

SECTION I

Introduction

1.1 The Transport Logistics Training Board (the Training Board) of the Vocational Training Council was set up by the Hong Kong Special Administrative Region Government to be responsible for, among other duties, determining the manpower situation and training needs in the transport logistics industry. In the first half of 2004, the Training Board conducted a manpower survey of the transport logistics industry.

1.2 The report is in 5 sections; including the four main topics of:

Section II	Summary of survey findings:	Snapshots of the manpower situation at the time of the survey.
Section III	Observation and analysis of survey findings:	An interpretation of the survey findings with reference to its historical background.
Section IV	Conclusion:	An outlook of the future manpower situation.
Section V	Recommendations:	The Training Board's recommendations based on the manpower survey.

Scope and Coverage of the Survey

1.3 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.

1.4 The nine sectors/branches of the transport logistics industry surveyed were:

- a. Warehousing and Cold Storage;
- b. Trucking and Container Haulage;
- c. Airfreight Transport (Airline Companies/Carriers);
- d. Forwarding Agents;
- e. Stevedore;
- f. Sea Freight Transport (note);
- g. Cargo Handling Terminals;
- h. International Couriers; and
- i. Other transport logistics service providers

Note: In previous surveys, the Ship Management and Chartering Companies had been surveyed as Separate entries, but they are now incorporated into the Sea Freight Transport Sector/Branch

Method of the Survey

1.5 The main 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.

1.6 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 (in (g), (h) and (i)).

Sectors/Branches Surveyed and Samples

1.7 The sectors/branches surveyed and the number of samples per respective sector/branch are:

Sector/ Branch	Description (HSIC Code)	Total Samples
(a)	Storage (721) / Cold storage (7211/721100)	105
	Storage (721) / General cargo warehouses and other storage services (7212/721200)	
(b)	Land freight transport (712) / Land freight transport by goods vehicles (7121/712100)	536
	Supporting services to water transport (716) / Container terminals, haulage of containers and container leasing (7161) / Haulage of containers and container leasing (716101)	
	Large vehicle fleet owner companies (Supplementary)	
(c)	Air transport (717) / Airline companies (7171) / Hong Kong based airline and helicopter companies (717101)	30
	Air transport (717) / Airline companies (7171) / Local representative offices of overseas airline companies (717102)	
(d)	Services incidental to transport (718) / Air cargo forwarding services (7182/718200)	272
	Services incidental to transport (718) / Sea cargo forwarding services (7183/718300)	
(e)	Supporting services to water transport (716) / Supporting services to water transport n.e.c. (7169) / Stevedore (716901)	34

Sector/ Branch	Description (HSIC Code)	Total Samples
(f)	Ocean and coastal water transport (714) / Ship agents and managers (7141/714101)	203
	Ocean and coastal water transport (714) / Ship agents and managers (7141) /Local representative offices of overseas shipping companies (714102)	
	Ocean and coastal water transport (714) / Ship owners of seagoing vessels (7142/714200)	
	Ocean and coastal water transport (714) / Operators of seagoing vessels (7143/714300)	
	Services incidental to transport (718) / Shipbrokers (7184/718400)	
(g)	Cargo Handling Terminals (Supplementary)	8
(h)	International Couriers (Supplementary)	15
(i)	Other transport logistics service providers (Supplementary)	117
	All Sectors/Branches	1 320

Limitations of the Survey Method

1.8 The same sampling method has been adopted for previous surveys and for this survey in order to maintain consistency. Nevertheless, the method has two shortcomings:

- i. Jobs that have been sub-contracted out might not be surveyed. The survey method relies heavily on HSIC. If a person works for the Transport Logistics Industry but the establishment that he/she works for is not classified within the scope of the survey according to the HSIC, he/she will not be surveyed. Because of this problem, the survey might produce an underestimation of manpower. Warehouses, depots, stevedores, cargo handling terminals, couriers are especially affected by this problem.
- ii. An establishment is assigned *ONE* HSIC code irrespective of whether the establishment has more than one area of business or operation. The employees working in a multi-sectoral establishment are not be differentiated according to the various sectors that the employees are working for.