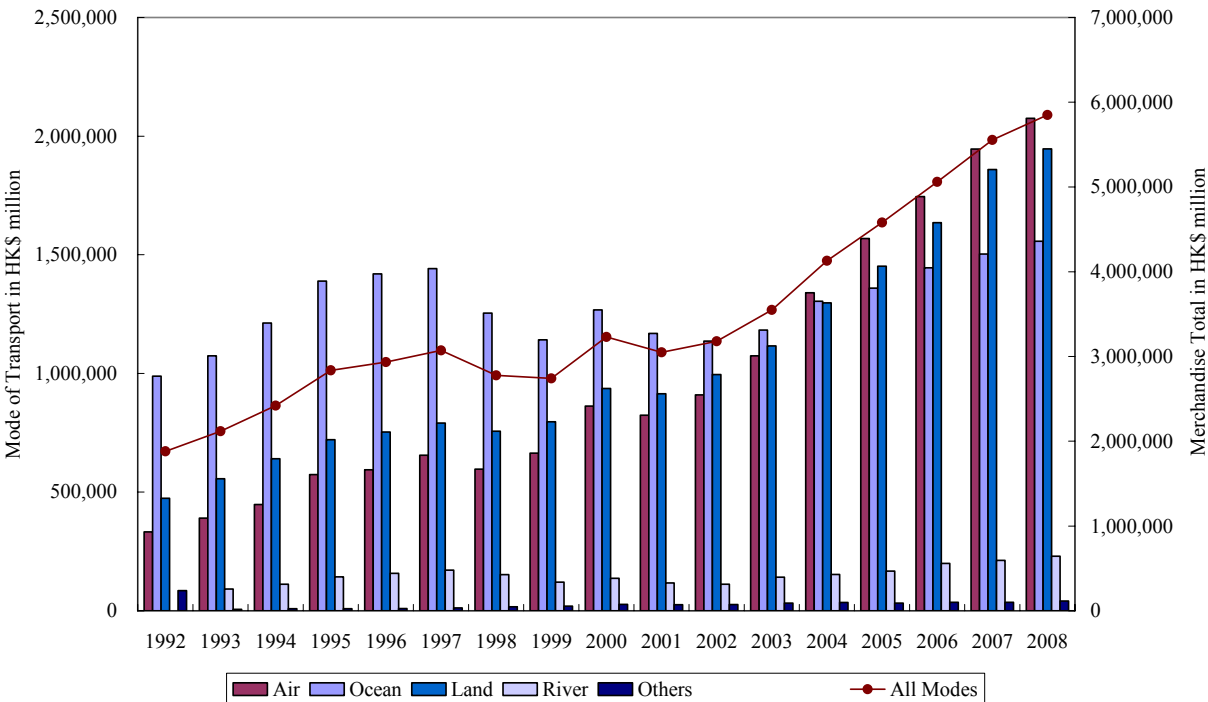


6. Statistics shows the turnover of trade in volume (tonnage) as well as in value. For interpretation of the growth (or negative growth), the value term is more useful because the cargo moving via Hong Kong are mostly voluminous and not calculated/measured in weight. Nevertheless, the trends of both indicators are similar.



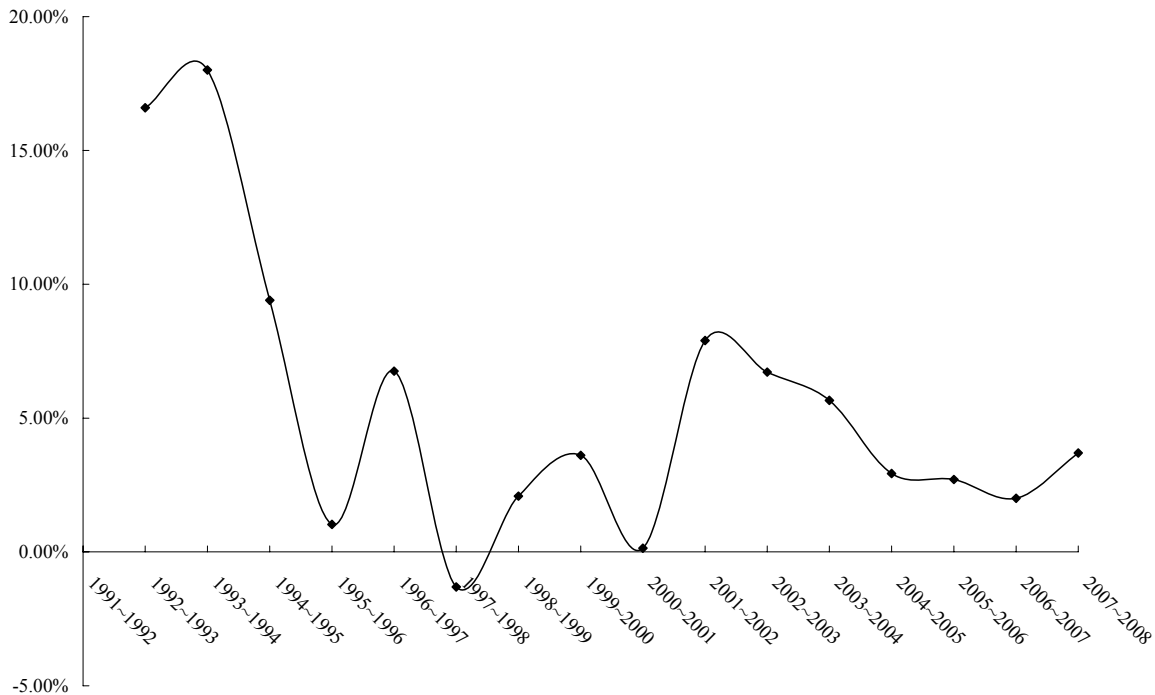
7. The airfreight in terms of value has now the highest percentage of cargo among all modes and it consistently registered double-digit growth. The new Hong Kong international airport, the changing commodity mix in favour of airfreight, the advance made in the air transport, the application of supply chain/logistics concepts all contribute to the growth in airfreight. This trend is likely to maintain beyond the period of the downturn.

Figure 8 Domestic Exports/Imports/Re-exports by Mode of Transport in Value



8. To complete the picture, the trend in tonnage of cargo moved is shown. Compared to the trend in value of cargo moved, single digital growth had occurred much earlier.

Figure 9 Annual Percentage Change by All Modes of Transport by Turnover in Tonnage



9. The sea freight is still an important mode. To quantify the change, the indicator mostly used is the number of containers handled, usually measured in Twenty-Footer Equivalent Units (TEUs). The fact is, comparing the connectivity of Shenzhen ports and Hong Kong port, it is shifting in favour of Shenzhen ports and it is a shared view that it is a matter of time that the turnover at Shenzhen ports is to overtake Hong Kong port. Shanghai and Singapore had earlier out-performed Hong Kong but they are not direct competitors of Hong Kong.

Figure 10 Container Throughput of Major Container ports in the World (in Million of TEU)

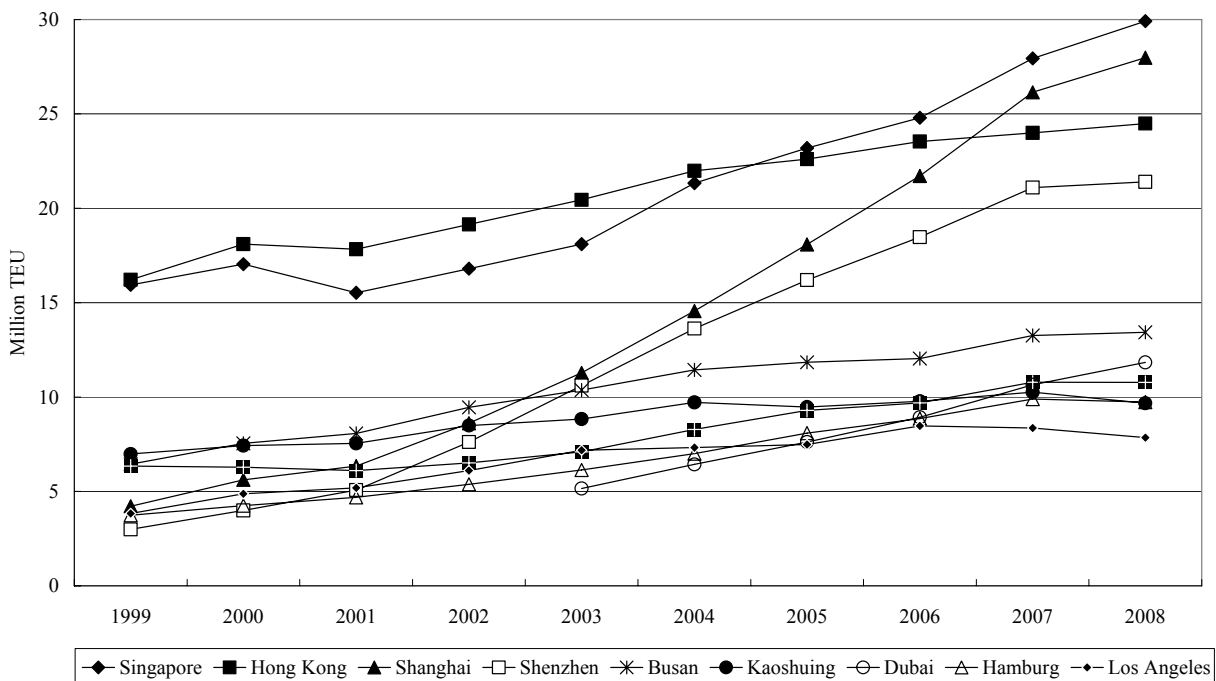
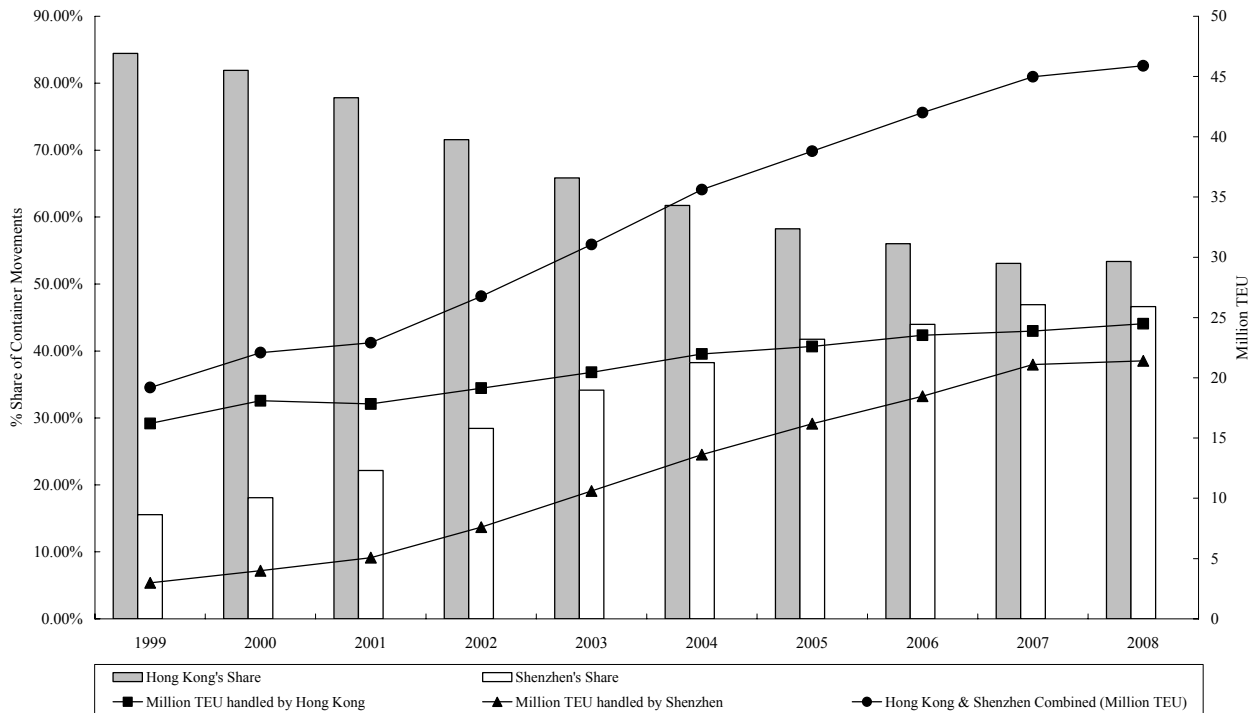


Figure 11 Containers handled by Hong Kong and Shenzhen and the Share of Total Container Movements



10. China's performance in international trade is phenomenal, experiencing always double-digit growth for more than 15 years. China is aiming at double-digit annual economic growth and had largely achieved it in the past. The growth had been fueled by international trade. Internal trade might partially compensate for the momentum lost because of the global economic downturn. It is a shared view that Hong Kong should play a part in China's internal trade even though it is even hardly to do so than to participate in China's international trade.

Figure 12 External trade of the People's Republic of China

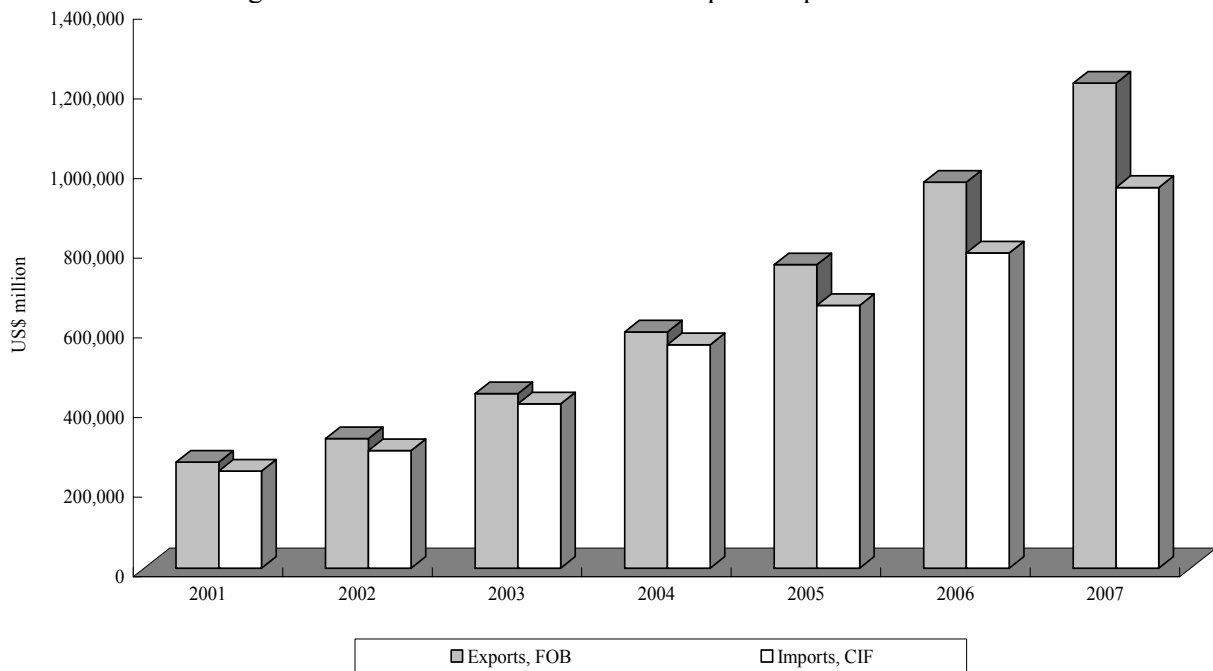
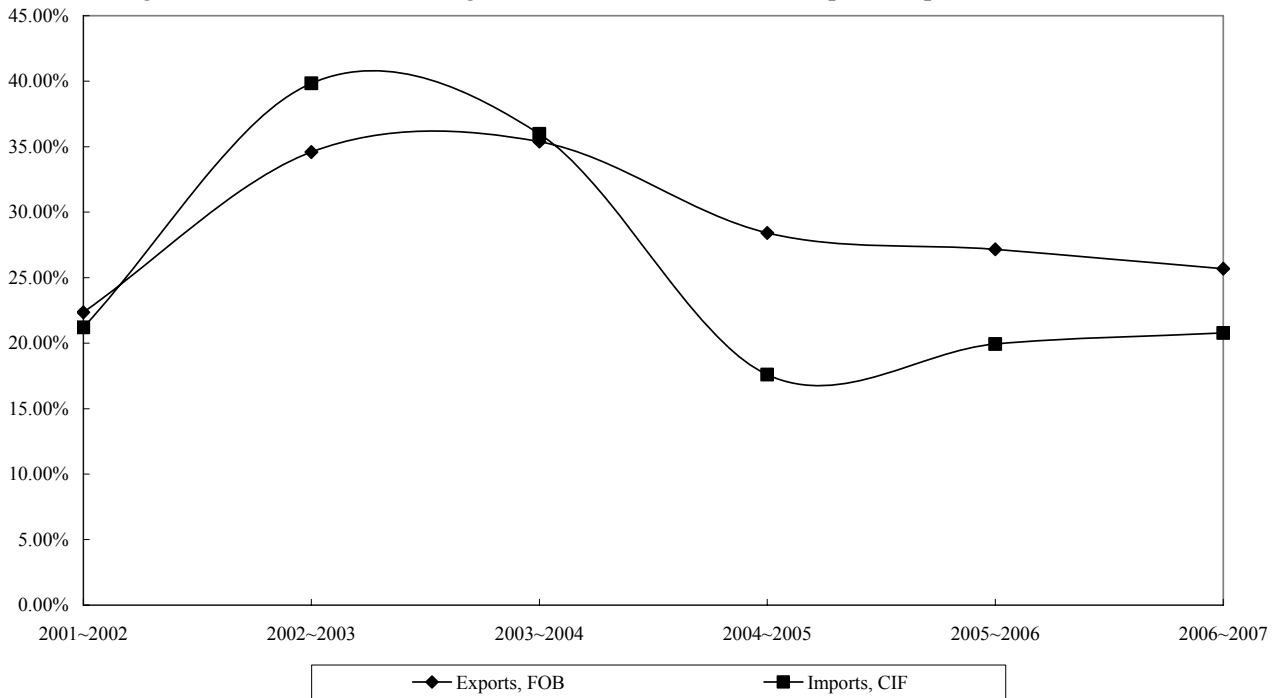


Figure 13 Annual Change in External Trade of the People's Republic of China



## Conclusion

11. Hong Kong is serving as a multi-modal hub for imports and exports of the neighbouring regions in the Mainland China. The industry is experiencing changes such as dwindling down of overland transportation once a popular mode.

12. Hong Kong has traditionally been able to offer a number of quality services to its customers, for example, service frequency, high productivity, short vessel turnaround time, streamlined Customs, free port status, etc. According to the rating of Business Monitor International (*BMI*)<sup>1</sup> for freight transport, Hong Kong scores a total of 76.7 (out of a potential maximum of 100), with particular strength in both the regulatory and competitive environments and a satisfactory showing in the ratings for long-term economic risk and infrastructure growth. It is hoped that the concerted efforts of the industry and the government continues to make Hong Kong an attractive place as a logistics hub.

13. To complete the analysis, the cycles in economy, trade and business and other elements such as consumer behaviour pattern should all be studied. However, it is not realistic to do so given the resources available.

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<sup>1</sup> Established in 1984, BMI is a leading online publisher of specialist business information on global emerging markets. Business Monitor's range of quarterly services covers political risk, finance, macroeconomic performance, outlook and forecast, industry sectors and the business operating environment. Each Industry Report has been researched at source, and features latest-available data covering production, sales, imports and exports; 5-year industry forecasts through end-2012; company rankings and competitive landscapes for multinational and local manufacturers and suppliers; and analysis of latest industry developments, trends and regulatory changes.

## **For Readers' Information**

### Manpower Survey Report Online

1. The 2008 Manpower Survey Report of the Transport Logistics Industry can be downloaded from the website of the Transport Logistics Training Board of the Vocational Training Council as follows:

<http://www.vtc.edu.hk>

Home → about VTC → The Council → Training Boards and General Committees → Transport Logistics Training Board → Publications → 2008 Manpower Survey of the Transport Logistic Industry

or

<http://tdtb.vtc.edu.hk>

The online version of the Report presents charts in colour.

### Supplementary to the Report

2. New information and analysis undertaken by the Transport Logistics Training Board will be published as Supplementary to the Report and will be uploaded to the website from time to time.

物流貨運業 2008 年人力調查  
人力調查報告

職業訓練局  
物流貨運業訓練委員會



# 物流貨運業 2008 年人力調查報告

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# 物流貨運業 2008 年人力調查

## 調查報告

### 背景

1. 物流貨運業訓練委員會隸屬職業訓練局，由政府委任，職責包括評估物流貨運業的人力情況和訓練需求。按此，本會於 2008 年第三季進行了物流貨運業人力調查，涵蓋業內九個類別。

### 調查範圍

2. 調查對象為所有與物流貨運業務與運作有關的僱員，負責電腦、會計、人事、行政及其他輔助工作的僱員並不包括在內。

3. 調查範圍包括以下九個類別：

- a. 貨倉及冷藏庫
- b. 貨運站
- c. 貨車及貨櫃運輸
- d. 空運
- e. 貨運代理
- f. 船上／碼頭裝卸貨物
- g. 國際速遞
- h. 其他物流服務經營者
- i. 海運

### 調查方法

4. 調查參考「香港標準行業分類」(HSIC)及其他方法，以混合方式決定抽樣範圍。HSIC 由政府統計處編訂，將本地業務性質相若的機構歸類，共分三層，各行業分別以三個、四個或六個數字代表。

5. 以 HSIC 為基礎抽出的樣本採用分層隨機抽樣法，所收集的數據於有需要時用統計學方式倍大，以反映有關門類的整體人力。補充調查所得數據則沒有作統計學上倍大。

## 接受調查的類別及樣本數目

6. 接受調查的類別及各類別的樣本數目如下：

<u>類別</u>		<u>樣本數目</u>
I.	<u>貨倉及冷藏庫</u>	
	1. 倉庫業／貨倉及其他倉庫服務 (HSIC 721200)	
	2. 冷藏庫(HSIC 721100)	179
	3. 包裝及裝箱服務；驗貨、抽樣檢驗及稱量服務 (HSIC 7185 - 7186)	
II.	<u>貨運站</u>	
	4. 補充調查樣本－貨運站	8
III.	<u>貨車及貨櫃運輸</u>	
	5. 貨車運輸服務及其他陸路貨運服務. (HSIC 7121, 7129)	494
	6. 貨櫃裝卸及貨櫃租賃服務 (HSIC 716101)	
	7. 補充調查樣本－擁有大型車隊的公司	
IV.	<u>空運</u>	
	8. 航空公司及空運輔助服務 (HSIC 7171, 7172)	65
V.	<u>貨運代理</u>	
	9. 航空貨運代理 (HSIC 7182)	311
	10. 海上貨運代理 (HSIC 7183)	
VI.	<u>貨物起卸服務</u>	
	11. 貨物起卸服務及其他海上運輸輔助服務 (HSIC 7169)	37
VII.	<u>國際速遞</u>	
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X.	<u>海運</u>	222
	15. 船務代理及經理 (HSIC 7141)	
	16. 遠洋輪船營運者 (HSIC 7143)	
XI.	<u>船務管理及租賃</u>	
	17. 遠洋輪船船東(HSIC 7142)	
	18. 船隻經紀(HSIC 7184)	
	19. 內河貨運服務(HSIC 7154)	

類別樣本數目

- XII. 船隻經紀及船東  
 20. 補充調查樣本—船隻經紀及船東

總數 **1,359**

## 主要調查結果

### 調查回應分析

7. 調查回應總結如下：

<u>結果</u>	<u>總數</u>	<u>%</u>
已停業	10	0.74%
店門鎖上	5	0.37%
與其他機構合併	13	0.96%
已搬遷，地址不詳	36	2.65%
無法聯絡	75	5.52%
並非從事物流貨運業務	19	1.40%
並無僱用物流貨運從業員	44	3.24%
尚未開業	10	0.74%
不完整回覆	41	3.02%
拒絕回覆	27	1.99%
僅為註冊辦事處／通訊地址	7	0.52%
回覆	1,012	74.47%
暫停業務	59	4.34%
空置	1	0.07%
<b>總數</b>	<b>1,359</b>	<b>100.00%</b>

## 機構總數

8. 接受調查的機構總數如下：

<u>類別</u>	<u>機構總數</u>
(a) 貨倉及冷藏庫	489
(b) 貨運站	8
(c) 貨車及貨櫃運輸	9,962
(d) 空運	93
(e) 貨運代理	2,829
(f) 船上／碼頭裝卸貨物	94
(g) 國際速遞	13
(h) 其他物流服務經營者	22
(i) 海運	422
<b>所有類別</b>	<b>13,932</b>

## 人力

9. 調查期間，物流貨運業的總人力分佈情況如下（負責行政及輔助工作的僱員除外）：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作工級</u>	<u>所有職級</u>
(a) 貨倉及冷藏庫	351	881	1,561	3,742	<b>6,535</b>
(b) 貨運站	140	900	1,018	3,345	<b>5,403</b>
(c) 貨車及貨櫃運輸	891	4,515	7,320	30,791	<b>43,517</b>
(d) 空運	187	534	602	2,907	<b>4,230</b>
(e) 貨運代理	3,844	6,507	16,627	3,124	<b>30,102</b>
(f) 船上／碼頭裝卸貨物	78	239	217	1,312	<b>1,846</b>
(g) 國際速遞	235	448	1,008	1,971	<b>3,662</b>
(h) 其他物流服務經營者	50	103	122	1,009	<b>1,284</b>
(i) 海運	838	1,077	1,916	259	<b>4,090</b>
<b>所有類別</b>	<b>6,614</b>	<b>15,204</b>	<b>30,391</b>	<b>48,460</b>	<b>100,669</b>

10. 不同職級僱員同類別佔人力總數百分率及分佈情況：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作工級</u>
(a) 貨倉及冷藏庫	5.37%	13.48%	23.89%	57.26%
(b) 貨運站	2.59%	16.66%	18.84%	61.91%
(c) 貨車及貨櫃運輸	2.05%	10.38%	16.82%	70.76%
(d) 空運	4.42%	12.62%	14.23%	68.72%
(e) 貨運代理	12.77%	21.62%	55.24%	10.38%
(f) 船上／碼頭裝卸貨物	4.23%	12.95%	11.76%	71.07%
(g) 國際速遞	6.42%	12.23%	27.53%	53.82%
(h) 其他物流服務經營者	3.89%	8.02%	9.50%	78.58%
(i) 海運	20.49%	26.33%	46.85%	6.33%
<b>所有類別</b>	<b>6.57%</b>	<b>15.10%</b>	<b>30.19%</b>	<b>48.14%</b>

僱員人數與空缺數目

11. 調查期間僱員人數與空缺分佈情況如下：

	<u>調查期間 僱員人數</u>	<u>調查 期間空缺</u>	<u>人力總數</u>	<u>空缺佔人 力總數 百分比率</u>
(a) 貨倉及冷藏庫	6,389	146	<b>6,535</b>	2.23%
(b) 貨運站	5,387	16	<b>5,403</b>	0.30%
(c) 貨車及貨櫃運輸	42,788	729	<b>43,517</b>	1.68%
(d) 空運	4,222	8	<b>4,230</b>	0.19%
(e) 貨運代理	29,680	422	<b>30,102</b>	1.40%
(f) 船上／碼頭裝卸貨物	1,846	0	<b>1,846</b>	0.00%
(g) 國際速遞	3,615	47	<b>3,662</b>	1.28%
(h) 其他物流服務經營者	1,248	36	<b>1,284</b>	2.80%
(i) 海運	4,060	30	<b>4,090</b>	0.73%
<b>所有類別</b>	<b>99,235</b>	<b>1,434</b>	<b>100,669</b>	<b>1.42%</b>

## 僱員宜有教育程度及資歷

12. 僱主認為僱員宜有教育程度及資歷如下：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作工級</u>	<u>所有職級</u>
學士學位或以上	3,805	2,225	171	0	<b>6,201</b>
專上程度	2,176	7,767	9,561	1,054	<b>20,558</b>
高中程度	196	4,324	18,688	17,908	<b>41,116</b>
初中或以下	0	3	124	25,965	<b>26,092</b>
未有說明	419	757	1,383	2,709	<b>5,268</b>
<b>總數</b>	<b>6,596</b>	<b>15,076</b>	<b>29,927</b>	<b>47,636</b>	<b>99,235</b>

13. 同一職級僱員宜有教育程度及資歷的分佈比率如下：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作工級</u>	<u>所有職級</u>
學士學位或以上	57.69%	14.76%	0.57%	0.00%	<b>6.25%</b>
專上程度	32.99%	51.52%	31.95%	2.21%	<b>20.72%</b>
高中程度	2.97%	28.68%	62.45%	37.59%	<b>41.43%</b>
初中或以下	0.00%	0.02%	0.41%	54.51%	<b>26.29%</b>
未有說明	6.35%	5.02%	4.62%	5.69%	<b>5.31%</b>

## 平均收入

14. 每月平均收入包括底薪、超時補薪、生活津貼、膳食津貼、佣金及花紅，為擔任同一職務僱員的平均收入，其分佈情況如下：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作工級</u>	<u>所有職級</u>
\$5,000 或以下	0	0	36	119	<b>155</b>
\$5,001 - \$10,000	0	97	12,837	18,051	<b>30,985</b>
\$10,001 - \$15,000	8	5,528	11,259	22,104	<b>38,899</b>
\$15,001 - \$20,000	1,283	5,276	2,015	2,650	<b>11,224</b>
\$20,001 - \$30,000	2,481	2,324	80	244	<b>5,129</b>
\$30,001 - \$40,000	1,331	30	0	0	<b>1,361</b>
\$40,001 或以上	572	6	0	0	<b>578</b>
未有說明	921	1,815	3,700	4,468	<b>10,904</b>
<b>總數</b>	<b>6,596</b>	<b>15,076</b>	<b>29,927</b>	<b>47,636</b>	<b>99,235</b>

15. 接受調查之僱員平均收入分佈比率如下：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作工級</u>	<u>所有職級</u>
\$5,000 或以下	0.00%	0.00%	0.04%	0.12%	<b>0.16%</b>
\$5,001 - \$10,000	0.00%	0.10%	12.94%	18.19%	<b>31.22%</b>
\$10,001 - \$15,000	0.01%	5.57%	11.35%	22.27%	<b>39.20%</b>
\$15,001 - \$20,000	1.29%	5.32%	2.03%	2.67%	<b>11.31%</b>
\$20,001 - \$30,000	2.50%	2.34%	0.08%	0.25%	<b>5.17%</b>
\$30,001 - \$40,000	1.34%	0.03%	0.00%	0.00%	<b>1.37%</b>
\$40,001 或以上	0.58%	0.01%	0.00%	0.00%	<b>0.58%</b>
未有說明	0.93%	1.83%	3.73%	4.50%	<b>10.99%</b>

16. 同一職級僱員的平均收入分佈數百分率：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作工級</u>	<u>所有職級</u>
\$5,000 或以下	0.00%	0.00%	0.12%	0.25%	<b>0.16%</b>
\$5,001 - \$10,000	0.00%	0.64%	42.89%	37.89%	<b>31.22%</b>
\$10,001 - \$15,000	0.12%	36.67%	37.62%	46.40%	<b>39.20%</b>
\$15,001 - \$20,000	19.45%	35.00%	6.73%	5.56%	<b>11.31%</b>
\$20,001 - \$30,000	37.61%	15.42%	0.27%	0.51%	<b>5.17%</b>
\$30,001 - \$40,000	20.18%	0.20%	0.00%	0.00%	<b>1.37%</b>
\$40,001 或以上	8.67%	0.04%	0.00%	0.00%	<b>0.58%</b>
未有說明	13.96%	12.04%	12.36%	9.38%	<b>10.99%</b>

### 主要／物流貨運相關職務

17. 調查對象為主要從事與物流貨運業務、操作或技術有關職務的僱員；主要職務不屬這個範疇的僱員，則納入其他訓練委員會／一般委員會的人力調查範圍內。兩類僱員的人數分別如下：

	<u>物流貨運業 非技術僱員</u>	<u>物流貨運業 技術僱員</u>	<u>總數</u>
(a) 貨倉及冷藏庫	1,105	6,389	<b>7,494</b>
(b) 貨運站	0	5,387	<b>5,387</b>
(c) 貨車及貨櫃運輸	2,457	42,788	<b>45,245</b>
(d) 空運	18,049	4,222	<b>22,271</b>
(e) 貨運代理	6,946	29,680	<b>36,626</b>
(f) 船上／碼頭裝卸貨物	137	1,846	<b>1,983</b>
(g) 國際速遞	0	3,615	<b>3,615</b>
(h) 其他物流服務經營者	0	1,248	<b>1,248</b>
(i) 海運	4,515	4,060	<b>8,575</b>
<b>所有類別</b>	<b>33,209</b>	<b>99,235</b>	<b>132,444</b>



## 流動及流失人數

18. 流動人數為調查進行前 12 個月內因各種原因離職的僱員人數。調查結果如下：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作工級</u>	<u>所有職級</u>
繼續於物流貨運業任職／創業	145	596	3,671	5,426	<b>9,838</b>
於其他行業任職／創業； 移居外地、退休、進修或 其他原因 (包括未有註明)	168	299	2,123	2,752	<b>5,342</b>
<b>總數</b>	<b>313</b>	<b>895</b>	<b>5,794</b>	<b>8,178</b>	<b>15,180</b>

19. 流動人數(過去 12 個月離職人數)佔同一職級僱員總數百分率如下：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作工級</u>	<u>所有職級</u>
繼續於物流貨運業任職／創業	2.19%	3.92%	12.08%	11.20%	<b>9.77%</b>
於其他行業任職／創業； 移居外地、退休、進修或 其他原因 (包括未有註明)	2.54%	1.97%	6.99%	5.68%	<b>5.31%</b>
<b>總數</b>	<b>4.73%</b>	<b>5.89%</b>	<b>19.06%</b>	<b>16.88%</b>	<b>15.08%</b>

## 擴大人力調查範圍

20. 人力調查範圍曾多次擴大，以納入新類別或次類別如下：

1996	新類別	國際速遞
2002	新類別	其他物流服務經營者
2006	新次類別：貨倉及冷藏庫公司	包裝及裝箱服務及驗貨； 抽樣檢驗及倉庫服務 (HSIC 7185 - 7186)
	新次類別：貨車及貨櫃運輸	其他陸路貨運 (HSIC 7129)
	新次類別：海運公司	內河貨運服務(HSIC 7154)
2008	新次類別：航空運輸	航空運輸輔助服務(HSIC 7172)

21. 2008 年人力調查剔除新次類別後結果如下：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作工級</u>	<u>所有職級</u>
(a) 貨倉及冷藏庫	267	701	1,435	3,217	<b>5,620</b>
(b) 貨運站	140	900	1,018	3,345	<b>5,403</b>
(c) 貨車及貨櫃運輸	891	4,515	7,320	30,791	<b>43,517</b>
(d) 空運	143	225	412	406	<b>1,186</b>
(e) 貨運代理	3,844	6,507	16,627	3,124	<b>30,102</b>
(f) 船上／碼頭裝卸貨物	78	239	217	1,312	<b>1,846</b>
(g) 國際速遞	235	448	1,008	1,971	<b>3,662</b>
(h) 其他物流服務經營者	50	103	122	1,009	<b>1,284</b>
(i) 海運	792	914	1,677	71	<b>3,454</b>
<b>所有類別</b>	<b>6,440</b>	<b>14,552</b>	<b>29,836</b>	<b>45,246</b>	<b>96,074</b>

22. 1996 及 2002 年分別加入新類別。剔除新類別及新次類別後，2008 年人力調查結果如下：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作工級</u>	<u>所有職級</u>
(a) 貨倉及冷藏庫	267	701	1,435	3,217	<b>5,620</b>
(b) 貨運站	140	900	1,018	3,345	<b>5,403</b>
(c) 貨車及貨櫃運輸	891	4,515	7,320	30,791	<b>43,517</b>
(d) 空運	143	225	412	406	<b>1,186</b>
(e) 貨運代理	3,844	6,507	16,627	3,124	<b>30,102</b>
(f) 船上／碼頭裝卸貨物	78	239	217	1,312	<b>1,846</b>
(g) 國際速遞	-	-	-	-	-
(h) 其他物流服務經營者	-	-	-	-	-
(i) 海運	792	914	1,677	71	<b>3,454</b>
<b>所有類別</b>	<b>6,155</b>	<b>14,001</b>	<b>28,706</b>	<b>42,266</b>	<b>91,128</b>

## 增補調查

23. 是次調查探討本行業勞工市場的不同範疇，鑑於本部份並非定期進行，故稱為增補調查。有關的調查結果詳見下列各段。

## 宜有技能

24. 僱主認為僱員宜有的技能，及須接受特定範疇訓練的僱員人數如下：

<u>訓練種類</u>	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作 工級</u>	<u>所有 職級</u>
<u>管理技巧／範疇</u>					
1 自動化策略計劃、推行及檢討	185	102	46	0	<b>333</b>
2 顧客服務及關係策略計劃、推行及檢討	297	241	56	0	<b>594</b>
3 成本控制	307	105	7	33	<b>452</b>
4 業務策略計劃、推行及檢討	324	122	46	0	<b>492</b>
5 環保策略計劃、推行及檢討	63	82	15	0	<b>160</b>
6 財務計劃、推行及檢討	96	39	20	0	<b>155</b>
7 人力資源計劃、推行及檢討	138	109	7	0	<b>254</b>
8 法律事務	98	64	18	0	<b>180</b>
9 價格策略	100	58	20	0	<b>178</b>
10 質素控制	125	157	53	14	<b>349</b>
11 風險評估	138	89	7	0	<b>234</b>
12 行銷及市場策略計劃、推行及檢討	209	125	80	0	<b>414</b>
13 督導管理	297	329	11	33	<b>670</b>
14 流程分析	159	190	95	14	<b>458</b>
15 職業健康及保險計劃	118	252	9	0	<b>379</b>
16 其他	0	2	20	0	<b>22</b>
<i>管理技巧總計</i>	<i>2,654</i>	<i>2,066</i>	<i>510</i>	<i>94</i>	<i>5,324</i>
<u>專門技巧／範疇</u>					
16 其他	74	19	22	0	<b>115</b>
17 物流貨運操作量比	55	180	331	20	<b>586</b>
18 物資分發	23	76	152	255	<b>506</b>

<u>訓練種類</u>	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作 工級</u>	<u>所有 職級</u>
19 自動化物料搬運	27	47	128	23	<b>225</b>
20 多式聯運	44	111	95	0	<b>250</b>
21 優化流程	67	139	97	0	<b>303</b>
22 貨運操作	126	549	653	871	<b>2,199</b>
23 倉儲及存貨控制	52	141	202	369	<b>764</b>
24 船隻租賃	21	20	22	0	<b>63</b>
25 海事保險	31	9	36	0	<b>76</b>
26 海事調查及檢驗	31	54	102	0	<b>187</b>
27 危險品運輸	105	236	429	105	<b>875</b>
28 國際貿易	106	75	76	0	<b>257</b>
29 供應鏈應用	73	191	102	2	<b>368</b>
30 客戶服務及關係	140	633	1,307	223	<b>2,303</b>
31 文件繕製	65	142	763	11	<b>981</b>
32 物料搬運	20	48	109	593	<b>770</b>
<i>專門技巧總計</i>	<i>1,060</i>	<i>2,670</i>	<i>4,626</i>	<i>2,472</i>	<i>10,828</i>
<u>專門技術／範疇</u>					
16 其他	6	24	19	104	<b>153</b>
33 鏟車操作	0	18	10	1,095	<b>1,123</b>
34 貨櫃吊機操作	0	3	0	906	<b>909</b>
35 裝卸機械操作	1	5	0	359	<b>365</b>
36 貨物包裝及儲存	0	41	65	198	<b>304</b>
37 危險貨物處理	116	127	290	887	<b>1,420</b>
<i>專門技術總計</i>	<i>123</i>	<i>218</i>	<i>384</i>	<i>3,549</i>	<i>4,274</i>

<u>訓練種類</u>	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作 工級</u>	<u>所有 職級</u>
<u>通用技巧／範疇</u>					
16 其他	7	74	79	638	<b>798</b>
38 多種語言商貿通訊及溝通	157	406	1,365	258	<b>2,186</b>
39 電子化商貿	64	208	955	1	<b>1,228</b>
40 資訊系統運用	59	294	851	44	<b>1,248</b>
<i>通用技巧總計</i>	287	982	3,250	941	<b>5,460</b>
<b>所有訓練種類／範疇</b>	<b>4,124</b>	<b>5,936</b>	<b>8,770</b>	<b>7,056</b>	<b>25,886</b>

#### 外判工作

25. 有關曾外判工作的機構調查結果如下：

	<u>機構數目</u>	<u>曾外判工作 的機構數目</u>	<u>佔機構總數 百分率</u>	<u>未有明確回覆 的機構數目</u>
(a) 貨倉及冷藏庫	489	44	9.00%	1
(b) 貨運站	8	3	37.50%	1
(c) 貨車及貨櫃運輸	9,962	670	6.73%	35
(d) 空運	93	7	7.53%	0
(e) 貨運代理	2,829	483	17.07%	9
(f) 船上／碼頭裝卸貨物	94	22	23.40%	0
(g) 國際速遞	13	3	23.08%	1
(h) 其他物流服務經營者	22	6	27.27%	0
(i) 海運	422	15	3.55%	0
<b>所有類別</b>	<b>13,932</b>	<b>1,253</b>	<b>8.99%</b>	<b>47</b>

## 招聘困難

26. 曾遇到招聘困難的機構數目，結果歸納如下：

		經理級	主任級	文員級	操作工級
(a) 貨倉及冷藏庫	曾遇到招聘困難	7	12	36	55
	沒有困難	10	27	55	61
	過去 12 個月沒有招聘／沒有嘗試招聘貨運／運輸／ 物流僱員	470	448	396	371
	未有註明	2	2	2	2
	<i>小計</i>	489	489	489	489
(b) 貨運站	曾遇到招聘困難	0	0	2	1
	沒有困難	3	3	2	2
	過去 12 個月沒有招聘／沒有嘗試招聘貨運／運輸／ 物流僱員	4	4	3	4
	未有註明	1	1	1	1
	<i>小計</i>	8	8	8	8
(c) 貨車及貨櫃運輸	曾遇到招聘困難	4	45	127	426
	沒有困難	46	39	294	1167
	過去 12 個月沒有招聘／沒有嘗試招聘貨運／運輸／ 物流僱員	9,875	9,841	9,504	8,332
	未有註明	37	37	37	37
	<i>小計</i>	9,962	9,962	9,962	9,962

		經理級	主任級	文員級	操作工級
(d) 空運	曾遇到招聘困難	0	1	0	2
	沒有困難	2	7	5	8
	過去 12 個月沒有招聘／沒有嘗試招聘貨運／運輸／ 物流僱員	91	85	88	83
	未有註明	0	0	0	0
	小計	93	93	93	93
(e) 貨運代理	曾遇到招聘困難	25	112	421	22
	沒有困難	72	225	527	78
	過去 12 個月沒有招聘／沒有嘗試招聘貨運／運輸／ 物流僱員	2,719	2,479	1,868	2,716
	未有註明	13	13	13	13
	小計	2,829	2,829	2,829	2,829
(f) 船上／碼頭裝卸 貨物	曾遇到招聘困難	0	0	0	3
	沒有困難	1	7	3	19
	過去 12 個月沒有招聘／沒有嘗試招聘貨運／運輸／ 物流僱員	93	87	91	72
	未有註明	0	0	0	0
	小計	94	94	94	94
(g) 國際速遞	曾遇到招聘困難	1	1	1	4
	沒有困難	1	1	5	3
	過去 12 個月沒有招聘／沒有嘗試招聘貨運／運輸／ 物流僱員	10	10	6	5
	未有註明	1	1	1	1
	小計	13	13	13	13

		經理級	主任級	文員級	操作工級
(h) 其他物流服務 經營者	曾遇到招聘困難	0	0	1	1
	沒有困難	7	7	8	4
	過去 12 個月沒有招聘／沒有嘗試招聘貨運／運輸／ 物流僱員	15	15	13	17
	未有註明	0	0	0	0
	小計	22	22	22	22
(i) 海運	曾遇到招聘困難	4	10	16	0
	沒有困難	12	8	45	1
	過去 12 個月沒有招聘／沒有嘗試招聘貨運／運輸／ 物流僱員	406	404	361	421
	未有註明	0	0	0	0
	小計	422	422	422	422
所有類別	曾遇到招聘困難	41	181	604	514
	沒有困難	154	324	944	1,343
	過去 12 個月沒有招聘／沒有嘗試招聘貨運／運輸／ 物流僱員	13,683	13,373	12,330	12,021
	未有註明	54	54	54	54
	總計	<b>13,932</b>	<b>13,932</b>	<b>13,932</b>	<b>13,932</b>



27. 調查顯示，導致招聘困難的原因，以機構數目為單位如下：

		經理級	主任級	文員級	操作工級
(a) 貨倉及冷藏庫	本地勞工短缺	3	5	9	22
	大專院校相關課程的畢業生不足	0	0	0	0
	應徵者缺乏相關經驗／訓練	4	9	21	22
	應徵者認為工作環境／薪酬福利未如理想	4	7	29	44
	其他原因	0	0	0	0
(b) 貨運站	本地勞工短缺	0	0	0	1
	大專院校相關課程的畢業生不足	0	0	0	0
	應徵者缺乏相關經驗／訓練	0	0	1	0
	應徵者認為工作環境／薪酬福利未如理想	0	0	1	0
	其他原因	0	0	1	1
(c) 貨車及貨櫃運輸	本地勞工短缺	1	1	7	117
	大專院校相關課程的畢業生不足	0	0	0	4
	應徵者缺乏相關經驗／訓練	3	35	52	88
	應徵者認為工作環境／薪酬福利未如理想	3	4	72	297
	其他原因	0	8	16	4
(d) 空運	本地勞工短缺	0	0	0	0
	大專院校相關課程的畢業生不足	0	0	0	0
	應徵者缺乏相關經驗／訓練	0	1	0	2
	應徵者認為工作環境／薪酬福利未如理想	0	1	0	1
	其他原因	0	0	0	0

		經理級	主任級	文員級	操作工級
(e) 貨運代理	本地勞工短缺	4	15	92	3
	大專院校相關課程的畢業生不足	0	4	13	0
	應徵者缺乏相關經驗／訓練	15	102	246	6
	應徵者認為工作環境／薪酬福利未如理想	12	19	179	19
	其他原因	0	36	89	2
(f) 船上／碼頭裝卸貨物	本地勞工短缺	0	0	0	1
	大專院校相關課程的畢業生不足	0	0	0	0
	應徵者缺乏相關經驗／訓練	0	0	0	1
	應徵者認為工作環境／薪酬福利未如理想	0	0	0	1
	其他原因	0	0	0	0
(g) 國際速遞	本地勞工短缺	1	1	0	0
	大專院校相關課程的畢業生不足	0	0	0	0
	應徵者缺乏相關經驗／訓練	1	1	1	0
	應徵者認為工作環境／薪酬福利未如理想	0	0	1	4
	其他原因	0	0	0	0
(h) 其他物流服務經營者	本地勞工短缺	0	0	1	0
	大專院校相關課程的畢業生不足	0	0	0	0
	應徵者缺乏相關經驗／訓練	0	0	0	1
	應徵者認為工作環境／薪酬福利未如理想	0	0	0	1
	其他原因	0	0	0	0

		<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>操作工級</u>
(i) 海運	本地勞工短缺	0	0	2	0
	大專院校相關課程的畢業生不足	0	1	1	0
	應徵者缺乏相關經驗／訓練	4	9	12	0
	應徵者認為工作環境／薪酬福利未如理想	0	4	8	0
	其他原因	1	1	1	0
所有類別	本地勞工短缺	9	22	111	144
	大專院校相關課程的畢業生不足	0	5	14	4
	應徵者缺乏相關經驗／訓練	27	157	333	120
	應徵者認為工作環境／薪酬福利未如理想	19	35	290	367
	其他原因	1	45	107	7

## 趨勢分析

28. 本會自 1982 年起每兩年進行一次人力調查。根據調查結果，可以編制一系列圖表，顯示本行業人力過去的演變模式及相關事宜，並就同類數字進行適當比較。

### 人力轉變趨勢

29. 過往調查結果顯示的人力轉變趨勢：

	<u>1991</u>	<u>1993</u>	<u>1996</u>	<u>1998</u>	<u>2000</u>	<u>2002</u>	<u>2004</u>	<u>2006</u>	<u>2008</u>
i. 貨倉及冷藏庫公司	3,074	4,954	6,125	4,711	4,016	4,607	4,136	4,861	5,620
ii. 貨運站	5,113	4,686	5,218	4,918	4,405	5,555	5,351	5,044	5,403
iii. 貨車及貨櫃運輸公司	44,952	48,059	46,523	43,373	42,958	39,874	39,819	42,807	43,517
iv. 空運公司	607	1,301	1,065	875	758	721	751	636	1,186
v. 貨運代理	13,064	15,637	18,681	17,612	17,673	17,507	21,897	26,095	30,102
vi. 船上／碼頭裝卸貨物公司	654	1,664	1,117	1,208	1,272	1,157	1,309	1,327	1,846
vii. 海運公司	7,183	7,692	6,746	6,051	4,876	3,912	3,873	3,753	3,454
<b>所有類別</b>	<b>74,647</b>	<b>83,993</b>	<b>85,475</b>	<b>78,748</b>	<b>75,958</b>	<b>73,333</b>	<b>77,136</b>	<b>84,523</b>	<b>91,128</b>
2008 年調查結果 =100%	81.91%	92.17%	93.80%	86.41%	83.35%	80.47%	84.65%	92.75%	100.00%

扣除第 20 段所顯示的新類別／次類別後的所有類別數字

30. 過往調查所顯示不同職級的人力轉變趨勢：

	<u>1991</u>	<u>1993</u>	<u>1996</u>	<u>1998</u>	<u>2000</u>	<u>2002</u>	<u>2004</u>	<u>2006</u>	<u>2008</u>
經理級	8,434	8,152	9,496	7,206	6,271	6,279	5,870	5,632	6,155
主任級	7,094	10,058	10,858	9,489	10,486	11,029	11,082	12,284	14,001
文員級	14,510	16,916	18,171	20,789	16,957	15,904	20,812	25,068	28,706
操作工級	44,609	48,867	46,950	41,390	42,244	40,121	39,372	41,539	42,266
<b>所有職級</b>	<b>74,647</b>	<b>83,993</b>	<b>85,475</b>	<b>78,874</b>	<b>75,958</b>	<b>73,333</b>	<b>77,136</b>	<b>84,523</b>	<b>91,128</b>

扣除第 20 段所顯示的新類別／次類別後的所有類別數字

### 收入水平轉變趨勢

31. 過往調查結果顯示的收入水平轉變趨勢：

	<u>1998</u>	<u>2000</u>	<u>2002</u>	<u>2004</u>	<u>2006</u>	<u>2008</u>
\$5,000 或以下	242	457	451	898	339	155
\$5,001 - \$10,000	18,443	25,870	25,545	28,839	34,392	30,985
\$10,001 - \$15,000	28,919	29,364	31,255	27,769	33,280	38,899
\$15,001 - \$20,000	14,733	12,790	10,268	13,006	11,966	11,224
\$20,001 - \$30,000	4,760	5,401	3,513	4,587	5,367	5,129
\$30,001 - \$40,000	1,394	2,002	1,256	1,457	1,774	1,361
\$40,001 或以上	1,193	923	823	1,134	954	578
未有註明	9,856	860	5,810	2,564	5,027	10,904

扣除第 20 段所顯示的新類別／次類別後的所有類別數字

### 宜有教育程度轉變趨勢

32. 過往調查結果顯示的宜有教育程度轉變趨勢：

	<u>1998</u>	<u>2000</u>	<u>2002</u>	<u>2004</u>	<u>2006</u>	<u>2008</u>
學位程度或以上	2,142	3,691	3,034	7,142	7,196	6,201
專上程度	11,653	7,214	7,540	9,454	17,230	20,558
高中程度	23,773	29,362	32,664	32,264	36,454	41,116
初中程度或以下	32,379	35,924	31,780	29,763	30,426	26,092
未有註明	9,593	186	3,903	1,631	1,793	5,268

扣除第 20 段所顯示的新類別／次類別後的所有類別數字

### 重要註釋

33. 是次人力調查的結果反映 2008 年第三季的業內情況。自 2008 年第四季起，行業包括人力等各方面出現急遽而顯著的變化，而有關變化並無在本報告中反映。

## 培訓需求分析

34. 為應付僱員更替，僱主在考慮其他方法前，通常會透過內部晉升或聘用業內其他公司的人員填補空缺。這可視為現職從業員於業內的流動。雖然這批僱員亦會接受兼讀制培訓及／或在職培訓，但這些訓練並不會改變他們的人數。

35. 公司內部或各公司之間有一名員工流動，將引發連鎖效應，需要填補騰出的空缺。僱主或屬意從本行業僱員中招聘員工，直至再沒這類僱員可供聘用時，則須招募本行業以外的員工，即完成相關全日制教育／培訓課程的應屆畢業生，或曾參與全日制再培訓的人士。由於缺乏所需數據，兼為了簡化分析，是次分析未有涵蓋僱用其他行業僱員從事本行業的情況。

36. 在本報告內，「培訓需求」是指訓練非本行業僱員獲取加入本行業所需的必要技能的全日制學額需求，通常按年計算。假設一名僱員離開本行業，最終將由一名曾接受職前培訓／再培訓的人士加入本行業填補。若行業正在增長，業界對曾受職前培訓人士的需求，將隨職位數目相應增加。相反，若行業僱員人數減少，培訓需求將隨之縮減，甚至完全消失。自然流失是減少僱員人數的方法之一，但非唯一途徑。

37. 培訓需求是根據調查所得的僱員流動及流失數字，以及僱主認為僱員宜有教育及資歷水平的意見計算出來。

### 僱員宜有教育及資歷水平

38. 職位是指按照規定的職責及技術／能力層面履行指定的職務。採用資歷架構以及其相關概念，如資歷架構級別等，可適切描述某一職位包含的元素。由於本行業的資歷架構尚未確立，故將按教育及資歷水平進行分析。然而，僱主對具備什麼教育程度的人士可擔任什麼職位的意見不盡相同。調查嘗試找出僱主的看法，並以僱主屬意僱員宜有的教育及資歷水平為根據。有關結果可視為指定職位的最低入職標準。各職位的統計數字將按職級而非個別職位顯示，務求簡化分析。按僱員職級劃分的調查結果如下：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>技術員／ 操作工級</u>	<u>所有職級</u>
學位程度或以上	3,805	2,225	171	0	<b>6,201</b>
專上程度	2,176	7,767	9,561	1,054	<b>20,558</b>
高中程度	196	4,324	18,688	17,908	<b>41,116</b>
初中程度或以下	0	3	124	25,965	<b>26,092</b>
未有註明	419	757	1,383	2,709	<b>5,268</b>
<b>總計</b>	<b>6,596</b>	<b>15,076</b>	<b>29,927</b>	<b>47,636</b>	<b>99,235</b>

- 專上程度包括副學位（高級文憑、副學士、文憑、高級證書）及預科程度；
- 高中程度指中四及中五；
- 初中或以下指中三或以下程度，包括技工級程度

39. 按比例分配「未有註明」類別的數字後，僱員宜有教育及資歷水平如下：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>技術員／ 操作工級</u>	<u>所有職級</u>
學位程度或以上	4,063	2,343	179	0	<b>6,585</b>
專上程度	2,324	8,178	10,024	1,118	<b>21,643</b>
高中程度	209	4,553	19,593	18,988	<b>43,343</b>
初中程度或以下	0	3	130	27,531	<b>27,664</b>
<b>總計</b>	<b>6,596</b>	<b>15,076</b>	<b>29,927</b>	<b>47,636</b>	<b>99,235</b>

40. 按職級劃分的僱員人數百分比如下：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>技術員／ 操作工級</u>
學位程度或以上	61.60%	15.54%	0.60%	0.00%
專上程度	35.23%	54.24%	33.50%	2.35%
高中程度	3.17%	30.20%	65.47%	39.86%
初中程度或以下	0.00%	0.02%	0.43%	57.79%
<b>總計</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>100.00%</b>

### 流動與流失

41. 調查亦得出因各種原因在過去 12 個月內離職的僱員數字，亦即流動數字，結果如下：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>技術員／ 操作工級</u>	<u>所有職級</u>
繼續於物流貨運業任職／ 創業	145	596	3,671	5,426	<b>9,838</b>
於其他行業任職／創業； 移居外地、退休、進修或 其他原因	86	104	754	711	<b>1,655</b>
未有註明	82	195	1,369	2,041	<b>3,687</b>
<b>總計</b>	<b>313</b>	<b>895</b>	<b>5,794</b>	<b>8,178</b>	<b>15,180</b>

42. 在本報告內，「流失」僱員是指因投身其他行業任職／創業；移居外地、進修或其他原因而「永久」離開本行業的僱員。按比例分配「未有註明」類別的數字後，各職級的流失情況如下：

<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>技術員／ 操作工級</u>	<u>所有職級</u>
117	133	987	947	<b>2,184</b>

#### 培訓需求

43. 以下培訓需求是根據調查中有關流動及流失數字，以及僱主認為僱員宜有教育及資歷水平的結果計算出來：

	<u>經理級</u>	<u>主任級</u>	<u>文員級</u>	<u>技術員／ 操作工級</u>	<u>所有職級</u>
學位程度或以上	72	21	6	0	<b>99</b>
專上程度	41	72	331	22	<b>466</b>
高中程度	4	40	646	377	<b>1,068</b>
初中程度或以下	0	0	4	547	<b>552</b>
<b>總計</b>	<b>117</b>	<b>133</b>	<b>987</b>	<b>947</b>	<b>2,184</b>

#### 相關學科／分流供應的畢業生

44. 本會集中研究全日制學位及副學位程度的畢業生供應情況。本會發現香港理工大學、香港大學專業進修學院保良局社區書院，以及香港專業教育學院每年約提供 300 至 350 個副學位程度的高級文憑課程全日制學額，詳情如下：

- 國際物流管理高級文憑
- 物流學高級文憑(供應鏈及資訊科技管理)
- 物流及運輸營運高級文憑
- 商業物流學高級文憑
- 運輸及物資流程學高級文憑

45. 每年，香港理工大學、香港科技大學及香港大學約提供 250 至 300 個全日制學士學位課程學額，包括以下及其他課程：

- 工商管理學士／物流學（榮譽）理學士
- 國際航運及物流管理榮譽理學士
- 工學士(物流管理及工程學)
- 工學士(物流管理及工程學)及工商管理學士(綜合商業管理學)
- 物流管理工學士
- 工學士（後勤工程及物流管理）



## 供求分析

46. 相關學科及分流的全日制畢業生供求情況摘錄如下：

	<u>每年供應的畢業生</u>	<u>每年的培訓需求</u>
學位程度或以上	250-300	99
副學位	300-350	466
<b>總計</b>	<b>550-630</b>	<b>565</b>

## 重要註釋

47. 本行業的供求分析，是根據本行業於 2008 年第三季的人力調查結果而計算出來的。例如有關流動／流失率的數字，是指 2008 年 7 月前 12 個月的情況。本行業自 2008 年第四季起面對的重大改變，並未反映於是次調查的結果與分析中。雖然預期畢業生的供應情況相對穩定，惟業界對培訓的需求僅屬指示性質，且只反映調查進行期間的狀況。

## 物流貨運業發展概況

48. 每次進行人力調查後，本會嘗試將人力調查結果對照物流貨運業的過往發展趨勢，務求推算未來趨勢及對人力資源的影響。

49. 在近期的全球經濟危機爆發前，本會基於本行業與國際貿易的密切關係而去描述其趨勢。本會認為優越的地理位置、世界級基建設施、完善的地理和資訊聯繫網絡、追求卓越的文化，以及有利營商的環境，均是香港具競爭優勢之處。特別對本行業而言，頻繁的海運及航空班次、龐大的網絡、出入口公司集中，以及大量曾受專業教育及培訓、具備優秀技能的人力，造就香港成為華南地區航運貨櫃樞紐及空運樞紐。然而，香港未來作為多式聯運樞紐的地位，正面對國內港口／樞紐的龐大壓力和挑戰。過去十年，本會發現香港在國內的物流運輸業務佔有率增幅，遜於國內該行業的增長率。而其他指標，例如基建發展等，亦落後於國內其他地區。過往調查報告對近年發展的觀察結果摘錄如下：

香港作為海運貨櫃樞紐的重要價值下降

- 香港作為海運集運中心的地位正減弱；
- 轉運成本為不利因素日益顯著
- 貨櫃車司機老化，青黃不接

香港作為空運樞紐的地位提升

- 較優越網絡；
- 較有效率運作；
- 重複本港成為貨櫃樞紐的成功故事，惟長遠而言將受內地機場／樞紐的威脅

50. 本會曾於過往的報告中指出，本行業僱員主要從事承接托運業務／營運，較少人從事綜合物流業務／營運。有關現象源於大部分從業員所隸屬公司的業務性質。多年來，業內不少人士已掌握物流的知識及概念，惟並非所有人都能加以運用。隨著時間流逝，知識將會過時，除非從業員及僱主有機會參與提供完整的物流運作／服務，否則有關知識將無用武之地。

51. 就此而言，香港在人力發展方面正與內地競爭。本會認為內地從業員有真正實踐理論的機會。據觀察所得，內地有關物流貨運業的專上及大學課程愈來愈受歡迎。至於有關課程的水平，包括教職員的質素能否與本港的相比，仍有待觀察。

52. 本會亦留意到政府過往宣佈及落實多項有助支持本行業的政策。其中一項直接／非直接的工作是持續進修基金資助與本行業有關的課程，以及如技能提升計劃等其他課程。本會認為在經濟繁盛的時候，應認真考慮相比於其他發展迅速、蓬勃增長的行業，本行業的增長相對緩慢，會否因此流失人才。

53. 過往分析總括出的結論為：

- 香港是內地出入口的多式聯運樞紐；
- 香港的物流貨運業是促進香港作為多式聯運樞紐的主要行業之一；
- 香港需與內地的港口／樞紐競爭；
- 香港的物流貨運業需與內地同業競爭；
- 長遠而言，香港的港口／樞紐相對內地並無明顯優勢；
- 基建發展與其他改善措施是影響本港物流貨運業未來發展的關鍵因素；
- 應廣義詮釋「基建發展」，當中應包括人力資源／人力發展；
- 本港較內地港口／樞紐的優勝之處中，人力資源是其中一環；
- 為與內地的港口／樞紐競爭，香港必須強化本身的人力資源；
- 人力資源的優勢見於能力、效能和效率；
- 香港未來的人口，以及勞動人力正在下降；
- 能夠保持人力資源供求平衡的行業，預期能有可持續發展；
- 物流貨運業需與本地其他行業競爭人力資源；
- 物流貨運業的競爭力／吸引力一般；
- 物流貨運業需要尋求創新的方法，以吸引人才；
- 物流貨運業的僱主及僱員須在人力資源方面作更多投資

## 展望未來

54. 本會成立物流貨運業人力調查專題小組，諮詢業界意見，以更有效分析本行業的人力發展。專題小組舉行討論會、面談和小型討論，小組有時更邀請其他嘉賓參與，務求蒐集業界的意見，供本會及人力調查工作小組參考。

## 前路崎嶇

55. 世界正處於史無前例的動蕩期中。由金融市場紊亂引發的經濟下滑，導致全球的經濟及社會秩序出現迅速而巨大的根本改變，包括以下大家熟悉的情況：

- 銀根緊絀，利率靈活度下降；
- 主要進口國的消費者消費及購物行為轉趨保守，
- 全球化和擴展國際貿易的機會減少；
- 對物流貨運服務的需求減少；
- 勞動市場轉弱；以及其他情況。

56. 事態之發展牽連既深且廣，實在無法按邏輯推理分析已發生的轉變，從而預期全球經濟的復甦。本會認為於 49 段至 50 段所述因素仍然切合香港現今的情況，而下列不利於本港的發展和挑戰亦不容忽視：

- 內地基建及網絡的改善；
- 內地營運成本的改善；
- 內地人力質素的改善；以及其他情況

57. 由於固有的不利因素，如土地、基建發展和人力成本高昂等，本港的企業面對不少困難。政府可於部分範疇，特別是地方政府對地方政府層面上的事宜進行介入，惟確實範疇和介入的程度仍有待商榷。

58. 在企業層面而言，經濟收縮期間的傳統智慧是在質量及質素方面重新對資源／生產要素進行評估，並作出相應調整。

59. 根據透過面談和小型討論從工業家和人力資源專家蒐集得來的意見，本會得出的印象是在 2008 年最後一季，企業或許已在招聘人手方面作出若干預防措施，而企業亦將密切監察全球及本地經濟的發展，準備在有需要時採取更果斷的行動。鑑於 2009 年初外界對未來前景普遍抱持悲觀態度，有關行動或會於 2009 年或以後付諸實行。

## 人才儲備

60. 人力／人力資源可稱為人才／技能儲備，這是教育及培訓的累積成果。香港的職業教育及訓練系統完善，保持人才儲備不匱供應。

61. 職業教育及訓練的角色主要是為離校生提供職前培訓，以及提升在職僱員的能力。為應付離校生的需求，儘管經濟收縮，仍難以減少職前培訓的學額。本會認為，由於一職多能是行內慣例，學生應接受多於一個學科範疇的培訓。因此值得關注的是，學生應透過職前培訓學習何種技能，以增加畢業後的靈活性，便於加入多個關連密切的行業。本會認為有關課題值得進一步研究。

62. 對現有的人力而言，精簡人手代表暫時失去部分人才，或是永久失去整個人才／技能儲備。在職培訓需迅速回應轉變，僱員或會採納「及時雨」的學習方式。從教育機構的角度而言，培訓的能力，包括教學內容及方法等有持續性，若教學人手流失，後果會頗嚴重。假設行業精簡人手均會影響教學人手，因此需關注的問題是如何在復甦期之前及期間，保持及培養出能幹的教學人員。

63. 企業、決策者及其他持份者或有興趣知道，如何在配合目前趨勢和未來復甦的前提下，維持相當規模的人才／技能儲備。本會及專題小組曾討論有關議題，並得出以下意見：

- 現正是重新調整企業人力資源的適當時候，確保運作更具效率及效益；
- 現正是適當時候，可透過僱員自發行動，或由企業或社會主導，整合僱員的知識和技能／能力

64. 社會亦普遍認為年輕一輩投身工作時，其語文技巧／能力較遜色。本會觀察到有關技巧／能力須於學校階段培養，而這一問題需進一步探討。

### 內地機遇

65. 本港的就業機會有可能減少，探索及開拓港人在內地就業的機會可能是順理成章的行動。其他行業的調查統計數字顯示，前往內地工作的員工呈減少趨勢。換言之，內地的工作機會或不顯著及充分，又或未能具持續性。

66. 然而，有關內地的知識對在內地設有業務的企業十分重要，本會認為需加強相關訓練。

### 競逐人才

67. 人們在規劃自身事業途徑、決定是否加入某一行業時，會考慮該行業的前景。本會從上文的分析得出結論，認為本行業在吸引人才方面的競爭力中等。從新血加入的數字正在下降趨勢判斷，本行業有出現不平衡的風險，或會危及未來的發展。此情況會否隨著金融及經濟危機而出現改變，本會相信這仍有待觀察。

## 結論

68. 讀者必須謹慎詮釋分析結果。是次分析屬靜態分析，是根據在指定時段內，即 2008 年第三季進行的調查所得結果作分析。在進行調查至報告發表期間，無論是全球或本地，行內及行外均出現遽變。由於前段所述的原因，調查並無進行動態分析，以推斷業內人手的未來轉變。在人力供求方面，市場力量將驅使具備某水平學歷及資歷，但無法在本行成功求職的人士轉往其他行業求職。相反，僱主亦可能僱用其他行業中的有能之士。由於缺乏足夠數據，故未能找出修畢物流相關課程卻投身他業，以及非物流相關課程畢業生加入本行業的人數。調查因而未有就此進行分析。此外，許多自資、由持續進修基金及其他方式資助的兼讀制學位及副學位程度課程，亦各具宗旨和切合不同需要，而這些課程亦未有納入分析範圍。為商業及服務界別的行業如物流貨運業等進行全面分析的複雜性及難度，由此可見一斑。

69. 本會認為，目前情勢瞬息萬變，事件層出不窮，加上經濟波動難測，分析結果可能轉瞬已因最新事故而不再適用，只能反映短期情況；因此，難以就中至長期的發展作分析推算。本會將於恰當時間檢討行業最新發展，並蒐集業界對前景的意見，以便進行有意義的分析，以及視乎情況公布結果。

- 報告完結 -

## 職業訓練局 訓練委員會職權範圍

1. 確定業內人力需求，包括收集、分析相關的人力和學生／見習員統計數字，以及關於社會經濟、科技及人力市場發展的資料。
2. 評估及研究本業的人力供求是否平衡。
3. 就發展業內專業教育及訓練設施以應付人力需求，向職業訓練局提供意見。
4. 就相關學科的課程發展方向及策略，向香港專業教育學院（IVE）、訓練及發展中心提出建議。
5. 就香港專業教育學院（IVE）、訓練及發展中心的課程策劃、課程發展及質素保證制度提供意見。
6. 擬訂本業主要職務的工作範圍，界定所需技能、知識及訓練。
7. 建議本業主要職務訓練方案，訂定每種技能所需的訓練期。
8. 對技術評估、技能測驗及證書頒發制度提供意見，以確定從業員、學徒及見習員的技能水平。
9. 就舉辦本業主要行業的技能比賽提供意見，以推廣專業教育及訓練，並派員參加國際賽事。
10. 就業內專業教育及訓練的發展及推廣事宜，與僱主、僱主聯會、工會、專業學會、訓練及教育機構、政府部門等聯絡。
11. 舉辦有關行內專業教育及訓練的研討會／會議／座談會。
12. 就推廣訓練委員會的工作，以及職訓局專業教育與培訓課程的宣傳事宜提供意見。
13. 向職訓局呈交訓練委員會的週年工作報告，並就相關學科的課程策略提出建議。
14. 根據《職業訓練局條例》第 7 條，執行局方所委派的其他任務。

職業訓練局  
物流貨運業訓練委員會  
委員名單

提名機構

**主席**

何志盛博士

香港運輸物流學會

**委員**

陳明亮先生

海港運輸業總工會

朱 桓先生

某空運貨站公司

鄭會友先生

香港物流協會

張迅文先生

海運學會

周燦強先生

香港貨倉聯合會

馮寶怡女士

航空公司貨運聯絡小組

林慶文先生

香港貨櫃碼頭商會

鄧永漢工程師

貨車車隊聯會

梁志恒博士

本地大專院校

李恩霖先生

香港貨運物流業協會

李慧貞女士

香港鐵路有限公司

盧兆民先生

獨立人士

盧麗華博士

香港船東會

鄧鳳鳴女士

國際速遞協會

黃超傑先生

香港定期班輪協會

黃漢樞博士

本地大專院校

英棋媛女士

職業訓練局執行幹事代表

勞永鎰先生

顧問

**秘書**

李慶偉先生

職業訓練局  
物流貨運業訓練委員會  
人力調查工作小組委員名單

何志盛博士 (召集人)

陳有榮先生

鄭會友先生

周燦強先生

朱 桓先生

馮寶怡女士

林慶文先生

利少佳先生

梁志恒博士

李慧貞女士

勞永鎰先生

黃漢樞博士

李慶偉先生 (秘書)



職業訓練局  
物流貨運業訓練委員會  
人力調查專題小組委員名單

提名機構

羅四維先生	航空公司貨運聯絡小組
陳屯尼先生	香港運輸物流學會
梁礪鋒先生	香港工業總會
徐翰恩先生	香港工業總會
李恩霖先生	香港貨運物流業協會
李耀光先生	香港貨櫃碼頭商會
盧頌德先生	香港貨櫃車主聯會
周燦強先生	香港貨倉聯合會
陳智菁女士	國際速遞協會
張儒學先生	國際速遞協會
黃超傑先生	香港定期班輪協會
潘淑玲女士	香港定期班輪協會
黃輔華先生	香港物流協會
梁剛銳先生	香港物流發展局
張梓昌博士	香港生產力促進局
陳偉堅先生	香港生產力促進局
包榮先生	香港船東會
何立基先生	香港付貨人委員會

## 香港標準行業分類 1.1 版

1. 「香港標準行業分類」(HSIC)採用聯合國的標準，作為香港各經濟行業分類的標準。HSIC 第 1 至 9 類如下：

### 第一界別

農業及漁業 (HSIC 第 1 類)

### 第二界別

採礦及採石業 (HSIC 第 2 類)

製造業 (HSIC 第 3 類)

電力、燃氣及水務業 (HSIC 第 4 類)

建造業 (HSIC 第 5 類)

### 第三界別

批發、零售、進出口貿易、飲食及酒店業 (HSIC 第 6 類)

運輸、倉庫及通訊業 (HSIC 第 7 類)

金融、保險、地產及商用服務業 (HSIC 第 8 類)

社區、社會及個人服務業 (HSIC 第 9 類)

2. 物流貨運業人力調查涵蓋的行業大部分屬 HSIC 第 7 類，但是次調查亦挑選特定門類，再輔以經挑選的個案作補充。

### 運輸、倉庫及通訊業

行業編碼 = 7

行業編碼	名稱
711100	公共巴士服務
711200	電車服務及鐵路運輸服務
711301	市區的士服務
711302	新界的士服務
711303	大嶼山的士服務
711400	公共小型巴士服務
711500	專線小型巴士服務
711600	保姆車服務
711700	配備司機的載客車出租服務

行業編碼	名稱
711900	其他陸路客運服務
<b>712100</b>	<b>貨車運輸服務</b>
<b>712900</b>	<b>其他陸路貨運服務</b>
713100	停車場服務
713200	汽車隧道服務
713901	不配備司機的載客車出租服務
<b>714101</b>	<b>船務代理及經理</b>
<b>714102</b>	<b>海外船公司駐港辦事處</b>
<b>714200</b>	<b>遠洋輪船船東</b>
<b>714300</b>	<b>遠洋輪船營運者</b>
714400	往來港澳船隻船東及營運者
715100	港海渡輪服務
715200	小型渡輪服務
715300	小型機動船(嘩啦嘩啦) 及其他港內海上客運服務
<b>715400</b>	<b>港內海上貨運服務</b>
<b>716101</b>	<b>貨櫃裝卸及貨櫃租賃服務</b>
<b>716102</b>	<b>貨櫃碼頭</b>
<b>716901</b>	<b>貨物起卸服務</b>
<b>716999</b>	<b>其他海上運輸輔助服務</b>
<b>717101</b>	<b>以香港為根據地的航空公司及直升機公司</b>
<b>717102</b>	<b>海外航空公司駐港辦事處</b>
<b>717200</b>	<b>空運輔助服務</b>
718100	旅行社及票務代理
<b>718200</b>	<b>航空貨運代理</b>
<b>718300</b>	<b>海上貨運代理</b>
<b>718400</b>	<b>船隻經紀</b>
<b>718500</b>	<b>包裝及裝箱服務</b>
<b>718600</b>	<b>驗貨、抽樣檢驗及稱量服務</b>
<b>721100</b>	<b>冷藏庫</b>
<b>721200</b>	<b>貨倉及其他倉庫服務</b>
732101	有線固定電訊網絡服務

行業編碼	名稱
732199	其他固定電訊網絡服務
732200	傳呼服務
732901	流動電訊服務
732902	互聯網接駁服務
732903	衛星通訊服務
732999	其他電訊服務
733000	其他通訊服務(電訊服務除外)

補充調查範圍

	<i>貨運碼頭</i>
	<i>船務經紀及船東</i>
	<i>大型車隊東主公司</i>
	<i>國際速遞公司</i>
	<i>其他物流業服務公司</i>

物流貨運業人力調查範圍內的相關行業以*斜體*字顯示

資料來源：政府統計處

## 人力調查其他結果

表 1 僱員人數、空缺及人力需求

職位 編號	所有類別	調查期間的 僱員人數	調查期間的 空缺數目	人力需求
001	董事總經理／行政總管／總經理	922	1	923
101	市場拓展／營業／商務經理	1,783	8	1,791
102	貨運／顧客服務／文件經理	1,595	1	1,596
103	分發／調度／操作經理	1,340	3	1,343
104	貨運站／倉庫運作經理	477	0	477
105	航線經理	99	0	99
106	貨物裝卸經理	39	0	39
107	技術／機械操作經理	81	0	81
108	船舶艙載計劃／船舶技術經理	80	0	80
109	船舶買賣／租賃經理及經紀	88	0	88
110	保險事務／理賠經理	40	0	40
116	海運貨物測量師	52	5	57
201	市場拓展／營業／商務／定價主任	2,621	14	2,635
202	貨運／顧客服務／文件主任	4,223	19	4,242
203	操作／運輸主任／送貨組長／管工	5,044	83	5,127
204	貨運站／倉庫運作主任	2,183	6	2,189
206	裝卸主任／船舶協調主任／上船檢驗員	288	0	288
207	技術／機械操作主任／機械修理及保養主任	356	0	356
209	船舶買賣／租賃主任	109	0	109
210	保險事務主任	65	1	66
211	貨櫃調動／設備管理主任	81	0	81
216	貨物量度員	106	5	111
301	市場拓展／商務／營業助理／代表	4,090	81	4,171
302	貨運／顧客服務／文件文員	12,731	243	12,974
303	調度／操作文員	9,140	115	9,255
304	貨運站／倉庫事務文員	3,401	21	3,422
307	技術助理	191	0	191
309	船舶買賣／租賃助理	152	4	156
310	保險事務文員	40	0	40
311	貨櫃／設備管理文員	182	0	182

職位 編號	所有類別	調查期間的 僱員人數	調查期間的 空缺數目	人力需求
403	搬運工人	11,593	348	11,941
404	貨運站／倉庫操作員／理貨員／檢查員	7,414	125	7,539
406	裝卸工人	1,378	1	1,379
407	技術及機械設備技術員及操作員	653	4	657
412	貨櫃拖車司機	6,341	74	6,415
413	大型貨車司機	14,114	204	14,318
414	小型貨車司機	2,779	36	2,815
415	搬運及裝卸機械鏟車操作員	3,364	32	3,396
		<b>99,235</b>	<b>1,434</b>	<b>100,669</b>

表 2 按類別及職稱劃分人力需求

職位 編號	職稱	(a) 貨倉及冷藏庫	(b) 貨運站 (包括港鐵)	(c) 貨車及貨櫃運輸	(d) 空運	(e) 貨運代理	(f) 船上/碼頭裝卸貨物	(g) 國際速遞	(h) 其他物流服務經營者	(i) 海運	所有類別
001	董事總經理/行政總管/總經理	51	13	111	14	547	18	18	6	144	<b>922</b>
101	市場拓展/營業/商務經理	41	23	261	48	1,118	8	76	4	204	<b>1,783</b>
102	貨運/顧客服務/文件經理	26	12	78	68	1,230	5	46	8	122	<b>1,595</b>
103	分發/調度/操作經理	25	9	335	33	757	9	86	14	72	<b>1,340</b>
104	貨運站/倉庫運作經理	143	43	100	21	118	14	7	18	13	<b>477</b>
105	航線經理	0	2	0	1	26	4	0	0	66	<b>99</b>
106	貨物裝卸經理	1	6	1	0	8	18	0	0	5	<b>39</b>
107	技術/機械操作經理	6	30	2	2	1	2	0	0	38	<b>81</b>
108	船舶艙載計劃/船舶技術經理	0	0	0	0	17	0	0	0	63	<b>80</b>
109	船舶買賣/租賃經理及經紀	0	0	0	0	4	0	0	0	84	<b>88</b>
110	保險事務/理賠經理	0	2	0	0	14	0	0	0	24	<b>40</b>
116	海運貨物測量師	51	0	0	0	0	0	0	0	1	<b>52</b>
201	市場拓展/營業/商務/定價主任	85	32	890	64	1,175	16	126	6	227	<b>2,621</b>
202	貨運/顧客服務/文件主任	45	74	541	141	3,030	18	98	12	264	<b>4,223</b>
203	操作/運輸主任/送貨組長/管工	94	127	2,563	79	1,732	37	182	44	186	<b>5,044</b>
204	貨運站/倉庫運作主任	518	406	369	244	471	71	30	41	33	<b>2,183</b>
206	裝卸主任/船舶協調主任/上船檢驗員	4	57	30	0	21	87	0	0	89	<b>288</b>
207	技術/機械操作主任/機械修理及保養主任	21	183	8	5	4	6	0	0	129	<b>356</b>
209	船舶買賣/租賃主任	0	0	0	0	10	4	0	0	95	<b>109</b>
210	保險事務主任	1	8	0	0	18	0	7	0	31	<b>65</b>
211	貨櫃調動/設備管理主任	0	13	42	0	12	0	0	0	14	<b>81</b>
216	貨物量度員	106	0	0	0	0	0	0	0	0	<b>106</b>
301	市場拓展/商務/營業助理/代表	101	17	1,237	46	2,056	15	220	30	368	<b>4,090</b>

職位 編號	職稱	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	
		貨倉及冷藏庫	貨運站 (包括港鐵)	貨車及貨櫃運輸	空運	貨運代理	船上/碼頭裝卸貨物	國際速遞	其他物流服務經營者	海運	所有類別
302	貨運/顧客服務/文件文員	272	82	2,274	360	8,456	60	424	35	768	<b>12,731</b>
303	調度/操作文員	266	294	3,058	116	4,623	100	324	24	335	<b>9,140</b>
304	貨運站/倉庫事務文員	914	460	675	80	1,082	38	20	28	104	<b>3,401</b>
307	技術助理	0	41	18	0	7	4	0	0	121	<b>191</b>
309	船舶買賣/租賃助理	0	0	0	0	4	0	0	0	148	<b>152</b>
310	保險事務文員	0	5	0	0	7	0	0	0	28	<b>40</b>
311	貨櫃/設備管理文員	2	114	13	0	28	0	0	0	25	<b>182</b>
403	搬運工人	505	477	7,731	693	618	65	983	508	13	<b>11,593</b>
404	貨運站/倉庫操作員/理貨員/檢查員	2,064	1,438	1,543	549	1,397	159	41	203	20	<b>7,414</b>
406	裝卸工人	4	21	202	0	56	993	0	0	102	<b>1,378</b>
407	技術及機械設備技術員及操作員	85	390	56	55	0	24	0	0	43	<b>653</b>
412	貨櫃拖車司機	26	0	6,180	0	111	3	0	0	21	<b>6,341</b>
413	大型貨車司機	260	4	12,027	1,035	373	2	205	203	5	<b>14,114</b>
414	小型貨車司機	39	0	1,581	340	90	0	722	7	0	<b>2,779</b>
415	搬運及裝卸機械鏟車操作員	633	1,004	862	228	459	66	0	57	55	<b>3,364</b>
		<b>6,389</b>	<b>5,387</b>	<b>42,788</b>	<b>4,222</b>	<b>29,680</b>	<b>1,846</b>	<b>3,615</b>	<b>1,248</b>	<b>4,060</b>	<b>99,235</b>



表 3 僱員宜有教育程度及資歷

行業類別	職級	學士學位 或以上	專業團體 成員	副學位 (副學士/ 高級文憑/ 高級證書)	文憑/證書	預科程度 (中六至中七)	高中程度 (中四至中五)	初中程度 (中三或以下)	技工證書	未有說明	總計
(a) 貨倉及 冷藏庫	經理級	167	23	52	25	63	0	0	0	14	<b>344</b>
	主任級	42	0	140	168	201	288	0	0	35	<b>874</b>
	文員級	2	0	10	5	286	1,225	10	0	17	<b>1,555</b>
	操作工級	0	0	0	0	86	1,664	1,693	68	105	<b>3,616</b>
	所有職級	211	23	202	198	636	3,177	1,703	68	171	<b>6,389</b>
(b) 貨運站 (包括港鐵)	經理級	71	0	0	51	0	0	0	0	18	<b>140</b>
	主任級	489	0	0	363	0	0	0	0	48	<b>900</b>
	文員級	0	0	0	329	211	405	0	0	68	<b>1,013</b>
	操作工級	0	0	0	89	145	2,820	157	0	123	<b>3,334</b>
	所有職級	560	0	0	832	356	3,225	157	0	257	<b>5,387</b>
(c) 貨車及 貨櫃運輸	經理級	348	6	194	52	150	49	0	0	89	<b>888</b>
	主任級	128	0	345	395	1,191	2,169	0	0	215	<b>4,443</b>
	文員級	0	0	0	0	2,258	4,685	69	0	263	<b>7,275</b>
	操作工級	0	0	0	0	612	9,040	18,468	433	1,629	<b>30,182</b>
	所有職級	476	6	539	447	4,211	15,943	18,537	433	2,196	<b>42,788</b>
(d) 空運	經理級	178	0	9	0	0	0	0	0	0	<b>187</b>
	主任級	43	2	26	403	59	0	0	0	0	<b>533</b>
	文員級	0	0	0	0	365	237	0	0	0	<b>602</b>
	操作工級	0	0	0	0	0	603	2,064	233	0	<b>2,900</b>
	所有職級	221	2	35	403	424	840	2,064	233	0	<b>4,222</b>
(e) 貨運代理	經理級	2,098	82	436	235	664	146	0	0	179	<b>3,840</b>
	主任級	1,079	24	1,029	978	1,480	1,606	0	0	277	<b>6,473</b>
	文員級	94	0	64	8	4,687	10,796	0	0	614	<b>16,263</b>
	操作工級	0	0	0	0	101	1,233	1,429	24	317	<b>3,104</b>
	所有職級	3,271	106	1,529	1,221	6,932	13,781	1,429	24	1,387	<b>29,680</b>
(f) 船上/碼頭 裝卸貨物	經理級	29	0	14	11	19	0	0	0	5	<b>78</b>
	主任級	2	12	4	31	89	79	3	0	19	<b>239</b>
	文員級	0	0	0	0	47	151	0	0	19	<b>217</b>
	操作工級	0	0	0	0	16	214	925	7	150	<b>1,312</b>
	所有職級	31	12	18	42	171	444	928	7	193	<b>1,846</b>

行業類別	職級	學士學位 或以上	專業團體 成員	副學位 (副學士/ 高級文憑/ 高級證書)	文憑/證書	預科程度 (中六至中七)	高中程度 (中四至中五)	初中程度 (中三或以下)	技工證書	未有說明	總計
(g) 國際速遞	經理級	187	0	1	0	1	0	0	0	44	233
	主任級	148	0	186	11	3	12	0	0	83	443
	文員級	0	0	41	0	262	456	0	0	229	988
	操作工級	0	0	0	0	0	669	897	0	385	1,951
	所有職級	335	0	228	11	266	1,137	897	0	741	3,615
(h) 其他 物流服務 經營者	經理級	34	0	11	1	0	1	0	0	3	50
	主任級	2	0	54	17	12	15	0	0	3	103
	文員級	0	0	0	0	69	42	0	0	6	117
	操作工級	0	0	0	0	0	799	179	0	0	978
	所有職級	36	0	65	18	81	857	179	0	12	1,248
(i) 海運	經理級	579	3	140	25	22	0	0	0	67	836
	主任級	253	1	135	311	136	155	0	0	77	1,068
	文員級	75	0	85	2	832	691	45	0	167	1,897
	操作工級	0	0	0	0	5	87	153	14	0	259
	所有職級	907	4	360	338	995	933	198	14	311	4,060
所有類別	經理級	3,691	114	857	400	919	196	0	0	419	6,596
	主任級	2,186	39	1,919	2,677	3,171	4,324	3	0	757	15,076
	文員級	171	0	200	344	9,017	18,688	124	0	1,383	29,927
	操作工級	0	0	0	89	965	17,129	25,965	779	2,709	47,636
	所有職級	6,048	153	2,976	3,510	14,072	40,337	26,092	779	5,268	99,235

表 4 收入水平

行業類別	職級	\$5,000 或以下	\$5,001   \$10,000	\$10,001   \$15,000	\$15,001   \$20,000	\$20,001   \$30,000	\$30,001   \$40,000	\$40,001 或以上	未有說明	總計
(a) 貨倉及 冷藏庫	經理級	0	0	8	113	128	63	26	6	<b>344</b>
	主任級	0	0	503	273	59	3	0	36	<b>874</b>
	文員級	0	776	648	40	0	0	0	91	<b>1,555</b>
	操作工級	0	2,497	827	120	0	0	0	172	<b>3,616</b>
	所有職級	0	3,273	1,986	546	187	66	26	305	<b>6,389</b>
(b) 貨運站 (包括港鐵)	經理級	0	0	0	0	16	25	14	85	<b>140</b>
	主任級	0	0	0	113	316	0	0	471	<b>900</b>
	文員級	0	0	310	12	0	0	0	691	<b>1,013</b>
	操作工級	0	1,388	494	194	0	0	0	1,258	<b>3,334</b>
	所有職級	0	1,388	804	319	332	25	14	2,505	<b>5,387</b>
(c) 貨車及 貨櫃運輸	經理級	0	0	0	281	433	56	26	92	<b>888</b>
	主任級	0	32	2,473	1,333	369	0	0	236	<b>4,443</b>
	文員級	35	4,331	1,907	449	0	0	0	553	<b>7,275</b>
	操作工級	119	11,200	15,011	2,092	181	0	0	1,579	<b>30,182</b>
	所有職級	154	15,563	19,391	4,155	983	56	26	2,460	<b>42,788</b>
(d) 空運	經理級	0	0	0	1	20	107	42	17	<b>187</b>
	主任級	0	0	20	346	134	0	0	33	<b>533</b>
	文員級	0	0	384	191	0	0	0	27	<b>602</b>
	操作工級	0	214	2,280	0	0	0	0	406	<b>2,900</b>
	所有職級	0	214	2,684	538	154	107	42	483	<b>4,222</b>
(e) 貨運代理	經理級	0	0	0	754	1,583	722	262	519	<b>3,840</b>
	主任級	0	50	2,136	2,596	873	17	6	795	<b>6,473</b>
	文員級	0	6,942	6,697	734	53	0	0	1,837	<b>16,263</b>
	操作工級	0	1,463	1,129	74	0	0	0	438	<b>3,104</b>
	所有職級	0	8,455	9,962	4,158	2,509	739	268	3,589	<b>29,680</b>

行業類別	職級	\$5,000 或以下	\$5,001	\$10,001	\$15,001	\$20,001	\$30,001	\$40,001 或以上	未有說明	總計
			 \$10,000	 \$15,000	 \$20,000	 \$30,000	 \$40,000			
(f) 船上／碼頭 裝卸貨物	經理級	0	0	0	12	24	26	5	11	<b>78</b>
	主任級	0	0	70	73	70	0	0	26	<b>239</b>
	文員級	0	54	83	41	0	0	0	39	<b>217</b>
	操作工級	0	120	959	13	0	0	0	220	<b>1,312</b>
	所有職級	0	174	1,112	139	94	26	5	296	<b>1,846</b>
(g) 國際速遞	經理級	0	0	0	3	84	22	79	45	<b>233</b>
	主任級	0	0	1	241	117	0	0	84	<b>443</b>
	文員級	0	387	284	85	0	0	0	232	<b>988</b>
	操作工級	0	357	1,076	130	0	0	0	388	<b>1,951</b>
	所有職級	0	744	1,361	459	201	22	79	749	<b>3,615</b>
(h) 其他 物流服務 經營者	經理級	0	0	0	2	8	31	3	6	<b>50</b>
	主任級	0	0	27	71	1	0	0	4	<b>103</b>
	文員級	0	30	75	0	0	0	0	12	<b>117</b>
	操作工級	0	777	199	1	0	0	0	1	<b>978</b>
	所有職級	0	807	301	74	9	31	3	23	<b>1,248</b>
(i) 海運	經理級	0	0	0	117	185	279	115	140	<b>836</b>
	主任級	0	15	298	230	385	10	0	130	<b>1,068</b>
	文員級	1	317	871	463	27	0	0	218	<b>1,897</b>
	操作工級	0	35	129	26	63	0	0	6	<b>259</b>
	所有職級	1	367	1,298	836	660	289	115	494	<b>4,060</b>
所有類別	經理級	0	0	8	1,283	2,481	1,331	572	921	<b>6,596</b>
	主任級	0	97	5,528	5,276	2,324	30	6	1,815	<b>15,076</b>
	文員級	36	12,837	11,259	2,015	80	0	0	3,700	<b>29,927</b>
	操作工級	119	18,051	22,104	2,650	244	0	0	4,468	<b>47,636</b>
	所有職級	<b>155</b>	<b>30,985</b>	<b>38,899</b>	<b>11,224</b>	<b>5,129</b>	<b>1,361</b>	<b>578</b>	<b>10,904</b>	<b>99,235</b>

表 5 貨運／運輸／物流業過去 12 個月離職員工去向

離職原因		經理級	主任級	文員級	操作工級	總計
(a) 貨倉及 冷藏庫	1. 於物流貨運業任職／創業	13	11	159	568	<b>751</b>
	2. 於非物流貨運業任職／創業	4	0	13	82	<b>99</b>
	3. 移民、退休、進修或其他原因	2	8	10	24	<b>44</b>
	原因不明	1	1	52	177	<b>231</b>
	總計	20	20	234	851	<b>1,125</b>
(b) 貨運站 (包括港鐵)	1. 於物流貨運業任職／創業	1	2	12	11	<b>26</b>
	2. 於非物流貨運業任職／創業	0	0	42	4	<b>46</b>
	3. 移民、退休、進修或其他原因	1	9	4	8	<b>22</b>
	原因不明	4	49	26	277	<b>356</b>
	總計	6	60	84	300	<b>450</b>
(c) 貨車及 貨櫃運輸	1. 於物流貨運業任職／創業	1	67	597	4,195	<b>4,860</b>
	2. 於非物流貨運業任職／創業	0	4	41	194	<b>239</b>
	3. 移民、退休、進修或其他原因	32	40	131	355	<b>558</b>
	原因不明	1	11	374	1,476	<b>1,862</b>
	總計	34	122	1,143	6,220	<b>7,519</b>
(d) 空運	1. 於物流貨運業任職／創業	1	16	12	193	<b>222</b>
	2. 於非物流貨運業任職／創業	0	1	4	9	<b>14</b>
	3. 移民、退休、進修或其他原因	1	5	5	8	<b>19</b>
	原因不明	0	6	10	18	<b>34</b>
	總計	2	28	31	228	<b>289</b>
(e) 貨運代理	1. 於物流貨運業任職／創業	122	453	2,732	343	<b>3,650</b>
	2. 於非物流貨運業任職／創業	8	17	266	8	<b>299</b>
	3. 移民、退休、進修或其他原因	14	8	196	0	<b>218</b>
	原因不明	66	116	864	22	<b>1,068</b>
	總計	210	594	4,058	373	<b>5,235</b>

		離職原因	經理級	主任級	文員級	操作工級	總計
(f) 船上／碼頭 裝卸貨物	1. 於物流貨運業任職／創業		0	9	9	22	<b>40</b>
	2. 於非物流貨運業任職／創業		0	0	2	8	<b>10</b>
	3. 移民、退休、進修或其他原因		0	0	8	0	<b>8</b>
	原因不明		0	0	2	46	<b>48</b>
	總計		0	9	21	76	<b>106</b>
(g) 國際速遞	1. 於物流貨運業任職／創業		0	1	11	27	<b>39</b>
	2. 於非物流貨運業任職／創業		0	0	1	1	<b>2</b>
	3. 移民、退休、進修或其他原因		4	0	4	3	<b>11</b>
	原因不明		4	4	12	19	<b>39</b>
	總計		8	5	28	50	<b>91</b>
(h) 其他 物流服務 經營者	1. 於物流貨運業任職／創業		1	0	17	67	<b>85</b>
	2. 於非物流貨運業任職／創業		0	1	2	5	<b>8</b>
	3. 移民、退休、進修或其他原因		0	0	0	2	<b>2</b>
	原因不明		0	3	2	0	<b>5</b>
	總計		1	4	21	74	<b>100</b>
(i) 海運	1. 於物流貨運業任職／創業		6	37	122	0	<b>165</b>
	2. 於非物流貨運業任職／創業		2	7	6	0	<b>15</b>
	3. 移民、退休、進修或其他原因		18	4	19	0	<b>41</b>
	原因不明		6	5	27	6	<b>44</b>
	總計		32	53	174	6	<b>265</b>
所有類別	1. 於物流貨運業任職／創業		145	596	3,671	5,426	<b>9,838</b>
	2. 於非物流貨運業任職／創業		14	30	377	311	<b>732</b>
	3. 移民、退休、進修或其他原因		72	74	377	400	<b>923</b>
	原因不明		82	195	1,369	2,041	<b>3,687</b>
	總計		313	895	5,794	8,178	<b>15,180</b>

## 人力調查更詳細分析

職位轉變

1. 本會比較過去六個人力調查的結果，以找出業內職位的轉變趨勢。各類別的工作／職位分類如下：

管理類別

營業／市場拓展／商業服務類別

操作類別；及

基本技能工作

特別闡出「海事服務專門工作」分類，以顯示這批工作性質獨特的僱員的人數。

表 1 所有類別職位的人力變動趨勢

職位 編號	所有界別	1998	2000	2002	2004	2006	2008
<b>管理類別</b>							
001	董事總經理／行政總管／總經理	1,533	1,527	1,540	1,133	1,074	923
<b>營業／市場拓展／商業服務類別</b>							
101	市場拓展／營業／商務經理	2,090	1,786	1,533	1,707	1,703	1,791
102	貨運／顧客服務／文件經理	694	1,079	812	1,239	1,170	1,596
201	市場拓展／營業／商務／定價主任	1,646	2,785	2,913	2,329	2,803	2,635
202	貨運／顧客服務／文件主任	1,583	2,600	1,902	2,822	3,045	4,242
301	市場拓展／商務／營業助理／代表	4,707	1,817	1,552	3,073	5,161	4,171
302	貨運／顧客服務／文件文員	9,103	6,096	5,866	9,611	9,442	12,974
	<i>小計</i>	<i>19,823</i>	<i>16,163</i>	<i>14,578</i>	<i>20,781</i>	<i>23,324</i>	<i>27,409</i>
<b>操作類別</b>							
103	分發／調度／操作經理	1,766	798	691	1,104	1,206	1,343
104	貨運站／倉庫運作經理	436	401	667	474	493	477
107	技術／機械操作經理	165	86	79	111	120	81
203	操作／運輸主任／送貨組長／管工	4,310	3,163	2,818	3,822	4,902	5,127

職位 編號	所有界別	1998	2000	2002	2004	2006	2008
204	貨運站／倉庫運作主任	1,291	1,558	2,575	1,848	1,822	2,189
207	技術／機械操作主任／機械 修理及保養主任	265	356	231	289	335	356
211	貨櫃調動／設備管理主任	301	126	157	127	155	81
303	調度／操作文員	4,144	8,620	6,100	5,747	8,916	9,255
304	貨運站／倉庫事務文員	2,128	1,363	1,638	2,711	3,459	3,422
307	技術助理	72	124	16	64	152	191
311	貨櫃／設備管理文員	1,063	122	353	357	268	182
	<i>小計</i>	<i>15,941</i>	<i>16,717</i>	<i>15,325</i>	<i>16,654</i>	<i>21,828</i>	<i>22,704</i>
<b>海事服務專門工作</b>							
105	航線經理	114	149	76	96	83	99
106	貨物裝卸經理	46	18	35	55	74	39
108	船舶艙載計劃／船舶技術經 理	72	68	20	55	112	80
109	船舶買賣／租賃經理及經紀	74	270	2	112	103	88
110	保險事務／理賠經理	92	70	23	28	39	40
206	裝卸主任／船舶協調主任／ 上船檢驗員	111	318	163	263	282	288
208	船舶艙載計劃／船舶技術主 任	0	0	0	0	19	0
209	船舶買賣／租賃主任	6	40	30	25	189	109
210	保險事務主任	56	43	11	33	54	66
308	船舶艙載計劃／船舶技術文 員	0	0	0	0	6	0
309	船舶買賣／租賃助理	5	31	0	66	160	156
310	保險事務文員	13	19	4	23	41	40
	<i>小計</i>	<i>589</i>	<i>1,026</i>	<i>364</i>	<i>756</i>	<i>1,162</i>	<i>1,005</i>
<b>基本技能工作</b>							
403	搬運工人	10,183	8,620	10,189	8,989	11,830	11,941
404	貨運站／倉庫操作員／理貨 員／檢查員	2,931	4,381	5,005	5,458	5,634	7,539
406	裝卸工人	81	1,050	169	650	1,048	1,379
407	技術及機械設備技術員及操 作員	989	611	910	743	607	657



職位 編號	所有界別	<u>1998</u>	<u>2000</u>	<u>2002</u>	<u>2004</u>	<u>2006</u>	<u>2008</u>
412	貨櫃拖車司機	8,489	8,078	9,763	8,378	8,606	6,415
413	大型貨車司機	15,479	16,324	13,437	13,613	13,610	14,318
414	小型貨車司機	2,109	2,506	1,427	1,506	1,989	2,815
415	搬運及裝卸機械鏟車操作員	2,586	2,972	2,550	2,658	3,554	3,396
	<i>小計</i>	<i>42,847</i>	<i>44,542</i>	<i>43,450</i>	<i>41,995</i>	<i>46,878</i>	<i>48,460</i>
	<b>未有說明</b>						
150+	其他未能歸類的管理級職位	231	233	198	4	32	57
250+	其他未能歸類的主任級／行政級職位	243	137	149	1	64	111
350+	其他未能歸類的文員級職位	121	149	379	0	0	0
450+	其他未能歸類的操作工級職位	0	444	273	0	0	0
	<i>小計</i>	<i>595</i>	<i>963</i>	<i>999</i>	<i>5</i>	<i>96</i>	<i>168</i>
	<b>總計</b>	<b>81,328</b>	<b>80,938</b>	<b>76,256</b>	<b>81,324</b>	<b>94,362</b>	<b>100,669</b>

2. 下列各圖亦顯示有關趨勢：

圖 1 所有類別職位的轉變趨勢

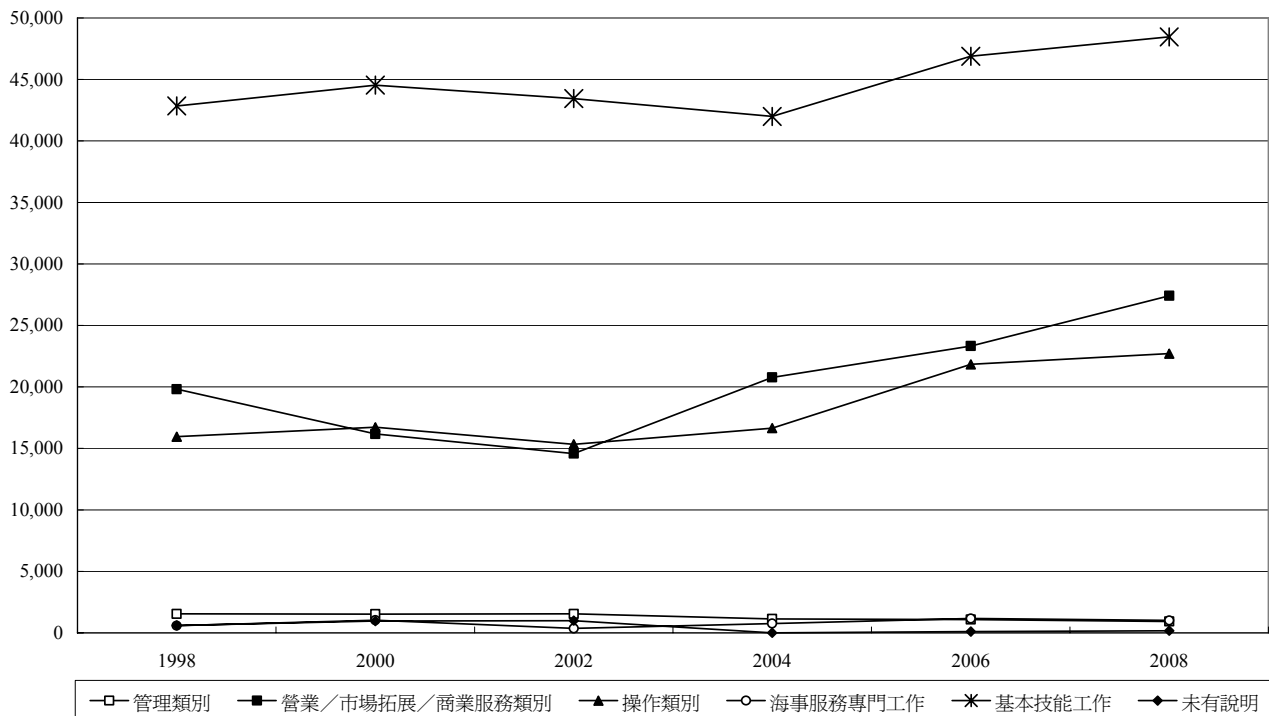
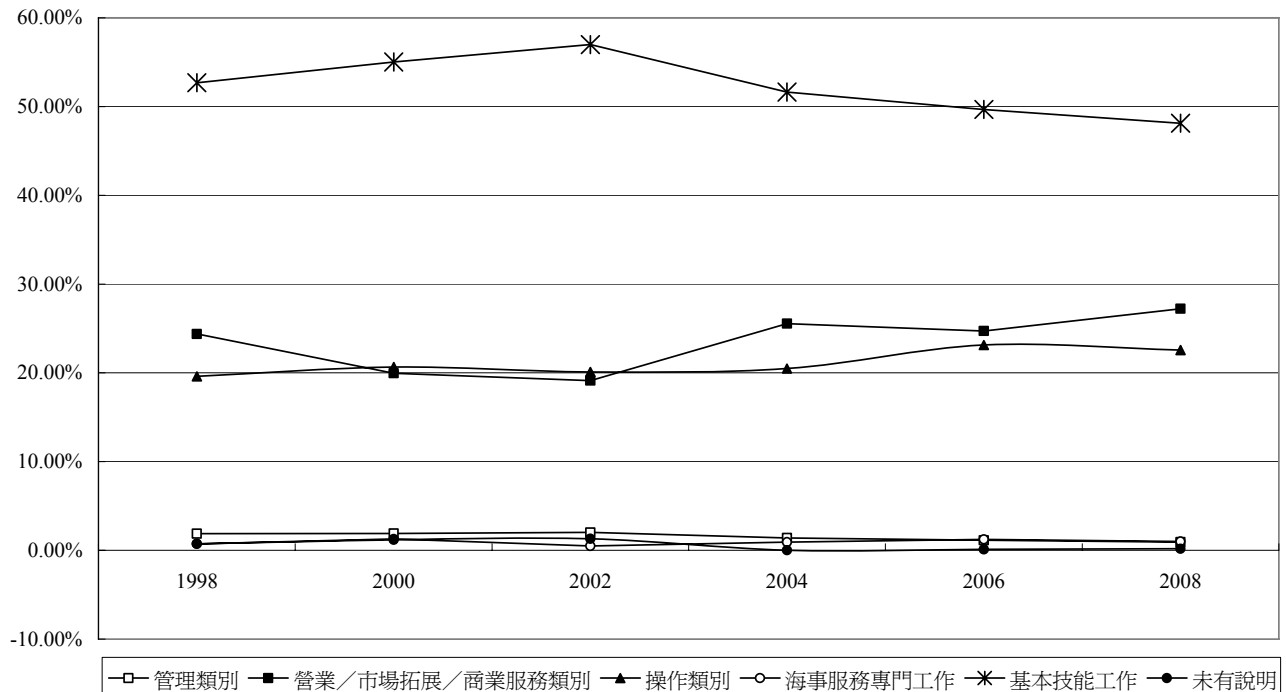


圖 2 所有類別職位轉變趨勢佔總人力百分率



3. 上述圖表顯示，近年來，業界對具備更高技術僱員的需求一直穩定上升，而對具備較低或基本技術的僱員需求則連年下降。有關觀察亦與其他調查結果吻合，無論是實際數字或總人力百分率，均反映業界對高技術僱員的需求逐漸增加。

4. 此外，上述數字亦反映業界近年來對管理類別職位的需求並無重大變動。

### 宜有技能之轉變

5. 本會亦就僱主認為僱員宜有的才能進行比較。

表 2 宜有技能

		2006年人力調查		2008年人力調查	
		數目	百分比	數目	百分比
管理技巧	1 自動化策略計劃、推行及檢討	715	1.38%	333	1.29%
	2 顧客服務及關係的策略計劃、推行及檢討	1,378	2.66%	594	2.29%
	3 成本控制	953	1.84%	452	1.75%
	4 業務策略計劃、推行及檢討	821	1.59%	492	1.90%
	5 環保策略計劃、推行及檢討	617	1.19%	160	0.62%
	6 財務計劃、推行及檢討	430	0.83%	155	0.60%
	7 人力資源計劃、推行及檢討	538	1.04%	254	0.98%
	8 法律事務	376	0.73%	180	0.70%
	9 價格策略	408	0.79%	178	0.69%
	10 質素控制	2,355	4.55%	349	1.35%
	11 風險評估	506	0.98%	234	0.90%
	12 行銷及市場策略計劃、推行及檢討	678	1.31%	414	1.60%
	13 督導管理	1,495	2.89%	670	2.59%
	14 流程分析	743	1.44%	458	1.77%
	15 職業健康及保險計劃	753	1.45%	379	1.46%
	16 其他	80	0.15%	22	0.08%
	小計	12,846	24.82%	5,324	20.57%
專門技巧	16 其他	691	1.33%	115	0.44%
	17 物流貨運操作量比	1,339	2.59%	586	2.26%
	18 物資分發	920	1.78%	506	1.95%
	19 自動化物料搬運	346	0.67%	225	0.87%
	20 多式聯運	610	1.18%	250	0.97%
	21 優化流程	791	1.53%	303	1.17%
	22 貨運操作	2,344	4.53%	2,199	8.49%
	23 倉儲及存貨控制	1,330	2.57%	764	2.95%
	24 船隻租賃	117	0.23%	63	0.24%
	25 海事保險	584	1.13%	76	0.29%
	26 海事調查及檢驗	238	0.46%	187	0.72%
	27 危險品運輸	1,273	2.46%	875	3.38%
	28 國際貿易	570	1.10%	257	0.99%
	29 供應鏈應用	396	0.77%	368	1.42%
	30 顧客服務及關係	4,175	8.07%	2,303	8.90%
	31 文件繕製	1,424	2.75%	981	3.79%
	32 物料搬運	1,571	3.04%	770	2.97%
	小計	18,719	36.16%	10,828	41.83%

		2006年人力調查		2008年人力調查	
		數目	百分比	數目	百分比
專門技術	16 其他	1,015	1.96%	153	0.59%
	33 鏟車操作	2,351	4.54%	1,123	4.34%
	34 貨櫃吊機操作	706	1.36%	909	3.51%
	35 裝卸機械操作	1,274	2.46%	365	1.41%
	36 貨物包裝及儲存	878	1.70%	304	1.17%
	37 危險貨物處理	2,526	4.88%	1,420	5.49%
	小計	8,750	16.90%	4,274	16.51%
通用技巧	16 其他	597	1.15%	798	3.08%
	38 多種語言商貿通訊及溝通	6,132	11.85%	2,186	8.44%
	39 電子化商貿	2,621	5.06%	1,228	4.74%
	40 資訊系統運用	2,096	4.05%	1,248	4.82%
	小計	11,446	22.11%	5,460	21.09%
		<b>51,761</b>	<b>100%</b>	<b>25,886</b>	<b>100%</b>

6. 2008年人力調查得出的培訓需求，較2006年的大幅下降，但兩次調查得出的宜有技能百分率卻大致相近。在四大主要類別中，以專門技巧的需求最高。

圖 3 宜有技能 — 人力調查結果

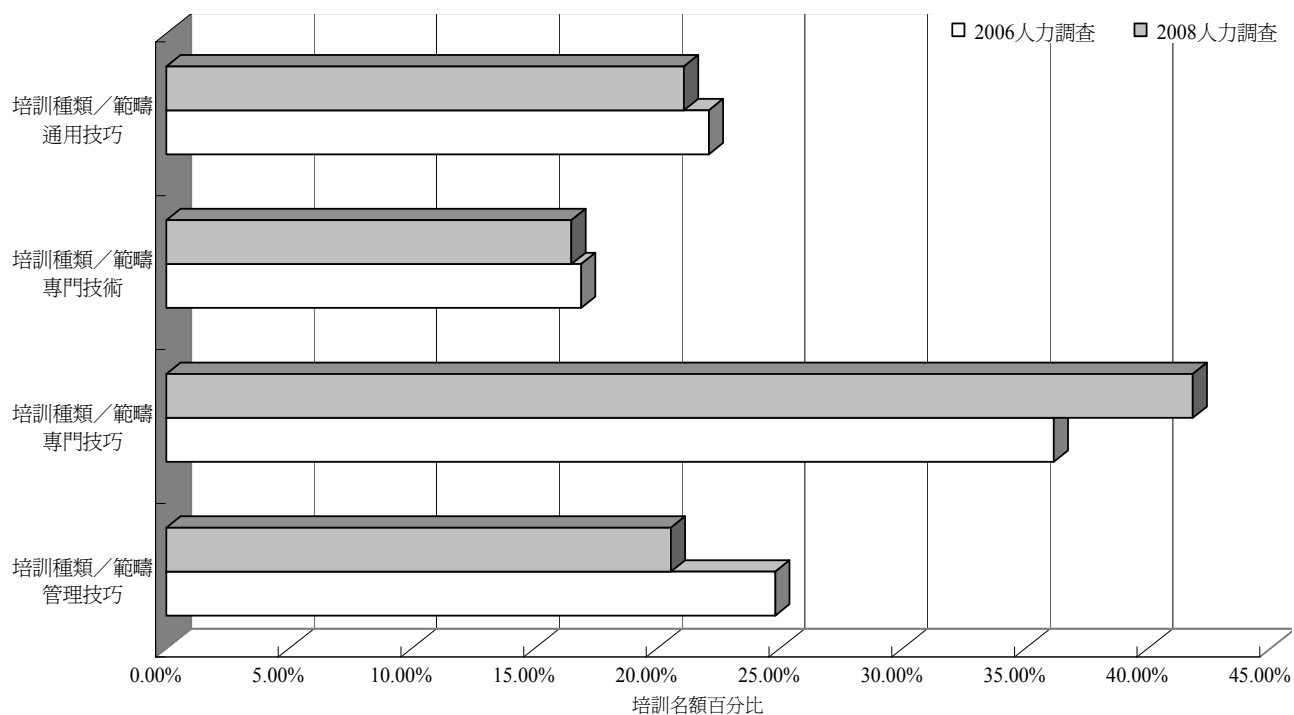
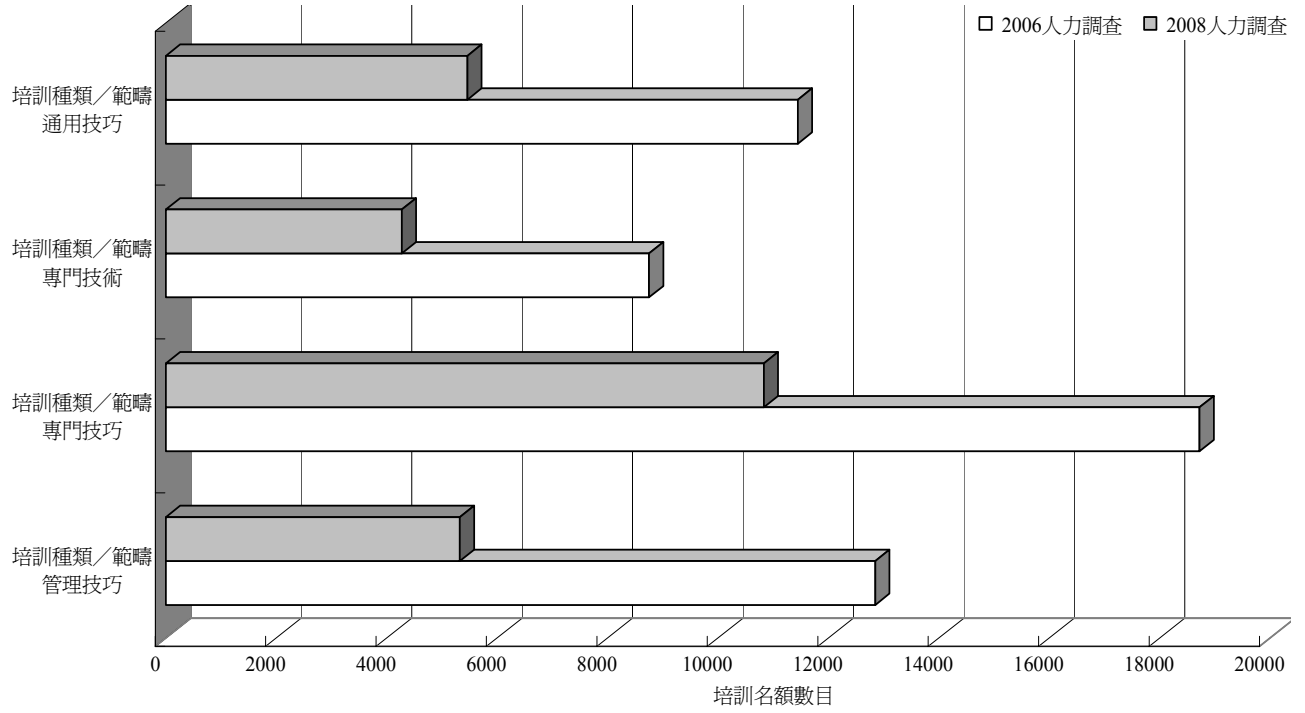


圖 4 宜有技能 - 人力調查結果



## 更詳盡經濟統計數據

1. 政府發佈不同經濟活動的統計數字。有關經濟活動可視為本地生產總值（下稱 GDP）的組成部分。下圖簡略顯示有關情況，詳情參見數據來源。

圖 1 2007 年本地生產總值組成部分

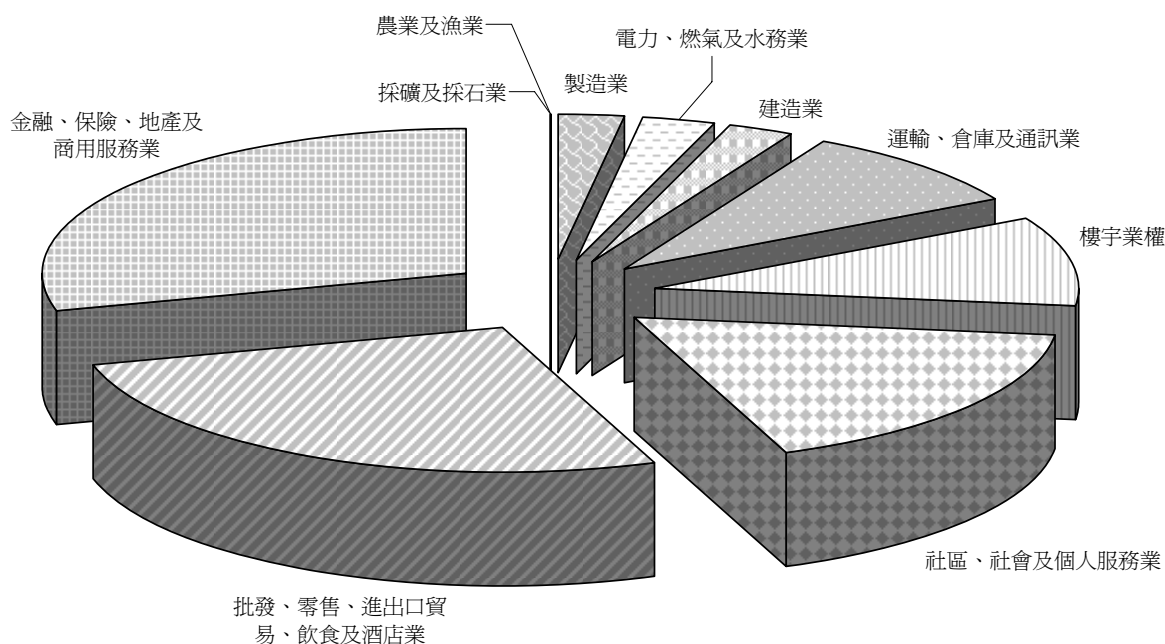
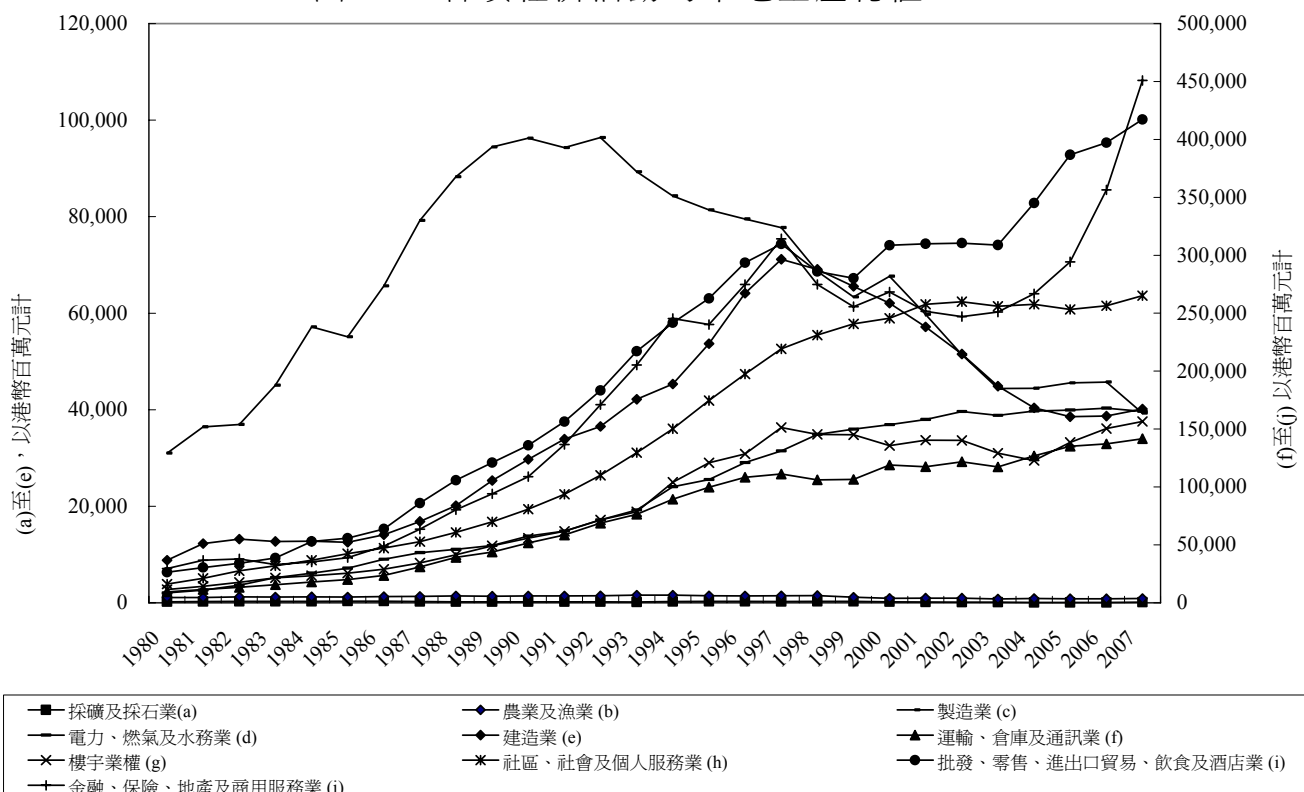
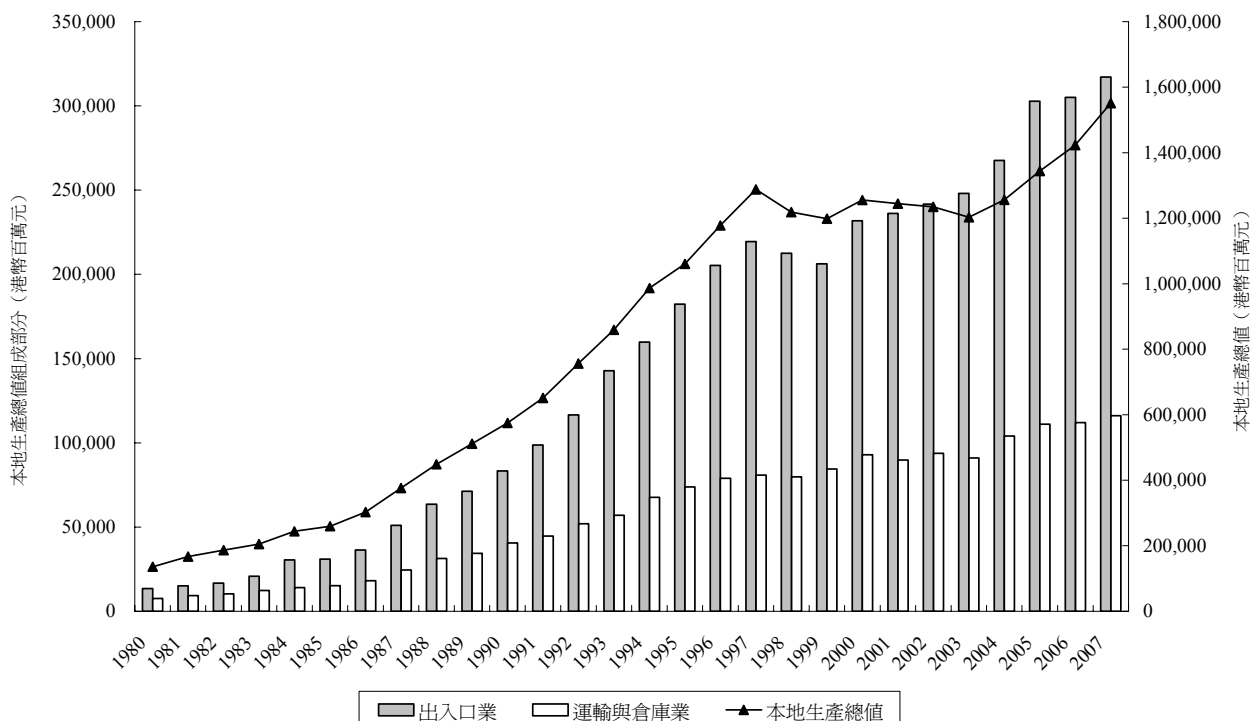


圖 2 各項經濟活動的本地生產總值



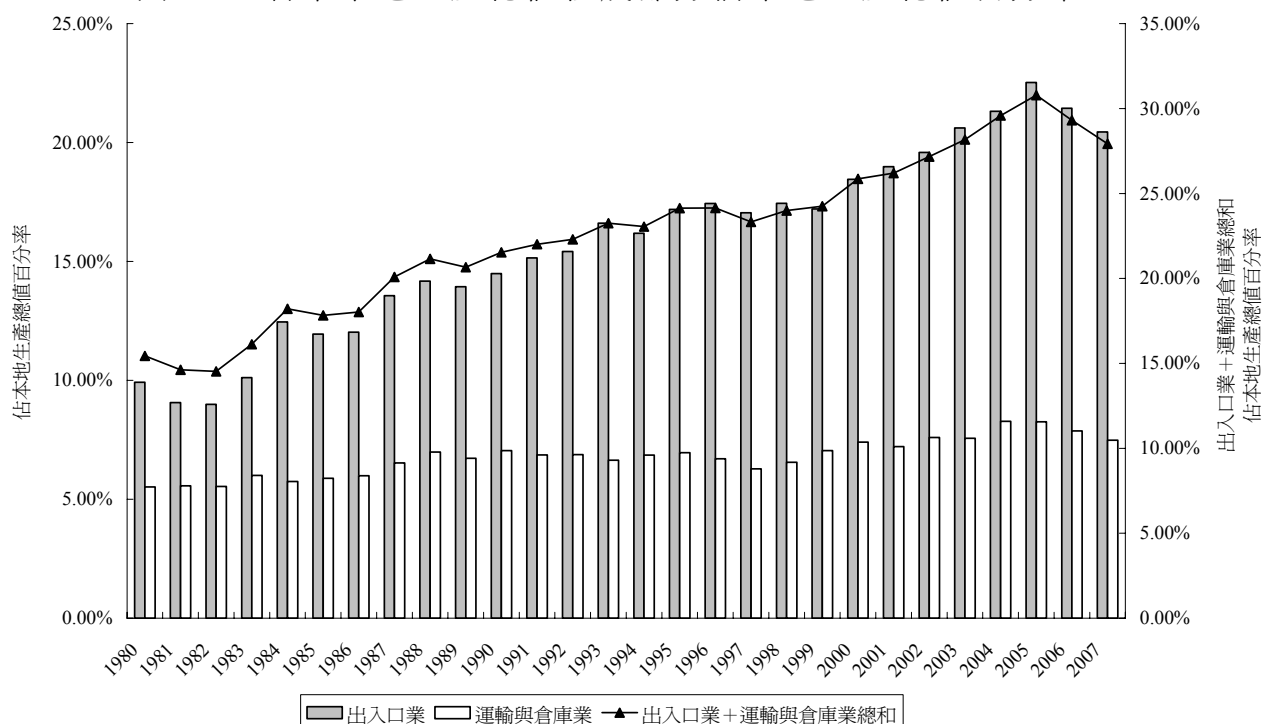
2. 統計數字顯示，「出入口業」與「運輸與倉庫業」這兩個次組成部分唇齒相依，佔 GDP 總額近三分之一。這兩個行業透過賺取外匯，以及為其他行業製造商機，作出經濟貢獻，然而兩者均極受出入口國家的營商環境，及其國民的消費習慣所影響。以地理位置而言，香港是連接內地與外國的樞紐。

圖 3 本地生產總值及若干組成部分



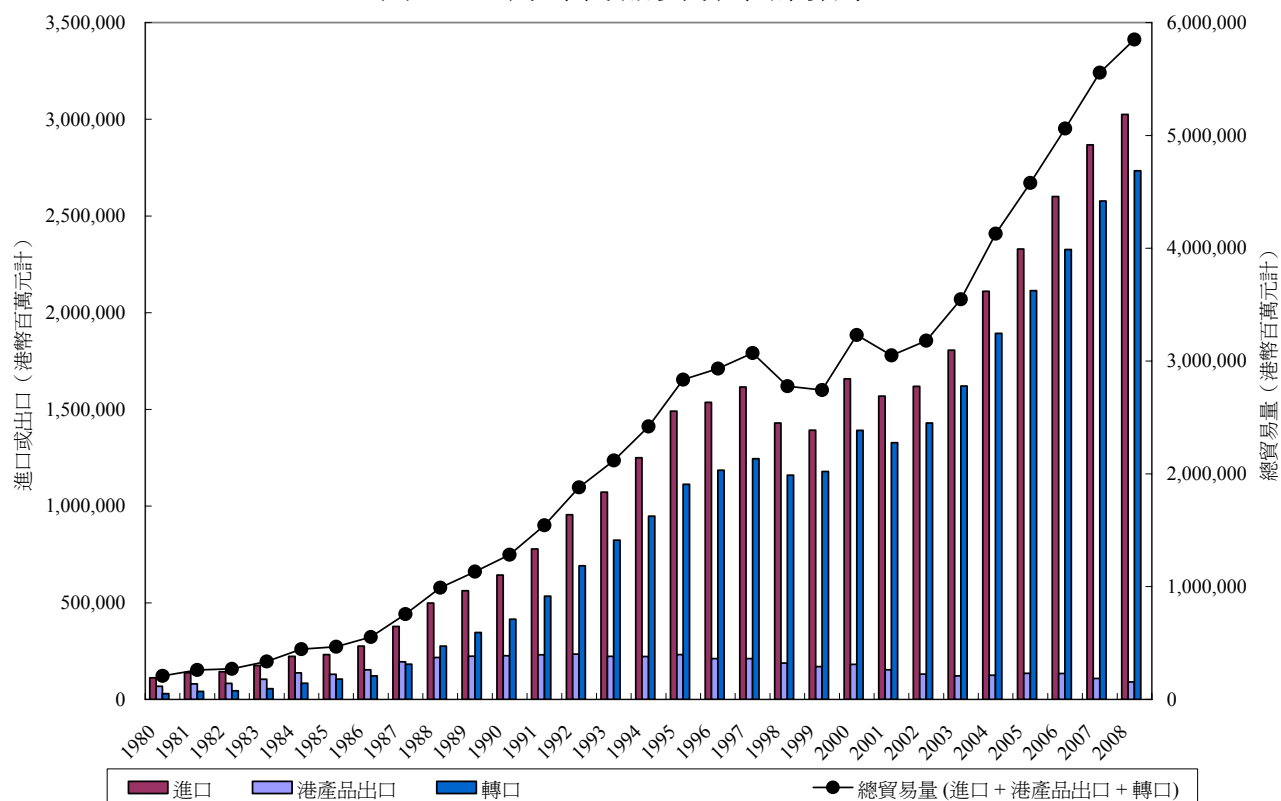
3. 統計數字顯示，運輸與倉庫業的增長不如出入口業。這可能是由於交易雖然是在香港進行／洽談，但愈來愈多貨物不經香港運輸。

圖 4 若干本地生產總值組成部分佔本地生產總值百分率



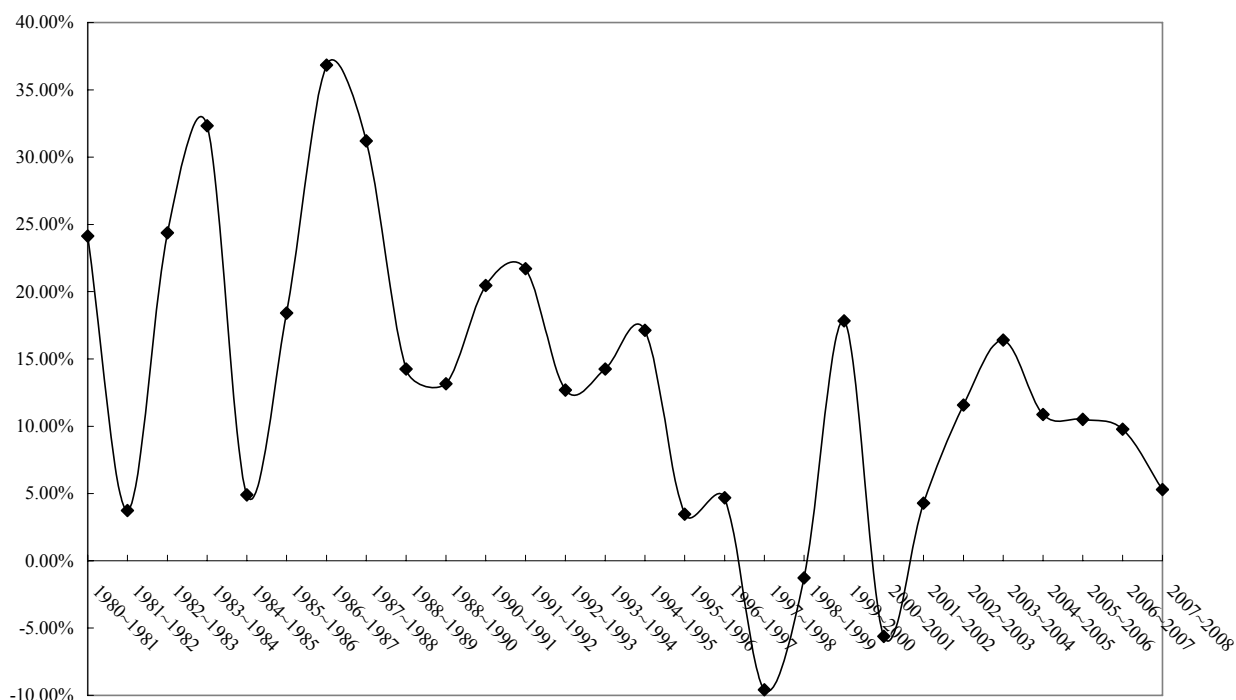
4. 統計數字顯示，總貿易量以進口及轉口為主。現時港產品出口貿易微不足道，在有關範疇，本港無疑非常依賴內地。

圖 5 對外商品貿易累計數字



5. 自 1980 年代起，除了其中幾年之外，香港的貿易多年來均錄得雙位數字的增長。市場普遍認為，就算全球經濟不曾下滑，貿易亦未必可一直維持雙位數字增長。

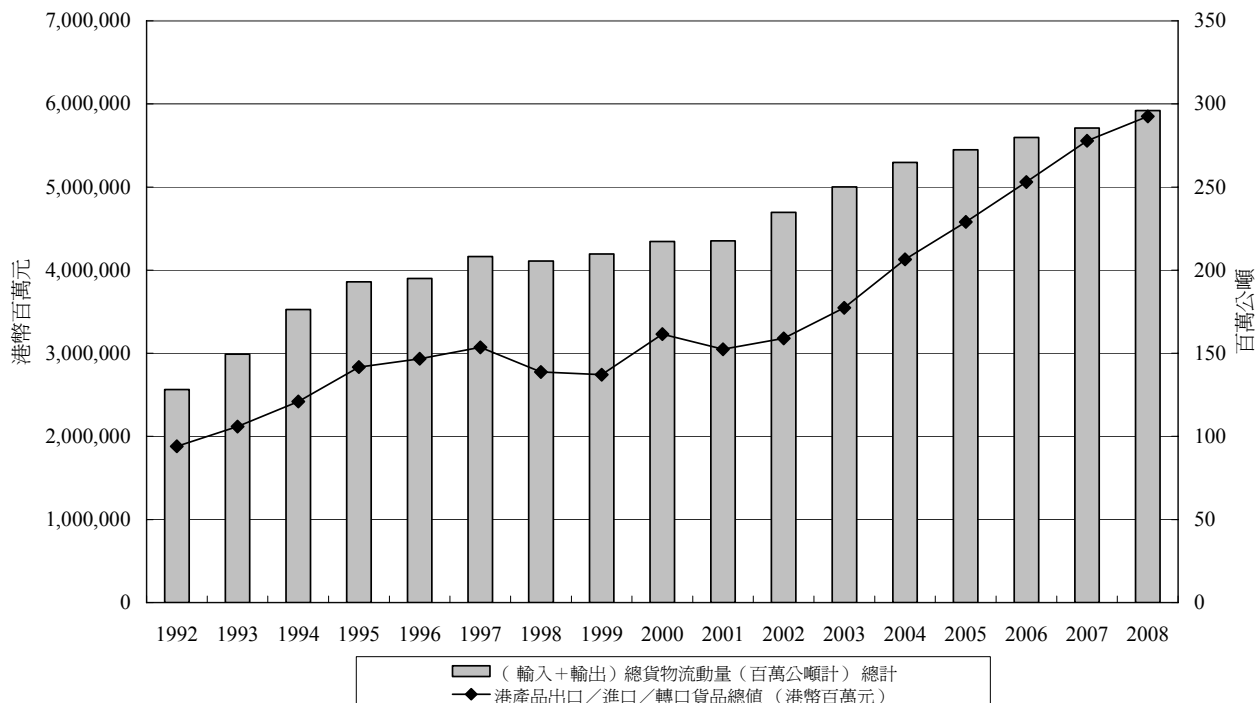
圖 6 總貿易量年度百分率轉變 (進口 + 港產品出口 + 轉口)





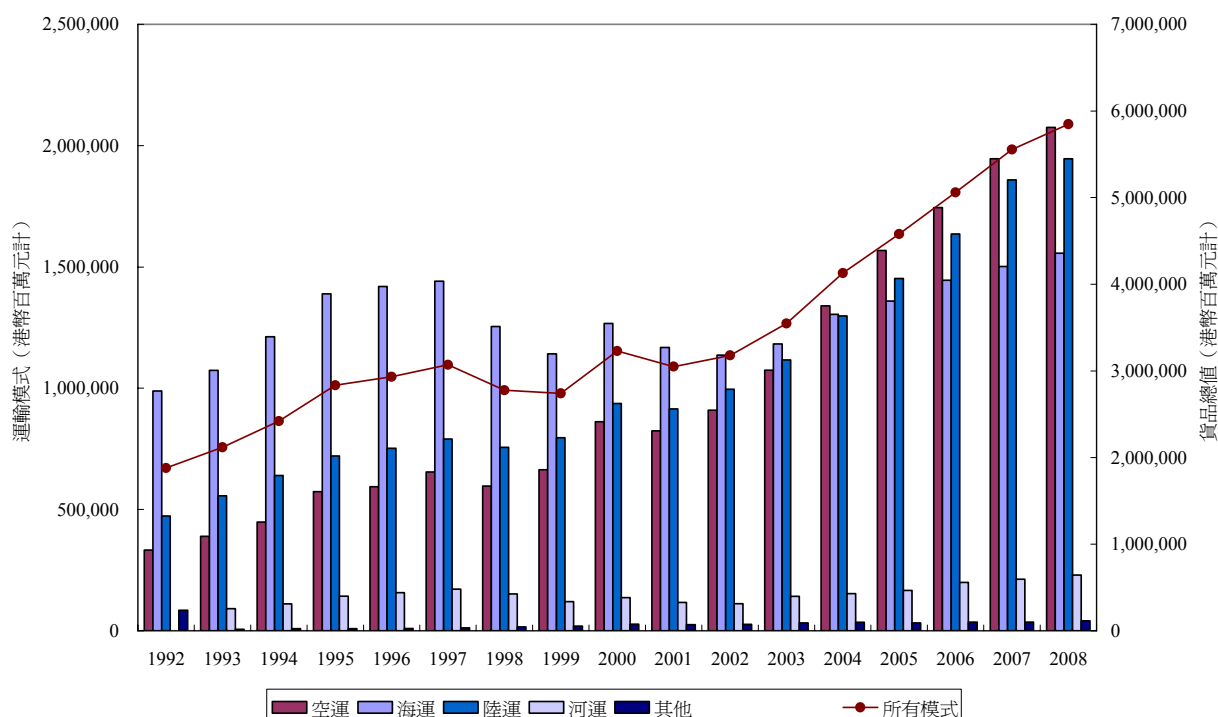
6. 下圖的統計數字顯示貿易的流動量（總噸數）及價值。由於運經香港的貨物通常以容積而不以重量計算／量度，因此在詮釋增長（或負增長）時，以價值計算更為有用，而這兩項指標顯示的趨勢相似。

圖 7 （輸入＋輸出）總貨物流動量（百萬公噸計）以及港產品出口／進口／轉口（港幣百萬元計）



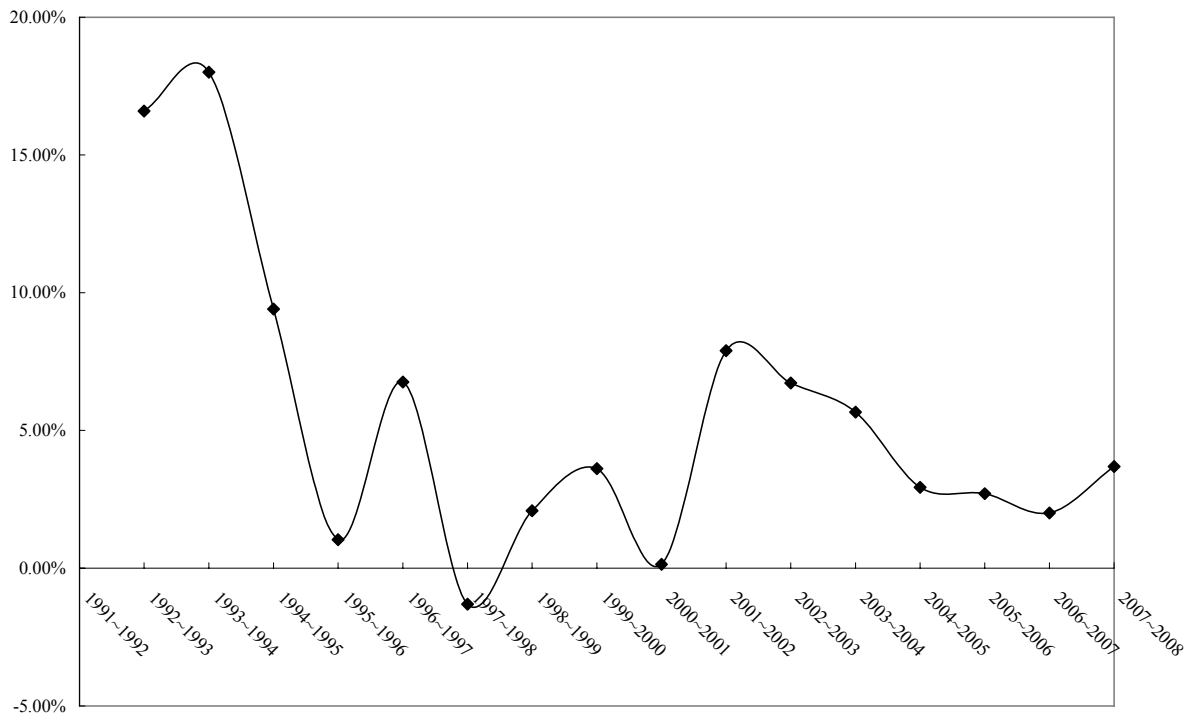
7. 以價值計算，空運的貨物運載百分率屬所有運輸模式中最高，且錄得穩定的雙位數字增長。新的香港國際機場、貨品組合朝有利空運的模式改變、空中交通工具的進步，以及供應鏈／物流概念的應用等，均助長空運業的發展。預料有關走勢至經濟走出低谷後仍會持續。

圖 8 以各種模式運輸的港產品出口／進口／轉口總值



8. 調查亦列出貨物總噸數的變化走勢，以顯示更全面的情況。與貨物價值走勢相比，總噸數更早出現單位數字增長。

圖 9 年度百分率轉變（按所有運輸模式及流動量的總噸數劃分）



9. 海上貨運依舊是重要模式。將轉變量化最常用的指標是貨櫃處理量，通常以 20 呎標準集裝箱計算單位(TEUs)表示。事實上，比較深圳與香港的港口網絡，深圳港口逐漸佔優。業界普遍認為，假以時日，深圳港口將超越香港港口。雖然上海與新加坡的表現已於早前超越香港，但兩者並非香港的直接競爭對手。

圖 10 全球主要貨櫃港口之貨櫃吞吐量（以百萬 TEU 計）

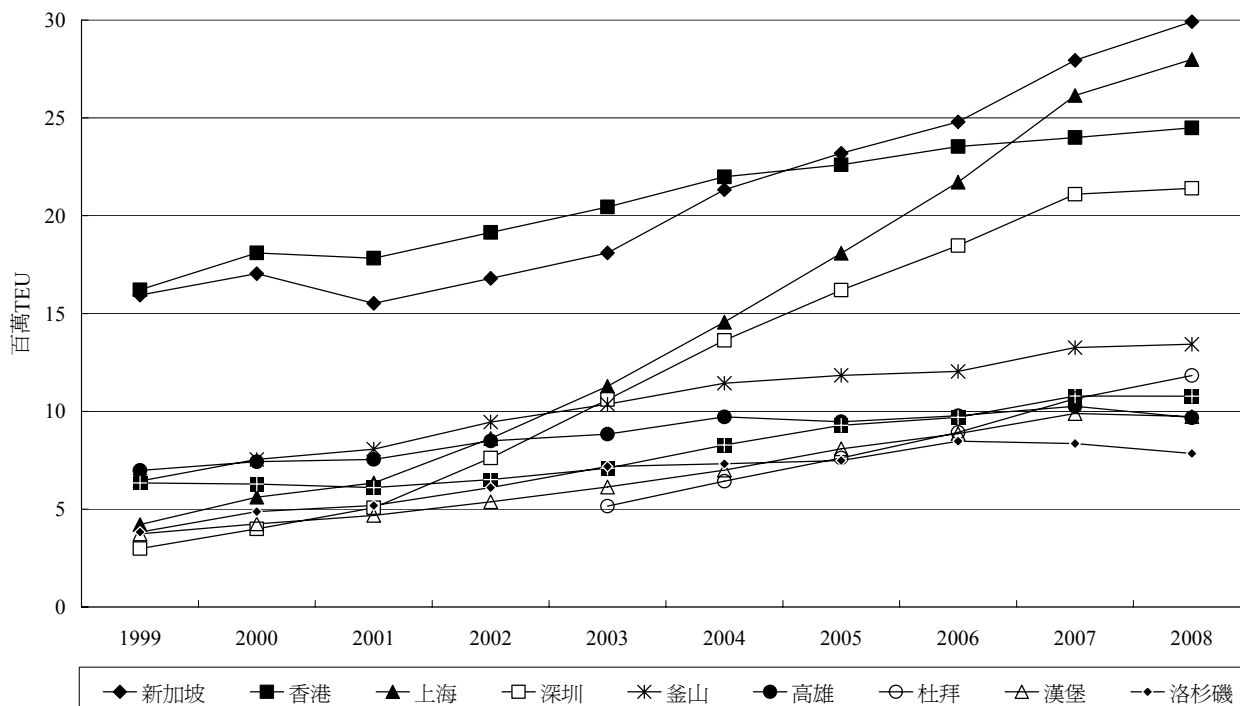
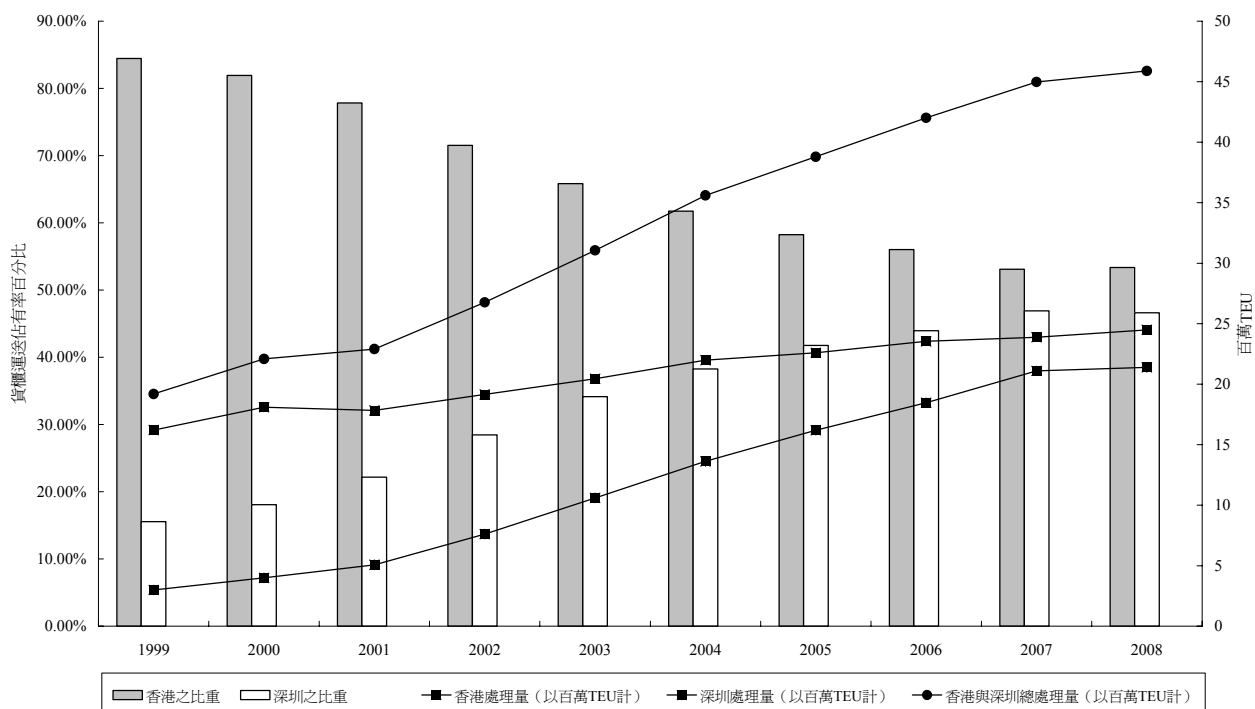


圖 11 香港與深圳處理的貨櫃量以及貨櫃流動總量佔有率



10. 中國的國際貿易表現令人刮目相看，超過 15 年均錄得雙位數字增長。中國的目標是每年取得雙位數字的經濟增幅，過去大都能達標。中國的增長受惠於國際貿易。全球經濟下滑，導致發展勢頭頓失，惟內需或能補充部分動力。業界普遍認為，雖然要參與中國的國際貿易殊不容易，要在內需貿易取一席位更是難上加難，惟香港亦應盡力爭取內需市場。

圖 12 中華人民共和國之對外貿易

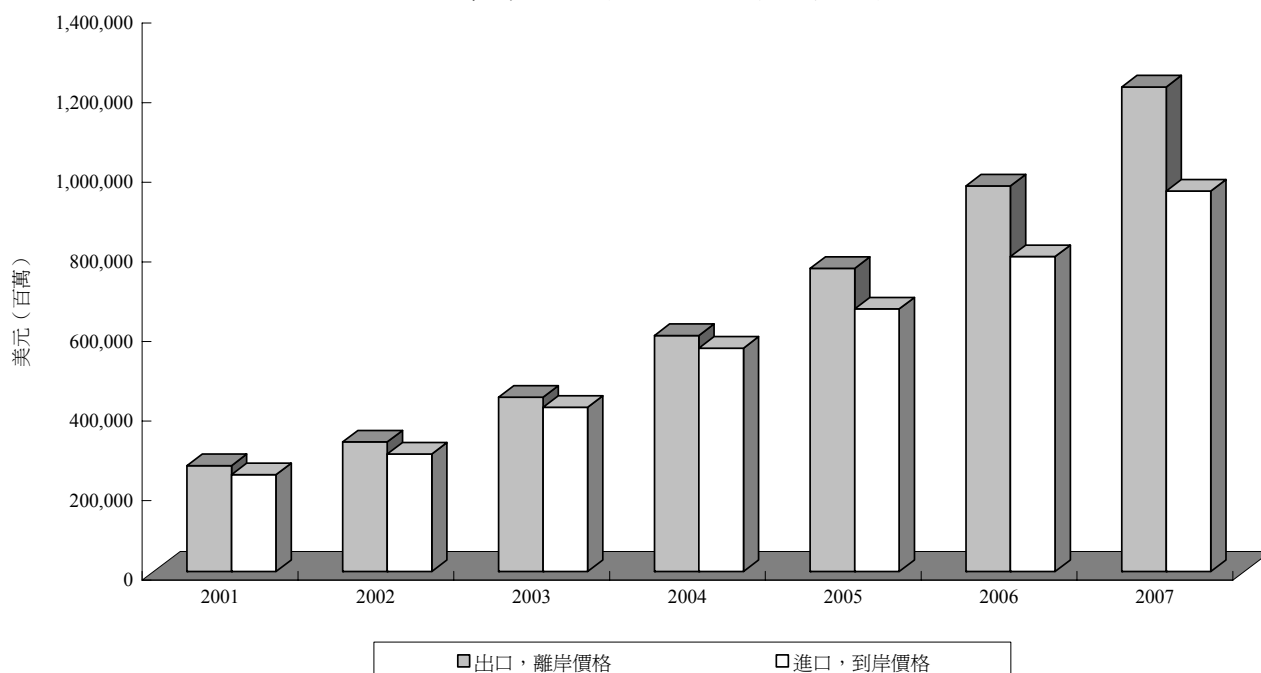
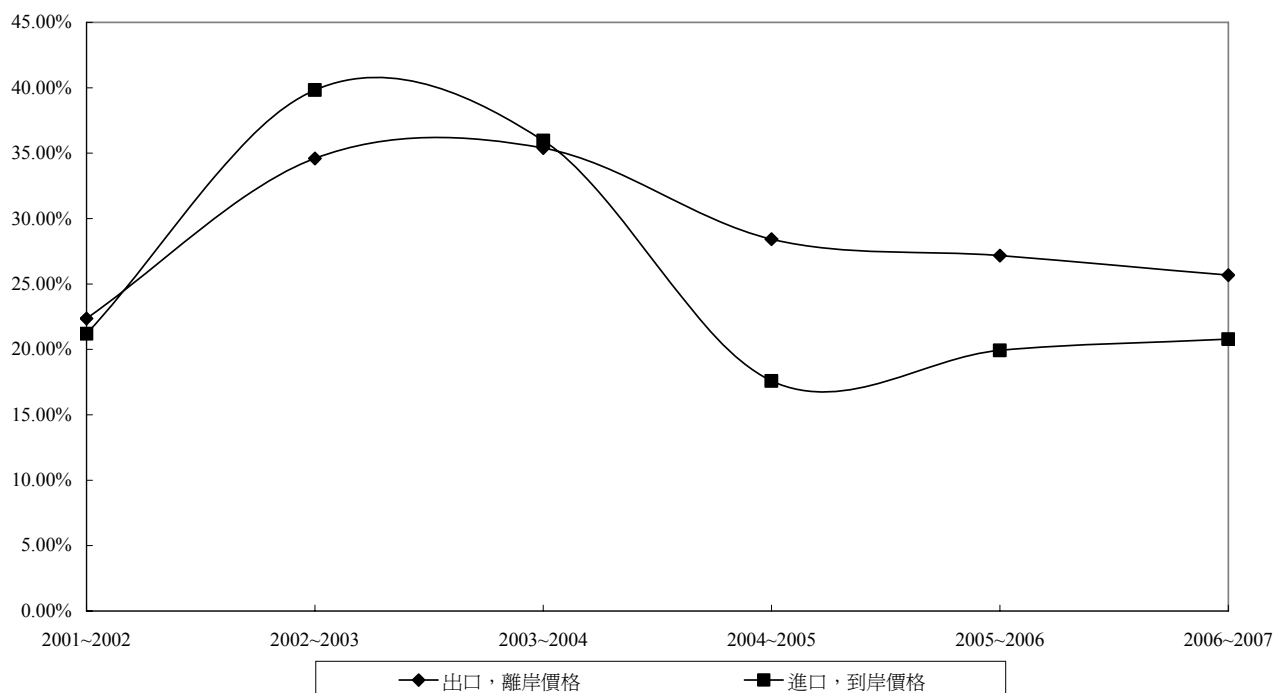


圖 13 中華人民共和國外貿年度轉變



## 結論

11. 目前香港是內地鄰近地區的進出口多式聯運樞紐。本業正面對各種轉變，包括盛極一時的陸運正逐漸衰微。

12. 傳統上，香港能為客戶提供多種優質服務，包括頻繁的班次、高生產力、船隻換向時間短促、簡明的清關程序，以及自由港地位等。根據 *Business Monitor International (BMI)*<sup>1</sup> 對貨運業的評分顯示，香港獲得 76.7 分（最高分數為 100），在監管及競爭環境方面尤有優勢，而在長期經濟風險與基建發展方面的得分亦令人滿意。期望業界及特區政府共同努力，繼續將香港打造為具吸引力的物流樞紐。

13. 要進行完整的分析，理應對經濟、貿易與商業周期、以及消費者行為模式等其他因素亦一併研究，惟囿於資源所限，故未能實行。

<sup>1</sup> BMI 創立於 1984 年，是首屈一指的商業資訊網上出版商，出版有關全球新興市場的資訊。公司提供的季度營商環境報告 (*Business Monitor*) 涵蓋政治風險分析；金融、宏觀經濟表現、展望及預測；不同行業及營商環境剖析。BMI 在資料來源進行調查後撰寫不同行業報告，內容包括有關生產、銷售、進口與出口的最新數據；至 2012 年底的 5 年行業預測；公司排名及跨國與本地製造商與供應商的競爭情況；以及最新行業發展、走勢與規管措施轉變等分析。

## 讀者須知

### 人力調查報告網上版

1. 2008 年物流貨運業人力調查報告書可於職業訓練局物流貨運業訓練委員會網站下載，路徑如下：

<http://www.vtc.edu.hk>

主頁 → 關於 VTC → 理事會 → 訓練委員會和一般委員會 → 物流貨運業訓練委員會 → 出版刊物 → 2008 年物流貨運業人力調查報告書

或

<http://tdtb.vtc.edu.hk>

網上版報告書的圖表以彩色顯示。

### 增補資料

2. 物流貨運業訓練委員會會不時把更新資料及分析結果上載至網站，作為調查報告的增補資料。

Vocational Training Council 職業訓練局

VTC Tower, 27 Wood Road, Wan Chai, Hong Kong 香港灣仔活道 27 號職業訓練局大樓

[www.vtc.edu.hk](http://www.vtc.edu.hk)

Our Reference 本局檔號

TL/1/2 (08)



7 July 2008

Dear Sir/Madam,

2008 Manpower Survey of the  
Transport Logistics Industry

The Vocational Training Council is a statutory body appointed by the Government to be responsible for manpower training in Hong Kong. The Transport Logistics Training Board is one of the 20 training boards of the Vocational Training Council. It is established to assess the manpower situation and devise training plans of the transport logistics industry.

The Training Board is conducting a manpower survey of the freight transport logistics establishments from 14 July to 15 August 2008. The purpose of this survey is to obtain data on the present and future manpower situation and training information so as to enable the Training Board to formulate appropriate training plans to meet the need of the industry. Your co-operation in supplying the information would be much appreciated.

I enclose the following documents for your reference and completion:

- (a) Questionnaire (Appendix A);
- (b) Explanatory notes (Appendix B); and
- (c) Descriptions of principal jobs in the transport logistics industry (Appendix C)

During the period of the survey, an officer of the Census and Statistics Department will call at your office to see you. The interviewing officer will answer any questions you may have, and will collect the completed questionnaire. I wish to assure you that the information collected will be handled in strict confidence and will be published only in the form of statistical summaries without reference to individual establishments. Should you have any question regarding the survey, please contact the Census and Statistics Department by telephoning 2116 8324.

Yours faithfully,

A handwritten signature in blue ink, appearing to read 'David Ho', is written over a faint, larger version of the signature.

(Dr David Ho)

Chairman

Transport Logistics Training Board



致僱主函

執事先生：

物流貨運業二〇〇八年人力調查

職業訓練局乃由政府委任的法定機構，負責本港的人力訓練事宜。職訓局屬下有二十個訓練委員會，物流貨運業訓練委員會為其中之一，負責評估物流貨運業的人力情況，以及制定訓練計劃。

為調查物流貨運業目前及未來的人力情況及訓練詳情，以便制定合適的訓練計劃配合需要，本訓練委員會將於二〇〇八年七月十四日至八月十五日期間進行物流貨運機構人力調查，懇請貴號惠予合作，提供有關資料。

茲夾附下述文件，供貴號參閱及填寫：

- (甲) 調查表 (附錄 A)
- (乙) 附註 (附錄 B)
- (丙) 物流貨運業主要職務工作說明 (附錄 C)

調查期間，政府統計處職員會造訪貴號，解答問題，並收回填妥的調查表。調查所得資料將絕對保密，只用摘要統計數字發表，並不會提及個別機構。如對是次調查有任何疑問，請致電 2116 8324 與政府統計處聯絡。

A handwritten signature in blue ink, appearing to read '何志盛'.

物流貨運業訓練委員會主席  
何志盛博士

二〇〇八年七月七日

**CONFIDENTIAL**  
WHEN ENTERED WITH DATA

填入數據後即成  
機密文件

**THE 2008 MANPOWER SURVEY OF THE TRANSPORT LOGISTICS INDUSTRY**  
物流貨運業二〇〇八年人力調查

**QUESTIONNAIRE**  
調查表

PLEASE READ THE EXPLANATORY NOTES BEFORE COMPLETING THIS QUESTIONNAIRE  
填表前請參閱附註

For official use only: 此欄毋須填寫								
Rec. Type	Survey Code	Industry Code	Establishment No.	Enumerator's No.	Editor's No.	Check Digit	No. of Employees Covered by the Questionnaire	
1   1	2     8   2 3	 4 5 6 7 8 9	 10 11 12 13 14 15	 16 17	 18 19	 20 21 22	 23 24 25 26 27	

NAME OF ESTABLISHMENT: \_\_\_\_\_  
機構名稱

TOTAL NUMBER OF PERSONS ENGAGED: \_\_\_\_\_  
僱員總人數

ADDRESS: \_\_\_\_\_  
地址

NAME OF PERSON TO CONTACT: \_\_\_\_\_  
聯絡人姓名

POSITION: \_\_\_\_\_  
職位

TEL NO.: \_\_\_\_\_  
電話

FAX NO.: \_\_\_\_\_  
圖文傳真

E-MAIL: \_\_\_\_\_  
電郵

**Broad Type 分類:**

PRINCIPAL LINE OF BUSINESS:  
主要業務

Warehousing and Cold Storage  
貨倉及冷藏庫

Trucking and Container Haulage  
貨車及貨櫃運輸

Airfreight Operators (Airline Companies/Carriers)  
空運 (航空公司)

Please Tick  
請✓在圈內

Airfreight Forwarding Agents  
空運貨運代理

Stevedore  
船上/碼頭裝卸貨物

Seafreight Operators (Shipping Companies/Carriers)  
海運 (航運公司)

Seafreight Forwarding Agents  
海運貨運代理

Ship Management and Chartering  
船舶管理及租賃

Cargo Handling Terminals  
貨運站

International Couriers  
國際速遞

Other Transport Logistics Services Providers  
其他物流服務經營者

PLEASE SPECIFY:  
請註明



Part I 第一部份

(A) Job Title 職稱	Rec. Type	(B) Job Code 職位編號	(C) Average Monthly Income 每月平均收入	(D) Number of Employees at Date of Survey 現有僱員人數	(E) Number of Vacancies at Date of Survey 現有空缺數目	(F) Forecast Number of Employees 12 Months from Now 預測十二個月後的僱員人數	(G) Forecast Number of Employees 24 Months from Now 預測廿四個月後的僱員人數	(H) Preferred Level of Education and Qualifications 僱員宜有教育程度及資歷/資格
		(按編號) (by code) 8-10	(按編號) (by code) 11	(數目) (by number) 12-14	(數目) (by number) 15-17	(數目) (by number) 18-20	(數目) (by number) 21-23	(按編號) (by code) 24
1.	2							
2.	2							
3.	2							
4.	2							
5.	2							
6.	2							
7.	2							
8.	2							
9.	2							
10.	2							
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21.	2							
22.	2							
23.	2							
24.	2							
25.	2							
26.	2							
27.	2							
28.	2							
29.	2							
30.	2							

**Coding Descriptions 譯碼說明**

Enter in Column (C) employee's average monthly income according to the following codes:  
請將僱員的每月平均收入，按下列編號填入「C」欄內：

Code 編號	Average Monthly Income 每月平均收入
1	\$5,000 or below 或以下
2	\$5,001 - \$10,000
3	\$10,001 - \$15,000
4	\$15,001 - \$20,000
5	\$20,001 - \$30,000
6	\$30,001 - \$40,000
7	\$40,001 or above 或以上

Enter in Column (H), employee's preferred level of education and qualifications according to the following codes:  
請將僱員宜有的教育程度及資歷/資格，按下列編號填入「H」欄內：

- 1 University Degree or above  
大學學位或以上
- 2 Membership of Professional Bodies  
有關專業學會會員
- 3 Sub-degree (Associate Degree/  
Higher Diploma/Higher Certificate)  
副學士/高級文憑/高級證書
- 4 Diploma/Certificate  
文憑/證書
- 5 Advanced Level  
(Secondary 6 to Secondary 7)  
中六/中七程度
- 6 Senior Secondary  
(Secondary 4 to Secondary 5)  
中四/中五程度
- 7 Junior Secondary  
(Secondary 3 or below)  
中三程度或以下
- 8 Craft Certificate  
技工證書

Note 1 If additional lines are necessary, please tick here  and enter on supplementary sheet(s).

附註一 如此頁填滿，請先將(✓)填入此 內，然後在附頁繼續填寫。

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此欄毋須填寫

Est. No. \_\_\_\_\_

Er. No. \_\_\_\_\_

**The 2008 Manpower Survey of the Transport Logistics Industry**  
**物流貨運業二〇〇八年人力調查**

**Questionnaire (Part II)**  
**調查表 (第二部份)**

1. Number of Freight/Transport/Logistics Staff Left in the Past 12 Months by Whereabouts  
過去十二個月內離職的物流貨運從業員人數 (按去向分類)

	Managerial Level 經理級	Supervisory Level 主任級	Clerical Level 文員級	Operative Level 操作工級
(a) Taking up/starting own business in freight/transport/logistics related jobs 繼續於物流貨運業任職/創業	<input type="text"/> <input type="text"/> 8	<input type="text"/> <input type="text"/> 10	<input type="text"/> <input type="text"/> 12	<input type="text"/> <input type="text"/> 14
(b) Taking up/starting own business in non freight/transport/logistics related jobs 於其他行業任職/創業	<input type="text"/> <input type="text"/> 16	<input type="text"/> <input type="text"/> 18	<input type="text"/> <input type="text"/> 20	<input type="text"/> <input type="text"/> 22
(c) Emigration, retirement, further studies and others 移民、退休、進修或其他原因	<input type="text"/> <input type="text"/> 24	<input type="text"/> <input type="text"/> 26	<input type="text"/> <input type="text"/> 28	<input type="text"/> <input type="text"/> 30

2. (a) Has your company sub-contracted out any job at time of survey?  
在調查時，貴機構有否將工作外判？

Yes

有

32

Please go to Q2 (b)  
請答第 2(b) 題

No

沒有

33

Please go to Q3  
請答第 3 題

- (b) If your reply to 2. (a) is "Yes", please specify.  
如有工作外判，請於以下註明。

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3. Did your company encounter any difficulty in recruitment of Freight/Transport/Logistics staff in the past 12 months?  
過去12個月內貴機構有否在招聘物流貨運業的僱員時遇到困難？

	Managerial Level 經理級	Supervisory Level 主任級	Clerical Level 文員級	Operative Level 操作工級
(a) Yes → Please go to Q4 有 請答第4題	<input type="checkbox"/> 48	<input type="checkbox"/> 49	<input type="checkbox"/> 50	<input type="checkbox"/> 51
(b) No → Please go to Q5 沒有 請答第5題	<input type="checkbox"/> 52	<input type="checkbox"/> 53	<input type="checkbox"/> 54	<input type="checkbox"/> 55
(c) Have not recruited or tried to recruit Freight/Transport/ Logistics staff in the past 12 months 過去12個月未曾招聘或 未有嘗試招聘物流 貨運業的僱員 → Please go to Q5 請答第5題	<input type="checkbox"/> 56	<input type="checkbox"/> 57	<input type="checkbox"/> 58	<input type="checkbox"/> 59

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60 64

4. If you have encountered difficulties in recruitment of Freight/Transport/Logistics staff in the past 12 months, please state the reasons. (You may tick more than 1 box for each job level.)  
如貴機構過去12個月內在招聘物流貨運業僱員方面有困難，請說明原因（每職級可選擇1項或以上）。

	Managerial Level 經理級	Supervisory Level 主任級	Clerical Level 文員級	Operative Level 操作工級
(a) General labour shortage in Hong Kong 香港勞工短缺情況普遍	<input type="checkbox"/> 65	<input type="checkbox"/> 66	<input type="checkbox"/> 67	<input type="checkbox"/> 68
(b) Insufficient graduates in relevant disciplines (e.g. Transport and Logistics, Business Administration, etc.) from tertiary institutions 專上院校有關學系（例如物流、 工商管理等）畢業生數目不足	<input type="checkbox"/> 69	<input type="checkbox"/> 70	<input type="checkbox"/> 71	<input type="checkbox"/> 72
(c) Candidates lacked the relevant experience/training 應徵者缺乏相關經驗／訓練	<input type="checkbox"/> 73	<input type="checkbox"/> 74	<input type="checkbox"/> 75	<input type="checkbox"/> 76
(d) Candidates found the working conditions/ remuneration package not attractive 應徵者認為服務條件／薪酬欠吸引	<input type="checkbox"/> 77	<input type="checkbox"/> 78	<input type="checkbox"/> 79	<input type="checkbox"/> 80
(e) Other reasons 其他原因	<input type="checkbox"/> 81	<input type="checkbox"/> 82	<input type="checkbox"/> 83	<input type="checkbox"/> 84

Please specify  
請註明

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5. Number of Hong Kong Freight/Transport/Logistics staff who have to work (on HK payroll) in Mainland:  
貴機構須在內地工作的香港物流貨運業的僱員人數：

	At Time of Survey 現時	Forecast In July 2009 預計2009年7月時
(a) <u>Managerial Level</u> <u>經理級</u>		
- Stationed Basis 長駐	□□□□ 90	□□□□ 93
- Travelling Basis 非長駐	□□□□ 96	□□□□ 99
(b) <u>Supervisory Level</u> <u>主任級</u>		
- Stationed Basis 長駐	□□□□ 102	□□□□ 105
- Travelling Basis 非長駐	□□□□ 108	□□□□ 111
(c) <u>Clerical Level</u> <u>文員級</u>		
- Stationed Basis 長駐	□□□□ 114	□□□□ 117
- Travelling Basis 非長駐	□□□□ 120	□□□□ 123

Note: Stationed Basis means 50% or above of the working time that an employee has to stay in Mainland.

註：長駐指一位僱員有百分之五十或以上的工作時間需要在內地工作。

6. Effects on your Hong Kong Freight/Transport/Logistics staff as a result of Mainland operations:  
內地業務對貴機構物流貨運業的香港僱員的影響：

	At Time of Survey 現時	Forecast In July 2009 預計2009年7月時
(a) How many additional Hong Kong employees do you need to recruit? 須增聘的香港僱員數目有多少？	□□□□ 126	□□□□ 129
(b) How many Hong Kong employees do you need to disengage? 須減少的香港僱員數目有多少？	□□□□ 132	□□□□ 135
(c) Number of existing Hong Kong employees to be trained to deal with Mainland operations in terms of control, communication skills and Mainland regulations. 須接受管理、溝通技巧、內地法規等方面訓練的現職香港僱員數目。	□□□□ 138	□□□□ 141
(d) Any other effects? 其他影響？		
Please specify _____ 請註明 _____		

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7. Preferred Competency

僱員宜有技能

Please fill in the number of Freight/Transport/Logistics staff who would require training as listed below in the coming 12 months:

請填上未來12個月貴機構物流貨運業僱員需要培訓的人數。

	Number of employees require training 需要培訓的人數			
	Managerial Level 經理級	Supervisory Level 主任級	Clerical Level 文員級	Operative Level 操作工級
<b>Managerial Skills</b> 管理技巧				
101 Automation Strategy Planning, Implementation and Evaluation 自動化策略計劃、推行及檢討	149	152	155	158
102 Customer Relationship and Service Strategy Planning, Implementation and Evaluation 顧客服務及關係的策略計劃、推行及檢討	161	164	167	170
103 Budgetary Control 成本控制	173	176	179	182
104 Business Strategy Planning, Implementation and Evaluation 業務策略計劃、推行及檢討	185	188	191	194
105 Environmental Protection Strategy Planning, Implementation and Evaluation 環保策略計劃、推行及檢討	197	200	203	206
106 Financial Planning, Implementation and Evaluation 財務計劃、推行及檢討	209	212	215	218
107 Human Resources Planning, Implementation and Evaluation 人力資源計劃、推行及檢討	221	224	227	230
108 Legal Affairs 法律事務	233	236	239	242
109 Pricing Strategy 價格策略	245	248	251	254
110 Quality Assurance and Control 質素控制	257	260	263	266

## Number of employees require training

## 需要培訓的人數

	Managerial Level 經理級	Supervisory Level 主任級	Clerical Level 文員級	Operative Level 操作工級
111 Risk Assessment 風險評估	269	272	275	278
112 Sales and Marketing Strategy Planning, Implementation and Evaluation 行銷及市場策略計劃、推行及檢討	281	284	287	290
113 Supervisory Techniques 督導管理	293	296	299	302
114 Workflow Analysis 流程分析	305	308	311	314
115 Occupational Health Planning & Insurance Planning 職業健康及保險計劃	317	320	323	326
116 Others (please specify) 其他 (請描述)	329	332	335	338
<hr/>				
117 Others (please specify) 其他 (請描述)	341	344	347	350
<hr/>				
118 Others (please specify) 其他 (請描述)	353	356	359	362
<hr/>				
119 Others (please specify) 其他 (請描述)	365	368	371	374
<hr/>				
120 Others (please specify) 其他 (請描述)	377	380	383	386
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## Number of employees require training

## 需要培訓的人數

	Managerial Level 經理級	Supervisory Level 主任級	Clerical Level 文員級	Operative Level 操作工級
<b>Specific Skills</b> <b>專門技巧</b>				
201 Benchmarking of Transport and Distribution Operations 物流貨運操作量比	389	392	395	398
202 Distribution Operations 物資分發	401	404	407	410
203 Automation of Material Handling 自動化物料搬運	413	416	419	422
204 Multi-modal Transportation 多式聯運	425	428	431	434
205 Routing Optimization 優化流程	437	440	443	446
206 Transport Operations 貨運操作	449	452	455	458
207 Warehousing and Storage Operations / Inventory Control 倉儲及存貨控制	461	464	467	470
208 Brokering 船隻租賃	473	476	479	482
209 Marine/P & I Insurance 海事保險	485	488	491	494
210 Marine Surveying 海事調查及檢驗	497	500	503	506
211 Transport of Dangerous Cargo 危險品運輸	509	512	515	518

Number of employees require training

需要培訓的人數

	Managerial Level 經理級	Supervisory Level 主任級	Clerical Level 文員級	Operative Level 操作工級
212 International Trading Practices 國際貿易	521	524	527	530
213 Application of Supply Chain Concepts 供應鏈應用	533	536	539	542
214 Customer Relation and Services 顧客服務及關係	545	548	551	554
215 Documentation Processing 文件繕製	557	560	563	566
216 Material Handling Techniques 物料搬運	569	572	575	578
217 Others (please specify) 其他 (請描述)	581	584	587	590
<hr/>				
218 Others (please specify) 其他 (請描述)	593	596	599	602
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219 Others (please specify) 其他 (請描述)	605	608	611	614
<hr/>				
220 Others (please specify) 其他 (請描述)	617	620	623	626
<hr/>				
221 Others (please specify) 其他 (請描述)	629	632	635	638
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Number of employees require training  
需要培訓的人數

	Managerial Level 經理級	Supervisory Level 主任級	Clerical Level 文員級	Operative Level 操作工級
<b>Technical Skills</b> <b>專門技術</b>				
301 Forklift Truck Operation 鑰車操作	_ _ _  641	_ _ _  644	_ _ _  647	_ _ _  650
302 Container Crane Operation 貨櫃吊機操作	_ _ _  653	_ _ _  656	_ _ _  659	_ _ _  662
303 Material Handling Equipment Operation 裝卸機械操作	_ _ _  665	_ _ _  668	_ _ _  671	_ _ _  674
304 Packing/Storage of Goods 貨物包裝及儲存	_ _ _  677	_ _ _  680	_ _ _  683	_ _ _  686
305 Dangerous Goods Handling 危險貨物處理	_ _ _  689	_ _ _  692	_ _ _  695	_ _ _  698
306 Others (please specify) 其他 (請描述)	_ _ _  701	_ _ _  704	_ _ _  707	_ _ _  710
<hr/>				
307 Others (please specify) 其他 (請描述)	_ _ _  713	_ _ _  716	_ _ _  719	_ _ _  722
<hr/>				
308 Others (please specify) 其他 (請描述)	_ _ _  725	_ _ _  728	_ _ _  731	_ _ _  734
<hr/>				
309 Others (please specify) 其他 (請描述)	_ _ _  737	_ _ _  740	_ _ _  743	_ _ _  746
<hr/>				
310 Others (please specify) 其他 (請描述)	_ _ _  749	_ _ _  752	_ _ _  755	_ _ _  758
<hr/>				

Number of employees require training

需要培訓的人數

	Managerial Level 經理級	Supervisory Level 主任級	Clerical Level 文員級	Operative Level 操作工級
<b>Generic Skills</b> 通用技巧				
401 Multi-lingual Business Communication 多種語言商貿通訊及溝通	<input type="text"/> 761	<input type="text"/> 764	<input type="text"/> 767	<input type="text"/> 770
402 e-Business/e-Commerce Concepts 電子化商貿	<input type="text"/> 773	<input type="text"/> 776	<input type="text"/> 779	<input type="text"/> 782
403 Information Systems Application 資訊系統運用	<input type="text"/> 785	<input type="text"/> 788	<input type="text"/> 791	<input type="text"/> 794
404 Others (please specify) 其他 (請描述)	<input type="text"/> 797	<input type="text"/> 800	<input type="text"/> 803	<input type="text"/> 806
<hr/>				
405 Others (please specify) 其他 (請描述)	<input type="text"/> 809	<input type="text"/> 812	<input type="text"/> 815	<input type="text"/> 818
<hr/>				
406 Others (please specify) 其他 (請描述)	<input type="text"/> 821	<input type="text"/> 824	<input type="text"/> 827	<input type="text"/> 830
<hr/>				
407 Others (please specify) 其他 (請描述)	<input type="text"/> 833	<input type="text"/> 836	<input type="text"/> 839	<input type="text"/> 842
<hr/>				
408 Others (please specify) 其他 (請描述)	<input type="text"/> 845	<input type="text"/> 848	<input type="text"/> 851	<input type="text"/> 854
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End of Questionnaire. Thank you for Your Co-operation.

問卷完，多謝合作

The completed questionnaire will be collected by an officer from the Census and Statistics Department.

政府統計處會派員收回填妥的調查表。

**The 2008 Manpower Survey of the Transport Logistics Industry**  
**物流貨運業二〇〇八年人力調查**

**Explanatory Notes**  
**附註**

1. The questionnaire is in three parts, the front page, part I and part II. Before completing the questionnaire, please read carefully the Explanatory Notes.  
調查表共有三部份：首頁、第一部份和第二部份。填寫調查表前，請參閱附註。
2. Please fill in a number or a code where applicable. The codes and the values of items they represent are listed in page 2 of Appendix A (the main questionnaire) or the Appendix C.  
請在適當空格內填入有關數字或編號，編號及所代表的事項載於附錄 A（主要調查表）第 2 頁或附錄 C。

3. Front Page of Questionnaire (page 1)  
調查表首頁（第 1 頁）

On the front page of the questionnaire, you are asked the principal line of business of the establishment.  
請填寫貴機構的主要業務性質。

4. Main Questionnaire (page 2 to 3)  
主要調查表（第 2、3 頁）

- (a) In the main questionnaire, you are asked to fill in numbers or codes for each and every job/positions in your establishment. Please complete all columns ('A' to 'H') of the questionnaire. Please insert a zero (0) in any column where not applicable.  
請於主要調查表內填寫貴機構內各職位的數目或編號。「A」至「H」各欄均須填寫。如有不適用者，請在該欄內填入（0）符號。

- (b) Job Title and Code (Column 'A' and Column 'B')  
職稱及編號（「A」欄及「B」欄）

- (i) Please fill in Column 'A', the job titles of job positions that are employed in your establishment. (Please refer to the job titles in Appendix C).  
請在「A」欄填上僱員的職稱。（請參閱附錄 C 內的職稱）。

- (ii) Please fill in Column 'B', the job codes that match the job titles in Column 'A'. (Please refer to Appendix C for the job codes and the corresponding job descriptions). The job titles provided in the Appendix C are generic and indicative. They may not match with those adopted by your firm/organization/establishment.

請在「B」欄填上僱員的職位編號（請參閱附錄 C 內的職位編號及其職務）。這些職稱屬籠統性質，或有別於貴機構所採用者。

- (iii) If you find that it is desirable to fill in a job and/or job description that is unique to those listed in the Appendix C, you may like to inform the interviewers of the Census and Statistics Department.

如欲填寫的職位有別於附錄 C 所載者，請告知統計處調查員。

(c) Average Monthly Income Range of Employees (Column 'C')

每月平均收入（「C」欄）

Please select and enter in this column the appropriate code number showing the average monthly income range for the employee(s) by referring to the codes in page 2 of Appendix A (main questionnaire). The monthly income should include basic salary, overtime pay, cost of living allowance, meal allowance, commission and bonuses. If you have more than one employee doing the same job, please enter the average figure.

請填寫僱員每月平均收入編碼，包括底薪、超時工作工資、生活津貼、膳食津貼、佣金及花紅等。如僱用超過一名僱員負責同樣工作，請取其平均收入。編碼說明請參閱附錄 A（主要調查表）第 2 頁。

(d) Number of Employees at the Date of Survey (Column 'D')

現有僱員人數（「D」欄）

Please fill in the total number of employees against each principal job at the time of the survey. 'Employees' refer to those who have worked for the establishment for 4 weeks or more and for not less than 18 hours in each week.

請填寫調查期間各主要職務的僱員總數。「僱員」指在貴機構全職工作已達四星期，每星期工作不少於十八小時的員工。

(e) Number of Vacancies at Date of Survey (Column 'E')

現有空缺數目（「E」欄）

Please fill in the number of existing vacancies. 'Existing Vacancies' refer to those unfilled, immediately available job openings for which the establishment is actively trying to recruit personnel at date of survey.

請填寫現有空缺額。「現有空缺額」指職位仍懸空，須立刻填補而現正積極進行招聘。

(f) Forecast Number of Employees 12 Months from Now (Columns 'F')

預測十二個月後的僱員人數（「F」欄）

Please fill in the forecast number of employees against each principal job 12 months from now.

請填寫預計十二個月後各主要職務的僱員人數。

(g) Forecast Number of Employees 24 Months from Now (Columns 'G')

預測二十四個月後的僱員人數（「G」欄）

Please fill in the forecast number of employees against each principal job 24 months from now.

請填寫預計二十四個月後各主要職務的僱員人數。

- (h) Preferred Level of Education and Qualifications (Column 'H')  
僱員宜有教育程度及資歷／資格（「H」欄）

The purpose of this column is to solicit your view on the education and qualifications, which your organization requires an employee in a particular position to have by referring to the codes in coding descriptions in page 2 of Appendix A (main questionnaire).

請填寫各職位僱員宜有的教育程度及資歷／資格編碼。編碼說明請參閱附錄 A（主要調查表）第 2 頁。

5. Supplementary Questionnaires  
補充調查表

- (a) In Question 1 of Questionnaire Part II, please fill in the number of freight/transport/logistics staff left in the past 12 months by whereabouts.  
請在調查表第二部份的第一題按去向填上過去十二個月離職的物流貨運從業員人數。
- (b) In Question 2 of Questionnaire Part II, please fill in whether your company has sub-contracted out any job at time of survey; and if so, which jobs. You might be asked to provide the name(s) of the sub-contractor(s) on a voluntary basis in order to find out the extent and level of sub-contracting. Sub-contracting means the performance of an establishment's jobs in part by one or more local sub-contractors.  
請在調查表第二部份的第二題回應貴機構有否工作外判及外判工作的種類。貴機構可能被要求但自願性提供外判商的資料，以進一步調查外判工作的實況。外判指貴機構之部份工作由一或多於一家本地外判商承辦。
- (c) In Question 3 of Questionnaire Part II, please fill in whether your company encountered difficulty in recruitment of freight/transport/logistics staff in the past 12 months.  
請在調查表第二部份的第三題填上貴機構有否在招聘物流貨運業的僱員時遇到困難。
- (d) In Question 4 of Questionnaire Part II, please fill in what are the difficulties your company has encountered in recruitment of freight/transport/logistics staff.  
請在調查表第二部份的第四題填上貴機構在招聘物流貨運業僱員時遇到的困難。
- (e) In Question 5 of Questionnaire Part II, please fill the number of Hong Kong freight/transport/logistics staff who have to work in Mainland.  
請在調查表第二部份的第五題填上貴機構須在內地工作的香港物流貨運業的僱員人數。

- (f) In Question 6 of Questionnaire Part II, please fill the effect of Mainland operations on your Hong Kong freight/transport/logistics staff.  
請在調查表第二部份的第六題填上內地業務對貴機構物流貨運業的香港僱員的影響。
- (g) In Question 7 of Questionnaire Part II, please fill in the preferred competency which your organization requires freight/transport/logistics staff in each job level to have and state the number of training places required for respective skills and knowledge training.  
請在調查表第二部份的第七題填上各職級僱員宜有的技能及需要培訓的人數。

**Note** The information received will be treated in strict confidence and will be published only in the form of statistical summaries without reference to an individual organization.

註：調查所得資料絕對保密，只以統計摘要方式發表，並不提及個別機構。

The Website of the Transport Logistics Training Board contains updated information regarding the manpower survey:

人力調查的最新資料載於物流貨運業訓練委員會網頁，網址為：

<http://tdtb.vtc.edu.hk>

**Job Descriptions and Job Titles for Principal Jobs  
in the Transport Logistics Industry**

物流貨運業  
主要職務工作說明

Job Level 職級	Job Code 職位編號	Job Title 職稱	Job Description 職務
<b>0. Overall Management 全面管理</b>			
Managerial 經理級	001	Managing Director / Chief Executive Officer / General Manager 董事總經理 / 行政總管 / 總經理	Assumes full responsibility of overall management and development. 全權負責公司的整體管理及發展。
			Formulates company strategies, sets guidelines, targets, and makes corporate decisions. 制定公司策略、方針及目標，並為公司作出決定。
			Monitors the performance of various departments. 監管各部門的運作。
			Reports to the Board of Directors overall company policies. 向董事會提交有關公司整體政策的報告。
<b>1. Commercial, sales, marketing, pricing activities 商務、銷售、市場拓展、定價</b>			
Managerial 經理級	101	Marketing / Sales / Commercial Manager 市場拓展 / 營業 / 商務經理	Plans, organizes, directs and controls marketing, sales and promotional activities. 策劃、籌辦、指導及監督市場推廣、營業及宣傳工作。
			Determines pricing policy and price packages. 定出收費政策及服務收費。
			Co-ordinates with operations and freight / traffic / customer service managers in anticipating, identifying and satisfying customer needs profitably. 與貨運經理和客務經理合作，預測、確定及滿足客戶的需要。
			Plans new service products. 策劃新服務。
			Reviews performance analysis for forecasting future marketing situation. 檢討業績分析，預測未來市場情況。
			Canvasses accounts with high potential. 與高潛力客戶接觸，以招攬生意。
			Handles trade association matters. 處理商會事宜。

Job Level 職級	Job Code 職位編號	Job Title 職稱	Job Description 職務
Supervisory 主任級	201	Marketing / Sales / Commercial / Pricing Supervisor / Executive 市場拓展／營業／商務／定價主任	Supervises the sales force. 監督營業人員。
			Assists marketing / sales manager in soliciting business. 協助市場推廣／營業經理招攬生意。
			Takes charge of sales promotion activities. 負責營業推廣工作。
			Monitors market conditions and reflects customer special requirements to management. 監察市場情況，並向管理層反映客戶的特別需要。
			Monitors tariff / prices changes and disseminates tariff / prices information to relevant departments. 監察運費的變動及將運費的資料通知各有關部門。
			Responsible for pricing and quotations according to market policy. 根據公司市場政策，定出個別客戶之服務價格。
Clerical 文員級	301	Marketing / Commercial Assistant; Sales Representative 市場拓展／商務／營業助理／代表	Canvasses business. 招攬生意。
			Assists customers in arranging follow-up procedures. 協助客戶安排貨運手續。
			Provides customer services if required. 有需要時，為客戶提供服務。
			Assists in carrying out promotional activities. 協助進行推廣工作。
<b>2. After sales service, customer service, documentation matters 售後、顧客服務、文件</b>			
Managerial 經理級	102	Freight / Customer Service / Documentation Manager 貨運／顧客服務／文件經理	Plans, organizes, directs and controls overall operational aspects of customer services. 策劃、籌辦、指導及監督客戶服務的全面運作。
			Supervises the booking of space and the acceptance of cargo. 監督艙位的預訂工作及貨物的接收。
			Supervises the preparation and issuing of shipping documents. 監督船務文件的編製及發出事宜。



<b>Job Level</b> 職級	<b>Job Code</b> 職位編號	<b>Job Title</b> 職稱	<b>Job Description</b> 職務
Supervisory 主任級	202	Freight / Customer Service / Documentation Supervisor / Executive 貨運／顧客服務／文件主任	Assists the freight manager in the handling of shipping enquiries and delivery matters. 協助貨運經理處理航運查詢及交貨事宜。
			Takes care of local traffic, transshipment, outbound / inbound bookings and documentation. 處理本地運輸、轉船運輸、出／入口貨運艙位的預訂，以及提供所需證明文件。
			Releases incoming cargo. 將入口的貨物交付收貨人。
			Arranges transshipment documents. 安排轉船運輸文件。
			Approves and signs bills of lading / airwaybills and delivery orders. 批准及簽署貨運／空運提單及送貨單。
Clerical 文員級	302	Freight / Customer Service / Documentation Assistant / Clerk 貨運／顧客服務／文件文員	Provides supporting services to clients. 向客戶提供支援服務。
			Answers enquiries from clients and other related organizations. 解答客戶及其他有關機構的電話查詢。
			Prepares documents. 編製文件。
<b>3. Distribution, delivery operations 分發、配送、交收操作</b>			
Managerial 經理級	103	Distribution / Traffic / Operations Manager 分發／調度／操作經理	Responsible for and controls of the receiving, storing and distribution of cargo. Ensures compliance with government and company regulations. 負責及監管貨物的接收、儲存及分配，確保符合政府及公司的規定。
			Advises management of planning and new techniques. 向管理層提供有關策劃及運用新技術的建議。
			Supervises the supply, maintenance, repair and installation of equipment. 監督設備的供應、保養、維修及裝置。

<b>Job Level</b> 職級	<b>Job Code</b> 職位編號	<b>Job Title</b> 職稱	<b>Job Description</b> 職務
Supervisory 主任級	203	Distribution / Traffic / Operations Supervisor / Executive, Delivery Gangleader; Foreman 操作／運輸主任／送貨組長／管工	Co-ordinates cargo handling activities with clients, warehouses, freight stations and terminals. 就貨物處理工作，與客戶、貨倉、貨運站及貨運碼頭合作。
			Controls space allocation and consolidation. 監管貨運艙位的分配及集運。
			Supervises the daily air / ship / rail and yard operation. 督導日常的空運／海運／鐵路運輸及貨櫃場工作。
			Attends to irregular cargo operations. 處理特殊貨物運輸。
			Takes charge of overall supervision of vessels / aircraft / storage planning / programming activities. 全面監督船舶／飛機／倉庫的裝卸計劃。
			Supervises the preparation of loading / discharging documents before arrival / departure of vessels / aircraft. 在船舶／飛機抵步／離開前，監督貨物裝卸文件的編製工作。
			Takes charge of the delivery gang in the delivery of cargo. 監管送貨員的送貨工作。
			Supervises order assembly, loading, safekeeping and delivery of cargo on that vehicle, and the processing and security of delivery documentation. 監督貨物裝載、保管及運送工作，以及送文件的過程和安全問題。
Clerical 文員級	303	Operation / Traffic Clerk 調度／操作文員	Prepares documents. 編製文件。
			Arranges the booking of shipping space. 安排預訂貨運艙位。
			Controls pick-up and delivery orders. 管理收貨單及提貨單。
			Checks uplift / forwarding details. 核對貨物裝卸／運輸的詳細資料。
Operative 技術員／操作工級	403	Delivery Man / Labourer 搬運工人	Handles cargo in warehouses, loading and unloading cargo onto / off from trucks and other vehicles. 在戶內及戶外搬動貨物。

Job Level 職級	Job Code 職位編號	Job Title 職稱	Job Description 職務
<b>4. Warehouse, depot, terminal operations 倉庫、場地、碼頭操作</b>			
Managerial 經理級	104	Warehouse / Depot / Terminal Operations Manager 貨運站/ 倉庫運作經理	Plans, organizes, directs and controls the activities of a cargo terminal. 策劃、籌辦、指揮及管理貨運站的工作。
			Monitors aircraft / vessel / train / trucks arrival and departure schedules, berth, closing time and cargo delivery date. 監督飛機／船舶／火車／貨車的抵步及離港時間表、停泊處、載貨時間及交貨日期。
			Formulates operation, maintenance and control policies relating to cargo handling in a cargo delivery base. 制定貨運站內有關貨物處理的運作、保養及管制措施。
			Takes charge of the overall operation of a warehouse. 負責貨倉的全面運作。
			Ensures receiving, storage and distribution services are provided for and records kept. 確保貨倉提供接收、儲存及遞送貨物服務，並保存紀錄。
			Enforces fire, safety and other government regulations. 執行防火、工作安全及其他政府規例。
			Interprets and recommends maintenance policies of warehouse and suggests ways to improve warehouse facilities and handling procedures. 闡釋及建議貨倉的保養措施，並就改善貨倉設備及貨物處理程序提出意見。

<b>Job Level</b> 職級	<b>Job Code</b> 職位編號	<b>Job Title</b> 職稱	<b>Job Description</b> 職務
Supervisory 主任級	204	Warehouse / Depot / Terminal Operations Supervisor / Executive 貨運站／倉庫運作主任	Schedules inward cargo movements, plans and supervises receipt, inspection and storage of cargo. 安排內部貨物往來，策劃及監督貨物的接收、檢驗及儲存。
			Maintains contact with outside labour and transport contractors, surveyors and internal shipping and marketing departments. 與外間工人及運輸承辦商、驗貨員及公司內部的船務及市場部門保持聯絡。
			Supervises warehouse staff in maintaining the workflow of warehouse, ensures the keeping of records of cargo entry and exit. 監督貨倉員工，以維持貨倉的工作程序及保存出貨及入貨紀錄。
			Allocates warehouse space and location. 分配貨倉的空間及位置。
			Co-ordinates with the Operations / Traffic Department. 與操作／運輸部門聯繫。
			Supervises and controls the overall floor operations of freight station / yard. 全面監管貨運站／貨物處理站的操作。
			Prepares operations statistics, import and export cargo statistics and documents for storage of cargo. 編製營業、出入口貨物統計數字，以及存貨文件。
Clerical 文員級	304	Warehouse / Depot / Terminal Operations Assistant / Clerk 貨運站／倉庫事務文員	Handles import and export manifest and export load list. 處理出入口貨物表及出口裝貨單。
			Takes charge of the preparation of import / export documents with respect of the loading and unloading of cargo on terminal. 編製貨運站貨物裝卸出入口文件。
			Prepares godown warrant documentation. 編製倉單。
			Checks godown receipt and co-ordinates with all routine documentation with godown keepers. 檢查倉庫收條，並與倉庫管理員合作，處理一切例行文件工作。
			Performs as shroff and signing clerk. 處理一切例行文件工作；負責收銀及簽署。
			Verifies stores' authorized signatures. 核實倉庫的授權簽名。

<b>Job Level</b> 職級	<b>Job Code</b> 職位編號	<b>Job Title</b> 職稱	<b>Job Description</b> 職務
Operative 技術員／ 操作工級	404	Warehouse / Depot / Terminal Operator, Tally Clerk, Checker 貨運站／倉庫操作員／ 理貨員／檢查員	Assists in loading and discharging of cargo. 協助裝卸貨物。
			Checks labels, weights and measures cargo. 檢查貨物標籤及重量，並進行量度。
			Operates equipment on trucks. 操作鑰車上的設備。
			Prepares vouchers for items received or delivered. 為所接送的貨物編製貨單。
			Looks after cargo inside the warehouse. 看管貨倉內的貨物。
			Assist in physical operators in movements of equipment such as containers and freight train wagons. 協助貨櫃、貨卡等設備的搬運工作。
			Assists in the communication process. 協助聯絡工作。
			Takes records if necessary. 有需要時保存紀錄。
			Checks documents and cargo to meet the requirements and assists in receiving cargo. 檢查單據及貨物，並協助收貨。
			Checks loading / unloading of containers on board of vessel and certifies physical integrity of containers. 檢查船上貨櫃裝卸情況，並證明貨櫃完整無 缺。

Job Level 職級	Job Code 職位編號	Job Title 職稱	Job Description 職務
<b>5. Traffic, routing, lines business, fleet management 航線、船隊管理</b>			
Managerial 經理級	105	Shipping Lines / Liner / Fleet Manager 航線經理	Assumes an overall responsibility for a fleet / liner service including planning its marketing and sales policies. 負責航線的整體服務，包括策劃市場推廣及 營業政策。
			Co-ordinates with documentation, operations and logistics managers to provide back-up service to customers. 與客務經理、操作經理及後勤經理聯絡，為 客戶提供輔助服務。
			Liaises with terminals and contractors to render other transport services to meet customers needs. 與貨運站及承包商聯絡，提供其他運輸服 務，以符合客戶需求。
			Monitors space allocation. 監察貨運艙位的分配。
			Attends conference meetings and votes on policy issues. 出席航運公會會議，就政策作出表決。
			Responsible for tariff matters. 負責運費事宜。
<b>6. Stevedoring, ship onboard services 船上操作</b>			
Managerial 經理級	106	Stevedore / Onboard Manager 貨物裝卸經理	Monitors freight operational activities including the delivery of cargo from vessel to land and from land to vessel. 監管貨運操作，包括在船上或碼頭起卸貨物。
			Controls use of vehicles / transport equipment. 管制車輛及貨運設備的使用。
			Responsible for on-the-job training and labour relations at shop floor level. 負責在職訓練及基層職工勞資關係。
			Supervises the assembly, delivery and disposal of vehicles. 監督車輛的裝配、分放及運用。
			Handles outside contractors in supplying transport and labour services. 與外間承包商接觸，以供應運輸及勞工服務。

Job Level 職級	Job Code 職位編號	Job Title 職稱	Job Description 職務
Supervisory 主任級	206	Stevedoring / Onboard Supervisor / Executive, Boarding Officer 裝卸主任／船舶協調主任／上船檢驗員	Arranges delivery of cargo from shore to vessel and vice versa. 安排岸上與船上貨物交收。
			Supervises the operation on board of vessel. 監督船上的貨物艙載操作。
			Attends to vessel arrivals and departures and the related formalities. 辦理船舶的抵步、離開及有關手續。
			Arranges the pilotage and berth of vessels. 安排船舶的領航及停泊。
			Co-ordinates with the Operations / Traffic or Freight Department and stevedores on cargo loading and discharging. 與操作／運輸或貨運部門及碼頭裝卸工人合作。
Operative 技術員／操作工級	406	Stevedore 裝卸工人	Handles cargo on board of barges. 在駁船上處理貨物。
<b>7. Technical, engineering services 技術支援</b>			
Managerial 經理級	107	Technical / Engineering Manager 技術／機械操作經理	Takes charge of installation, maintenance and servicing the terminal's electrical, electronic equipment and mechanical system. 裝置、保養及維修貨運站內的電機、電子設備及機械系統。
			Recommends engineering maintenance and procurement policies. 就工程保養及購買設備的措施提出建議。
			Responsible for shipboard performance, dry docking, repairs and maintenance. 監督輪機的效能，入乾塢及船隻的維修事宜。
			Manages purchasing activities in sourcing, negotiating price, terms and conditions of suppliers' contracts. Approves purchase orders. Oversees overall purchasing procedures. 統籌有關設施的購置事宜，包括採購、議價、訂定合同。批核定單。監督購置程序及進度。

<b>Job Level</b> 職級	<b>Job Code</b> 職位編號	<b>Job Title</b> 職稱	<b>Job Description</b> 職務
Supervisory 主任級	207	Technical / Engineering / Repair and Maintenance Supervisor / Executive 技術／機械操作主任／ 機械修理及保養主任	Assists in handling ship registration, repairs and maintenance, dry docking. 協助處理船隻的註冊、維修保養及入乾塢事宜。
			Checks certificates required for operating the ship. 審查操作船隻所需證書。
			Monitors the progress of ship under repairs or construction. 監察船入塢修理或建造的進度。
			Assists the Engineering Manager / Chief Engineer in the planning and directing all phases of engineering activities. 協助工程經理／總工程師策劃及指揮各階段的工程。
			Supervises the implementation of maintenance and repair policies. 監督維修保養政策的推行。
			Supervises the repairs, services and maintenance of transport and delivery equipment. 監督運輸設備的維修保養。
			Assists the manager in implementing purchasing functions. 協助工程經理購置有關設施。
Clerical 文員級	307	Technical Assistant / Clerk 技術助理	Prepares certificates required for operating the ship. 編製操作船隻所需證書。
			Keeps ship survey and repair and ship registration records. 保存船隻的檢驗、修理及註冊紀錄。
			Maintains ship's performance records and all incoming and outgoing cables. 保存船隻航行紀錄及出入電報。
			Receives stores and distributes supplies and commodities. Prepares purchasing orders and maintain records of items purchased. Compiles and compares stock records to prepare requisitions. 收取及分發物料。安排定單及記錄。比較需求與存貨並適時地準備採購。



Job Level 職級	Job Code 職位編號	Job Title 職稱	Job Description 職務
Operative 技術員／ 操作工級	407	Technical / Engineering Technician / Operative 技術及機械設備技術員 及操作員	Carries out normal maintenance and repair of equipment and machinery. 維修及保養機械設備。
			Carries out planned maintenance and emergency repairs and installation of refrigerated containers. 執行既定的保養計劃，進行緊急維修，並裝 置冷藏貨櫃。
			Checks and adjusts the temperature of refrigerated containers. 檢查及調校冷藏貨櫃溫度。
<b>8. Ships technical affairs 船隻運作</b>			
Managerial 經理級	108	Ship Planner / Ship's Technical Manager 船舶艙載計劃／ 船舶技術經理	Delivers sailing instructions to ship master for every voyage. 每次啓航前給予船長航次指示。
			Appoints agent in foreign port to attend ship or arrange bunker. 委任各港口的代理商打理船隻和補給燃料。
			Monitors ship's performance through voyage logs submitted by the ship master and chief engineer. 通過船長和輪機長遞交的航海日誌，監察船 隻的航行表現。
			Deals with ship registration, ship survey and repairs, dry docking and various certificates required for operating the ship. 處理船隻的註冊、檢驗、修理、入乾塢等事 宜，並安排辦理操作船隻所需的各種證書。
			Attends the ship during dry docking and during ship building. 於船隻入乾塢時或在造船過程中，監察有關 工作的進行。
			For on board maintenance, formulates policy for instructing and monitoring ship masters and chief engineers. 制定政策，以便指示和監督船長和輪機長進 行船隻的維修工作。
<b>9. Sales &amp; purchases, chartering, brokering of ships 船舶買賣、租賃及定艙</b>			
Managerial 經理級	109	Ship Sales & Purchase / Chartering / Brokering Manager 船舶買賣／ 租賃經理及經紀	Arranges to charter in and charter out of ships. 安排租入及租出船隻。
			Responsible for sales, purchases and new ship building contracts. 負責船隻買賣和造船合約。
Supervisory 主任級	209	Ship Sales & Purchase / Chartering / Brokering Supervisor 船舶買賣／租賃主任	Assists in the study of ships for chartering evaluation and other sales and purchase and chartering matters. 協助研究船隻的特點，以評定是否適合買賣 租用。

<b>Job Level</b> 職級	<b>Job Code</b> 職位編號	<b>Job Title</b> 職稱	<b>Job Description</b> 職務
Clerical 文員級	309	Ship Sales & Purchase / Chartering / Brokering Assistant / Clerk 船舶買賣／租賃助理	Prepares necessary documents for ship sales and purchase chartering. 編製買賣船舶及租船所需文件。
<b>10. P&amp;I, insurance, claims affairs 保險、理賠事務</b>			
Managerial 經理級	110	P& I / Insurance / Claims Manager 保險事務／理賠經理	Deals with underwriters for hull, cargo liability, crew and liability insurance. 就船身、貨物責任、船員責任保險等，與保 險公司交涉。
			In case of damage of ships or being claimed by cargo owners, takes care claim settlement and claims against the insurer. 遇有船隻受損毀或遭貨主索償時，安排解 決，並向保險公司要求賠償。
			Handles cargo claims. 處理貨物索償事件。
			Makes recommendations on cargo handling to reduce claims. 就如何處理貨物以減少索償提供建議。
Supervisory 主任級	210	P& I / Insurance / Claims Supervisor / Executive 保險事務主任	Assists insurance manager to settle minor claims from consignee. 協助保險經理處理收貨人的小額索償事宜。
			Assists the claims manager in implementing the cargo claim policy. 協助索償經理執行貨物索償政策。
			Carries out the claims procedures. 負責貨物索償程序。
Clerical 文員級	310	P& I / Insurance / Claims Assistant / Clerk 保險事務文員	Prepares insurance and claims documents. 編製保險及索償文件。
<b>11. Equipment control and arrangements 貨櫃調度</b>			
Supervisory 主任級	211	Container / Equipment Control Supervisor / Executive 貨櫃調動／ 設備管理主任	Maintains a suitable stock level of empty containers. 維持適當存量的空置貨櫃。
			Co-ordinates container movements. 統籌貨櫃往來。
			Arranges on-hire and off-hire surveys. 安排調查貨櫃的租用情況。
			Negotiates repair expenses with repair contractors. 與修理承包商商議修理費用。
Clerical 文員級	311	Container / Equipment Control Clerk 貨櫃／設備管理文員	Handles documents relating to container movements. 處理與貨櫃往來有關的文件。
			Updates containers movement records. 更新貨櫃往來紀錄。

Job Level 職級	Job Code 職位編號	Job Title 職稱	Job Description 職務
<b>12. Container haulage 貨櫃、拖運</b>			
Operative 技術員／ 操作工級	412	Container Haulage Driver 貨櫃拖車司機	Operates vehicles according to requirements and company regulations. 按規例及公司規定駕駛貨櫃車。
			Ensures documentary procedures are adhered to at container interchange point and at shipper / consignee premises. 確保文件在貨櫃交收地方及收貨人辦公室內依程序辦理。
			Takes notes of any container damage at time of receipt. 收貨時，留意貨櫃有否損壞。
<b>13. Trucking 大型貨車運輸</b>			
Operative 技術員／ 操作工級	413	Truck Driver 大型貨車司機	Drives trucks to receive and distribute cargo. 駕駛貨車接送貨物。
			Operates equipment on trucks. 操作貨車上的儀器。
			Prepares vouchers for items received or delivered. 為所接送的貨物編製貨單。
			Records arrival and departure time of consignments. 記錄貨物抵達及付運時間。
<b>14. Van Delivery 小型貨車運輸</b>			
Operative 技術員／ 操作工級	414	Van Driver 小型貨車司機	Drives vans to pick up and despatch cargo. 駕駛小型貨車接收及運送貨物。
<b>15. Lifting equipment handling 搬運操作</b>			
Operative 技術員／ 操作工級	415	Material Handling Equipment / Crane / Forklift Truck Operator 搬運及裝卸機械鏟車 操作員	Operates forklift trucks; checks equipment and fuel. 操作鏟車；檢查車上設備及燃料。
			Drives various material handling equipment as qualified. 駕駛各類搬運設備。
			Responsible for daily equipment safety checks, cleaning, refueling, battery charging and care. 每日檢查設備的安全，清理設備，加燃料，為電池充電及看管設備。
			Enters material handling equipment log records and reports defects. 登記物料搬運設備的使用紀錄及報告損壞。

Job Level 職級	Job Code 職位編號	Job Title 職稱	Job Description 職務
<b>16. Marine-Cargo Surveying 海運貨物測量</b>			
Managerial 經理級	116	Marine-Cargo Surveyor 海運貨物測量師	<p>Inspects cargo stowed in containers or in breakbulk to find out whether the packing and stowage are safe for transportation. 檢視貨櫃裝載貨物或散裝貨物的包裝及裝載是否合乎安全運輸。</p>
			<p>Inspects cargo that is apparently or visibly damaged to find out the nature of the damage(s) and possibility of salvage. 檢視明顯或不明顯破損貨物並鑒定損壞原因及補救可能。</p>
			<p>Inspects ship holds, fuel tanks and water tanks to find out the contents loaded. 檢視船艙、燃料艙、存水艙以測定內裝物體。</p>
			<p>Advises the ships officers on loading/unloading of cargo in respect of stowage, stability and other safety factors. 就船舶裝卸有關積載、平衡及其他安全事項向船上人員提供意見。</p>
Supervisory 主任級	216	Sworn Measurer 貨物量度員	<p>Measures the weight and dimensions of cargo (to be) stowed in containers or in breakbulk. 量度貨櫃裝載貨物或散裝貨物的重量及尺寸。</p>
			<p>Assists marine-cargo surveyors in the inspection of cargo. 協助海運貨物測量師檢視貨物。</p>