



Report on 2023 Manpower Projection

Labour and Welfare Bureau

The Government of the Hong Kong Special Administrative Region

14 November 2024

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Executive Summary

The Government has been conducting periodic Manpower Projection (MP) exercises to assess Hong Kong's future manpower supply and requirement trends at a macro level.

2. Amid Hong Kong's gradual recovery from the pandemic, a new round of MP exercise commenced in 2023 (2023 MP) to examine the medium-term manpower needs. 2023 MP consolidated statistics and data collected from Government and open sources as well as sectoral consultations to provide detailed analyses on manpower situation in 17 selected industries, highlighting manpower shortages and skills in demand on a sectoral basis. The projection period for 2023 MP is shortened from 10 years to five years.

3. The 17 selected industries include the eight key areas for the development of Hong Kong as outlined in the National 14th Five-Year Plan (the "eight centres"¹) and nine significant sectors² supporting local services and city operation, covering over 2.8 million workers, representing more than 80% of Hong Kong's workforce and contributing over 70% of the city's Gross Domestic Product (GDP).

Situation in the base year

4. In 2023 (the base year), Hong Kong's economy gradually recovered from the pandemic, which led to an increase in manpower demand. However, the local labour force (excluding foreign domestic helpers) had

decreased for three consecutive years during the pandemic period to 3.5 million, causing a tight labour market with a shortage³ of approximately 50 000 workers.

5. Most of the selected industries experienced manpower shortages at varying degrees, with more notable gaps observed in some labour-intensive industries, such as Construction, City operation, Health services, Accommodation and food, Retail, Tourism, as well as in the Innovation and technology (I&T) Centre that the Government is actively promoting. Each of these industries reported a shortage of over 5 000 workers.

Situation in 2028

6. Looking ahead, Hong Kong's economy is projected to grow at 3.2% annually during the projection period, driving sustained high manpower demand for major industries. By 2028, the local labour force is projected to slightly increase to 3.56 million. The supply of local manpower would nevertheless fall short to meet the rising demand, resulting in a widening manpower shortage to 180 000, an increase of 130 000 from 2023.

7. Due to an ageing workforce and a lack of new entrants, the projection indicates that there would be a severe shortage of "Skilled technical workers", accounting for over one-third of the total shortage in 2028.

8. All selected industries are projected to face manpower shortages at varying degrees. The respective shortage of 10 industries would exceed 10 000 workers (see Figure 1).

¹ The "eight centres" includes the East-meets-West centre for international cultural exchange, International aviation hub, International financial centre, International innovation and technology centre, International trade centre, International transportation centre, Regional centre for international legal and dispute resolution services as well as Regional intellectual property trading centre.

² Significant sectors includes Accommodation and food, City operation, Construction industry, Education, Health services, Manufacturing, Retail, Social services and Tourism.









³ The manpower shortage has already taken into account the number of unemployed persons and therefore is not the same as the number of job vacancies. For more details, please refer to **Appendix VII**.










9. Economic restructuring, technology advancement, business automation and digitalisation across industries would alter demand for job roles and skills in the market. Even conventional industries like the legal services and accountancy are embracing digital transformation. Some traditional positions (such as clerical and administrative roles performing routine and mundane tasks) may gradually be replaced by automation. Meanwhile, there would be rising demand for new roles related to digitalised operations (such as artificial intelligence (AI) specialists, data analysts and information technology experts).

10. As the application of technology becomes increasingly common across industries, the future workforce on the one hand should need to master core skills being sought in the market (such as language proficiency, communication skills, teamwork and problem-solving abilities), but also need to acquire new operational skills (such as e-commerce and AI applications) in response to industry transformations and changes in operational models on an ongoing basis. Therefore, Hong Kong needs to establish a flexible and forward-looking skills-based training system to equip the local workforce with relevant skills and knowledge to remain competitive in a rapidly changing market.

11. In the face of future manpower shortages, the Government and all quarters of community should collaborate to implement appropriate measures, including enhancing and expanding local training, as well as optimising recruitment and work arrangements, to enhance the quality and quantity of the local workforce. These efforts aim to attract more potential labour into the market and ensure the competitiveness of the local workforce could be maintained. At the same time, Hong Kong would continue to import outside talents and labour in an appropriate scale to address the challenge of manpower shortages.

Figure 1: Manpower balance for selected industries in 2028

Eight centres		Manpower balance in 2028
	I&T centre	- 18 000 to - 23 000
	Aviation hub	- 18 000 to - 23 000
	Trade centre	- 11 000 to - 16 000
	Transportation centre	- 10 000 to - 15 000
	EICE centre	- 5 000 to - 8 000
	Financial centre	- 1 500 to - 4 500
	IP trading centre	- 1 000 to - 4 000
	Legal & ADR centre	§

Nine significant sectors		Manpower balance in 2028
	Construction industry	- 45 000 to - 55 000
	City operation	- 39 000 to - 44 000
	Accommodation and food	- 14 000 to - 19 000
	Health services	- 13 000 to - 18 000
	Tourism	- 9 000 to - 14 000
	Manufacturing	- 9 000 to - 14 000
	Retail	- 7 000 to - 10 000
	Social services	- 3 500 to - 6 500
	Education	- 2 000 to - 5 000

Note: § denotes manpower balance within ± 500 .

1 Introduction

Background

To facilitate manpower planning, the Government has been conducting periodic MP exercises since the late 1980s to assess Hong Kong's future manpower supply and requirement trends at a macro level. The Labour and Welfare Bureau (LWB) completed the last MP in 2019, which set out the manpower situation up to 2027.

2023 MP

2. Pursuant to the announcement in the 2022 Policy Address, LWB commenced a new round of MP in 2023. Such 2023 MP was conducted at the juncture of the lapse of the global pandemic. It provides a timely opportunity to examine our manpower needs to boost our impetus for driving recovery, diversified economic growth and high quality development.

3. The results of 2023 MP would facilitate various stakeholders such as the Government, business sector, labour organisations and training institutions in understanding the future manpower requirements to guide concerted efforts in addressing gaps in manpower and skills, down to sectoral-specific contexts.

4. In addition to the conventional analyses rendered in previous MPs, 2023 MP sets out detailed analyses on the selected industries, including the magnitude of the manpower shortage and occupations and skills in demand in individual industries in the projection period. The selected industries include the eight key areas for the development of Hong Kong as outlined in the National 14th Five-Year Plan (the "eight centres") and nine significant sectors supporting local services and city operation. These selected industries collectively covered over 2.8 million workers, representing more than 80% of Hong Kong's

workforce, and contributed over 70% of the city's GDP.

Figure 1-1: Selected industries for 2023 MP



[] Figures in square brackets refer to the employment in 2023 in the relevant industries.

Note: As certain economic activities are pertinent to multiple selected industries, the relevant manpower figures would overlap.

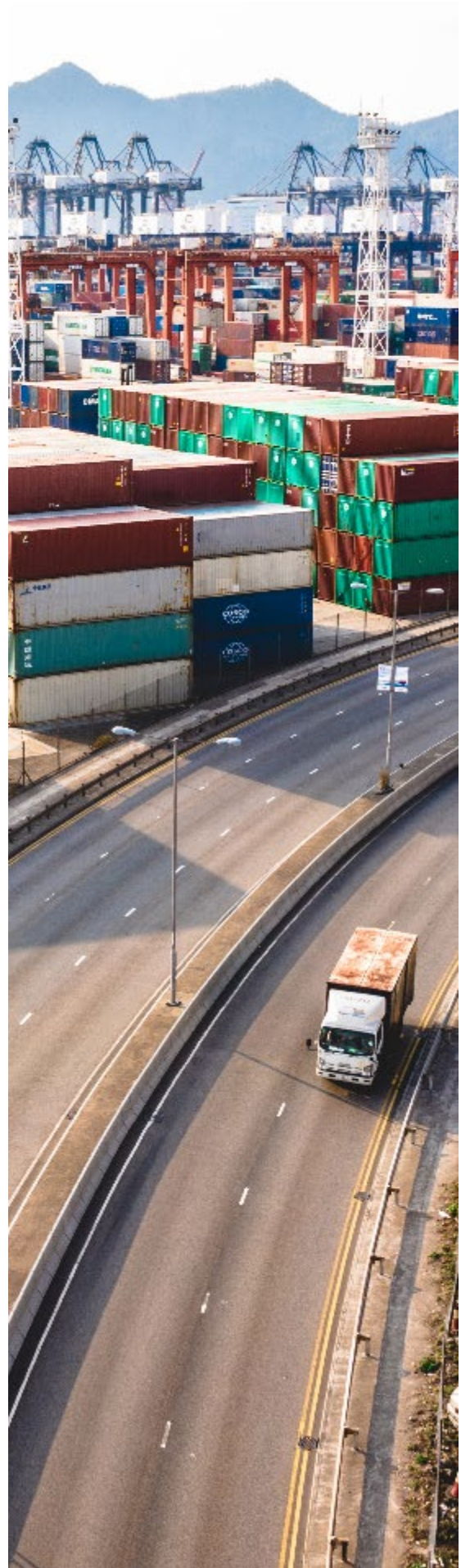
5. We extensively utilised demographic, economic and labour statistics from Government sources as well as data from other sources. These include manpower studies conducted by various bureaux and departments, public and private organisations (such as the Construction Industry Council and the Vocational Training Council) and big data analytics derived from industry practitioners and recruitment agencies.

6. To gather insights and perspectives from stakeholders in various selected industries, in-depth sectoral consultations with stakeholders were conducted to add market dimension in the analyses.

7. Automation and technology application are accelerating business cycles and driving structural shifts in job types and skills requirements. Therefore, we shortened the projection period from the previous 10 years to five years to better capture short- to medium-term changes affecting manpower demand and supply. 2023 MP covers the period of 2023 to 2028.

8. For comparability with the analyses in previous projections, the projected manpower situation of the 12 conventional economic sectors are also presented as supplementary analyses in this report.







9. Please refer to **Appendix I** for the methodology of 2023 MP.



2 Base Year – Manpower Situation in 2023

10. In 2023, business activities returned to normalcy following the lapse of the pandemic. Businesses resumed hiring, which led to a significant increase in manpower demand across sectors. Against the backdrop of a shrinking local workforce and an increase in job vacancies, the labour market was very tight in 2023. The unemployment rate stood at 2.9%, indicating nearly full employment.

Figure 2-1: Key indicators for the labour market in 2023

		Indicators
\$	GDP growth rate (year-on-year)	+ 3.3%
	Labour force [^]	3.50 million
	Employed persons [^]	3.39 million
	Vacancy rate	4.6%
	Number of vacancies	160 000
	Unemployment rate	2.9%
	Manpower requirements [^]	3.55 million

Note: [^] Foreign domestic helpers are excluded.

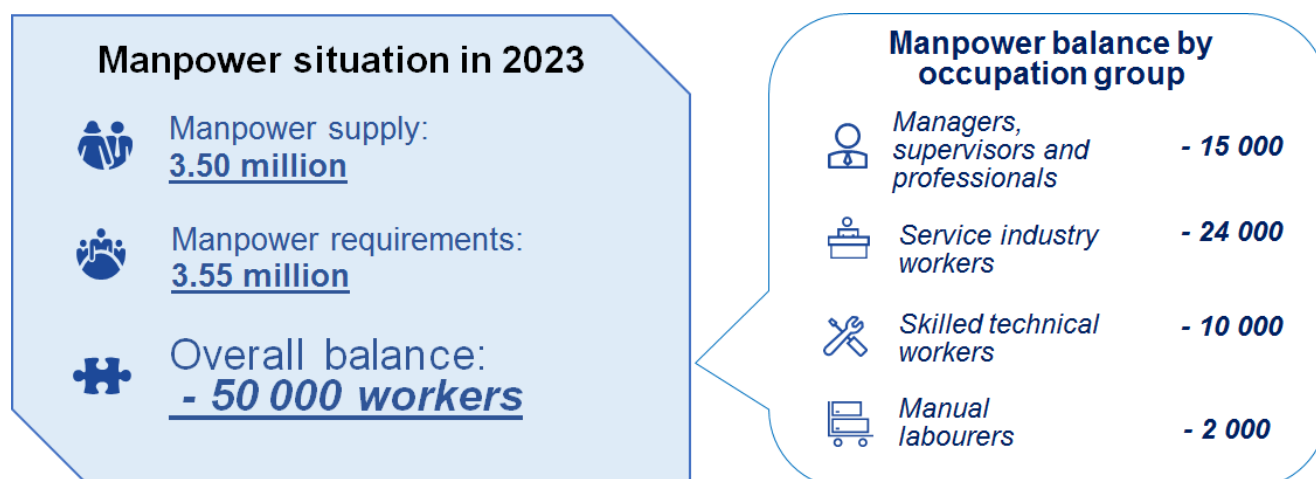
11. Taking into account the number of employed and unemployed persons and vacancies in the market, we estimate that there was a manpower shortage of some 50 000 workers in 2023. Manpower shortages were observed across all occupation groups, with more severe shortages found in the “Managers, supervisors and professionals” and “Service industry workers”⁴ groups.

⁴ The four occupation groups, as defined and adopted in this report, are as follows:

- 1) Managers, supervisors and professionals: Individuals who plan, direct and coordinate organisational activities, typically requiring advanced education or significant experience (e.g. engineers, medical doctors and shop managers);
- 2) Service industry workers: Non-managerial level personnel providing essential support or customer-facing services (e.g. clerical workers, flight attendants, cooks and salespersons);
- 3) Skilled technical workers: Workers with specialised skills or training to perform tasks related to construction, maintenance, and operation of machinery and structures (e.g. electricians, mechanics and drivers); and
- 4) Manual labourers: Individuals who carry out routine tasks that do not require specialised training or significant work experience (e.g. cleaners, kitchen helpers and porters).

Please refer the detailed definitions of the four occupation groups in **Appendix II**.

Figure 2-2: Manpower balance by occupation group in 2023



12. Most of the selected industries experienced manpower shortages in 2023 at varying degrees, with more notable gaps observed in some labour-intensive sectors, such as Construction, City operation, Health services, Accommodation and food, Retail, Tourism, as well as in the I&T Centre that the Government is actively promoting. Each of these industries reported a shortage of over 5 000 workers.

Figure 2-3: Manpower balance for selected industries in 2023

Eight centres		Manpower balance in 2023
	I&T centre	- 6 000
	Transportation centre	- 4 000
	Aviation hub	- 3 000
	EICE centre	§
	Financial centre	§
	IP trading centre	§
	Legal & ADR centre	§
	Trade centre	+ 5 000

Nine significant sectors		Manpower balance in 2023
	Construction industry	- 15 000
	City operation	- 9 000
	Health services	- 8 000
	Accommodation and food	- 7 000
	Retail	- 7 000
	Tourism	- 5 000
	Social services	- 4 000
	Education	- 4 000
	Manufacturing	+ 1 000

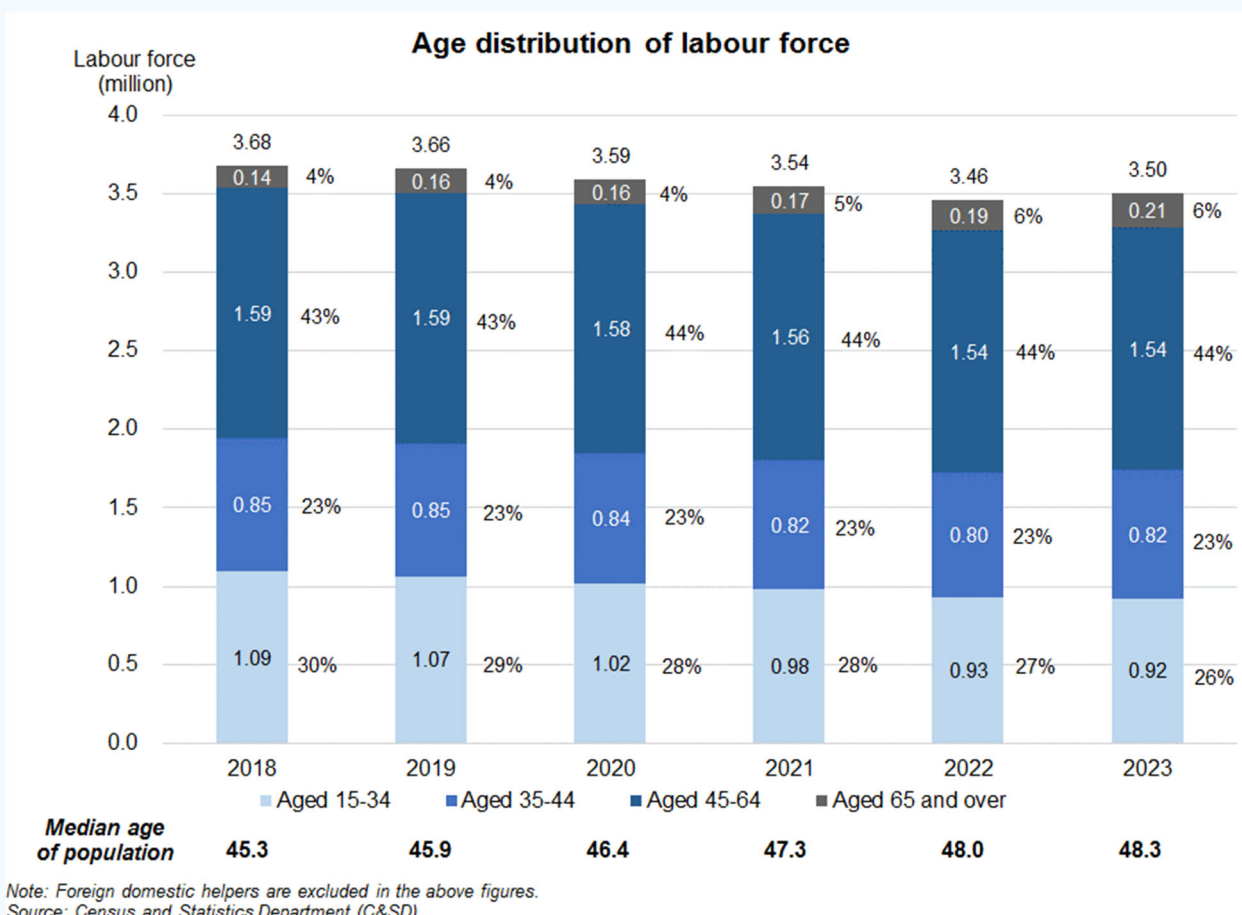
Note: § denotes manpower balance within ± 500 .

13. As certain economic activities are pertinent to multiple selected industries, the relevant manpower figures would overlap. For instance, logistics—essential for the movement and storage of goods—is involved in the economic activities under the Trade centre, Transportation centre and Aviation hub. On the other hand, the I&T centre includes I&T professionals and support staff across multiple sectors, with the relevant manpower also counted under the relevant sectors. Detailed coverage of the selected industries are at **Appendix III**. In addition, unemployed persons have been taken into account to assess the manpower balances for the overall economy and selected industries. Therefore, a negative manpower balance (i.e. a manpower shortage) is not the same as the number of vacancies in the labour market.

Box 1: Government Initiatives to Address Manpower Shortages through Talent Admission Schemes

To proactively attract global talents, the Government has implemented a series of measures since late 2022 to enhance the talent admission regime, including the introduction of the Top Talent Pass Scheme targeting high-income earners and graduates from world-renowned universities. The measures have received an enthusiastic response. As of the end of October 2024, over 250 000 applications were approved under various schemes, with over 160 000 talents already having arrived in Hong Kong.

The local labour force registered a continuous decline for four years from 2019 to 2022. The active measures trawling for talents successfully reversed this downward trend in the local workforce. In 2023, the labour force increased by 40 000 to 3.50 million, with half of the increase coming from the 35-44 age group. As most of the arrived talents are in the working age, the inflow of talents also slowed the pace of population ageing. The median age of population rose by just 0.3 year in 2023, compared to annual increases of 0.5 to 0.9 year from 2018 to 2022. Outside talents and imported labour have been playing a crucial role in alleviating manpower shortages across various sectors, and MP has already factored in the impact of existing measures regarding outside talents and imported labour.



3 Factors Affecting Manpower Demand and Supply in the Next Five Years

14. Manpower requirements and labour force are dynamic and subject to changes in demography, Government policy, economic structure and technology applications, etc. The following factors would impact the manpower requirements and workforce supply in the next five years:

Demand side



Domestic economic growth and structural shifts



Government policies and measures for sectoral development



Automation and digitalisation in business operation



National development strategies and integration with the Mainland



Geopolitical tensions and global economy

Supply side



Ageing population



Increasing education level of the labour force



Labour force participation and skills mismatch



Talent and labour movements

Box 2: Ageing Workforce

Like other developed economies, Hong Kong's population is ageing rapidly. According to the population projections using the mid-2021 population as the base by the Census and Statistics Department (C&SD), the proportion of the local population at the age of 65 and over would increase from 23% in 2023 to 28% five years later. At the same time, our median age would rise from 48.3 in 2023 to 50.2 in 2028, making it one of the highest among developed economies globally.

Ageing workforce would constrain labour supply and exacerbate the manpower shortage further down the road. Coupled with the sheer interest of the young generation to join, the manpower supply of the occupations in the groups of "Skilled technical workers" and "Manual labourers" is concerning.

Occupation group		Median age of employed persons in 2023	Number and proportion of employed persons aged 60 and over
1.	 Managers, supervisors and professionals	41	148 000 (10%)
2.	 Service industry workers	44	158 000 (14%)
3.	 Skilled technical workers	50	104 000 (26%)
4.	 Manual labourers	53	102 000 (31%)
Overall		45	513 000 (15%)

Note: Foreign domestic helpers are excluded in the above figures.

4 Manpower Situation in 2028

Key findings

15. Looking ahead, Hong Kong's economy is projected to grow at 3.2% annually during the projection period, driving sustained high demand for manpower from major sectors. By 2028, the local labour force is projected to slightly increase to 3.56 million. The supply of local manpower would nevertheless fall short to meet the rising demand, resulting in a widening

manpower shortage to 180 000, an increase of 130 000 from 2023.

16. Manpower shortages are forecasted to worsen significantly across all occupation groups, with "Skilled technical workers" facing the most severe strain, accounting for more than one-third of the overall shortage in 2028. This is primarily due to an ageing workforce and a lack of new entrants.

17. All selected industries are projected to face manpower shortages at varying degrees. The respective shortage of 10 industries would exceed 10 000 workers.

Figure 4-1: Manpower balance by occupation group in 2028

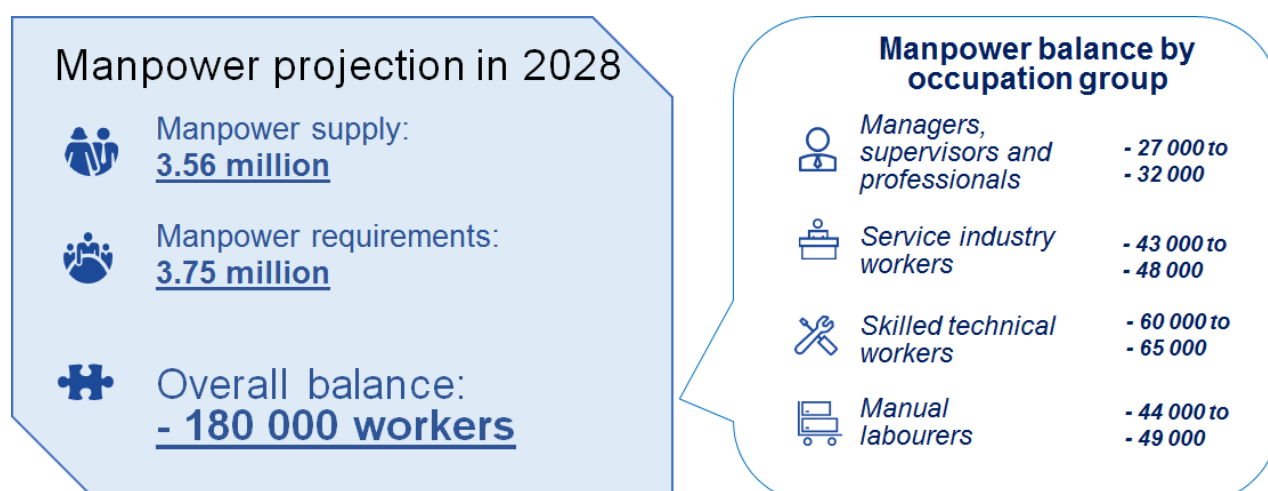


Figure 4-2: Manpower balance for selected key industries in 2028

Eight centres		Manpower balance in 2028	Nine significant sectors		Manpower balance in 2028
	I&T centre	- 18 000 to - 23 000		Construction industry	- 45 000 to - 55 000
	Aviation hub	- 18 000 to - 23 000		City operation	- 39 000 to - 44 000
	Trade centre	- 11 000 to - 16 000		Accommodation and food	- 14 000 to - 19 000
	Transportation centre	- 10 000 to - 15 000		Health services	- 13 000 to - 18 000
	EICE centre	- 5 000 to - 8 000		Tourism	- 9 000 to - 14 000
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	IP trading centre	- 1 000 to - 4 000		Retail	- 7 000 to - 10 000
	Legal & ADR centre	§		Social services	- 3 500 to - 6 500
				Education	- 2 000 to - 5 000

Note: § denotes manpower balance within ± 500 .

Box 3: Overview of Eight Centres

3.1 International Innovation and Technology Centre

Under the National 14th Five-Year Plan, Hong Kong is positioned to be an international innovation and technology (I&T) centre. With the opportunities arising from this positioning and the development of the Guangdong-Hong Kong-Macao Greater Bay Area (GBA), Hong Kong's I&T sector is poised for significant growth.

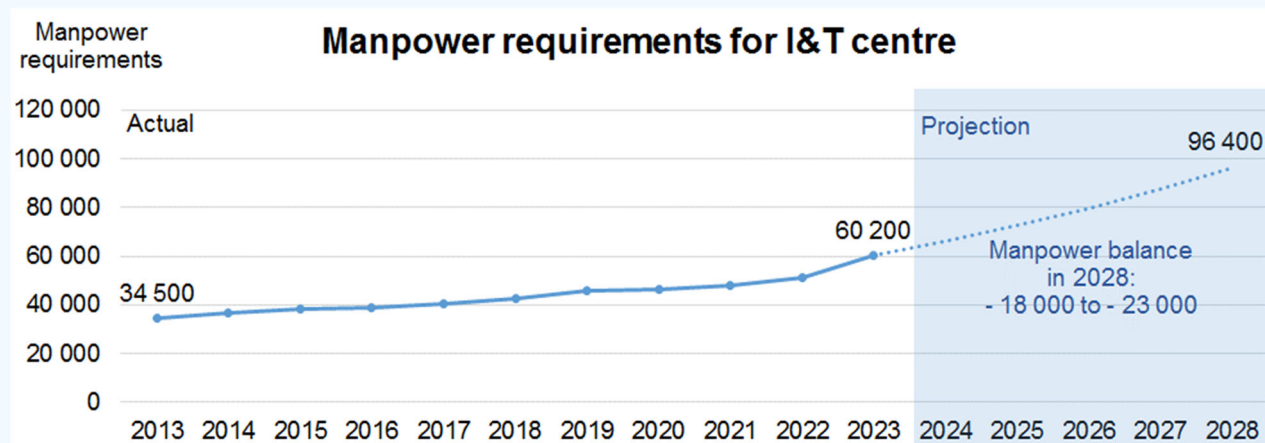
In 2022, the Government promulgated the Hong Kong I&T Development Blueprint (I&T Development Blueprint) to establish a clear development path for Hong Kong's I&T development over the next five to 10 years, charting Hong Kong in moving full steam towards the vision of an international I&T centre. The I&T Development Blueprint outlines four broad development directions:

- To enhance the I&T ecosystem and promote 'new industrialisation' in Hong Kong;
- To enlarge the I&T talent pool to create strong impetus for growth;
- To promote digital economy development and develop Hong Kong into a smart city;
- To proactively integrate into the overall development of the country and consolidate our role as a bridge connecting the Mainland and the world.

The Government is prioritising the attraction of leading I&T enterprises in sectors such as life and health technology, artificial intelligence (AI) and data science, advanced manufacturing and new energy technology industries.

Looking forward, Hong Kong's I&T sector is expected to witness an upsurge in start-ups, venture capital investments and initial public offerings from new I&T companies. Breakthroughs in scientific research, research and development (R&D) applications and robust growth in downstream industries are anticipated. With reference to the vision as set out in the I&T Development Blueprint, it is hoped that the ratio of Gross Domestic Expenditure on R&D to GDP, as well as the number of I&T start-ups and practitioners should further increase in the future.

Manpower requirements for the I&T centre is projected to rise from 60 200 in 2023 to 96 400 by 2028, exceeding 100 000 by 2030. A manpower shortage of 18 000 to 23 000 is projected by 2028. Occupations in demand would include project managers, data analysts, as well as I&T specialists and experts in AI, new energy technology, microelectronics and pharmaceuticals, etc.

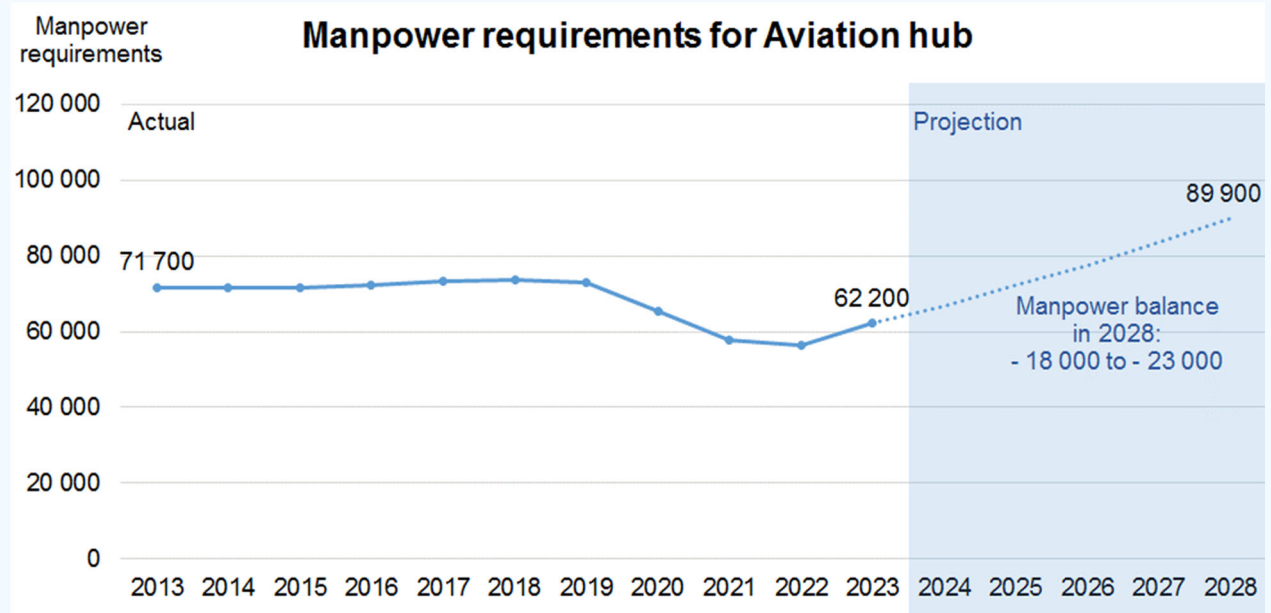


3.2 International Aviation Hub

As of 2023, Hong Kong International Airport (HKIA) remains the world's busiest cargo airport, underscoring its pivotal role in global aviation and logistics. Passenger traffic is recovering, with daily passenger traffic on peak days expected to return to 85% of the pre-pandemic levels by the end of 2024. The newly launched three-runway system to be commissioned this year would enable HKIA to handle up to 120 million passengers and 10 million tonnes of cargo annually by 2035, representing an annual growth rate of 7% to 10% in passenger and cargo volumes from 2023 levels.

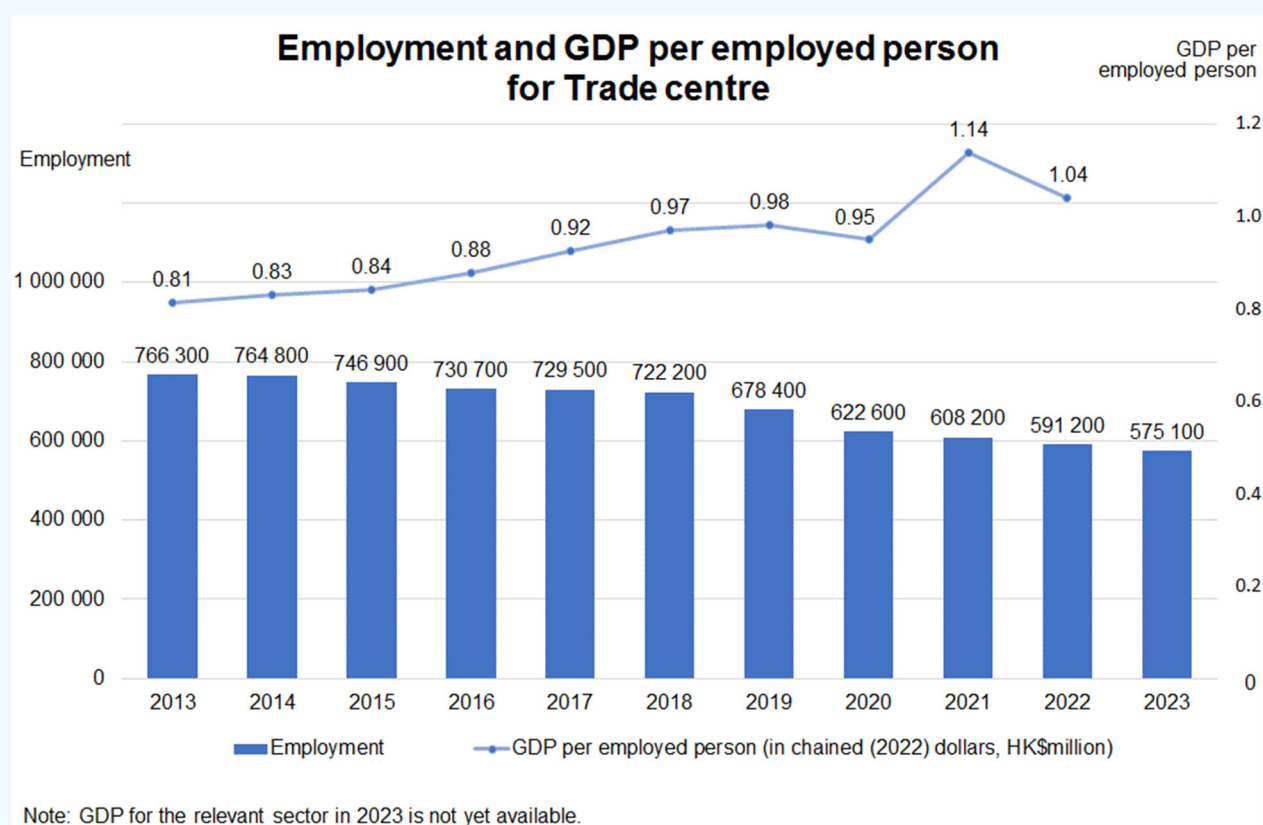
Key growth drivers in the sector include the commissioning of the three-runway system, increased integration with GBA through enhanced intermodal connectivity and heightened tourism appeal through promotional campaigns.

Despite advancements in automation, such as self-service check-ins and baggage handling, which are expected to reduce manpower requirements in certain areas, manpower demand in the aviation sector is still projected to grow at 8% over the next five years. A manpower shortage of 18 000 to 23 000 workers is anticipated by 2028. Occupations in demand include cabin crew, customer service officers, pilots, aircraft engineers and maintenance technicians.



3.3 International Trade Centre

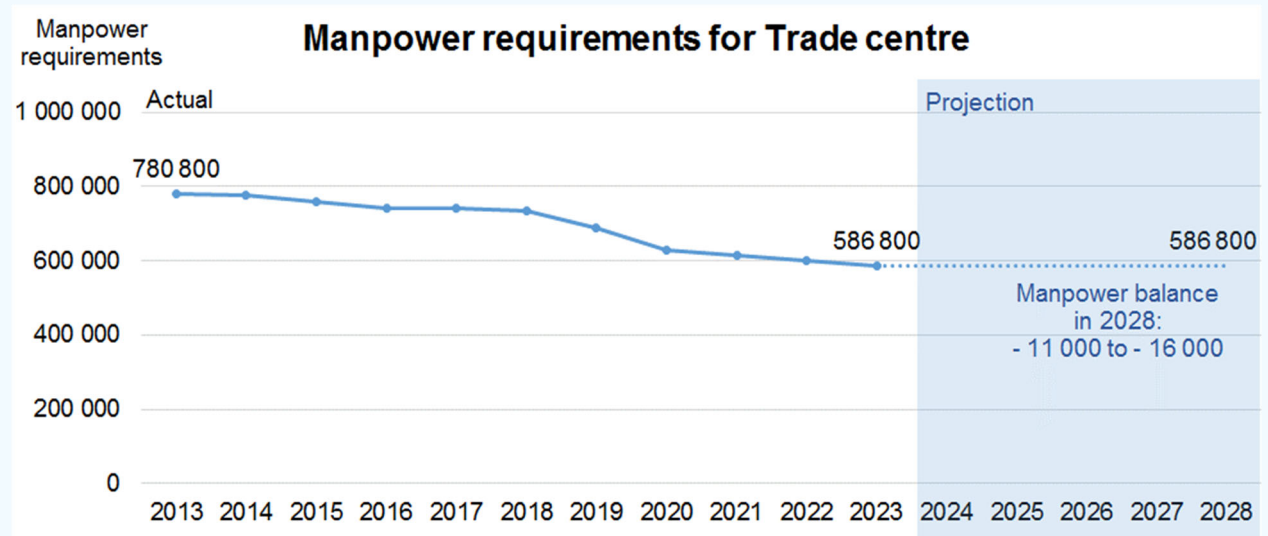
Over the past decade, Hong Kong as an international trade centre has undergone significant transformation driven by global shifts in business models and digitalisation. There has been extensive consolidation of the manpower in this sector, downsizing from over 766 300 in 2013 to around 575 100 in 2023 as a result of the shifts from labour-intensive operation to high-value added trade functions, particularly during the pandemic years. Despite the decline in the workforce, the GDP per employed person has surged by over 20% in the past 10 years, and unemployment rates within the sector remained at a very low level.



As logistics is essential for the movement and storage of goods, economic activities related to logistics are included in Trade centre, Transportation centre and Aviation hub.

In the next five years, Hong Kong would further consolidate its role as an international centre for trade and logistics, reinforced by the Resolution of the Central Committee of the Communist Party of China on Further Deepening Reform Comprehensively to Advance Chinese Modernisation (“the Resolution”). The Trade centre would continue to evolve towards higher-end and tech-driven activities, particularly in areas like e-commerce, online marketing and smart logistics. In line with the trend of Mainland manufacturing enterprises extending their production supply chains abroad, there is a goal to develop Hong Kong into a multinational supply chain management centre.

3.3 International Trade Centre (cont'd)



It is projected that the centre would face a manpower shortage of over 10 000 workers by 2028, especially in the groups of “Managers, supervisors and professionals” (such as e-commerce professionals and supply chain management system specialists) and “Skilled technical workers” (such as E&M mechanics / technicians for logistics facilities and machinery). Upskilling and reskilling measures would be essential to meet the industry’s evolving demands.

3.4 International Transportation Centre

Hong Kong, as an international transportation centre, remains a critical global hub, featuring a world-class public transport system that facilitates over 10 million passenger journeys daily for both local passengers and visitors, and one of the world's top 10 container ports. Hong Kong ranked 4th as an international maritime centre in 2023. Looking ahead, Hong Kong's transportation development would be driven by policies such as integration into GBA and green port and automation initiatives.

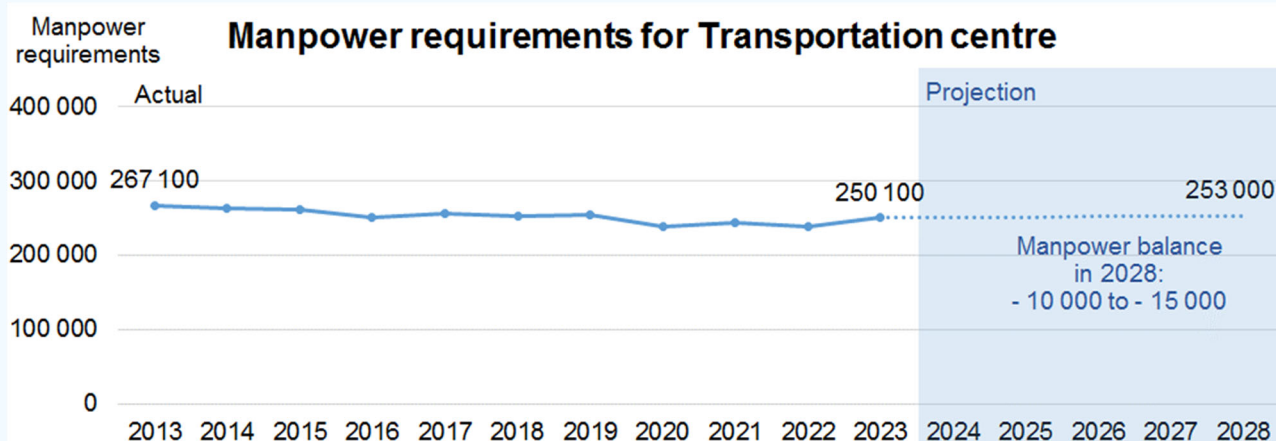
Manpower requirements within the sector has remained relatively stable at around 250 000 over the past five years. Land and water logistics services constitute 58% of the workforce, followed by land and water passenger services (42%).

Several factors would shape future manpower requirements, including:

- E-commerce growth: The rise of online shopping is driving higher demand for logistics workers, particularly in warehousing, postal and courier services;
- Technological advancements: The adoption of robotics and digitalisation is reducing the need for some manual labour; and
- Green transformation of transportation: The shift towards electric and liquefied natural gas (LNG) vehicles is boosting the demand for green energy specialists.

By 2028, the manpower requirements for the sector is projected to grow steadily by 2 900 workers (+0.2% per annum), reaching total manpower requirements of 253 000. A manpower shortage of over 10 000 workers is anticipated. However, the actual situation would hinge on the developments of this sector in the coming years, particularly in terms of productivity growth. Taking the situation of the shipping industry in the recent five years as an example, the value-added of the industry has been increasing while employment has been decreasing. Of note is that the timeframe of this report does not cover the effect of timely measures, such as retraining and importation of labour introduced in 2023 that have helped address the prevailing manpower situation.

Based on qualitative information including findings from sectoral consultations, occupations in demand would include E&M mechanics / technicians, IT specialists, drivers, warehouse operative staff and porters. In particular, expertise in logistics automation, robotics, digital platforms and green technologies (e.g. electric and LNG vehicles) would be increasingly important. Knowledge of GBA regulations and sustainable infrastructure would also be crucial as Hong Kong develops its smart port and green transport initiatives.



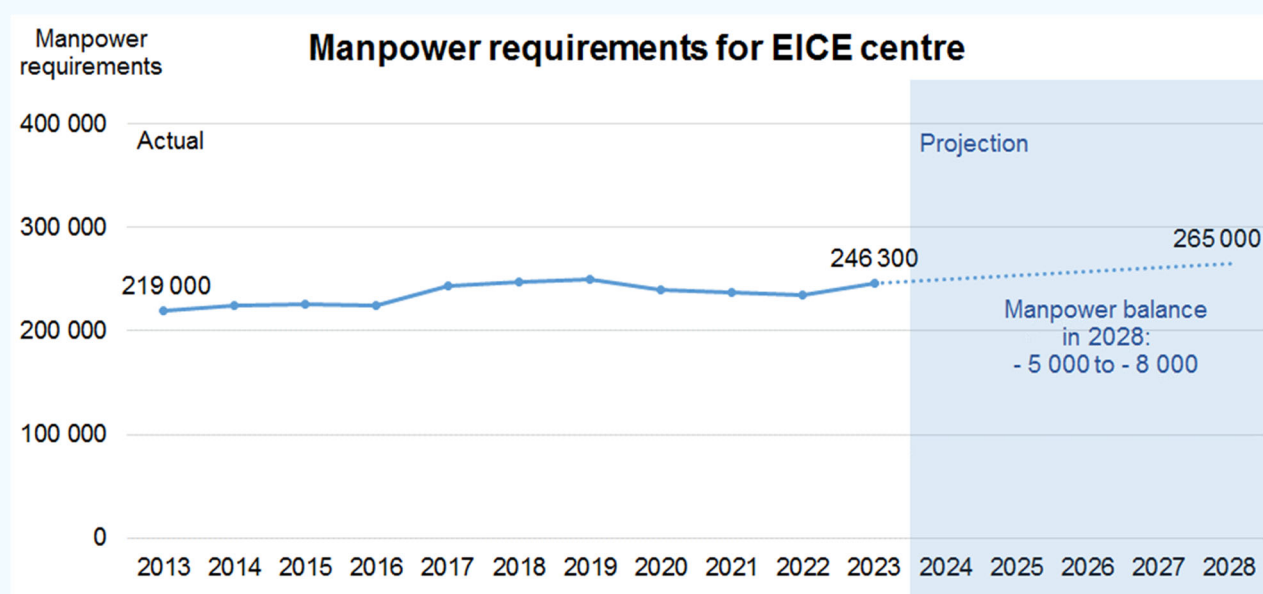
3.5 East-Meets-West Centre for International Cultural Exchange

Cultural and creative industries (CCIs) serve as the core for Hong Kong as an East-meets-West centre for international cultural exchange (EICE centre). These industries encompass activities where creativity and intellectual capital are key inputs, producing goods and services with cultural, artistic and creative content. Key sectors under CCIs include art, antiques and crafts; cultural education, library, archive and museum services; performing arts; film, video and music; television and radio; publishing; software, computer games and interactive media; design; architecture; advertising; and amusement services.

Hong Kong's unique role as a cultural bridge between East and West offers substantial potential for cultural development. The completion of major cultural facilities, such as the West Kowloon Cultural District and Kai Tak Sports Park, would further enhance this potential. The commissioning of such facilities is expected to spur demand for professionals in cultural management, arts curation and cultural exchange.

The art trade, particularly in antiques and auctions, is poised to become a significant growth area for Hong Kong. As a global centre for art trading, the city would require professionals skilled in art appraisal, auction management and cultural marketing. Additionally, the rise of art technology, interactive media and software design would lead to significant increase in demand for experts in digital platforms and immersive experiences.

The manpower requirements for these industries is expected to increase at 1.5% annually over the next five years. Key occupations in demand would include stage and sound technicians, creative directors and art tech specialists, all of whom would play a vital role in strengthening Hong Kong's position as an East-meets-West centre for international cultural exchange. The integration of AI would further increase the demand for digital media professionals who could blend creativity with cutting-edge technology.



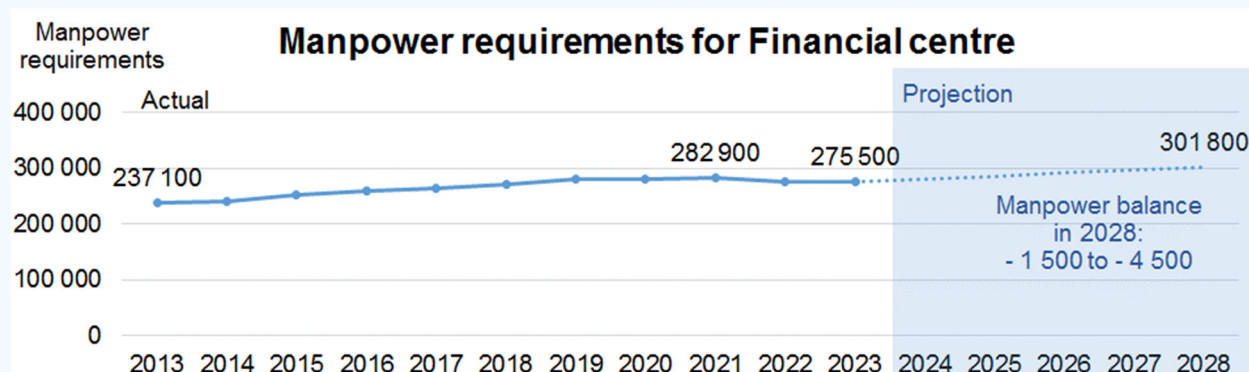
3.6 International Financial Centre

As an international financial centre, Hong Kong's financial sector continues to be one of the key pillars for the city's economy, contributing approximately 20% of its GDP. Over the past decade, the sector experienced annual manpower demand growth of 2.7% before the pandemic. While the financial sector has adjusted in recent years in response to global economic trends, future prospects are strengthened by supportive national policies, particularly the latest measures introduced in late September 2024 and the reaffirmation of support for the financial sector in "the Resolution". Key growth areas include:

- **Wealth management:** Driven by increased Mainland-Hong Kong market access, Cross-boundary Wealth Management Connect Scheme in the Guangdong-Hong Kong-Macao Greater Bay Area (Cross-boundary WMC) and family office business expansion;
- **Green and sustainable finance:** Growing demand for professionals in environmental, social and governance (ESG) and compliance, fuelled by Hong Kong's leadership in sustainable debt and green bonds;
- **Mainland-related financial markets initiatives:** Expansion of Renminbi (RMB) business, Stock Connects, Bond Connect, Cross-boundary WMC and the mutual access between the Mainland and Hong Kong interest rate swap markets (Swap Connects) increase demand for financial services;
- **Fintech and digital assets:** Fintech innovation (e.g. Regtech, Insurtech) and growing interest in virtual assets would drive demand for tech-savvy professionals in financial services; and
- **Insurance sector:** Growing need for actuaries, underwriters and IT specialists due to new regulatory regimes (International Financial Reporting Standards 17 Insurance Contract and Risk-based Capital regime) and industry digitalisation. Growing potentials from GBA would also bring development opportunities.

Looking ahead, manpower requirements for the financial sector is expected to grow by approximately 1.8% annually over the next five years, with rapid development anticipated in areas such as insurance, wealth management and fintech innovations including cryptocurrencies. Given the presence of international firms in Hong Kong, many of which could meet manpower demands through internal reallocation, combined with the influx of talents with financial sector expertise brought in by various talent attraction initiatives recently implemented by the Government, the overall manpower shortage is expected to be relatively modest.

It is projected that the centre would face a manpower shortage of around 1 500 to 4 500 workers, particularly in specialised roles such as fintech and blockchain specialists, asset management specialists and insurance professionals including actuaries.

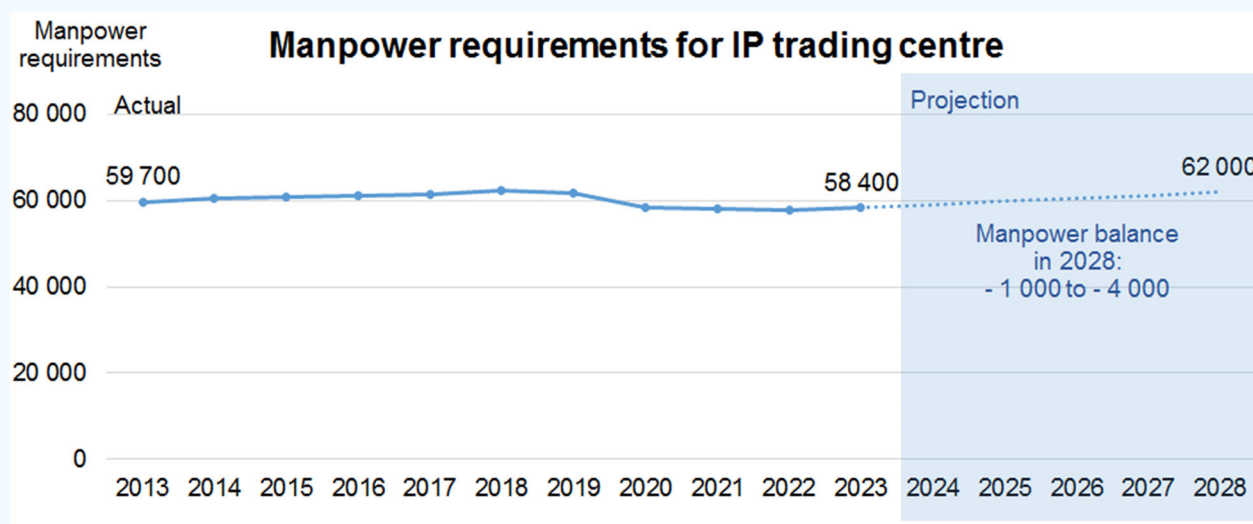


3.7 Regional Intellectual Property Trading Centre

Hong Kong is rapidly establishing itself as a regional intellectual property (IP) trading centre, driven by its robust legal framework, I&T ecosystem and close collaboration with the Mainland. The National 14th Five-year Plan, the Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area and the key policies promulgated in the Chief Executive's recent Policy Addresses have been instrumental in promoting IP trading.

The manpower requirements for IP-trading related sectors were 58 400 in 2023, with an expected annual growth rate of 1.2% over the next five years, reaching 62 000 in 2028. Driven by development in various areas such as the I&T sector, CCIs, as well as the development of IP-related industries in the Mainland and Hong Kong's original grant patent system, this growth aligns with broader economic trends.

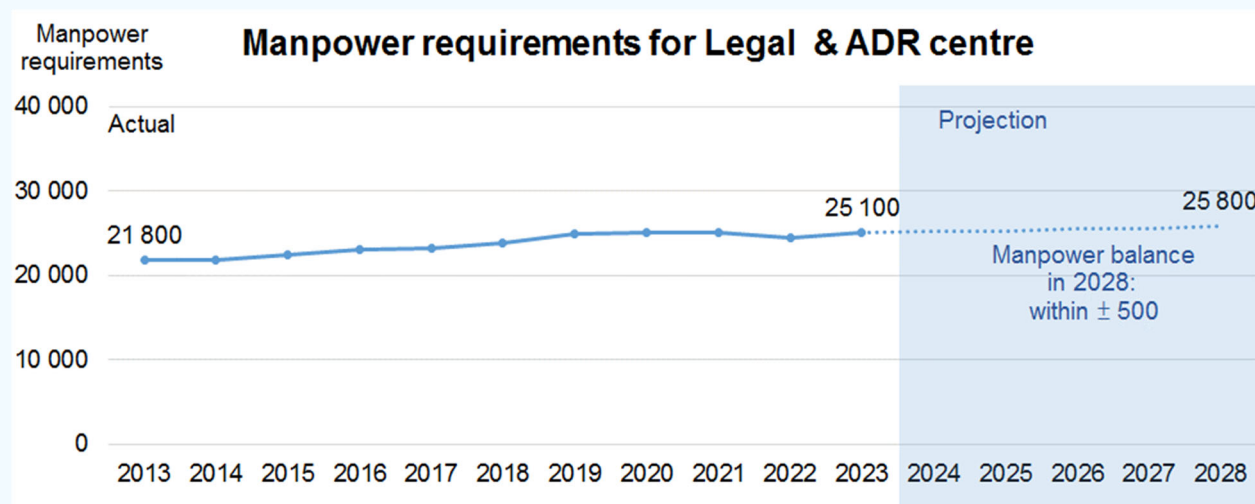
Occupations in demand in relevant sectors include IP managers and IP service professionals. These professionals would need a strong understanding of IP-related fields (e.g. patent drafting, prosecution and analytics; IP protection, management and commercialisation; etc.), coupled with broader knowledge of national and international IP systems as well as national and GBA development strategies and market trends.



3.8 Regional Centre for International Legal and Dispute Resolution Services

Hong Kong's unique legal system rooted in common law and judicial independence gives it a competitive edge in international legal and dispute resolution services. The decision by the Central Government to establish the headquarters of the International Organisation for Mediation in Hong Kong has further solidified the city's position as a regional centre for international legal and dispute resolution services. With the continuous expansion of regional economic activities, the demand for dispute resolution services will continue to rise, positioning Hong Kong as a potential prime destination for international legal services.




Manpower requirements in the sector is expected to grow steadily at 0.6% annually, from 25 100 in 2023 to 25 800 by 2028. While AI and automation are expected to handle routine tasks such as document processing, specialised roles including alternative dispute resolution experts, legal technology specialists and automation experts would be essential, particularly those with expertise in cross-border commercial arbitration. Hong Kong's strong legal education and training framework would help mitigate talent shortages, ensuring a sustained supply of qualified professionals for the sector.



Scenario analysis

18. Scenario analysis was conducted at the macro-level based on different projected rate of GDP growth in the projection period. Under the baseline scenario as presented in this report, an annualised real GDP growth rate at 3.2% is assumed. High and low case scenarios were developed based on GDP growth variations of ± 0.5 percentage points⁵ over the projection period. The scenario analysis estimates manpower requirements under different scenarios by referencing the historical statistical relationship between manpower demand and GDP growth rate.

19. The overall manpower balances in 2028 under the three scenarios are as follows:

Scenario on economic growth		Manpower balance
	High-case scenario (GDP growth by 3.7% per annum)	- 220 000
	Base-case scenario (GDP growth by 3.2% per annum)	- 180 000
	Low-case scenario (GDP growth by 2.7% per annum)	- 150 000

⁵ The range of the real GDP growth rate used in the assumptions under the three scenarios was drawn up with reference to the fluctuations of the real GDP growth rate the past 20 years (excluding the pandemic years).

Occupations, skills and knowledge in demand in the next five years

20. Hong Kong needs to cultivate a skills-diverse workforce to fill roles and vacancies in the next five years. With economic restructuring, the rapid advancement of AI and digitalisation affecting all sectors of the economy, job roles and skill requirements are expected to undergo significant transformation. Even conventional industries like the legal services and accountancy are embracing digital transformation. While AI and automation are becoming prevalent, efficiency and productivity could be enhanced and traditional positions performing routine and mundane tasks, such as clerical roles and administrative jobs, may gradually be replaced by AI and automation over time. At the same time, new roles, such as AI specialists, data analysts as well as IT and digitalisation experts, would be in rising demand across all sectors as business operations evolve in tandem with the increasing application of technology.

21. Nine key skills and four essential areas of knowledge have been identified as critical across all sectors. The rise of AI and digitalisation is reshaping skill demands, making digital proficiency essential for the future workforce. Each sector would have specific requirements. For example, workers in the retail sector would need to be equipped with skills in online marketing and e-commerce, while practitioners in the trade sector should have knowledge of digital logistics processes.

22. As an international city providing professional services to global clients, our workforce should be sensitive and agile in working in multilingual and cross-cultural environments. At the same time, our workforce need to continuously upskill to maintain strengths in core skills including communication, language proficiency and global awareness.

23. A flexible training strategy is essential to assist our workforce to upskill and reskill. Skills-based learning is a continuous journey for all. All workers would have to pick up new skills and update their knowledge according to the market requirements. This would ensure that Hong Kong's workforce remains competitive and drive development of our economy in a rapidly changing global environment.

Essential skills

- | | | |
|-------------------------------------|---|------------------------------|
| • Adaptability and learning agility | • Critical thinking and problem solving | • Collaboration and teamwork |
| • Communication skills | • Data analytical skills | • Digital proficiency |
| • Innovation and creativity | • Resilience and stress management | • Multilingual competence |

Essential knowledge

- | | |
|---|---|
| • Basic digital literacy (including AI application) | • ESG principles |
| • Cultural awareness and sensitivity | • Mainland and GBA development strategies and market trends |

Box 4: Impact of Automation and AI on Our Workforce

The advent of automation and AI has significantly reshaped the global workforce landscape. According to Goldman Sachs Research[#] in 2023, generative AI could raise global GDP by 7% and boost annual productivity growth by 1.5 percentage points over a 10-year period. This transformation presents both opportunities and challenges to the global economy.

Automation and AI are becoming increasingly prevalent for the purpose of enhancing efficiency and productivity. In sectors such as hospitality, retail, aviation and banking, these technologies help perform routine and repetitive tasks, allowing more strategic deployment of the limited human resources. Technology helps save headcounts in some sectors. Some organisations report a reduction in manpower requirements by 10% to 20% upon the adoption of automation and AI.

Additionally, automation and AI catalyse the creation of new roles that require advanced skills. There is growing demand for AI specialists, data scientists and digital transformation experts for development, management and customisation of these technologies. However, certain jobs and occupations may not be easily replaced by the technologies in the short to medium term due to the nature of the work. These include, but are not limited to, the following:

- Chefs and culinary experts
- Emergency responders (firemen and policemen, etc)
- I&T experts
- Creative professionals
- Executives and managers (leadership roles)
- Personal service specialists (hairdressers and beauticians, etc)
- Educators and teachers
- Healthcare professionals
- Skilled trade technicians

Challenges

While global integration of automation and AI streamlines operations and reduces costs, it also poses challenges to the existence of certain job roles. A study by the International Monetary Fund[#] in 2024 suggests that AI would affect nearly 40% of jobs worldwide, particularly in high-skill sectors. While AI could help less experienced workers enhance their productivity, younger workers may find it easier to seize new opportunities, whereas experienced and mature workers may face greater pressure to adapt.

To mitigate these challenges, there is a need for strategic policy development focused on reskilling and upskilling programs by the Government and all quarters of the community. These initiatives would be essential for equipping workers with the competencies needed to thrive in a technology-driven world and ensuring Hong Kong's workforce remains competitive globally. In the long term, it is also necessary to consider integrating the cultivation of digital literacy into foundational education, to better equip the new generation to adapt to the evolving demands of the workforce.

Sources:

1. Goldman Sachs Research Department. (2023). *Generative AI Could Raise Global GDP by 7%*.
2. International Monetary Fund. (2024). *AI Will Transform the Global Economy. Let's Make Sure It Benefits Humanity*.

5 Summary for Selected Industries

24. A factsheet is prepared for each selected industry. The factsheet summarises the key statistics reflecting the manpower situation of the concerned industry in 2023, the key factors impacting outlook, the projected manpower requirements and anticipated balance by 2028. The key occupations in demand as well as essential skills and knowledge in the next five years are also outlined.



East-meets-West Centre for International Cultural Exchange



Sector coverage

- Art, antiques and crafts
- Cultural education, library, archive and museum services
- Performing arts
- Film, video and music
- Television and radio
- Publishing
- Software, computer games and interactive media
- Design
- Architecture
- Advertising
- Amusement services

Situation in 2023

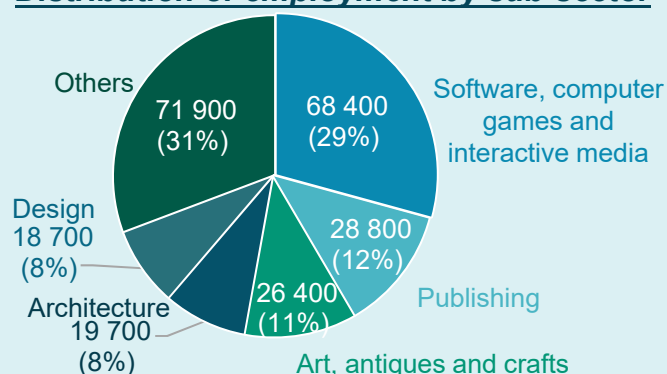
Employment
233 800

Vacancies
12 600

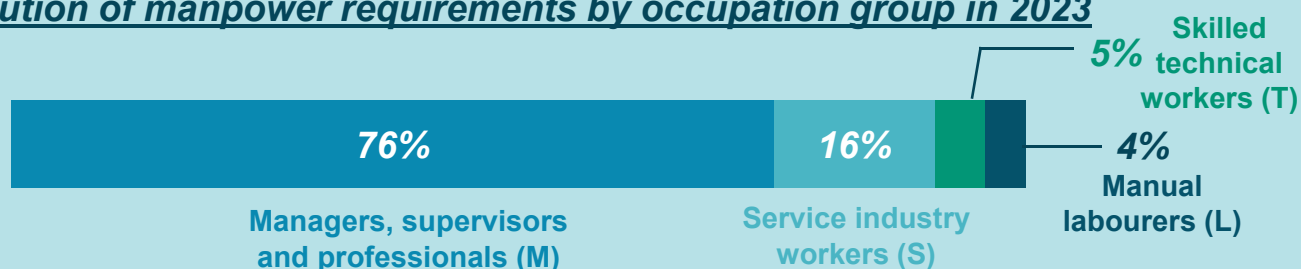
Manpower requirements
246 300

Vacancy rate
5.1%

Distribution of employment by sub-sector



Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower requirements **265 000**

Change from 2023 to 2028

Projected change

+18 600

Annual change

+1.5%

Sectoral manpower balance **-5 000 to -8 000**

Key factors impacting outlook



Integration with GBA



Development/ operation of new and major cultural facilities



Policies to promote development of arts and culture



Technology and AI

Manpower balance by occupation group

Managers, supervisors and professionals

- 5 500 to
- 7 500

Service industry workers

within ± 500

Skilled technical workers

within ± 500

Manual labourers

within ± 500



Occupations in demand

- Arts administration and management specialists (M)
- Art tech specialists (M)
- Conservation specialists (M)
- Curators (M)
- Art educators (M)
- Art trading specialists (M)
- Creative directors (M)
- IT and digitalisation staff (M&T)
- Art project financing experts (M)
- Artwork appraisers (M)
- Cultural intellectual property (IP) experts (M)
- E&M mechanics / technicians (including stage lighting and sound specialists) (T)

Essential skills

- Adaptability and learning agility
- Communication skills
- Innovation and creativity
- Business acumen and entrepreneurship
- Digital proficiency
- Multilingual competence
- Collaboration and teamwork
- Financial management and fundraising acumen
- Storytelling and content creation

Essential knowledge

- Art technology
- Global and Mainland cultural and creative market development trends
- Cultural awareness and sensitivity
- IP literacy (e.g. IP management and commercialisation)



Sector coverage



Air transport services

(including air passenger transport, air freight transport and aircraft maintenance)

Situation in 2023



Employment

56 900



Vacancies

5 300



Manpower requirements

62 200



Vacancy rate

8.5%

Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower requirements



89 900

Change from 2023 to 2028

Projected change



+27 700

Annual change



+7.7%

Sectoral manpower balance



-18 000 to -23 000

Key factors impacting outlook



Commissioning of the Three-Runway System



Expansion of aviation network



Expansion of Airport City



Enhancement in intermodal connectivity for passenger and cargo in GBA



Increase in tourism appeal of Hong Kong



Increase in travel demand within GBA

Manpower balance by occupation group

Managers, supervisors and professionals

- 5 500 to
- 7 000

Service industry workers

- 8 500 to
- 10 000

Skilled technical workers

- 3 200 to
- 4 200

Manual labourers

- 800 to
- 1 800



Occupations in demand

- Aircraft engineers (M)
- Aircraft pilots (M)
- Aircraft safety officers (M)
- Data analysts (M)
- IT and digitalisation staff (M&T)
- Route development officers (M)
- Customer service officers (S)
- Travel attendants (cabin crew) (S)
- Aircraft maintenance mechanics / technicians (T)
- Airport operational supporting staff (e.g. passenger service officers, ramp service agents, airport tug drivers, tractor drivers, equipment / loader operators as well as E&M mechanics / technicians) (S&T)
- Cleaners / cabin workers (L)
- Warehouse operative staff and porters / cargo handlers (L)

Essential skills

- Adaptability and learning agility
- Collaboration and teamwork
- Communication skills
- Customer service and complaint handling
- Digital proficiency
- Flight safety and risk management
- Multilingual competence
- Resilience and stress management
- Route development

Essential knowledge

- Aviation regulatory knowledge
- Digital literacy (e.g. customer service bots and flight scheduling apps)
- ESG principles
- National and GBA development strategies and market trends

Sector coverage



Banking



Stock brokerage and
asset management



Insurance

Situation in 2023



Employment
269 100



Vacancies
6 500



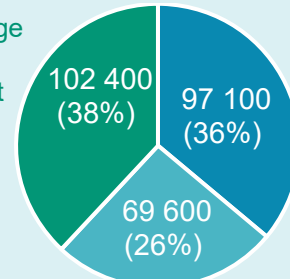
Manpower requirements
275 500



Vacancy rate
2.3%

Distribution of employment by sub-sector

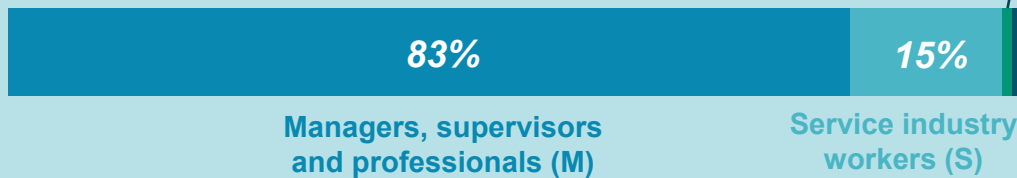
Stock brokerage
and asset
management



Banking

Insurance

Distribution of manpower requirements by occupation group in 2023



1% Skilled
technical
workers (T)

1%

Manual
labourers (L)

Projection for 2028

Manpower
requirements



301 800

Change from 2023 to 2028

Projected change

Annual change



+26 300



+1.8%

Sectoral manpower
balance



-1 500 to -4 500

Key factors impacting outlook



ESG awareness



Fintech development



Mutual market access



New listing rules in
Hong Kong



Offshore Renminbi hub



Virtual assets
ecosystem

Manpower balance by occupation group

Managers,
supervisors and
professionals

- 2 000 to
- 3 000

Service industry
workers

within ± 500

Skilled technical
workers

within ± 500

Manual labourers

within ± 500

Occupations in demand

- Accountants (M)
- Data analysts (M)
- IT and digitalisation staff (M&T)
- Technical sales (Fintech) (M)
- Asset and wealth management professionals (M)
- ESG analysts / sustainability officers (M)
- Relationship managers (M)
- E&M mechanics / technicians (T)
- Compliance and risk management professionals (M)
- Fintech and blockchain specialists (M)
- Specialist insurance professionals (i.e. underwriters, actuaries, etc.) (M)

Essential skills

- Adaptability and learning agility
- Critical thinking and problem solving
- Innovation and creativity
- Collaboration and teamwork
- Data analytical skills
- Multilingual competence
- Communication skills
- Digital proficiency
- Resilience and stress management

Essential knowledge

- Anti money laundering (AML)
- ESG principles
- National and GBA development strategies and market trends
- Blockchain and cryptocurrency
- Financial and banking related regulatory knowledge
- Digital literacy (e.g. AI application – customer service bots and online banking)
- Green finance

International Innovation and Technology Centre



Sector coverage



Life & health technology



AI & data science



Advanced manufacturing and new energy

Situation in 2023



Employment
52 400



Vacancies
7 800

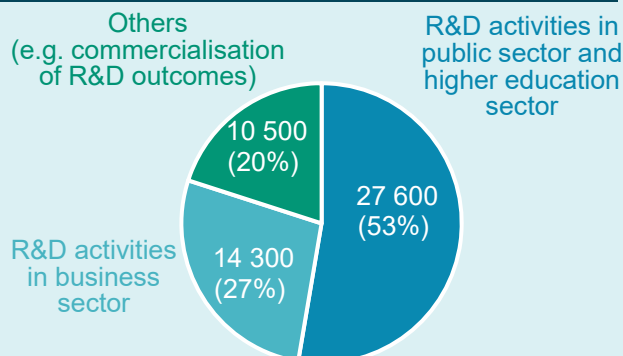


Manpower requirements
60 200

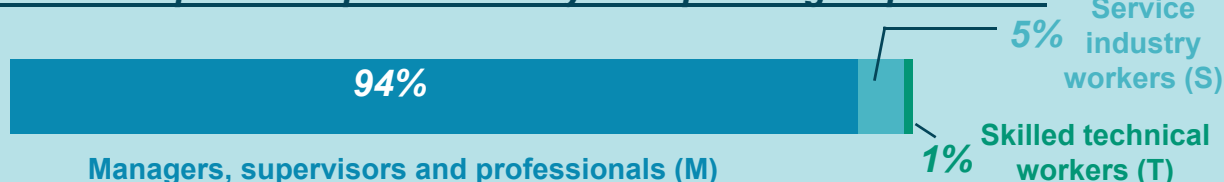


Vacancy rate
13.0%

Distribution of employment by sub-sector



Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower requirements



96 400

Change from 2023 to 2028

Projected change



+36 100

Annual change



+9.8%

Key factors impacting outlook



I&T ecosystem development



Development of new industrialisation



Digitalisation and AI adoption



Integration with GBA



Strong policy support

Sectoral manpower balance



-18 000 to -23 000

Manpower balance by occupation group

Managers, supervisors and professionals

- 17 000 to
- 21 000

Service industry workers

- 500 to
- 1 500

Skilled technical workers

within ± 500

Manual labourers

not applicable



Occupations in demand

Overall

- Data analysts (M)
- Entrepreneurs / startup advisors (M)
- IP experts (M)
- Project managers (M)
- Regulatory affair specialists (M)
- E&M mechanics / technicians (systems/ data centre and network installation) (T)

AI and data science

- AI programmers / specialists (M)
- Business analysts and data scientists (M)
- Cloud infrastructure specialists (M)
- Cyber security specialists (M)
- Digital transformation experts (M)
- Robotics experts (M)
- System architects (M)

Life and health technology

- Medical laboratory technologists (M)
- Pharmaceutical process developing engineers (M)

Advanced manufacturing and new energy

- Electronic engineers (M)
- Microelectronics experts (M)
- New energy experts (M)

Essential skills

- | | | |
|-------------------------------------|---|------------------------------|
| • Adaptability and learning agility | • Business acumen and entrepreneurship | • Collaboration and teamwork |
| • Communication skills | • Critical thinking and problem solving | • Data analytical skills |
| • Digital proficiency | • Financial management and fundraising acumen | • Innovation and creativity |
| • Multilingual competence | • R&D project management | |

Essential knowledge

- | | | |
|--|---|---|
| • Global technology development trends | • ESG principles | • I&T related regulatory knowledge |
| • Intellectual property (IP) literacy (e.g. IP management and commercialisation) | • National and GBA development strategies and market trends | • User experience (UX) / user interface (UI) design |



Sector coverage



Trading (import, export and
wholesale trades)



Logistics

Situation in 2023



Employment
575 100



Vacancies
11 700

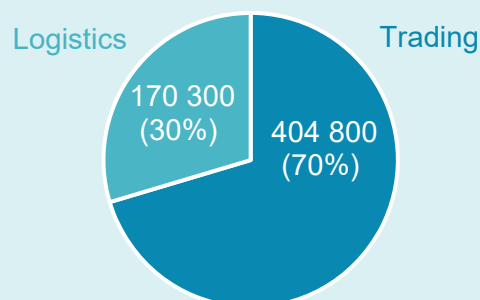


Manpower requirements
586 800



Vacancy rate
2.0%

Distribution of employment by sub-sector



Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower
requirements



586 800

Change from 2023 to 2028

Projected change



**no significant
change**



Annual change

**no significant
change**

Sectoral manpower
balance



-11 000 to -16 000

Key factors impacting outlook



Offshore trade
platforms



Regional cooperation
and Belt and Road
Initiative



Rise of e-commerce



Transformation to
high value-added
services

Manpower balance by occupation group

Managers,
supervisors and
professionals

- 2 000 to
- 3 000

Service industry
workers

- 600 to
- 1 600

Skilled technical
workers

- 4 400 to
- 5 400

Manual labourers

- 4 000 to
- 6 000



Occupations in demand

- Data analysts (M)
- Digital marketing professionals (M)
- E-commerce professionals (M)
- ESG analysts / sustainability officers (M)
- Global supply chain management system specialists (M)
- IT and digitalisation staff (M&T)
- E&M mechanics / technicians (T)
- Warehouse operative staff and porters (L)

Essential skills

- Adaptability and learning agility
- Collaboration and teamwork
- Communication skills
- Critical thinking and problem solving
- Data analytical skills
- Digital marketing
- E-commerce
- Global supply chain management
- Multilingual competence

Essential knowledge

- Digital literacy (e.g. digitalisation of customer and shipping documents)
- ESG principles
- Insights into emerging markets (South East Asia, Middle East, etc.)
- National and GBA development strategies and market trends
- Trade related regulatory knowledge
- Trends in international trade and geopolitical tensions



Sector coverage



Land passenger transport



Water passenger transport



Land and water logistics services

Situation in 2023



Employment
238 600



Vacancies
11 600

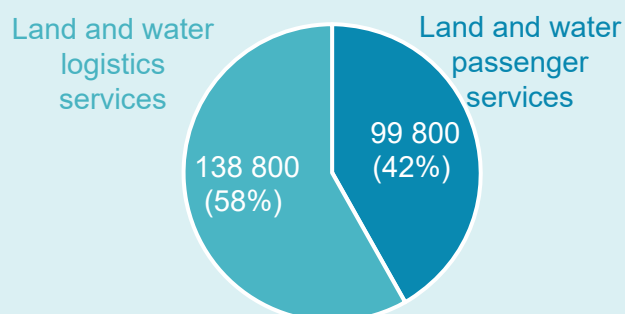


Manpower requirements
250 100

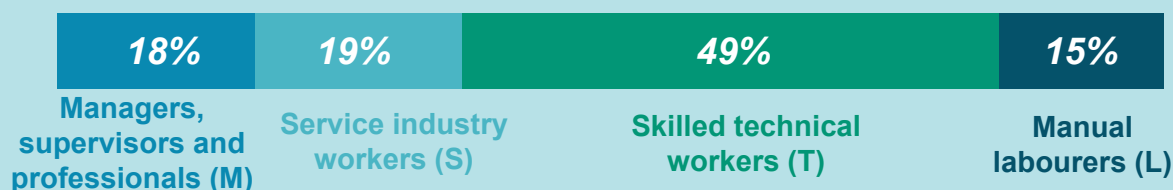


Vacancy rate
4.6%

Distribution of employment by sub-sector



Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower requirements



253 000

Change from 2023 to 2028

Projected change



+2 900

Annual change



+0.2%

Key factors impacting outlook



Green transportation



Integration with GBA



Rise of e-commerce



Technological advancements



Transport network development

Sectoral manpower balance



-10 000 to -15 000

Manpower balance by occupation group

Managers, supervisors and professionals

- 500 to
- 1 000

Service industry workers

- 2 000 to
- 3 500

Skilled technical workers

- 4 500 to
- 6 500

Manual labourers

- 3 000 to
- 4 000



Occupations in demand

- Captains/ Chief officers (M)
- IT and digitalisation staff (M&T)
- Customer service officers and service assistants (S)
- Seafarers (T)
- Chartered ship surveyors (M)
- Signal engineers (M)
- Drivers (T)
- Smart logistics facility and machinery operators / technicians (T)
- Data analysts (M)
- Cargo controllers (S)
- E&M mechanics / technicians (including maritime services and vehicle maintenance) (T)
- Warehouse operative staff and porters (L)

Essential skills

- Adaptability and learning agility
- Data analytical skills
- Multilingual competence
- Collaboration and teamwork
- Digital marketing
- Communication skills
- E-commerce

Essential knowledge

- Digital literacy (e.g. autonomous vehicles and traffic management and smart logistics systems)
- National and GBA development strategies and market trends
- ESG principles
- Transportation related regulatory knowledge

Regional Centre for International Legal and Dispute Resolution Services



Sector coverage



Legal and dispute resolution services



Arbitration and mediation platforms and supporting services

Situation in 2023



Employment

24 600



Vacancies

400



Manpower requirements

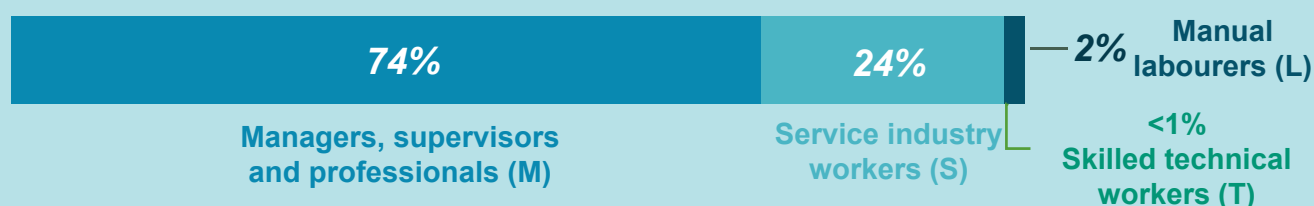
25 100



Vacancy rate

1.7%

Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower requirements



25 800

Change from 2023 to 2028

Projected change



+700

Annual change



+0.6%

Key factors impacting outlook



Financial market rebound



I&T and IP related legal regime



Integration with GBA



Demand for legal services in art, culture and event sectors



National policies supporting alternative dispute resolution

Sectoral manpower balance



within ± 500



Occupations in demand

- Alternative dispute resolution professionals (arbitrators and mediators) (M)
- Legal knowledge engineers (M)
- IT and digitalisation staff (M&T)
- Legal technologists and automation specialists (M)

Essential skills

- Adaptability and learning agility
- Communication skills
- Alternative dispute resolution techniques
- Digital proficiency
- Collaboration and teamwork
- Multilingual competence

Essential knowledge

- Blockchain and virtual assets, and their regulatory framework
- Law for art and culture
- Maritime law
- Contract law in events
- Law for I&T and cyber security
- National and GBA development strategies and market trends
- Intellectual property law / Patent protection
- Mainland law

Note: Some arbitrators and mediators, who might work on a part-time basis and have a primary employment outside the legal and alternative dispute resolution services industry, are not included in the manpower projection based on projection methodology and definitions while constrained by unavailability of robust and reliable information.

Regional Intellectual Property Trading Centre



Sector coverage



Intellectual property (IP) intermediaries



IP intensive industries

Situation in 2023



Employment
57 100



Vacancies
1 300

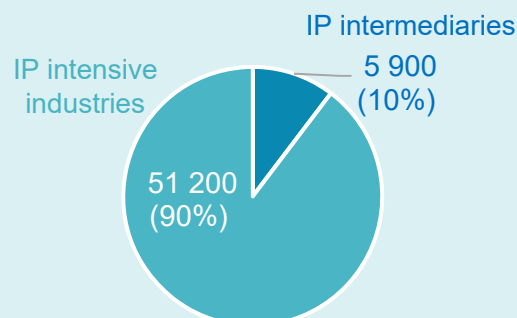


Manpower requirements
58 400

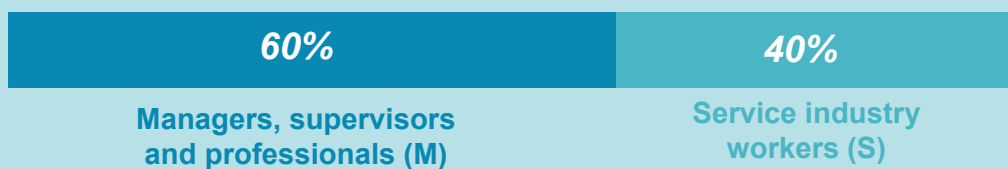


Vacancy rate
2.2%

Distribution of employment by sub-sector



Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower requirements



62 000

Change from 2023 to 2028

Projected change



+3 600

Annual change



+1.2%

Key factors impacting outlook



I&T ecosystem development



IP development in the Mainland



Original grant patent system development in HK



Policies to promote the development of cultural and creative industries

Sectoral manpower balance



-1 000 to -4 000

Manpower balance by occupation group

Managers, supervisors and professionals

- 500 to
- 2 500

Service industry workers

- 500 to
- 1 500

Skilled technical workers

not applicable

Manual labourers

not applicable



Occupations in demand

- IP managers (M)
- IP service professionals (M)

Essential skills

- Adaptability and learning agility
- Collaboration and teamwork
- Communication skills
- Digital proficiency
- Innovation and creativity
- Multilingual competence

Essential knowledge

- Patent drafting, prosecution and analytics
- Intellectual property (IP) literacy (e.g. IP protection, management and commercialisation)
- Knowledge of national and international patent systems
- National and GBA development strategies and market trends

Accommodation and Food



Sector coverage



Accommodation services



Food services

Situation in 2023



Employment
249 900



Vacancies
19 700

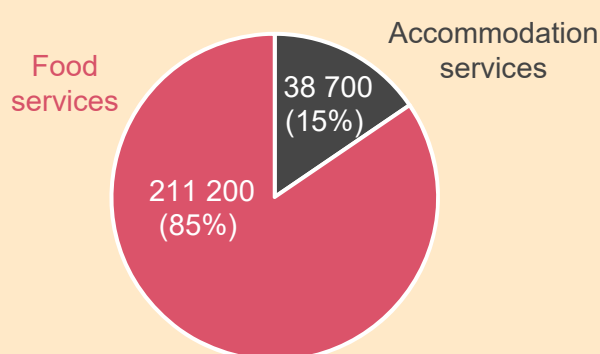


Manpower requirements
269 600



Vacancy rate
7.3%

Distribution of employment by sub-sector



Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower requirements



272 500

Changes from 2023 to 2028

Projected change



+2 900

Average annual growth rate



+0.2%

Sectoral manpower balance



-14 000 to -19 000

Key factors impacting outlook



Change in visitors' preference



Digitalisation and automation



Post-pandemic rebound



Rise in visitor arrivals

Manpower balance by occupation group

Managers, supervisors and professionals

- 500 to
- 1 500

Service industry workers

- 7 000 to
- 8 500

Skilled technical workers

- 500 to
- 1 500

Manual labourers

- 6 000 to
- 7 500



Occupations in demand

- Data analysts (M)
- IT and digitalisation staff (M&T)
- Cooks (S)
- Hotel front desk staff (S)
- Reservation clerks (S)
- Waiters / waitresses (S)
- E&M mechanics / technicians (T)
- Dish washers (L)
- Room attendants (L)

Essential skills

- Adaptability and learning agility
- Collaboration and teamwork
- Communication skills
- Customer service and complaint handling
- E-commerce and data management
- Event planning and execution
- Innovation and creativity
- Multilingual competence
- Social media marketing

Essential knowledge

- Digital literacy (e.g. online order management systems and customer service bots)
- Food safety protocols and regulations
- Hotel / restaurant operation knowledge
- Local consumers' and tourists' preference and requirements

City Operation



Coverage

- Automobile
- Beauty care and hairdressing
- Electrical and mechanical services
- Electronics and telecommunications
- Information technology
- Real estate services
- Security services

Situation in 2023



Employment
540 500



Vacancies
34 000

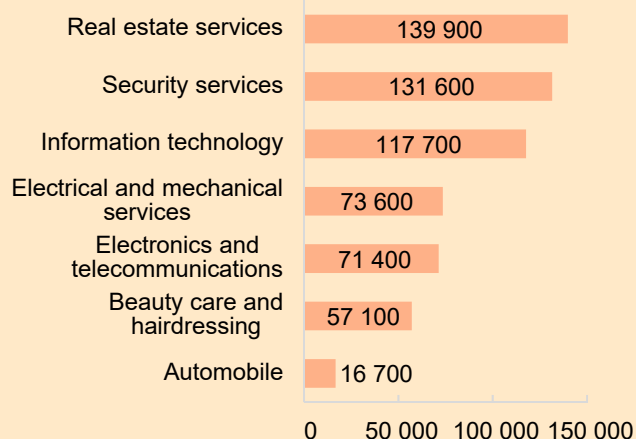


Manpower requirements
574 500



Vacancy rate
5.9%

Distribution of employment by category



Note: The coverage of different categories within City operation would overlap to some extent. For example, certain security guards are included in both Real estate services and Security services, and some Information technology (IT) personnel are counted under both IT and Electronics and telecommunications. Such overlaps have been deducted from the overall figure.

Distribution of manpower requirements by occupation group in 2023

55%

31%

14%

Skilled technical workers (T)

Managers, supervisors and professionals (M)

Service industry workers (S)

Note: The manpower figures mainly cover trade-specific or related technical personnel for the relevant categories. General non-technical supporting staff and workers (e.g. cleaners) are not included.

Projection for 2028

Manpower requirements



635 600

Changes from 2023 to 2028

Projected change

Average annual growth rate



+61 100



+2.0%

Manpower balance



-39 000 to -44 000

Key factors impacting outlook



Ageing population



City development and urban renewal



Digitalisation and automation



Integration with GBA

Manpower balance by occupation group

Managers, supervisors and professionals

- 16 500 to
- 18 500

Service industry workers

- 14 500 to
- 16 000

Skilled technical workers

- 8 000 to
- 9 500

Manual labourers

not applicable



Occupations in demand, essential skills and essential knowledge

Category	Occupations in demand	Essential skills / Essential knowledge
Automobile	<ul style="list-style-type: none"> • Electric vehicles maintenance workers (T) • Vehicle mechanics (T) • Vehicle painters (T) 	<p><u>Essential skills</u></p> <ul style="list-style-type: none"> • Computer-aided diagnosis and repair <p><u>Essential knowledge</u></p> <ul style="list-style-type: none"> • Customers' preference and requirements • New energy vehicles markets and trends
Beauty care and hairdressing	<ul style="list-style-type: none"> • Hairdressing assistants (S) 	<p><u>Essential skills</u></p> <ul style="list-style-type: none"> • Customer service and complaint handling <p><u>Essential knowledge</u></p> <ul style="list-style-type: none"> • Beauty care and body care (products and equipments) • Store operation knowledge
Electrical and mechanical services	<ul style="list-style-type: none"> • Electrical / mechanical engineers (M) • Lift/escalator engineers (M) • E&M mechanics / electricians (T) • Lift /escalator mechanics (T) 	<p><u>Essential skills</u></p> <ul style="list-style-type: none"> • Project management and design • System maintenance with advanced technology <p><u>Essential knowledge</u></p> <ul style="list-style-type: none"> • Relevant trade's ordinances and regulations • Safety awareness
Electronics and telecommunications	<ul style="list-style-type: none"> • Electronics engineers (M) • IoT solution specialists (M) • Software engineers (M) • Electronics/ telecommunications technicians (T) • Technicians (systems, data centre and network installation) (T) 	<p><u>Essential skills</u></p> <ul style="list-style-type: none"> • Information and system security • Network technology & management <p><u>Essential knowledge</u></p> <ul style="list-style-type: none"> • IoT solution application • Advanced mobile network technology development trends (e.g. 6G development)



Occupations in demand, essential skills and essential knowledge

Category	Occupations in demand	Essential skills / Essential knowledge
Information technology	<ul style="list-style-type: none"> • Cloud infrastructure specialists (M) • Cyber security specialists (M) • Data scientists (M) • IoT solution specialists (M) • IT and digitalisation staff (M&T) • Software engineers (M) • Systems architects (M) • UI/UX designers (M) • Mechanics / technicians (system, data centre and network) (T) 	<p><u>Essential skills</u></p> <ul style="list-style-type: none"> • Application development tools / programming languages • Information and system security • Project management and design <p><u>Essential knowledge</u></p> <ul style="list-style-type: none"> • IoT solution application • User experience (UX/UI design)
Real estate services	<ul style="list-style-type: none"> • Security guards (S) • E&M mechanics / technicians (T) 	<p><u>Essential skills</u></p> <ul style="list-style-type: none"> • Artificial intelligence in property and facility management • Customer service and complaint handling <p><u>Essential knowledge</u></p> <ul style="list-style-type: none"> • Real estate regulatory knowledge • Sustainable property management
Security services	<ul style="list-style-type: none"> • Cyber security specialists (M) • Security guards (S) 	<p><u>Essential skills</u></p> <ul style="list-style-type: none"> • Artificial intelligence in security services • Customer service and complaint handling • Cybersecurity skills <p><u>Essential knowledge</u></p> <ul style="list-style-type: none"> • IoT solution application • Security and guarding services regulatory knowledge

Construction Industry



Sector coverage



Professional services
(architectural, surveying
and project engineering
services)



Construction activities

Situation in 2023



Employment

295 300



Vacancies

15 500



*Manpower
requirements*

310 800



Vacancy rate

5.0%

Distribution of manpower requirements by occupation group⁽¹⁾ in 2023

34%

**Managers, supervisors
and professionals (M)**

66%

**Skilled technical
workers (T)**

Projection for 2028

*Manpower
requirements*



359 800

Changes from 2023 to 2028

Projected change



+48 900

Average annual growth rate



+3.0%

**Sectoral manpower
balance⁽²⁾**



-45 000 to -55 000

Key factors impacting outlook



City development
and urban renewal



Digitalisation and
automation



Infrastructure
construction projects

Manpower balance by occupation group

**Managers,
supervisors and
professionals**

- 12 000 to
- 17 000

**Service industry
workers**

not applicable

**Skilled technical
workers**

- 30 000 to
- 40 000

Manual labourers

not applicable

Notes:

(1) The occupation group "Managers, supervisors and professionals" covers construction professionals, technicians and site supervisory personnel, while the group "Skilled technical workers" covers skilled / semi-skilled construction workers. The manpower figures mainly cover the above trade-specific / technical personnel for the industry. General supporting staff and workers (e.g. cleaners) are not covered.

(2) The numbers of workers expected to be imported through the Labour Importation Scheme for the Construction Sector have been taken into consideration.



Occupations in demand

Professionals (M)

- Architects
- Building Information Modelling (BIM) managers
- Building services engineers
- Building surveyors
- Civil and structural engineers
- Construction managers / Site engineers
- Electrical / mechanical engineers
- Environmental engineers
- Geotechnical engineers
- Land surveyors
- Landscape architects
- Quantity surveyors
- Town planners

Technicians / site supervisory personnel (M)

- BIM coordinators
- BIM modellers
- Civil / structural / geotechnical engineering technicians
- Clerk of works / inspectors
- Draftsmen
- E&M engineering technicians
- Environmental technicians
- Fire services technicians
- Landscape technicians
- Lift / escalator technicians
- Project coordinators
- Refrigeration / air-conditioning / ventilation technicians
- Safety officers
- Site agents
- Site foremen
- Site supervisors
- Surveying technicians (building)
- Surveying technicians (land)
- Surveying technicians (quantity)
- Surveying technicians (town planning)
- Technical officers

Skilled / Semi-skilled workers (T)

- Asbestos abatement workers
- Asphalters (road construction)
- Bar benders and fixers
- Blasting workers
- Cement sand mortar workers
- Concrete and grouting workers
- Construction goods vehicle drivers
- Curtain wall and glass panes installers
- Demolition workers
- Divers (construction work)
- Drain and pipe layers
- Electricians
- False ceiling installers
- Fire service mechanics
- Levellers
- Lift and escalator mechanics
- Metal-steel workers
- Overhead linesmen (high voltage)
- Painters and decorators
- Paving block layers
- Piling operatives
- Plant and equipment mechanics (construction work)
- Plant and equipment operators
- Refrigeration / air-conditioning / ventilation mechanics
- Rigger / metal formwork erectors
- Scaffolders
- Tower crane mechanics (erecting, dismantling and height alternation)
- Welders
- Woodworkers

IT and digitalisation staff (M&T)



Essential skills

- Adaptability and learning agility
- Building Information Modelling (BIM)
- Collaboration and teamwork
- Construction contract and project management
- Critical thinking and problem solving skills
- Design for safety
- Digital proficiency
- Multilingual competence

Essential knowledge

- Digital literacy (e.g. IoT solutions such as sensor data and incident data analysis)
- ESG principles
- High productivity construction
- Sustainable construction

Education



Sector coverage



Kindergartens



School education
(Primary and secondary schools)



Tertiary institutions and universities

Situation in 2023



Employment
174 000



Vacancies
7 700

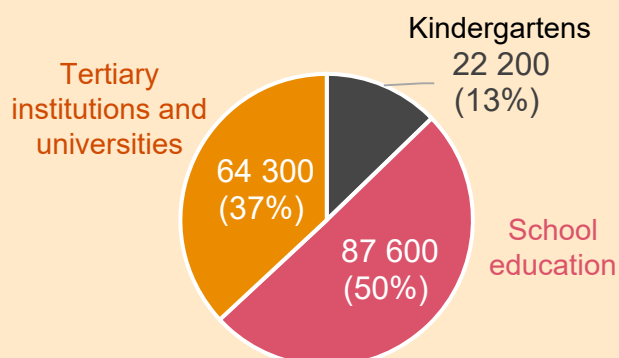


Manpower requirements
181 700



Vacancy rate
4.2%

Distribution of employment by sub-sector



Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower requirements



183 900

Changes from 2023 to 2028

Projected change



+2 200

Average annual growth rate



+0.2%

Sectoral manpower balance



-2 000 to -5 000

Key factors impacting outlook



Digitalisation and automation



I&T development



Integration with GBA



International post-secondary education hub



Structural decline in school-age population

Manpower balance by occupation group

Managers, supervisors and professionals

- 2 000 to
- 3 000

Service industry workers

+ 500 to
+ 1 500

Skilled technical workers

within \pm 500

Manual labourers

- 1 000 to
- 2 000



Occupations in demand

- Educational psychologists (M)
- IT and digitalisation staff (M&T)
- Laboratory technicians (M)
- Senior academic staff and research assistants (STEAM-related research) (M)
- Speech therapists (M)
- STEAM educators (M)
- E&M mechanics / technicians (T)

Essential skills

- Adaptability and learning agility
- Collaboration and teamwork
- Communication skills
- Critical thinking and problem solving skills
- Digital proficiency
- Education technology
- Financial management and fundraising acumen
- Innovation and creativity
- Resilience and stress management

Essential knowledge

- Cultural awareness and sensitivity
- Global, National and GBA education strategies and trends
- Learning styles of students
- Technological pedagogical content knowledge

Health Services



Sector coverage



Hospitals



Other health services

(general and specialised medical clinics, dental clinics, Chinese medicine clinics, radiology, laboratories, and services provided by other allied health practitioners or healthcare personnel)

Situation in 2023



Employment

165 700



Vacancies

12 400



Manpower requirements

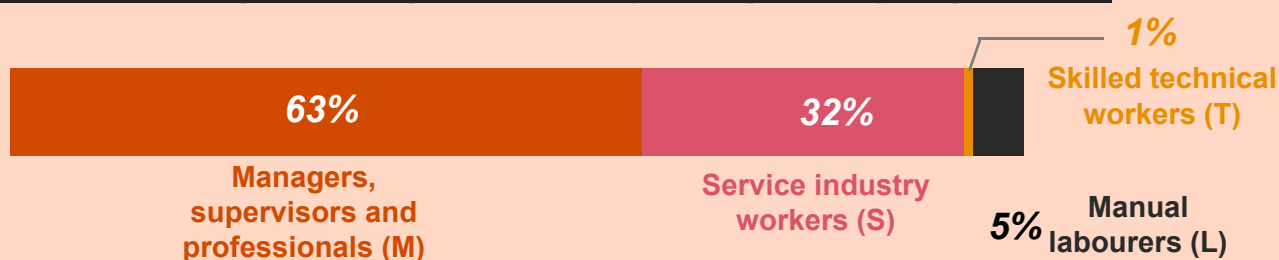
178 100



Vacancy rate

6.9%

Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower requirements



209 400

Changes from 2023 to 2028

Projected change



+31 400

Average annual growth rate



+3.3%

Key factors impacting outlook



Ageing population



Integration with GBA



Medical tourism



Population growth



Prevalence of chronic diseases

Sectoral manpower balance



-13 000 to -18 000

Manpower balance by occupation group

Managers, supervisors and professionals

- 8 000 to
- 9 500

Service industry workers

- 3 200 to
- 5 200

Skilled technical workers

within ± 500

Manual labourers

- 1 800 to
- 3 300



Occupations in demand

- Thirteen types of professionals (M)
 - Chinese medicine practitioners
 - Chiropractors
 - Dental hygienists
 - Dentists
 - Doctors
 - Medical laboratory technologists
 - Midwives
 - Nurses (general/psychiatric)
 - Occupational therapists
 - Optometrists
 - Pharmacists
 - Physiotherapists
 - Radiographers
- IT and digitalisation staff (M&T)
- E&M mechanics / technicians (T)
- Care workers (S)
- Ward attendants (S)

Essential skills

- Adaptability and learning agility
- Collaboration and teamwork
- Communication skills
- Critical thinking and problem solving skills
- Digital proficiency
- Multilingual competence
- Resilience and stress management

Essential knowledge

- Health related regulatory knowledge
- National and GBA health market trends and regulations

Manufacturing



Sector coverage



All manufacturing activities

Situation in 2023



Employment

75 700



Vacancies

2 500



Manpower requirements

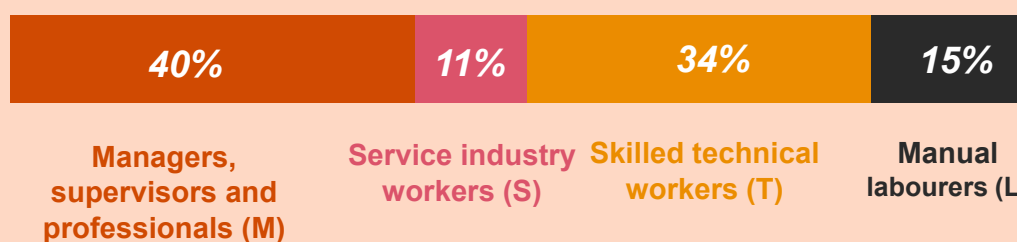
78 300



Vacancy rate

3.3%

Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower requirements



99 900

Changes from 2023 to 2028

Projected change
 +21 600

Average annual growth rate
 +5.0%

Sectoral manpower balance



-9 000 to -14 000

Key factors impacting outlook



Digitalisation and automation



Integration with GBA



Strong policy support

Manpower balance by occupation group

Managers, supervisors and professionals

- 2 500 to
- 4 500

Service industry workers

- 500 to
- 1 500

Skilled technical workers

- 6 000 to
- 8 000

Manual labourers

within ± 500



Occupations in demand

- Automation/ robotics engineers (M)
- Data analysts (M)
- IT and digitalisation staff (M&T)
- E&M mechanics / technicians (including installation and maintenance of advanced manufacturing facilities) (T)

Essential skills

- Adaptability and learning agility
- Collaboration and teamwork
- Communication skills
- Data analytical skills
- Digital proficiency
- Innovation and creativity
- Multilingual competence
- Product design
- Smart production

Essential knowledge

- Digital literacy (e.g. IoT solutions and sensor data analysis)
- ESG principles
- Global advanced manufacturing development trends
- Intellectual property literacy (e.g. IP management and commercialisation)
- Safety protocols and regulations

Retail



Sector coverage



All forms of retail trade

Situation in 2023



Employment

273 100



Vacancies

17 400



Manpower requirements

290 500



Vacancy rate

6.0%

Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower requirements



293 000

Changes from 2023 to 2028

Projected change



+2 600

Average annual growth rate



+0.2%

Sectoral manpower balance



-7 000 to -10 000

Key factors impacting outlook



Change in visitors' preferences



E-commerce



Post-pandemic rebound



Rise in visitor arrivals

Manpower balance by occupation group

Managers, supervisors and professionals

within ± 500

Service industry workers

- 6 000 to
- 7 000

Skilled technical workers

- 500 to
- 1 500

Manual labourers

- 500 to
- 1 500



Occupations in demand

- Data analysts (M)
- E-commerce professionals (M)
- IT and digitalisation staff (M&T)
- Social media specialists (M)
- Salespersons (S)
- Warehouse operative staff and porters (L)

Essential skills

- Adaptability and learning agility
- Collaboration and teamwork
- Communication skills
- Customer service and complaint handling
- Data analytical skills
- E-commerce and live commerce expertise (including social media marketing)
- Inventory management
- Multilingual competence

Essential knowledge

- Cultural awareness and sensitivity
- Digital literacy (e.g. order management systems and customer service bots)
- Local consumers' and tourists' preference and requirements

Social Services



Sector coverage



Residential care services



Non-residential social services

Situation in 2023



Employment

74 500



Vacancies

7 300



Manpower requirements

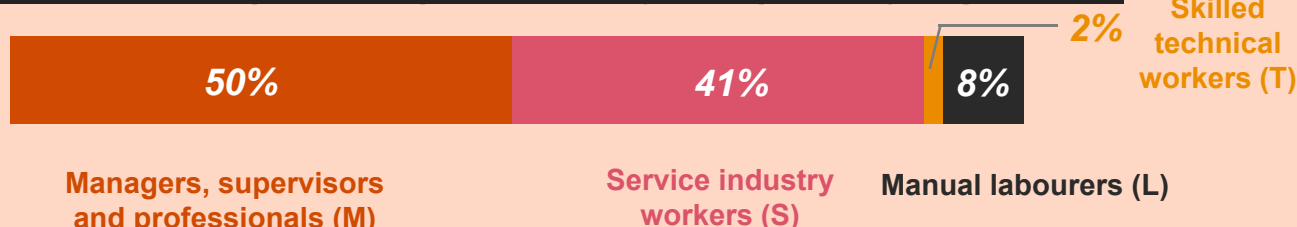
81 800



Vacancy rate

8.9%

Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower requirements



93 300

Changes from 2023 to 2028

Projected change

Average annual growth rate



+11 400



+2.6%

Sectoral manpower balance



-3 500 to -6 500

Key factors impacting outlook



Ageing population



Gerontechnology adoption



Integration with GBA



Investment towards social services



Population growth

Manpower balance by occupation group

Managers, supervisors and professionals

**- 500 to
- 2 000**

Service industry workers

**- 1 000 to
- 3 000**

Skilled technical workers

within \pm 500

Manual labourers

**- 1 000 to
- 2 500**



Occupations in demand

- Audiologists (M)
- Clinical psychologists (M)
- IT and digitalisation staff (M&T)
- Nurses (M)
- Occupational therapists (M)
- Physiotherapists (M)
- Social workers (degree posts) (M)
- Speech therapists (M)
- Care workers (S)
- Service project officers (S)
- Cleaners and labourers (L)

Essential skills

- Ageing and chronic disease management
- Adaptability and learning agility
- Collaboration and teamwork
- Communication skills
- Customer service and complaint handling
- Digital proficiency
- Event and activity planning and execution
- Financial management and fundraising acumen
- Multilingual competence
- Resilience and stress management

Essential knowledge

- Changes in Hong Kong demographics and requirements for social services
- Digital literacy (e.g. gerontechnology, etc.)
- Social services related regulatory knowledge

Tourism



Sector coverage



Travel agency, reservation service and related activities



Other services related to tourism
(such as retail, accommodation and food, and transport)

Situation in 2023



Employment
163 200



Vacancies
12 600

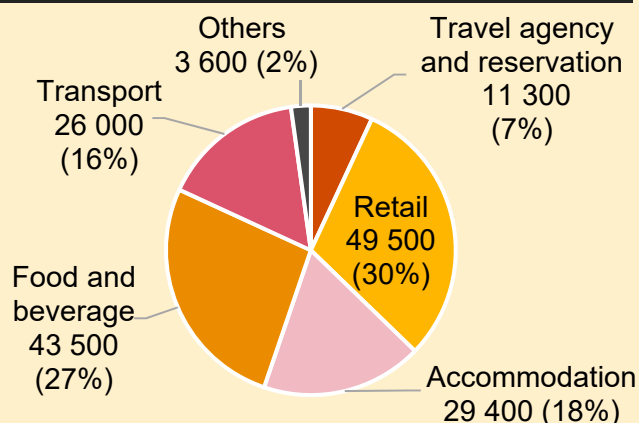


Manpower requirements
175 800

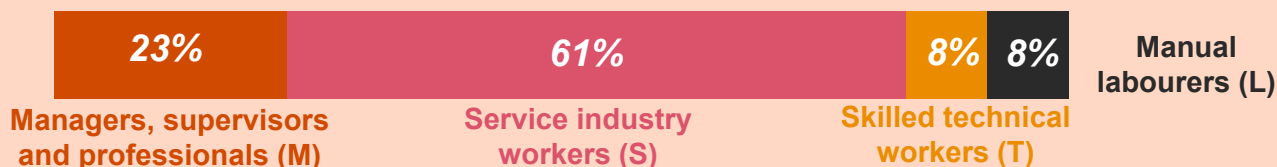


Vacancy rate
7.2%

Distribution of employment by sub-sector



Distribution of manpower requirements by occupation group in 2023



Projection for 2028

Manpower requirements



215 400

Changes from 2023 to 2028

Projected change



+39 600

Average annual growth rate



+4.1%

Key factors impacting outlook



Change in visitors' preferences



Increase in Hong Kong's tourism appeal



Post-pandemic rebound



Rise in visitor arrivals

Sectoral manpower balance



-9 000 to -14 000

Manpower balance by occupation group

Managers, supervisors and professionals

- 2 500 to
- 3 500

Service industry workers

- 5 500 to
- 7 500

Skilled technical workers

- 500 to
- 1 500

Manual labourers

- 500 to
- 1 500



Occupations in demand

- Green and conservation tour guides (inbound/outbound) (M&S)
- IT and digitalisation staff (M&T)
- Customer service officers (S)

Essential skills

- Adaptability and learning agility
- Collaboration and teamwork
- Communication skills
- Customer service and complaint handling
- Local tour-guiding (such as local culture and history)
- Multilingual competence
- Outbound product development
- Social media marketing
- Storytelling and content creation

Essential knowledge

- Cultural awareness and sensitivity
- Hong Kong's culture, tourist attractions and activities
- Local consumers' and tourists' preference and requirements

6 *Mid-term Update and Next Round MP*

25. LWB would conduct a mid-term update of the MP in late 2025. The updated results are expected to be available in 2026.
26. The next round of MP would commence in 2028.



Appendix I: Methodology of 2023 MP

The projection methodology for 2023 MP builds on the approaches and frameworks adopted in previous MPs, augmented by the introduction of enhanced elements. It involves extensive data collection from the Government and open sources as well as sectoral consultations. Detailed analyses of the 17 selected industries were conducted to assess manpower shortages and skills in demand on a sectoral basis. The projection period was shortened to five years to more accurately reflect market changes in the short- to medium-term.

2. The findings of the Manpower Supply Projection (MSP) and Manpower Requirement Projection (MRP) are compiled independently of each other, with no pre-defined interconnection between the two. The results of these projections do not influence each other. This framework is intended to fully reflect the potential job opportunities that may emerge in the labour market during the projection period. Attention should be paid to the concept of unconstrained manpower requirements when interpreting manpower balance. However, the manpower requirements of an economy should ultimately be constrained by, inter alia, its manpower supply in reality.

3. The projection methodologies for the overall economy and selected industries are discussed in the following paragraphs. [New components introduced in 2023 MP are highlighted in blue.](#)

Classification of Economic Sectors/Selected Industries

12 Conventional Economic Sectors

4. To facilitate comparison with the results of previous MPs, the actual and projected manpower supply and requirements for 12 conventional economic sectors were compiled. The classification of these economic sectors is based on the Hong Kong Standard Industrial Classification Version 2.0⁶. By aggregating the statistics from these sectors, the manpower situation of the entire economy was derived.

17 Selected Industries

5. [The 17 selected industries include the eight key areas for the development of Hong Kong as outlined in the National 14th Five-Year Plan \(“eight centres”\) and nine significant sectors supporting local services and city operation. These selected industries collectively covered more than 80% of Hong Kong’s workforce and contributed over 70% of the city’s GDP. The selected industries are listed below.](#)

Eight centres:-

- [East-meets-West centre for international cultural exchange;](#)
- [International aviation hub;](#)
- [International financial centre;](#)
- [International innovation and technology centre;](#)
- [International trade centre;](#)
- [International transportation centre;](#)

⁶ The classification is devised by the Census and Statistics Department (C&SD) by modelling on the latest “International Standard Industrial Classification of All Economic Activities Revision 4” promulgated by the United Nations. C&SD adopts such classification in the compilation of labour and economic statistics in Hong Kong. 12 conventional economic sectors together constitute the entire economy.

- Regional centre for international legal and dispute resolution services; and
- Regional intellectual property trading centre.

Nine significant sectors:-

- Accommodation and food;
- City operation;
- Construction industry;
- Education;
- Health services;
- Manufacturing;
- Retail;
- Social services; and
- Tourism.

Manpower Supply Projection

6. Manpower supply⁷ to the labour market was projected by age group, sex, education level, [occupation group and economic sector/industry](#), during the period from 2023 to 2028.

Actual Manpower Supply in the Base Year

7. The actual manpower for the base year of 2023, by education level, occupation group and economic sector/industry, was compiled from various sources, including: (i) the Census and Statistics Department (C&SD)'s General Household Survey and Composite Employment Estimates; (ii) [manpower studies conducted by various bureaux and departments \(B/Ds\) and major organisations such as the Vocational Training Council \(VTC\) and Construction Industry Council \(CIC\)](#); (iii) [sectoral consultations and surveys](#); and (iv) [big data analytics on practitioners' and recruitment agencies' data](#). These data has also, provided in-depth insights into the distributions of occupations and industries.

Projected Manpower Supply to 2028

8. The manpower supply for 2028 was projected by referencing a wide range of statistics and information from the following sources:

- Hong Kong Population Projections 2022–2046 (from C&SD): These projections provide detailed data and information on the future size of Hong Kong's population, taking into account births, deaths, and population movements during the projection period. They are based on the findings from the 2021 Population Census and are analysed by age and sex.
- Hong Kong Labour Force Projections for 2022–2046 (from C&SD): These projections offer statistics and information on the future labour force (or manpower supply) in Hong Kong, with breakdowns by age group and sex. Statistically, the relationship between the labour force and the population is measured by the age-sex-specific labour force participation rate.
- Education statistics: Two major sets of education statistics were used to estimate the education profile of the projected manpower supply, including (i) students in education programmes at different academic levels, and (ii) working individuals upgrading their academic qualifications through continuing education. These statistics are primarily sourced from C&SD, the University Grants Committee (UGC) and the Education Bureau.
- Statistics on Holders of Permits for Proceeding to Hong Kong and Macao (commonly known as One-Way Permit Holders (OWPHs)): The number of OWPHs projected to arrive

⁷ Excludes foreign domestic helpers.

from the Mainland and reside in Hong Kong during the period from 2023 to 2028 is reflected in C&SD's population projections. The education levels of OWPBs, at the time of their arrival, are sourced from demographic and social characteristics data collected by the Immigration Department (ImmD), and their employment profiles have been referenced from the relevant findings of C&SD's Population Census.

- (v) Statistics on admitted talents and imported workers: Their demographic (age group, sex and education level), industry and occupation profiles were estimated using statistics and administrative records from C&SD, ImmD and the Labour Department.
- (vi) Manpower studies conducted by various B/Ds and major organisations (e.g. VTC, CIC and UGC): These studies provide valuable insights into sector-specific manpower supply and future workforce trends, as well as employment profiles of graduates from tertiary institutions.
- (vii) Sectoral consultations and surveys: Over 170 consultation sessions were held with more than 1 000 stakeholders from a wide range of industries, representing over 60 000 organisations or industry representations. These consultations focused on the career prospects across industries and critical topics such as retirement ages, wastage rates, shifts in occupations and industries, as well as the working preferences of the local workforce.
- (viii) Big data analytics on practitioners' and recruitment agencies' data: We utilised a variety of market data sources, including data from online recruitment advertisements and analytics from recruitment websites and professional social networking platforms.

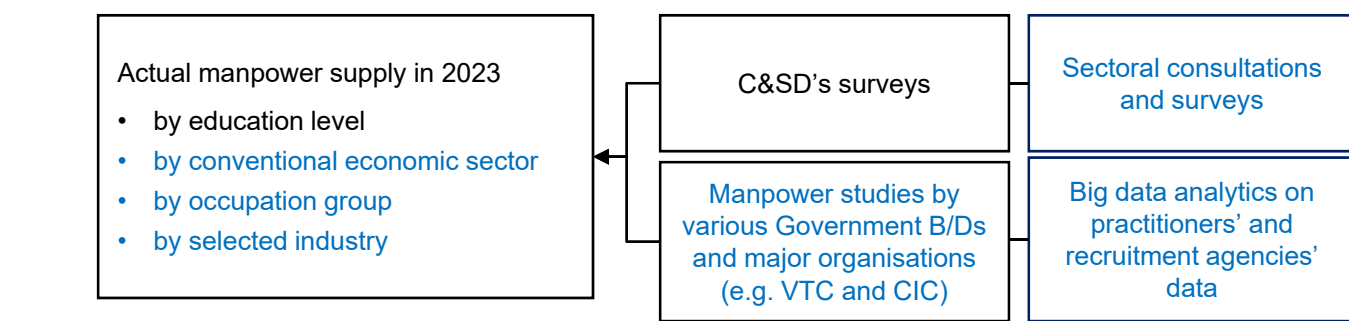
Industry and Occupation Distributions

9. For the first time, the MSP model was expanded to project the distribution of the local workforce by occupation and industry, using a component method. This approach considers key factors such as wastage rates, retirement percentages and inter-industry mobility. The five major components includes:

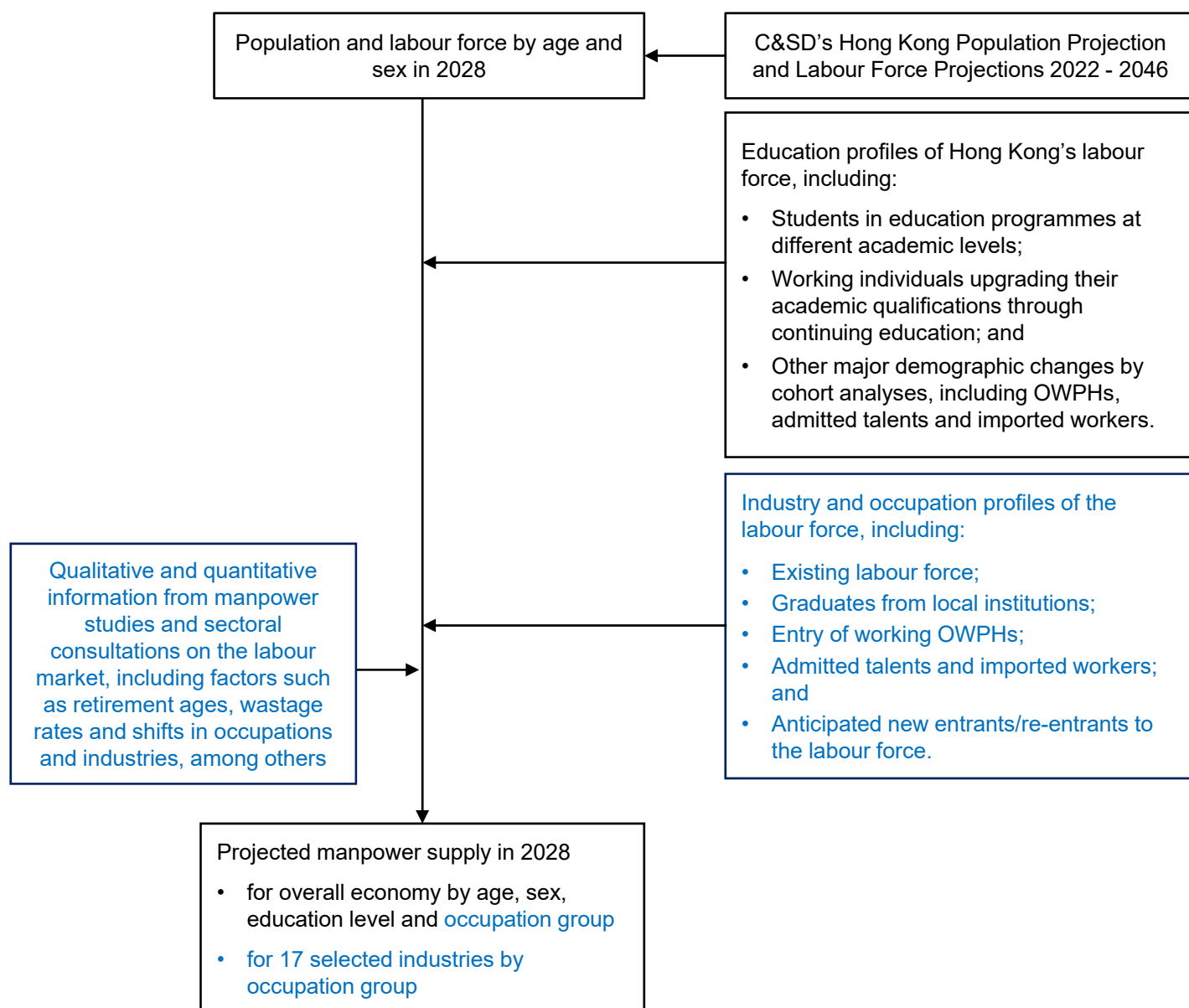
- Existing labour force;
- Graduates from local institutions;
- Entry of working OWPBs;
- Net inflow of admitted talents and imported workers; and
- Anticipated new entrants/re-entrants to the labour force.

Figure A1-1: Schema on Compilation of Manpower Supply Projection

Base Year (i.e. 2023)



Projections for 2028



Abbreviations:

B/Ds: Bureaux and Departments
C&SD: Census and Statistics Department
CIC: Construction Industry Council
OWPHs: One-Way Permit Holders
VTC: Vocational Training Council

Note : New components for 2023 MP are denoted in blue.

Manpower Requirement Projection

10. Manpower requirements is regarded as job opportunities in various industries and economic sectors available in Hong Kong. The actual manpower requirements for the base year of 2023 was calculated as the sum of employed persons and job vacancies across various economic sectors. The vacancy rate in 2023 adopted a broader definition, referring to the ratio of job vacancies to total manpower demand, and this definition not only encompasses data on job openings that were being actively recruited as of the reference date of C&SD's relevant statistical surveys, but also includes estimates from sectoral consultations regarding vacancies that have yet to be actively filled under staffing plan. The broader definition aims to provide a more holistic picture of potential job vacancies in the market.

11. The sectoral manpower requirements together with occupations in demand were projected using a four-step statistical process, covering 12 conventional economic sectors and 17 selected industries. The results were then aggregated to provide the overall projected manpower requirements for the entire economy.

Four-step Statistical Process

- ***Step One – Fitting of Statistical Models for Preliminary Results***
Based on manpower statistics from C&SD, manpower studies conducted by various B/Ds and major organisations, we first established the actual manpower requirements for each economic sector/industry in the base year and previous years. Time series models were then applied to analyse historical data and project future trends, thereby deriving preliminary estimates of the manpower requirements for 2028.
- ***Step Two – Review of Preliminary Results with Regard to Consultation Findings, Survey Results and Other Intelligence***
The preliminary projection results were reviewed and fine-tuned by considering a wide range of data and information, including views gathered through consultations and surveys from over 1 000 stakeholders in selected industries, such as chambers, public organisations, professional bodies, business representatives and relevant advisory committee members. Participants were engaged through interviews, focus groups, stakeholder forums, and electronic surveys, and were provided with industry factsheets to help them articulate their insights into the future manpower requirements of various sectors in a more focused manner. Discussions covered topics such as vacancy rates, anticipated positions to be filled, the impact of automation and digitalisation on business operations, expected new opportunities (such as integration with the Mainland) and challenges, occupations in demand and essential skills for the future. Additional sources of reference included big data analytics on practitioners' and recruitment agencies' data and a literature review on emerging job market mega-trends.

This review was crucial, particularly given the rapid advancements in AI and digitalisation, ongoing economic changes, and the emergence of new opportunities and challenges.

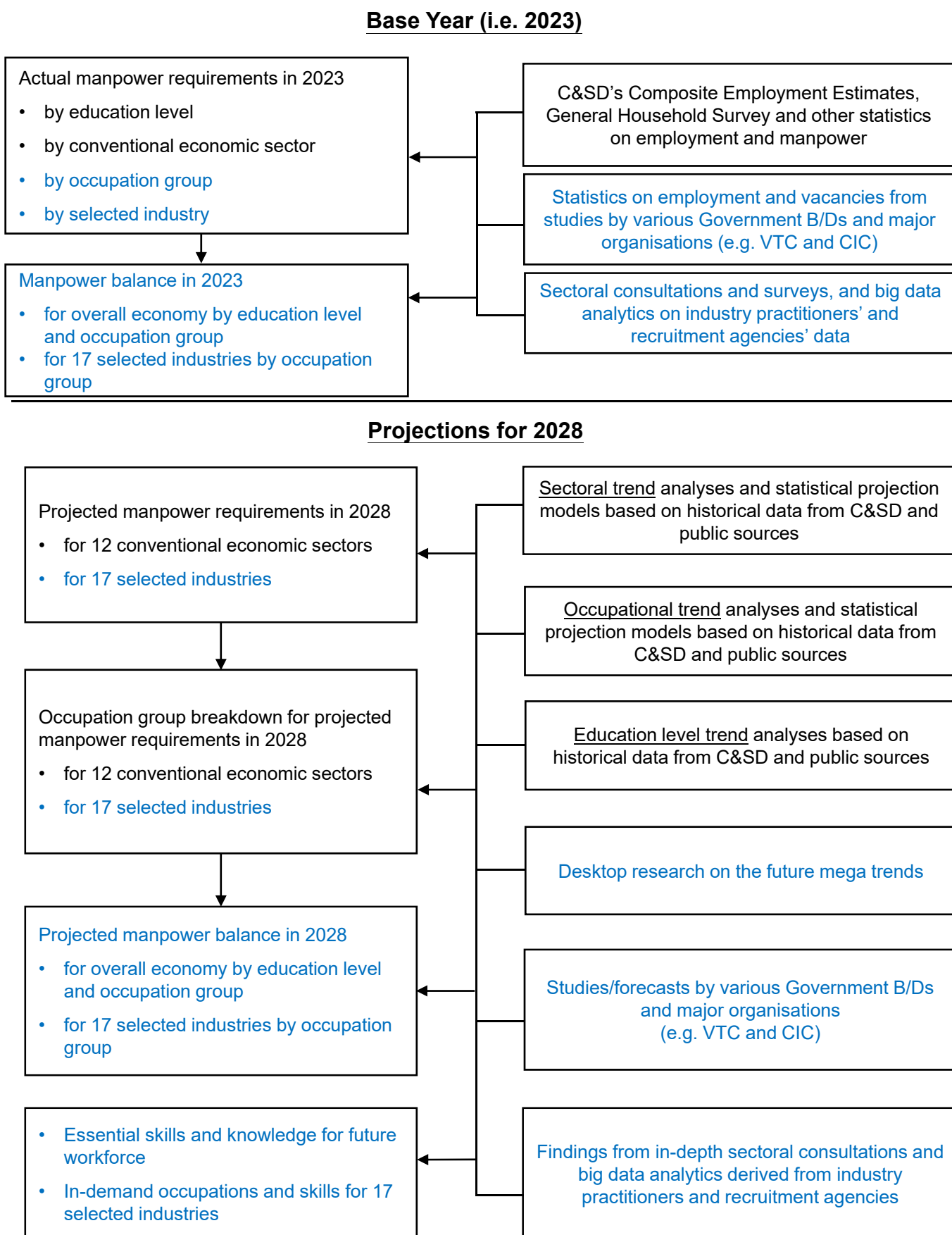
- ***Step Three – Compilation of Projected Figures by Occupation Group***
For each sector/selected industry, statistical models based on historical trends in manpower requirements by occupation group were developed by incorporating both qualitative and quantitative data, such as consultation findings and market trends. These models were further calibrated by considering factors such as anticipated inter-occupation group mobility to project the occupational distribution for the overall economy and individual sectors/industries in 2028.

- **Step Four – In-demand Occupation and Essential Skills for 17 Selected Industries**
Occupations in demand and the essential skills required in the 17 selected industries were identified based on both quantitative and qualitative data, as well as big data analytics on practitioners' and recruitment agencies' data. This analysis aimed to project the emerging occupations and essential skills/knowledge for each industry by 2028.

Manpower Balance for Overall Hong Kong Economy and 17 Selected Industries

12. By considering both the projected manpower supply and the projected manpower requirements, the projected manpower balance was derived for the overall Hong Kong economy and the 17 selected industries. This balance was further broken down by occupation group, providing a clearer view of potential shortages or surpluses in the labour market by 2028. Additionally, further analyses of the educational requirements for anticipated manpower shortages were conducted to obtain the breakdown of education distribution of the manpower shortage for the overall economy.

Figure A1-2: Schema on Compilation of Manpower Requirement Projection



Abbreviations:

B/Ds: Bureaux and Departments

C&SD: Census and Statistics Department

CIC: Construction Industry Council

VTC: Vocational Training Council

Note : New components for 2023 MP are denoted in blue.

Appendix II: Definition of Four Occupation Groups

The classification of occupation groups adopted in the 2023 MP includes four categories based on job functions, skill levels and education levels by referring to the relevant definitions of occupation groups in the International Standard Classification of Occupations published by the International Labour Organisation in 2008.

Occupation group	Description	Examples
Managers, supervisors and professionals	Individuals who plan, direct and coordinate organisational activities, typically requiring advanced education or significant experience.	<ul style="list-style-type: none"> • Corporate management personnel • Researchers and academics (e.g. scientists, university professors) • Professionals (e.g. doctors, accountants, architects, engineers, teachers)
Service industry workers	Non-managerial level personnel providing essential support or customer-facing services.	<ul style="list-style-type: none"> • Cooks • Salespersons • Security guards • Flight attendants • Administrative clerks
Skilled technical workers	Workers with specialised skills or training to perform tasks related to construction, maintenance and operation of machinery and structures.	<ul style="list-style-type: none"> • E&M mechanics / electricians • Lift /escalator mechanics • Aircraft maintenance technicians • Skilled construction workers • Telecommunications technicians
Manual labourers	Individuals who carry out routine tasks that do not require specialised training or significant work experience.	<ul style="list-style-type: none"> • Cleaners • Hotel room attendants • Kitchen helpers • Warehouse operative staff and porters

Appendix III: Coverage for Selected Industries

Eight centres

They refer to the eight areas supported in the National 14th Five-Year Plan for the development of Hong Kong. The definitions and coverage for each of the eight centres are listed below:-

Centre	Coverage
East-meets-West centre for international cultural exchange	It involves activities that use creativity and intellectual capital as primary inputs to produce and deliver goods and services with cultural, artistic and creative elements. It covers areas such as art, antiques and crafts; cultural education and library, archive and museum services; performing arts; film, video and music; television and radio; publishing; software, computer games and interactive media; design; architecture; advertising; and amusement services. This definition aligns with the "Cultural and Creative Industries" as recognised in Government official statistics, representing cultural and creative economic activities.
International aviation hub	It includes all services related to air passengers, freight and transportation. This encompasses Hong Kong-based airline and helicopter companies, local offices of overseas airlines, air cargo forwarding services, aircraft maintenance and repairs, the assembly and manufacture of aviation transport equipment and machinery and services incidental to air transportation.
International financial centre	It covers a wide range of financial services including banking, insurance, stock brokerage, asset management, financial leasing, and investment and holding companies etc.
International innovation and technology centre	It comprises activities directly involved in innovation activities, i.e. research and development (R&D) activities, commercialisation of R&D outcomes and business process innovation activities. It covers I&T practitioners and trade-specific supporting staff across various fields, such as life and health technology, artificial intelligence (AI) and data science, advanced manufacturing and new energy technologies, spanning the public, business, and higher education sectors.
International trade centre	It covers trading and logistics services, including import and export trade, wholesale, freight services (including land, water and air freight services), warehousing and storage, and postal and courier services.
International transportation centre	It covers land and water passenger and freight services, as well as warehousing and storage, and postal and courier services. Air freight and related services are not included.

Centre	Coverage
Regional centre for international legal and dispute resolution services	It covers establishments providing legal services and alternative dispute resolution (ADR) services. This includes law firms and counsel chambers, as well as organisations offering services, platforms and trainings to support the operation of legal and ADR services. Some arbitrators and mediators, who might work on a part-time basis and have a primary employment outside the legal and ADR services industry, are not included in the manpower projection based on projection methodology and definitions due to the unavailability of robust and reliable information.
Regional intellectual property trading centre	It covers activities related to the protection, management and commercialisation of intellectual properties (IPs), such as patents, trade marks, designs and copyright, undertaken by various industries, in particular the IP-intensive industries ⁸ , as well as the IP intermediary services that facilitate or support IP protection, management and commercialisation, such as registration, consultation, due diligence, valuation, insurance, financing, matching, litigation, arbitration and mediation related to IP.

⁸ In the “Study Report on Contribution of Intellectual Property-Intensive Industries to Hong Kong Economy” published by the Intellectual Property Department in 2023, IP-intensive industries refer to those industries in Hong Kong with higher-than-average ownership and use of IP rights. A total of 196 industries were identified as IP-intensive industries.

Nine significant sectors

The definitions and coverage for each of the nine significant sectors supporting local services and the city's operation are provided below:-

Sector	Coverage
Accommodation and food	It include hotels, guesthouses and other short-term accommodation providers, as well as restaurants, fast food shops, cafes, takeaway food services, bars and catering services.
City operation	It refers to the positions that support the city's daily functioning and management. This includes seven specific categories: automobile, beauty care and hairdressing, electrical and mechanical services, electronics and telecommunications, information technology, real estate services, and security services. General workers without specific industry-related training are excluded.
Construction industry	It includes all trade-specific practitioners involved in construction activities, civil engineering works and related professional services (e.g. architectural, surveying and project engineering services), such as technical professionals, site supervisory personnel, technicians and skilled or semi-skilled workers, as covered by the Manpower Forecast by the Construction Industry Council. General workers without specific industry-related training are excluded. The manpower projection figures for construction industry in MP are aggregated from data sourced from the report on Manpower Forecast for Construction Industry released by the Construction Industry Council in 2023.
Education	It includes kindergartens, primary schools, secondary schools, special schools, tertiary institutions and universities.
Health services	It includes public and private hospitals, general and specialised medical clinics, dental clinics, Chinese medicine clinics, radiology, laboratories and other allied health practitioners and other healthcare personnel-provided services.
Retail	It refers to the sale of new or used goods to the general public, such as shops, supermarkets, department stores, stalls and local online platforms.
Manufacturing	It includes all economic activities within the manufacturing industry, including advanced manufacturing related to I&T development.

Sector	Coverage
Social services	It includes both residential and non-residential social services. Residential services cover facilities like care homes for the elderly, people with disabilities, children and drug rehabilitation centres, etc. Non-residential social services include neighbourhood elderly centres, day care units, family and youth service centres, child care centres, support centres for people with disabilities and mental wellness centres, etc.
Tourism	Tourism industry includes both inbound tourism and outbound tourism. Inbound tourism involves services provided to tourists, such as retail, accommodation, food and beverage, transport and personal services. Outbound tourism focuses on services for Hong Kong residents traveling abroad, including cross-boundary passenger transport, travel agency services and reservation-related activities.

Appendix IV: Supplementary Statistical Tables

1. Labour Force and Labour Force Participation Rate by Sex and Age Group, 2023 and 2028
2. Number of Employed Persons by Occupation Group, 2023
3. Number of Employed Persons by Selected Industry and Occupation Group, 2023
4. Manpower Requirements by Occupation Group, 2023 and 2028
5. Manpower Requirements by Selected Industry, 2023 and 2028
6. Manpower Requirements by Selected Industry and Occupation Group, 2023 and 2028
7. Manpower Requirements by Conventional Economic Sector, 2023 and 2028
8. Manpower Requirements by Conventional Economic Sector and Occupation Group, 2023 and 2028
9. Manpower Balance by Occupation Group, 2023 and 2028
10. Manpower Balance by Selected Industry, 2023 and 2028
11. Manpower Balance by Selected Industry and Occupation Group, 2028
12. Manpower Supply by Sex, Age Group and Education Level (Highest Level Completed), 2023 and 2028
13. Manpower Balance by Education Level (Highest Level Completed), 2023 and 2028

Rounding of figures

Figures in the tables may not add up to the respective totals due to rounding. Projected changes and growth rates are derived from unrounded figures.

Symbols

- | | |
|------|--|
| n.a. | Not applicable / not covered in the study. |
| ± | Estimates within ± 100 or related rates of change derived based on such estimates. |
| § | Manpower balance within ± 500. |

Table 1 Labour Force and Labour Force Participation Rate (LFPR) by Sex and Age Group, 2023 and 2028

Sex / Age group	2023 (Actual)		2028 (Projection)		Projected change (2023 to 2028)	
	Labour force	LFPR (%)	Labour force	LFPR (%)	Labour force	LFPR (% point)
Male						
15 - 24	93 000	30.1	115 000	34.5	+ 22 000	+ 4.4
25 - 34	389 000	90.7	359 000	94.9	- 30 000	+ 4.2
35 - 44	440 000	94.5	461 000	96.3	+ 20 000	+ 1.8
45 - 54	435 000	91.2	453 000	92.6	+ 18 000	+ 1.4
55 - 64	397 000	70.6	365 000	73.8	- 32 000	+ 3.2
65 and over	144 000	19.4	164 000	18.0	+ 20 000	- 1.3
15 and over	1 898 000	63.6	1 917 000	62.2	+ 19 000	- 1.4
Female						
15 - 24	89 000	30.2	107 000	34.7	+ 17 000	+ 4.5
25 - 34	350 000	80.2	330 000	84.3	- 20 000	+ 4.1
35 - 44	380 000	70.3	400 000	75.5	+ 20 000	+ 5.3
45 - 54	405 000	67.7	422 000	71.9	+ 17 000	+ 4.2
55 - 64	308 000	47.3	309 000	49.9	+ 1 000	+ 2.6
65 and over	69 000	8.3	77 000	7.3	+ 7 000	- 0.9
15 and over	1 601 000	47.7	1 645 000	47.3	+ 43 000	- 0.4
Both sexes						
15 - 24	182 000	30.2	222 000	34.6	+ 40 000	+ 4.5
25 - 34	739 000	85.4	689 000	89.5	- 50 000	+ 4.1
35 - 44	820 000	81.5	861 000	85.4	+ 41 000	+ 3.9
45 - 54	840 000	78.1	875 000	81.3	+ 36 000	+ 3.2
55 - 64	705 000	58.1	674 000	60.5	- 31 000	+ 2.4
65 and over	214 000	13.5	241 000	12.3	+ 27 000	- 1.2
15 and over	3 499 000	55.2	3 562 000	54.3	+ 62 000	- 0.9

Table 2 Number of Employed Persons by Occupation Group, 2023

Occupation group	Employment in 2023
Managers, supervisors and professionals	1 525 000
Service industry workers	1 126 600
Skilled technical workers	401 300
Manual labourers	333 800
Overall	3 386 700

Table 3 Number of Employed Persons by Selected Industry and Occupation Group, 2023

Selected industry	Employment in 2023				
	Managers, supervisors and professionals	Service industry workers	Skilled technical workers	Manual labourers	Overall
Eight Centres					
East-meets-West centre for international cultural exchange	177 100	36 900	10 700	9 100	233 800
International aviation hub	23 400	21 500	6 300	5 700	56 900
International financial centre	223 800	40 700	2 300	2 400	269 100
<i>Banking</i>	<i>76 700</i>	<i>18 900</i>	<i>600</i>	<i>900</i>	<i>97 100</i>
<i>Stock brokerage and asset management</i>	<i>86 700</i>	<i>13 200</i>	<i>1 400</i>	<i>1 100</i>	<i>102 400</i>
<i>Insurance</i>	<i>60 400</i>	<i>8 600</i>	<i>300</i>	<i>400</i>	<i>69 600</i>
International innovation and technology centre	49 400	2 600	400	n.a.	52 400
International trade centre	284 400	168 000	62 000	60 700	575 100
<i>Trading</i>	<i>244 700</i>	<i>122 800</i>	<i>13 400</i>	<i>23 900</i>	<i>404 800</i>
<i>Logistics</i>	<i>39 600</i>	<i>45 300</i>	<i>48 600</i>	<i>36 800</i>	<i>170 300</i>
International transportation centre	42 600	46 100	114 700	35 200	238 600
<i>Land and water passenger services</i>	<i>15 400</i>	<i>13 600</i>	<i>68 100</i>	<i>2 700</i>	<i>99 800</i>
<i>Land and water logistics services</i>	<i>27 200</i>	<i>32 500</i>	<i>46 600</i>	<i>32 500</i>	<i>138 800</i>
Regional centre for international legal and dispute resolution services	18 400	5 800	‡	400	24 600
Regional intellectual property trading centre	34 400	22 700	n.a.	n.a.	57 100

Table 3 Number of Employed Persons by Selected Industry and Occupation Group, 2023 (cont'd)

Selected industry	Employment in 2023				Overall
	Managers, supervisors and professionals	Service industry workers	Skilled technical workers	Manual labourers	
Nine Significant Sectors					
Accommodation and food	35 000	179 400	5 500	30 100	249 900
<i>Accommodation</i>	13 300	18 700	2 700	4 000	38 700
<i>Food</i>	21 700	160 600	2 800	26 100	211 200
City operation	295 700	169 800	75 000	n.a.	540 500
<i>Automobile</i>	3 000	3 000	10 700	n.a.	16 700
<i>Beauty care and hairdressing</i>	9 600	43 100	4 500	n.a.	57 100
<i>Electrical and mechanical services</i>	33 500	n.a.	40 100	n.a.	73 600
<i>Electronics and telecommunications</i>	58 000	n.a.	13 400	n.a.	71 400
<i>Information technology</i>	117 700	n.a.	n.a.	n.a.	117 700
<i>Real estate services</i>	54 600	77 400	7 800	n.a.	139 900
<i>Security services</i>	22 900	108 700	n.a.	n.a.	131 600
Construction industry	99 100	n.a.	196 200	n.a.	295 300
Education	134 200	26 700	800	12 300	174 000
Health services	104 900	52 300	1 200	7 300	165 700
Manufacturing	30 900	8 800	24 900	11 100	75 700
Retail	53 600	195 700	8 900	14 900	273 100
Social services	38 200	29 600	1 300	5 500	74 500
Tourism	37 000	100 100	13 200	12 800	163 200

Notes:

- (1) As certain economic activities are pertinent to multiple selected industries, the relevant manpower figures would overlap.
- (2) For the International innovation and technology centre, Regional intellectual property trading centre, City operation and Construction industry, the manpower figures mainly cover trade-specific or related technical personnel for the relevant industries. General supporting personnel and workers (e.g. cleaners) are generally not covered.
- (3) The coverage of different categories within City operation would overlap to some extent. For example, certain security guards are included in both Real estate services and Security services, and some Information technology (IT) personnel are counted under both IT and Electronics and telecommunications. Such overlaps have been deducted from the overall figure.

Table 4 Manpower Requirements by Occupation Group, 2023 and 2028

Occupation group	Actual manpower requirements in 2023	Projected manpower requirements in 2028	Projected change (2023 to 2028)	
	Number	Number	Number	Annual change
Managers, supervisors and professionals	1 579 100	1 709 600	+ 130 500	+ 1.6%
Service industry workers	1 194 100	1 224 400	+ 30 300	+ 0.5%
Skilled technical workers	426 500	458 300	+ 31 800	+ 1.4%
Manual labourers	350 700	353 200	+ 2 400	+ 0.1%
Overall	3 550 400	3 745 500	+ 195 100	+ 1.1%

Table 5 Manpower Requirements by Selected Industry, 2023 and 2028

Selected industry	Actual manpower requirements in 2023	Projected manpower requirements in 2028	Projected change (2023 to 2028)	
	Number	Number	Number	Annual change
Eight Centres				
East-meets-West centre for international cultural exchange	246 300	265 000	+ 18 600	+ 1.5%
International aviation hub	62 200	89 900	+ 27 700	+ 7.7%
International financial centre	275 500	301 800	+ 26 300	+ 1.8%
International innovation and technology centre	60 200	96 400	+ 36 100	+ 9.8%
International trade centre	586 800	586 800	±	±
International transportation centre	250 100	253 000	+ 2 900	+ 0.2%
Regional centre for international legal and dispute resolution services	25 100	25 800	+ 700	+ 0.6%
Regional intellectual property trading centre	58 400	62 000	+ 3 600	+ 1.2%
Nine Significant Sectors				
Accommodation and food	269 600	272 500	+ 2 900	+ 0.2%
City operation	574 500	635 600	+ 61 100	+ 2.0%
Construction industry	310 800	359 800	+ 48 900	+ 3.0%
Education	181 700	183 900	+ 2 200	+ 0.2%
Health services	178 100	209 400	+ 31 400	+ 3.3%
Manufacturing	78 300	99 900	+ 21 600	+ 5.0%
Retail	290 500	293 000	+ 2 600	+ 0.2%
Social services	81 800	93 300	+ 11 400	+ 2.6%
Tourism	175 800	215 400	+ 39 600	+ 4.1%

Note: As certain economic activities are pertinent to multiple selected industries, the relevant manpower figures would overlap.

Table 6 Manpower Requirements by Selected Industry and Occupation Group, 2023 and 2028

Selected industry / Occupation group	Actual manpower requirements in 2023	Projected manpower requirements in 2028	Projected change (2023 to 2028)	
	Number	Number	Number	Annual change
Eight Centres				
East-meets-West centre for international cultural exchange				
Managers, supervisors and professionals	186 700	205 600	+ 19 000	+ 2.0%
Service industry workers	38 900	38 900	±	±
Skilled technical workers	11 300	12 100	+ 800	+ 1.4%
Manual labourers	9 600	8 400	- 1 100	- 2.5%
Overall	246 300	265 000	+ 18 600	+ 1.5%
International aviation hub				
Managers, supervisors and professionals	25 300	37 000	+ 11 700	+ 7.9%
Service industry workers	23 500	34 600	+ 11 100	+ 8.0%
Skilled technical workers	6 900	9 800	+ 2 900	+ 7.3%
Manual labourers	6 400	8 400	+ 2 000	+ 5.6%
Overall	62 200	89 900	+ 27 700	+ 7.7%
International financial centre				
Managers, supervisors and professionals	229 400	254 500	+ 25 000	+ 2.1%
Service industry workers	41 300	42 500	+ 1 200	+ 0.6%
Skilled technical workers	2 300	2 400	±	±
Manual labourers	2 500	2 500	±	±
Overall	275 500	301 800	+ 26 300	+ 1.8%

Table 6 Manpower Requirements by Selected Industry and Occupation Group, 2023 and 2028 (cont'd)

Selected industry / Occupation group	Actual manpower requirements in 2023	Projected manpower requirements in 2028	Projected change (2023 to 2028)	
	Number	Number	Number	Annual change
Eight Centres (cont'd)				
International innovation and technology centre				
Managers, supervisors and professionals	56 800	91 500	+ 34 700	+ 10.0%
Service industry workers	3 000	4 000	+ 1 000	+ 5.7%
Skilled technical workers	400	900	+ 400	+ 14.7%
Manual labourers	n.a.	n.a.	n.a.	n.a.
Overall	60 200	96 400	+ 36 100	+ 9.8%
International trade centre				
Managers, supervisors and professionals	287 700	296 700	+ 9 100	+ 0.6%
Service industry workers	171 200	165 100	- 6 000	- 0.7%
Skilled technical workers	64 800	64 300	- 500	- 0.2%
Manual labourers	63 100	60 600	- 2 500	- 0.8%
Overall	586 800	586 800	‡	‡
International transportation centre				
Managers, supervisors and professionals	44 100	45 700	+ 1 600	+ 0.7%
Service industry workers	47 600	47 800	+ 300	+ 0.1%
Skilled technical workers	121 700	122 000	‡	‡
Manual labourers	36 700	37 500	+ 800	+ 0.4%
Overall	250 100	253 000	+ 2 900	+ 0.2%

Table 6 Manpower Requirements by Selected Industry and Occupation Group, 2023 and 2028 (cont'd)

Selected industry / Occupation group	Actual manpower requirements in 2023	Projected manpower requirements in 2028	Projected change (2023 to 2028)	
	Number	Number	Number	Annual change
Eight Centres (cont'd)				
Regional centre for legal and dispute resolution services				
Managers, supervisors and professionals	18 600	19 900	+ 1 300	+ 1.3%
Service industry workers	5 900	5 300	- 600	- 2.1%
Skilled technical workers	‡	‡	‡	‡
Manual labourers	400	500	‡	‡
Overall	25 100	25 800	+ 700	+ 0.6%
Regional intellectual property trading centre				
Managers, supervisors and professionals	35 100	37 300	+ 2 200	+ 1.2%
Service industry workers	23 200	24 700	+ 1 400	+ 1.2%
Skilled technical workers	n.a.	n.a.	n.a.	n.a.
Manual labourers	n.a.	n.a.	n.a.	n.a.
Overall	58 400	62 000	+ 3 600	+ 1.2%

Table 6 Manpower Requirements by Selected Industry and Occupation Group, 2023 and 2028 (cont'd)

Selected industry / Occupation group	Actual manpower requirements in 2023	Projected manpower requirements in 2028	Projected change (2023 to 2028)	
	Number	Number	Number	Annual change
Nine Significant Sectors				
Accommodation and food				
Managers, supervisors and professionals	36 100	36 600	+ 500	+ 0.3%
Service industry workers	194 800	196 800	+ 1 900	+ 0.2%
Skilled technical workers	6 000	6 100	±	±
Manual labourers	32 700	33 000	+ 300	+ 0.2%
Overall	269 600	272 500	+ 2 900	+ 0.2%
City operation				
Managers, supervisors and professionals	314 300	358 900	+ 44 700	+ 2.7%
Service industry workers	180 500	190 000	+ 9 500	+ 1.0%
Skilled technical workers	79 700	86 600	+ 6 900	+ 1.7%
Manual labourers	n.a.	n.a.	n.a.	n.a.
Overall	574 500	635 600	+ 61 100	+ 2.0%
Construction industry				
Managers, supervisors and professionals	104 300	121 200	+ 16 900	+ 3.0%
Service industry workers	n.a.	n.a.	n.a.	n.a.
Skilled technical workers	206 500	238 500	+ 32 000	+ 2.9%
Manual labourers	n.a.	n.a.	n.a.	n.a.
Overall	310 800	359 800	+ 48 900	+ 3.0%

Table 6 Manpower Requirements by Selected Industry and Occupation Group, 2023 and 2028 (cont'd)

Selected industry / Occupation group	Actual manpower requirements in 2023	Projected manpower requirements in 2028	Projected change (2023 to 2028)	
	Number	Number	Number	Annual change
Nine Significant Sectors (cont'd)				
Education				
Managers, supervisors and professionals	139 600	143 100	+ 3 400	+ 0.5%
Service industry workers	28 200	28 200	±	±
Skilled technical workers	800	800	±	±
Manual labourers	13 000	11 800	- 1 200	- 1.9%
Overall	181 700	183 900	+ 2 200	+ 0.2%
Health services				
Managers, supervisors and professionals	111 600	131 500	+ 19 900	+ 3.3%
Service industry workers	57 100	67 800	+ 10 700	+ 3.5%
Skilled technical workers	1 300	1 400	±	±
Manual labourers	8 000	8 800	+ 700	+ 1.8%
Overall	178 100	209 400	+ 31 400	+ 3.3%
Manufacturing				
Managers, supervisors and professionals	31 600	50 300	+ 18 700	+ 9.8%
Service industry workers	9 000	8 100	- 900	- 2.1%
Skilled technical workers	26 200	31 600	+ 5 300	+ 3.8%
Manual labourers	11 500	10 000	- 1 500	- 2.8%
Overall	78 300	99 900	+ 21 600	+ 5.0%

Table 6 Manpower Requirements by Selected Industry and Occupation Group, 2023 and 2028 (cont'd)

Selected industry / Occupation group	Actual manpower requirements in 2023	Projected manpower requirements in 2028	Projected change (2023 to 2028)	
	Number	Number	Number	Annual change
Nine Significant Sectors (cont'd)				
Retail				
Managers, supervisors and professionals	55 000	55 800	+ 800	+ 0.3%
Service industry workers	210 300	211 900	+ 1 600	+ 0.2%
Skilled technical workers	9 500	9 600	+ 200	+ 0.3%
Manual labourers	15 700	15 700	±	±
Overall	290 500	293 000	+ 2 600	+ 0.2%
Social services				
Managers, supervisors and professionals	40 800	46 800	+ 6 000	+ 2.8%
Service industry workers	33 300	38 100	+ 4 700	+ 2.7%
Skilled technical workers	1 400	1 500	±	±
Manual labourers	6 300	6 900	+ 600	+ 1.9%
Overall	81 800	93 300	+ 11 400	+ 2.6%
Tourism				
Managers, supervisors and professionals	39 800	50 700	+ 10 900	+ 4.9%
Service industry workers	107 900	132 600	+ 24 700	+ 4.2%
Skilled technical workers	14 300	16 400	+ 2 100	+ 2.8%
Manual labourers	13 800	15 700	+ 1 800	+ 2.5%
Overall	175 800	215 400	+ 39 600	+ 4.1%

Note: As certain economic activities are pertinent to multiple selected industries, the relevant manpower figures would overlap.

Table 7 Manpower Requirements by Conventional Economic Sector, 2023 and 2028

Conventional sector	Actual manpower requirements in 2023	Projected manpower requirements in 2028	Projected change (2023 to 2028)	
	Number	Number	Number	Annual change
Agriculture, fishing and quarrying	4 000	3 900	±	±
Manufacturing	78 300	99 900	+ 21 600	+ 5.0%
Electricity, gas, water and waste management	17 100	17 800	+ 800	+ 0.9%
Construction (see Note (2))	364 200	409 200	+ 45 000	+ 2.4%
Import and export, wholesale and retail trades	699 200	686 500	- 12 700	- 0.4%
Accommodation and food	269 600	272 500	+ 2 900	+ 0.2%
Transportation, storage, postal and courier services	304 900	332 800	+ 27 800	+ 1.8%
Information and communications	119 000	136 200	+ 17 200	+ 2.7%
Financial services	275 500	301 800	+ 26 300	+ 1.8%
Real estate	160 000	166 100	+ 6 100	+ 0.7%
Professional and business services	427 300	439 900	+ 12 500	+ 0.6%
Social and personal services	831 300	878 900	+ 47 600	+ 1.1%
Overall Economy	3 550 400	3 745 500	+ 195 100	+ 1.1%

Notes:

- (1) This table provides breakdown of economic activities based on the Hong Kong Standard Industry Classification (HSIC) version 2.0 adopted by the Census and Statistics Department (C&SD). The 12 conventional sectors together constitute the entire economy.
- (2) The coverage of “Construction sector” under the 12 conventional sectors follows HSIC version 2.0 adopted by C&SD and is thus different from that of the “Construction industry” under the nine significant sectors, which follows the coverage of Manpower Forecast by the Construction Industry Council.

Table 8 Manpower Requirements by Conventional Economic Sector and Occupation Group, 2023 and 2028

Conventional sector / Occupation group	Actual manpower requirements in 2023	Projected manpower requirements in 2028	Projected change (2023 to 2028)	
	Number	Number	Number	Annual change
Agriculture, fishing and quarrying				
Managers, supervisors and professionals	700	700	±	±
Service industry workers	±	±	±	±
Skilled technical workers	3 000	3 000	±	±
Manual labourers	200	200	±	±
Overall	4 000	3 900	±	±
Manufacturing				
Managers, supervisors and professionals	31 600	50 300	+ 18 700	+ 9.8%
Service industry workers	9 000	8 100	- 900	- 2.1%
Skilled technical workers	26 200	31 600	+ 5 300	+ 3.8%
Manual labourers	11 500	10 000	- 1 500	- 2.8%
Overall	78 300	99 900	+ 21 600	+ 5.0%
Electricity, gas, water and waste management				
Managers, supervisors and professionals	7 800	8 200	+ 300	+ 0.8%
Service industry workers	1 900	2 000	±	±
Skilled technical workers	4 800	5 200	+ 300	+ 1.3%
Manual labourers	2 500	2 600	±	±
Overall	17 100	17 800	+ 800	+ 0.9%

Table 8 Manpower Requirements by Conventional Economic Sector and Occupation Group, 2023 and 2028 (cont'd)

Conventional sector / Occupation group	Actual manpower requirements in 2023	Projected manpower requirements in 2028	Projected change (2023 to 2028)	
	Number	Number	Number	Annual change
Construction (see Note(2))				
Managers, supervisors and professionals	99 000	112 500	+ 13 600	+ 2.6%
Service industry workers	18 900	20 400	+ 1 500	+ 1.5%
Skilled technical workers	174 400	198 100	+ 23 700	+ 2.6%
Manual labourers	71 900	78 200	+ 6 300	+ 1.7%
Overall	364 200	409 200	+ 45 000	+ 2.4%
Import and export, wholesale and retail trades				
Managers, supervisors and professionals	301 400	304 400	+ 2 900	+ 0.2%
Service industry workers	334 300	324 400	- 9 800	- 0.6%
Skilled technical workers	23 100	22 300	- 900	- 0.8%
Manual labourers	40 300	35 400	- 4 900	- 2.6%
Overall	699 200	686 500	- 12 700	- 0.4%
Accommodation and food				
Managers, supervisors and professionals	36 100	36 600	+ 500	+ 0.3%
Service industry workers	194 800	196 800	+ 1 900	+ 0.2%
Skilled technical workers	6 000	6 100	±	±
Manual labourers	32 700	33 000	+ 300	+ 0.2%
Overall	269 600	272 500	+ 2 900	+ 0.2%

Table 8 Manpower Requirements by Conventional Economic Sector and Occupation Group, 2023 and 2028 (cont'd)

Conventional sector / Occupation group	Actual manpower requirements in 2023	Projected manpower requirements in 2028	Projected change (2023 to 2028)	
	Number	Number	Number	Annual change
Transportation, storage, postal and courier services				
Managers, supervisors and professionals	66 800	79 100	+ 12 300	+ 3.4%
Service industry workers	71 000	82 300	+ 11 300	+ 3.0%
Skilled technical workers	124 500	126 100	+ 1 600	+ 0.3%
Manual labourers	42 600	45 200	+ 2 600	+ 1.2%
Overall	304 900	332 800	+ 27 800	+ 1.8%
Information and communications				
Managers, supervisors and professionals	101 600	118 800	+ 17 200	+ 3.2%
Service industry workers	12 200	12 200	±	±
Skilled technical workers	3 800	4 000	+ 200	+ 1.1%
Manual labourers	1 500	1 200	- 300	- 3.7%
Overall	119 000	136 200	+ 17 200	+ 2.7%
Financial services				
Managers, supervisors and professionals	229 400	254 500	+ 25 000	+ 2.1%
Service industry workers	41 300	42 500	+ 1 200	+ 0.6%
Skilled technical workers	2 300	2 400	±	±
Manual labourers	2 500	2 500	±	±
Overall	275 500	301 800	+ 26 300	+ 1.8%
Real estate				
Managers, supervisors and professionals	69 100	67 200	- 1 900	- 0.5%
Service industry workers	77 200	83 400	+ 6 200	+ 1.5%
Skilled technical workers	9 000	10 500	+ 1 500	+ 3.1%
Manual labourers	4 700	5 000	+ 300	+ 1.2%
Overall	160 000	166 100	+ 6 100	+ 0.7%

Table 8 Manpower Requirements by Conventional Economic Sector and Occupation Group, 2023 and 2028 (cont'd)

Conventional sector / Occupation group	Actual manpower requirements in 2023	Projected manpower requirements in 2028	Projected change (2023 to 2028)	
	Number	Number	Number	Annual change
Professional and business services				
Managers, supervisors and professionals	200 800	210 900	+ 10 000	+ 1.0%
Service industry workers	125 200	127 100	+ 1 900	+ 0.3%
Skilled technical workers	14 600	14 400	‡	‡
Manual labourers	86 700	87 500	+ 700	+ 0.2%
Overall	427 300	439 900	+ 12 500	+ 0.6%
Social and personal services				
Managers, supervisors and professionals	434 700	466 400	+ 31 700	+ 1.4%
Service industry workers	308 300	325 300	+ 17 000	+ 1.1%
Skilled technical workers	34 600	34 700	‡	‡
Manual labourers	53 700	52 500	- 1 200	- 0.5%
Overall	831 300	878 900	+ 47 600	+ 1.1%
Overall economy				
Managers, supervisors and professionals	1 579 100	1 709 600	+ 130 500	+ 1.6%
Service industry workers	1 194 100	1 224 400	+ 30 300	+ 0.5%
Skilled technical workers	426 500	458 300	+ 31 800	+ 1.4%
Manual labourers	350 700	353 200	+ 2 400	+ 0.1%
Overall	3 550 400	3 745 500	+ 195 100	+ 1.1%

Notes:

- (1) This table provides breakdown of economic activities based on HSIC version 2.0 adopted by C&SD. The 12 conventional sectors together constitute the entire economy.
- (2) The coverage of "Construction sector" under the 12 conventional sectors follows HSIC version 2.0 adopted by C&SD and is thus different from that of the "Construction industry" under the nine significant sectors, which follows the coverage of Manpower Forecast by the Construction Industry Council.

Table 9 Manpower Balance by Occupation Group, 2023 and 2028

Occupation group	2023	2028
Managers, supervisors and professionals	- 15 000	- 27 000 to - 32 000
Service industry workers	- 24 000	- 43 000 to - 48 000
Skilled technical workers	- 10 000	- 60 000 to - 65 000
Manual labourers	- 2 000	- 44 000 to - 49 000
Overall	- 50 000	- 180 000

Table 10 Manpower Balance by Selected Industry, 2023 and 2028

Selected industry	2023	2028
Eight Centres		
International innovation and technology centre	- 6 000	- 18 000 to - 23 000
International aviation hub	- 3 000	- 18 000 to - 23 000
International trade centre	+ 5 000	- 11 000 to - 16 000
International transportation centre	- 4 000	- 10 000 to - 15 000
East-meets-West centre for international cultural exchange	§	- 5 000 to - 8 000
International financial centre	§	- 1 500 to - 4 500
Regional intellectual property trading centre	§	- 1 000 to - 4 000
Regional centre for international legal and dispute resolution services	§	§
Nine Significant Sectors		
Construction industry	- 15 000	- 45 000 to - 55 000
City operation	- 9 000	- 39 000 to - 44 000
Accommodation and food	- 7 000	- 14 000 to - 19 000
Health services	- 8 000	- 13 000 to - 18 000
Tourism	- 5 000	- 9 000 to - 14 000
Manufacturing	+ 1 000	- 9 000 to - 14 000
Retail	- 7 000	- 7 000 to - 10 000
Social services	- 4 000	- 3 500 to - 6 500
Education	- 4 000	- 2 000 to - 5 000

Note: As certain economic activities are pertinent to multiple selected industries, the relevant manpower figures would overlap.

Table 11 Manpower Balance by Selected Industry and Occupation Group, 2028

Selected industry	Managers, supervisors and professionals	Service industry workers	Skilled technical workers	Manual labourers	Overall
Eight Centres					
International innovation and technology centre	- 17 000 to - 21 000	- 500 to - 1 500	§	n.a.	- 18 000 to - 23 000
International aviation hub	- 5 500 to - 7 000	- 8 500 to - 10 000	- 3 200 to - 4 200	- 800 to - 1 800	- 18 000 to - 23 000
International trade centre	- 2 000 to - 3 000	- 600 to - 1 600	- 4 400 to - 5 400	- 4 000 to - 6 000	- 11 000 to - 16 000
International transportation centre	- 500 to - 1 000	- 2 000 to - 3 500	- 4 500 to - 6 500	- 3 000 to - 4 000	- 10 000 to - 15 000
East-meets-West centre for international cultural exchange	- 5 500 to - 7 500	§	§	§	- 5 000 to - 8 000
International financial centre	- 2 000 to - 3 000	§	§	§	- 1 500 to - 4 500
Regional intellectual property trading centre	- 500 to - 2 500	- 500 to - 1 500	n.a.	n.a.	- 1 000 to - 4 000
Regional centre for international legal and dispute resolution services	§	§	§	§	§
Nine Significant Sectors					
Construction industry	- 12 000 to - 17 000	n.a.	- 30 000 to - 40 000	n.a.	- 45 000 to - 55 000
City operation	- 16 500 to - 18 500	- 14 500 to - 16 000	- 8 000 to - 9 500	n.a.	- 39 000 to - 44 000
Accommodation and food	- 500 to - 1 500	- 7 000 to - 8 500	- 500 to - 1 500	- 6 000 to - 7 500	- 14 000 to - 19 000
Health services	- 8 000 to - 9 500	- 3 200 to - 5 200	§	- 1 800 to - 3 300	- 13 000 to - 18 000
Tourism	- 2 500 to - 3 500	- 5 500 to - 7 500	- 500 to - 1 500	- 500 to - 1 500	- 9 000 to - 14 000
Manufacturing	- 2 500 to - 4 500	- 500 to - 1 500	- 6 000 to - 8 000	§	- 9 000 to - 14 000
Retail	§	- 6 000 to - 7 000	- 500 to - 1 500	- 500 to - 1 500	- 7 000 to - 10 000
Social services	- 500 to - 2 000	- 1 000 to - 3 000	§	- 1 000 to - 2 500	- 3 500 to - 6 500
Education	- 2 000 to - 3 000	+ 500 to + 1 500	§	- 1 000 to - 2 000	- 2 000 to - 5 000

Note: As certain economic activities are pertinent to multiple selected industries, the relevant manpower figures would overlap.

Table 12 Manpower Supply by Sex, Age Group and Education Level (Highest Level Completed), 2023 and 2028

Sex / Age group	Upper secondary and below	Diploma/ sub-degree	First degree	Postgraduate	Overall
<u>2023 (Actual)</u>					
Sex					
Male	1 042 000	216 000	466 000	174 000	1 898 000
Female	828 000	173 000	444 000	156 000	1 601 000
Both sexes	1 871 000	389 000	910 000	330 000	3 499 000
Age group					
15 - 24	80 000	32 000	65 000	5 000	182 000
25 - 34	209 000	118 000	332 000	81 000	739 000
35 - 44	357 000	101 000	258 000	106 000	820 000
45 - 54	519 000	75 000	164 000	82 000	840 000
55 - 64	532 000	51 000	75 000	48 000	705 000
65 and over	175 000	12 000	17 000	10 000	214 000
15 and over	1 871 000	389 000	910 000	330 000	3 499 000
<u>2028 (Projection)</u>					
Sex					
Male	910 000	250 000	549 000	209 000	1 917 000
Female	710 000	212 000	530 000	192 000	1 645 000
Both sexes	1 620 000	462 000	1 079 000	401 000	3 562 000
Age group					
15 - 24	108 000	36 000	72 000	5 000	222 000
25 - 34	139 000	123 000	341 000	86 000	689 000
35 - 44	284 000	125 000	321 000	131 000	861 000
45 - 54	457 000	98 000	217 000	104 000	875 000
55 - 64	452 000	61 000	102 000	59 000	674 000
65 and over	180 000	18 000	27 000	16 000	241 000
15 and over	1 620 000	462 000	1 079 000	401 000	3 562 000

**Table 13 Manpower Balance by Education Level (Highest Level Completed),
2023 and 2028**

Education level	2023	2028
Upper secondary and below	- 10 000	- 65 000 to - 70 000
Diploma/sub-degree	- 20 000	- 71 000 to - 76 000
Degree	- 12 000	- 23 000 to - 28 000
Postgraduate	- 8 000	- 16 000 to - 21 000
Overall	- 50 000	- 180 000

Appendix V: List of Consultees

General

1. Ahsay Systems Corporation Limited
2. Business Facilitation Advisory Committee
3. CLP Power Hong Kong Limited
4. Commerce and Economic Development Bureau
5. Eastern Path Limited
6. Eating Establishment Employees General Union
7. Egon Zehnder International Limited
8. Employers' Federation of Hong Kong
9. Ernst & Young
10. Gammon Construction Limited
11. Hip Shing Hong (Holdings) Company Limited
12. Hong Kong (SME) Economic and Trade Promotional Association
13. Hong Kong Air Cargo Terminals Employees Union
14. Hong Kong Chinese Enterprises Association
15. Hong Kong Clerical and Professional Employees General Union
16. Hong Kong Commerce and Industry Association
17. Hong Kong Construction Industry Employees General Union
18. Hong Kong Federation of Trade Unions
19. Hong Kong General Chamber of Commerce
20. Hong Kong Greater China SME Alliance Association
21. Hong Kong Institute of Human Resource Management
22. Hong Kong Management Association
23. Hong Kong Small and Medium Enterprises Association
24. Hong Kong SME Development Association
25. Hong Kong SME Development Federation Ltd
26. Hotel, Food & Beverage Employees Association
27. Human Resources Planning Commission
28. International Business Committee
29. JobsDB Hong Kong Limited
30. Jones Lang LaSalle Limited
31. Keystone Electric Wire & Cable Co. Ltd.
32. Lau Chor Tak Institute of Global Economics and Finance, The Chinese University of Hong Kong
33. LinkedIn Hong Kong
34. Motor Transport Workers General Union
35. Office for Attracting Strategic Enterprises
36. Office of the Government Economist
37. QBE Hongkong & Shanghai Insurance Limited
38. Randstad Holding NV
39. Roger Kam & Co.
40. Small and Medium Enterprises Committee
41. SME Global Alliance
42. The Australian Chamber of Commerce Hong Kong
43. The British Chamber of Commerce in Hong Kong
44. The Chinese General Chamber of Commerce
45. The Dutch Chamber of Commerce in Hong Kong
46. The European Chamber of Commerce in Hong Kong
47. The Federation of Hong Kong and Kowloon Labour Unions
48. The Federation of Hong Kong Electrical & Mechanical Industries Trade Unions
49. The Federation of Hong Kong Food & Beverage Industries Trade Unions
50. The French Chamber of Commerce in Hong Kong
51. The Hang Seng University of Hong Kong
52. The Spanish Chamber of Commerce in Hong Kong
53. The Staffs and Workers Union of Hong Kong Civil Airlines
54. The Swiss Chamber of Commerce in Hong Kong

East-meets-West Centre for International Culture Exchange

1. 1a Space
2. 6 Waves
3. Alison Fine Arts
4. Alliance Française de Hong Kong
5. Art and Culture Outreach
6. Art Basel Hong Kong
7. Art Intelligence Global (Hong Kong)
8. Art Mentor International Ltd
9. Asia Art Archive Ltd
10. Asia Society Hong Kong Center
11. Association of Motion Picture Post-Production Professionals
12. Bookazine Limited
13. Breakthrough Ltd
14. British Council Hong Kong
15. Brunswick Group
16. Chartered Society of Designers in Hong Kong
17. Chinachem Group
18. City Chamber Orchestra of Hong Kong
19. City University of Hong Kong
20. CL3 Architects Ltd
21. CoDeCode Limited
22. Consulate General of France in Hong Kong & Macau
23. CoolGranite Ltd
24. Cultural and Creative Industries Development Agency
25. Culture, Sports and Tourism Bureau
26. Edko Films Ltd.
27. Enrich Culture Group
28. Federation of Hong Kong Filmmakers
29. Fine Arts Asia
30. Goods of Desire
31. HASS Lab
32. HK01 Internet Company Limited
33. Hong Kong Arts Administrators Association
34. Hong Kong Arts Centre
35. Hong Kong Arts Development Council
36. Hong Kong Association for Pictures and Sound Production
37. Hong Kong Chapter of Interaction Design Association
38. Hong Kong Chinese Orchestra
39. Hong Kong Comics and Animation Federation
40. Hong Kong Dance Company
41. Hong Kong Design Institute
42. Hong Kong Designers Association
43. Hong Kong Digital Entertainment Association
44. Hong Kong Fashion Designers Association
45. Hong Kong Film Arts Association
46. Hong Kong Film Assistant Directors' Association
47. Hong Kong Film Composers Association
48. Hong Kong Film Development Council
49. Hong Kong Gaudeamus Dunhuang Ensemble
50. Hong Kong Institute of Architects
51. Hong Kong Live Performance and Production Industry Association
52. Hong Kong Metropolitan University
53. Hong Kong Movie Production Executives Association
54. Hong Kong Palace Museum
55. Hong Kong Philharmonic Orchestra
56. Hong Kong Printers Association
57. Hong Kong Publishing Federation
58. Hong Kong Repertory Theatre
59. Hong Kong Screenwriters' Guild
60. Hong Kong Theatres Association Ltd
61. Hong Kong Tradebook Publishers Association
62. Hong Kong Visual Effects Association
63. Hong Kong Young Industrialists Council
64. International Federation of the Phonographic Industry (Hong Kong Group) Limited
65. Irresistible Films
66. Lan Kwai Fong Group

67. Leisure and Cultural Services Department
68. M+
69. Madison Asia Ltd.
70. MCH Group Asia Ltd.
71. Media and Communications Training Board, Vocational Training Council
72. Mender of Things
73. Mill 6 Foundation Limited
74. Movie Producers and Distributors Association of Hong Kong
75. Mr Donald CHOI, JP, Former Executive Director and CEO, Chinachem Group
76. Mr Johnson CHANG, Veteran curator and dealer of contemporary Chinese art
77. Mr Louis YU, Veteran arts administrator
78. Ms Ada TSE, Member of Advisory Committee on Arts Development
79. Ms Elaine YEUNG, BBS, Former directorate officer of the Leisure and Cultural Services Department
80. Ms Leonie KI, GBS, JP, Member of Culture Commission
81. Ms Tisa HO, Veteran arts administrator
82. MTR Corporation Limited
83. New Arts (consultancy)
84. OMD Hong Kong
85. Peninsula Knitters Ltd
86. PHD Media Hong Kong
87. Phillips
88. Pixio Limited
89. PMQ
90. Print Media and Publishing Training Board, Vocational Training Council
91. Prof. Douglas SO, BBS, JP, Opinion leader in the Creative and Culture Industries
92. Programme and Development Committee
93. Radio Television Hong Kong
94. Red Publish
95. Stage Tech Limited
96. Tai Kwun
97. Taihe Music Group
98. Television Broadcasts Limited
99. Textile Council of Hong Kong
100. TFI Digital Media Limited
101. The Absolutely Fabulous Theatre Connection
102. The Association of Accredited Advertising Agencies of Hong Kong
103. The Chinese University of Hong Kong
104. The Education University of Hong Kong
105. The Hang Seng University of Hong Kong
106. The Hon Bernard Charnwut CHAN, GBM, GBS, JP, Opinion leader in the Creative and Culture Industries
107. The Hon MA Fung-kwok, GBS, JP
108. The Hong Kong Academy of Performing Arts
109. The Hong Kong Federation of Design and Creative Industries
110. The Hong Kong Institute of Planners
111. The Hong Kong Polytechnic University
112. The University of Hong Kong
113. Theatre du Pif
114. Thomas Chow Architects Limited
115. TSW Theatre Studio
116. University Museum and Art Gallery, The University of Hong Kong
117. WE Marketing Group
118. West Kowloon Cultural District Authority
119. Wure Area
120. Yangtze Foundation

International Aviation Hub

1. Aerovision Technology Limited
2. Air New Zealand Limited
3. Airport Authority Hong Kong
4. Board of Airline Representatives in Hong Kong
5. Cathay Pacific Airways Limited
6. Civil Aviation Department
7. Greater Bay Airlines Company Limited
8. Hong Kong Air Cargo Terminals Limited
9. Hong Kong Aircraft Engineering Company Limited
10. Hong Kong Airline Service Providers Association
11. Hong Kong Airlines Limited
12. Hong Kong Aviation Industry Association
13. Hong Kong Business Aviation Centre
14. Hong Kong International Airport Services Holdings Ltd.
15. Menzies CNAC Aviation Services
16. Metrojet Limited
17. TAG Aviation Asia Ltd
18. Transport and Logistics Bureau

International Financial Centre

1. Acacia Insurance Solutions Limited
2. Accountancy Training Board, Vocational Training Council
3. AIA International Limited
4. Allied World Assurance Company, Ltd
5. Association of Chartered Certified Accountants - Hong Kong
6. Association of International Certified Professional Accountants
7. AXA China Region Insurance Company (Bermuda) Limited
8. AXA Hong Kong and Macau
9. Bank of China (Hong Kong) Limited
10. Bank of Communications (Hong Kong) Limited
11. Banking and Finance Training Board, Vocational Training Council
12. BDO Limited
13. BOA International Financial Group
14. BOC Group Life Assurance Company Limited
15. China Construction Bank (Asia) Limited
16. China Development Bank
17. China Guangfa Bank Co. Ltd.
18. China Life Insurance (Overseas) Company Limited
19. China Minsheng Banking Corp. Ltd. Hong Kong Branch
20. China Ping An Insurance (Hong Kong) Company Limited
21. China Taiping Life Insurance (Hong Kong) Company Limited
22. Chinese Banking Association in Hong Kong
23. Chiyu Banking Corporation Limited
24. CW CPA
25. Deloitte Touche Tohmatsu
26. Endowus Hong Kong
27. Ernst & Young
28. Financial Services and the Treasury Bureau
29. Financial Services Development Council
30. Forms Syntron Information (HK) Limited
31. FWD Group Holdings Limited
32. GLF Wealth Management Limited
33. Habib Bank Zurich (Hong Kong) Limited
34. Hang Seng Bank Limited
35. Hong Kong Association of Registered Public Interest Entity Auditors
36. Hong Kong Business Accountants Association
37. Hong Kong Cyberport Management Company Limited
38. Hong Kong Exchanges and Clearing Limited
39. Hong Kong Federation of Insurers
40. Hong Kong Fintech Association
41. Hong Kong Institute of Bankers
42. Hong Kong Institute of Certified Public Accountants
43. Hong Kong Insurance Authority
44. Hong Kong Investment Funds Association
45. Hong Kong Monetary Authority
46. Hong Kong Securities Association
47. Hong Leong Insurance (Asia) Ltd
48. Industrial and Commercial Bank of China (Asia) Limited
49. Industrial Bank Co. Ltd. Hong Kong Branch
50. Institute of Financial Planners of Hong Kong
51. Insurance Training Board, Vocational Training Council
52. InvestHK
53. Karrie International Holdings Limited
54. Lockton Companies (Hong Kong) Limited
55. Mainetti Group
56. Mandatory Provident Fund Schemes Authority
57. Marine Insurance Club Ltd.
58. Mirae Asset Global Investments (HK) Limited
59. Nanyang Commercial Bank Ltd.
60. New World Development Company Limited

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61. Nomura International (HK) Ltd.
 62. Ping An Bank Co. Ltd.
 63. Professional Insurance Brokers Association
 64. Prudential Hong Kong Limited
 65. Securities and Futures Commission
 66. Shanghai Commercial Bank Limited
 67. Shanghai Pudong Development Bank Co.
Ltd. Hong Kong Branch
 68. Shinewing Hong Kong
 69. Standard Chartered Bank (Hong Kong) Ltd
 70. Starr International Insurance (Asia) Ltd
 71. Swire Pacific Limited
 72. Tahoe Life Insurance Company Limited
 73. Taiping Reinsurance Company Limited
 74. The Actuarial Society of Hong Kong
 75. The DTC Association
 76. The Export-Import Bank of China
 77. The Hon CHAN Kin-por's LegCo Member's
Office
 78. The Hon Edmund WONG Chun-sek
 79. The Hong Kong Confederation of Insurance
Brokers
 80. The Hong Kong Mortgage Corporation
Limited
 81. The Hongkong and Shanghai Banking
Corporation Limited
 82. The Society of Chinese Accountants and
Auditors
 83. Transamerica Life Bermuda Ltd.
 84. Tsunami Advisors Limited
 85. Victory Securities Co. Ltd.

International Innovation and Technology Centre

- | | |
|---|--|
| 1. Advanced Biomedical Instrumentation Centre | 30. Ferro Resources Ltd. |
| 2. Advanced Manufacturing Training Board, Vocational Training Council | 31. Fortune Industrial Products Limited |
| 3. Ahsay Systems Corporation Limited | 32. GS1 Hong Kong |
| 4. Archireef | 33. HKT Limited |
| 5. Ascendent Capital Partners | 34. Hong Kong Academy of Engineering Sciences |
| 6. Automatic Manufacturing Limited | 35. Hong Kong Applied Science and Technology Research Institute |
| 7. Automotive Platforms and Application Systems R&D Centre | 36. Hong Kong Baptist University |
| 8. Baguio Green Group Limited | 37. Hong Kong Center for Neurodegenerative Diseases |
| 9. Beijing-Hong Kong Academic Exchange Centre | 38. Hong Kong Cloud Security Alliance |
| 10. CATALO Natural Health Foods Limited | 39. Hong Kong Computer Society |
| 11. Centre for Advances in Reliability and Safety | 40. Hong Kong Council for Testing and Certification |
| 12. Centre for Novostics | 41. Hong Kong E-Vehicles Business General Association |
| 13. Centre for Perceptual and Interactive Intelligence | 42. Hong Kong Innovative Technology Development Association |
| 14. Centre for Transformative Garment Production | 43. Hong Kong Life Sciences Society |
| 15. Centre for Translational Stem Cell Biology | 44. Hong Kong New Emerging Technology Education Association |
| 16. Centre for Virology, Vaccinology and Therapeutics | 45. Hong Kong Productivity Council |
| 17. China Mobile Hong Kong Company Limited | 46. Hong Kong Science and Technology Parks Corporation |
| 18. China Resources Cement Holdings Limited | 47. Hong Kong Software Industry Association |
| 19. Cisco Systems (Hong Kong) Limited | 48. Huawei Technologies Co. Ltd. |
| 20. City University of Hong Kong | 49. InfoTech Services (H.K.) Limited |
| 21. CMGE Technology Group | 50. Innovation and Information Technology Committee of The Chinese Manufacturers' Association of Hong Kong |
| 22. Committee on Innovation, Technology and Industry Development | 51. Innovation and Technology Commission |
| 23. Communications Association of Hong Kong | 52. Innovation and Technology Training Board, Vocational Training Council |
| 24. Dark Lab, PwC | 53. Innovation, Technology and Industry Bureau |
| 25. Digital Economy Development Committee | 54. Institute of Electrical and Electronics Engineers Inc. Hong Kong Section |
| 26. Digital Policy Office | 55. Institution of Engineering and Technology Hong Kong |
| 27. Ecoinno (H.K.) Limited | |
| 28. Education and Manpower Committee of The Chinese Manufacturers' Association of Hong Kong | |
| 29. Federation of Hong Kong Industries | |

56. Jacobson Pharma Corporation Limited
57. Ka Shui Manufactory Co. Ltd.
58. Laboratory for AI-Powered Financial Technologies Limited
59. Laboratory for Synthetic Chemistry and Chemical Biology Limited
60. Laboratory of Artificial Intelligence in Design Limited
61. Laboratory of Data Discovery for Health Limited
62. Lingnan University
63. Logistics and Supply Chain and MultiTech R&D Centre
64. Microsoft Hong Kong Limited
65. Multi-Scale Medical Robotics Center
66. Nan Fung Life Sciences
67. Nissin Foods (HK) Management Co. Ltd.
68. Office of the Communications Authority
69. PCCW Group
70. PHASE Scientific International Limited
71. PlayFourC Innovation Education
72. Pro-Technic Machinery Ltd
73. Roche Hong Kong Limited
74. Smart City Consortium
75. Thales Group
76. The Association of Construction Materials Laboratories
77. The Chinese Manufacturers' Association of Hong Kong
78. The Chinese University of Hong Kong
79. The Education University of Hong Kong
80. The Hon Duncan CHIU
81. The Hon YUNG Hoi-yan, JP
82. The Hong Kong Electronic Industries Association Ltd.
83. The Hong Kong Polytechnic University
84. The Hong Kong University of Science and Technology
85. The Hong Kong Young Academy of Sciences
86. The Hongkong Electric Co. Ltd.
87. The University of Hong Kong
88. Trade and Industry Committee of The Chinese Manufacturers' Association of Hong Kong
89. Veolia Environmental Services Hong Kong Ltd.
90. Yuanhua Robotics, Perception & AI Technologies (HK) Limited

International Trade Centre

1. Carter Industrial Company
2. Commerce and Economic Development Bureau
3. Computer And Technologies Holdings Limited
4. Creative Manufacturing Limited
5. Cross Border E-Commerce Service Group
6. Dandelion Intelligence Ltd.
7. E. Tech Management (HK) Limited
8. Education and Manpower Committee of The Chinese Manufacturers' Association of Hong Kong
9. Eurosia Holdings (China) Limited
10. Golden Resources Development International Limited
11. Hinasia (HK) Industrial Co. Ltd.
12. Hip Shing Hong (Holdings) Company Limited
13. HKI Group
14. Hong Kong Chinese Enterprises Association
15. Hong Kong Committee for Pacific Economic Cooperation
16. Hong Kong Logistics Management Staff Association
17. Hong Kong Shippers' Council
18. Hong Kong Small and Medium Enterprises Association
19. Kolinker Industrial Equipments Limited
20. Lee Lim Ming Metal Works Ltd.
21. Li & Fung (Trading) Ltd.
22. M & C Toy Centre Ltd.
23. Merchandise Trading and E-Commerce Training Board, Vocational Training Council
24. Shun Hing Technology Co. Ltd.
25. Stelix Education Ltd.
26. The Chinese General Chamber of Commerce
27. The Chinese Manufacturers' Association of Hong Kong
28. The Hang Seng University of Hong Kong
29. The Hong Kong General Chamber of Commerce
30. The Hong Kong General Chamber of Small and Medium Business
31. The Hong Kong Polytechnic University
32. Trade and Industry Committee of The Chinese Manufacturers' Association of Hong Kong
33. Wah Ming Hong Limited
34. Wah Yuen Foods (H.K.) Co. Ltd.
35. Wessen Group Limited
36. Whole Win (Group) Ltd.
37. Yick Shun Electronic Toys Manufactory Ltd.

International Transportation Centre

1. DHL Global Forwarding (Hong Kong) Limited
2. GEODIS Hong Kong Limited
3. GoGoX Holdings Limited
4. Hong Kong and Kowloon Ferry Limited
5. Hong Kong Association of Freight Forwarding and Logistics Limited
6. Hong Kong Shippers' Council
7. Hongkong International Terminals Limited
8. Hongkong Salvage and Towage Services Limited
9. Hutchison Ports Asia Port Services Limited
10. Kwoon Chung Bus Holdings Limited
11. Maritime Services Training Board, Vocational Training Council
12. Modern Terminals Group
13. MTR Corporation Limited
14. New Lantao Bus Company (1973) Limited
15. Shun Tak-China Travel Ship Management Limited
16. The "Star" Ferry Company, Limited
17. The Chartered Institute of Logistics and Transport in Hong Kong
18. The Hon CHAN Siu-hung, JP
19. The Hon Frankie YICK Chi-ming, GBS, JP
20. The Hong Kong Joint Branch of The Royal Institution of Naval Architects and The Institute of Marine Engineering, Science and Technology
21. Hong Kong Ferry (Holdings) Company Limited
22. The Kowloon Motor Bus Co. (1933) Ltd.
23. Transport and Logistics Bureau
24. Transport and Logistics Training Board, Vocational Training Council
25. Valles Steamship Company, Limited
26. Yun Lee Marine Group Holdings

Regional Centre for International Legal and Dispute Resolution Services

1. Academy of International Dispute Resolution & Professional Negotiation
2. Advisory Committee on Promotion of Arbitration
3. Asia Pacific Centre for Arbitration and Mediation
4. Baker & McKenzie
5. China International Economic and Trade Arbitration Commission Hong Kong Arbitration Center
6. Deacons
7. Dentons
8. Department of Justice
9. eBRAM International Online Dispute Resolution Centre
10. Financial Dispute Resolution Centre
11. Haiwen & Partners
12. Herbert Smith Freehills
13. Hong Kong Centre of International Commercial Arbitration
14. Hong Kong International Arbitration Centre
15. Hong Kong International Mediation Centre
16. Hong Kong Maritime Arbitration Group
17. Hong Kong Mediation Centre
18. International Dispute Resolution and Risk Management Institute
19. International Professional Advocates Association
20. Legal Education Fund Ltd
21. Mainland - Hong Kong Joint Mediation Centre
22. Reed Smith Richards Butler LLP
23. South China International Arbitration Center (HK)
24. Steering Committee on Mediation
25. The Chambers of Anthony Francis Neoh QC, SC, JP
26. The Hon LAM San-keung, JP
27. The Law Society of Hong Kong
28. YYC Legal LLP

Regional Intellectual Property Trading Centre

1. Asian Patent Attorneys Association, Hong Kong Group
2. Automotive Platforms and Application Systems R&D Centre
3. City University of Hong Kong
4. CLT Patent & Trademark (H.K.) Limited
5. Commerce and Economic Development Bureau
6. Deacons
7. Gallant
8. Hogan Lovells
9. Hong Kong Creative Industries Association
10. Hong Kong Design Centre
11. Hong Kong Institute of Patent Attorneys
12. Hong Kong Productivity Council
13. Hong Kong Reprographic Rights Licensing Society
14. Intellectual Property Department
15. King & Wood Mallesons
16. Marks & Clerk
17. OLN IP Service Limited
18. Robin Bridge & John Liu
19. Rouse & Co. International (Overseas) Limited
20. The Hong Kong Chinese Patent Attorneys Association
21. The Hong Kong Institute of Patent Practitioners
22. The Hong Kong University of Science and Technology
23. Universal Music Group
24. Wilkinson & Grist

Accommodation and Food

1. Alva Hotel by Royal
2. Butterfly Hospitality (HK) Limited
3. Cordis, Hong Kong
4. Courtyard by Marriott Hong Kong
5. Crowne Plaza Hong Kong Kowloon East
6. EAST Hong Kong
7. Empire Hotel Hong Kong
8. Four Points by Sheraton Hong Kong Tung Chung
9. Four Seasons Hotel Hong Kong
10. Fuk Yuen Group
11. Gloucester Luk Kwok Hong Kong
12. Gold Coast Yacht & Country Club Limited
13. Grand Hyatt Hong Kong
14. Harbour Grand Hong Kong
15. Harbour Grand Kowloon
16. Harbour Plaza 8 Degrees
17. Holiday Inn Express Hong Kong Causeway Bay
18. Holiday Inn Golden Mile
19. Hong Kong Disneyland Hotel
20. Hong Kong Gold Coast Hotel
21. Hong Kong Hotels Association
22. Hong Kong Ocean Park Marriott Hotel
23. Hotel Alexandra
24. Hotel ICON
25. Hotel Stage
26. Hotel, Catering and Tourism Training Board, Vocational Training Council
27. Hyatt Centric Victoria Harbour Hong Kong
28. Hyatt Hotels & Resorts
29. Hyatt Regency Hong Kong, Sha Tin
30. Hyatt Regency Hong Kong, Tsim Sha Tsui
31. Ibis Hong Kong Central & Sheung Wan
32. Institute of Dining Professionals
33. InterContinental Grand Stanford Hong Kong
34. JEN Hong Kong by Shangri-La
35. JW Marriott Hotel Hong Kong
36. K11 ARTUS
37. Kau Kiu Noodles Ltd
38. Kerry Hotel Hong Kong
39. Kowloon Shangri-la Hotel
40. Lai Sun Dining
41. Lan Kwai Fong Hotel @ Kau U Fong
42. Langham Hospitality Group
43. Le Meridien Hong Kong, Cyberport
44. LH Group Ltd
45. Maxim's Caterers Limited
46. Nathan Hotel Hong Kong
47. Nina Hospitality Company Limited
48. Nina Hotel Kowloon East
49. Novotel Century Hong Kong
50. Novotel Citygate Hong Kong & The Silveri Mgallery
51. Ovolo Hotels Group
52. Panda Hotel
53. Pentahotel Hong Kong, Tuen Mun
54. Prudential Hotel
55. Regal Airport Hotel Hong Kong
56. Regal Hotels International Holdings Limited
57. Renaissance Hong Kong Harbour View Hotel
58. Rosedale Hotel Hong Kong
59. Royal Pacific Hotel
60. Royal Park Hotel
61. Royal Plaza Hotel
62. Sheraton Hong Kong Tung Chung Hotel
63. Sino Land Company Limited
64. Taste of Asia Group Limited
65. The Association for Hong Kong Catering Services Management Ltd.
66. The Cityview
67. The Federation of Hong Kong Hotel Owners Limited
68. The Harbourview
69. The Hon Tommy CHEUNG Yu-yan, GBM, GBS, JP
70. The Kowloon Hotel Hong Kong
71. The Park Lane Hong Kong, a Pullman Hotel
72. The Ritz-Carlton, Hong Kong

City Operation

Training Boards of Vocational Training Council:

1. Automobile Training Board
2. Beauty Care and Hairdressing Training Board
3. Electrical and Mechanical Services Training Board
4. Electronics and Telecommunications Training Board
5. Innovation and Technology Training Board
6. Real Estate Services Training Board
7. Security and Disciplined Services Training Board

Construction Industry

1. BIMSONS Limited
2. Building, Civil Engineering, and Built Environment Training Board, Vocational Training Council
3. China Harbour Engineering Company Ltd.
4. Chun Wo Development Holdings Limited
5. Construction Industry Council
6. Development Bureau
7. Kim Hung Construction & Engineering Co. Ltd.
8. Ove Arup & Partners Hong Kong Limited
9. Rider Levett Bucknall Limited
10. The Association of Consulting Engineers of Hong Kong
11. The Hon Tony TSE Wai-chuen, BBS, JP
12. The Hong Kong Institute of Surveyors
13. The Hong Kong Institution of Engineers

Education

1. ABC Pathways Group
2. ABC Pathways International Kindergarten
3. AP School
4. Baptist (Sha Tin Wai) Lui Ming Choi Primary School
5. Baptist Rainbow Primary School
6. Bishop Hall Jubilee School
7. BrainX
8. C.&M.A. Chui Chak Lam Memorial School
9. C.C.C. Cheung Chau Church Kam Kong Primary School
10. Canadian International School of Hong Kong
11. Education Committee, Caritas
12. Caritas Institute of Higher Education (renamed as Saint Francis University, Hong Kong)
13. Caritas Jockey Club Lok Yan School
14. Catholic Diocese of Hong Kong
15. Catholic Education Office
16. CCC Kei Wai Primary School
17. Chan's Creative School (Hong Kong Island)
18. Chinese International School Foundation
19. Chun Tok School
20. City University of Hong Kong
21. Committee on Home-School Cooperation
22. Committee on Special Education Needs
23. Creativekids
24. CTF Education Group
25. Dr Elaine CHAN, Veteran education psychologist
26. Drs Richard Charles and Esther Yewpick Lee Charitable Foundation
27. Education Bureau
28. Employees Retraining Board
29. Ergon Global
30. F.D.B.W.A. Chow Chin Yau School
31. French International School of Hong Kong
32. Fung Kai Liu Yun Sum Memorial School
33. Generation Hong Kong
34. Gratia Christian College
35. Harrow International School Hong Kong
36. Heep Yunn Primary School
37. HKICC Lee Shau Kei School of Creativity
38. HKPC Academy
39. HKRSS Tai Po Secondary School
40. HKTA Wun Tsuen Ng Lai Wo Memorial School
41. HKUGA Primary School
42. Hong Chi Morninglight School, Tuen Mun
43. Hong Chi Shiu Pong Morninghope School
44. Hong Kong Aided Primary School Heads Association
45. Hong Kong Association for Computer Education
46. Hong Kong Association of Careers Masters and Guidance Masters
47. Hong Kong Association of Deputy Principals
48. Hong Kong Baptist Convention Primary School
49. Hong Kong College of Technology
50. Hong Kong Council for Accreditation of Academic and Vocational Qualifications
51. Hong Kong Education City
52. Hong Kong Institute of Education for Sustainable Development
53. Hong Kong Institute of Technology
54. Hong Kong International School
55. Hong Kong Kindergarten Association
56. Hong Kong Nang Yan College of Higher Education
57. Hong Kong Shue Yan University
58. Hong Kong Society for Education in Art
59. Hong Kong Special Education School Heads Association
60. Human Resources Division, Vocational Training Council
61. Institute for Higher Education Research & Development, The Hong Kong Polytechnic University

62. JobsDB Hong Kong Limited
63. Ka Ling School of the Precious Blood
64. Kellett School Association Limited
65. Korn Ferry (HK) Limited
66. Kowloon City Baptist Church Hay Nien (Yan Ping) Primary School
67. Lam Tin Methodist Primary School
68. Leung Kui Kau Lutheran Primary School
69. Li Sing Primary School
70. Ling Liang Church Sau Tak Primary School
71. Lutheran Church Hong Kong Synod
72. Mary Rose School
73. Mr Chester TSANG, Veteran L&D professional
74. Mr CHOW Ping Yan, MH, Member of Committee on Professional Development of Teachers and Principals
75. Mr Eugene FONG, Chairman of Committee on Home-School Co-operation
76. Ms Eva NG, Former Head of Cathay Academy
77. Northern Lamma School
78. Our Hong Kong Foundation
79. Our Lady's Primary School
80. Po Leung Kuk
81. Po Leung Kuk Lee Shing Pik College
82. Po Leung Kuk Mrs Chan Nam Chong Memorial Primary School
83. Po Leung Kuk Tin Ka Ping Primary School
84. Po Leung Kuk Vicwood K.T. Chong No.2 Primary School
85. Prof. Anthony CHEUNG, GBS, JP, Former Chairman of Committee on Self-financing Post-secondary Education
86. Prof. CHUI Yat Hung, Member of The Advisory Committee on Gifted Education
87. PTI Group
88. Pui Ling School of the Precious Blood
89. Qurio Education Company Limited
90. Regal Hotels International Limited
91. S.K.H. Bishop Mok Sau Tseng Secondary School
92. S.K.H. Chai Wan St. Michael's Primary School
93. S.K.H. Kei Oi Primary School
94. S.K.H. Kei Tak Primary School
95. S.K.H. Ling Oi Primary School
96. S.K.H. Tin Wan Chi Nam Primary School
97. S.K.H. Tseung Kwan O Kei Tak Primary School
98. S.K.H. Tsing Yi Chu Yan Primary School
99. S.K.H. Yuen Chen Maun Chen Jubilee Primary School
100. SAHK Ko Fook Lu Memorial School
101. Salesian Yip Hon Millennium Primary School
102. School Leadership Academy, CTF Education Group
103. Sha Tau Kok Central Primary School
104. Shatin Public School
105. Singapore International School (Hong Kong)
106. St. Margaret's Co-educational English Secondary and Primary School
107. Tai Po Methodist School
108. Tai Po Old Market Public School (Plover Cove)
109. Tak Sun School
110. The Absolutely Fabulous Theatre Connection
111. The BSD Academy
112. The Chinese University of Hong Kong
113. The Division of Educational Psychology, Hong Kong Psychological Society
114. The Education University of Hong Kong
115. The Hang Seng University of Hong Kong
116. The Hon CHU Kwok-keung
117. The Hon TANG Fei, MH
118. The Hong Kong Academy for Gifted Education
119. The Hong Kong Council of the Church of Christ in China

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120. The Hong Kong Polytechnic University
 121. The Hong Kong University of Science and Technology
 122. The Jockey Club Hong Chi School
 123. The Little Flower's Catholic Primary School
 124. The Lok Sin Tong Benevolent Society Kowloon
 125. The Salvation Army Centaline Charity Fund Queen's Hill School
 126. The University of Hong Kong
 127. The University of Hong Kong School of Professional and Continuing Education
 128. Tung Wah College
 129. Tung Wah Group of Hospitals
 130. Tung Wan Mok Law Shui Wah School
 131. University Grants Committee
 132. Victoria Shanghai Academy
 133. Vivere Sky Group
 134. Vocational Training Council
 135. W F Joseph Lee Primary School
 136. Xianggang Putonghua Yanxishe Primary School of Science and Creativity
 137. Yan Chai Hospital Tung Chi Ying Memorial Secondary School
 138. Yew Chung College of Early Childhood Education
 139. Yew Chung Education Foundation
 140. Yuen Long Po Kok Primary School

Health Services

1. Chan & Hou Medical Laboratories Ltd.
2. Dr the Hon David LAM Tzit-yuen
3. Evangel Hospital
4. Health Bureau
5. Healthcare and Wellness Training Board,
Vocational Training Council
6. Hong Kong Adventist Hospital
7. Hong Kong Association of Educational
Psychologists
8. Hong Kong Health Food Association
9. Hong Kong Institute of Audiologists
10. Hong Kong Institute of Clinical Psychologists
11. Hong Kong Institute of Speech Therapists
12. Hong Kong Medical and Healthcare Device
Industries Association
13. Hong Kong Sanatorium and Hospital
14. Hospital Authority
15. Matilda International Hospital
16. St. Paul's Hospital
17. The Hong Kong Private Hospitals
Association
18. Viatrix Healthcare Hong Kong Limited

Manufacturing

1. Advanced Manufacturing Training Board, Vocational Training Council
2. Ahsay Systems Corporation Limited
3. Automatic Manufacturing Limited
4. Baguio Green Group Limited
5. City University of Hong Kong
6. Computer And Technologies Holdings Limited
7. E. Tech Management (HK) Limited
8. Education and Manpower Committee of The Chinese Manufacturers' Association of Hong Kong
9. Euroasia Holdings (China) Limited
10. Ferro Resources Ltd.
11. Fortune Industrial Products Limited
12. Hinasia (HK) Industrial Co. Ltd.
13. HKI Group
14. Hong Kong Plastics Manufacturers Association
15. Innovation and Information Technology Committee of The Chinese Manufacturers' Association of Hong Kong
16. Ka Shui Manufactory Co. Ltd.
17. Kolinker Industrial Equipments Limited
18. Lee Kee Group
19. Lee Lim Ming Metal Works Ltd.
20. M & C Toy Centre Ltd.
21. Nissin Foods Company Limited
22. PlayFourC Innovation Education
23. The Chinese Manufacturers' Association of Hong Kong
24. Trade and Industry Committee of The Chinese Manufacturers' Association of Hong Kong

Retail

1. Chevron Hong Kong Limited
2. China Aims Enterprises Limited
3. Chow Sang Sang Holdings International Limited
4. Devialet
5. DFS Group
6. Esquel Group
7. Fortress
8. The Jewellers' and Goldsmiths' Association of Hong Kong Limited
9. Hong Kong Retail Management Association
10. Hong Kong Retail Technology Industry Association
11. Hong Kong TV Shopping Network Company Limited
12. Mikanya & Co.
13. Retail Trade Training Board, Vocational Training Council
14. Sa Sa International Holdings Limited
15. Sensormatic Limited
16. Swire Resources Limited
17. The Hon SHIU Ka-fai, BBS, JP
18. The Lark Group

Social Services

1. Association of Bought Place Elderly Services
2. Bamboos Health Care Holdings Limited
3. Baptist Oi Kwan Social Service
4. Chinese YMCA of Hong Kong
5. Christian Family Service Centre
6. Ebenezer School and Home for the Visually Impaired
7. Elderly Commission
8. Evangelical Lutheran Church Social Service - Hong Kong
9. Fu Hong Society
10. Haven of Hope Christian Service
11. Healthcare and Wellness Training Board, Vocational Training Council
12. Heep Hong Society
13. Hong Chi Association
14. Hong Kong Association of Gerontology
15. Hong Kong Children and Youth Services
16. The Hong Kong Society for Rehabilitation
17. Hong Kong Family Welfare Society
18. Hong Kong Federation of Youth Groups
19. Hong Kong Jockey Club
20. Hong Kong Lutheran Social Service
21. Hong Kong PHAB Association
22. Hong Kong Playground Association
23. Hong Kong Sheng Kung Hui Welfare Council Limited
24. Hong Kong Social Welfare Sector Heart to Heart Joint Action
25. Hong Kong Social Workers Association
26. Hong Kong Society for the Protection of Children
27. Hong Kong Young Women's Christian Association
28. International Social Service Hong Kong Branch
29. Kato (Hong Kong) Holdings Limited
30. Labour and Welfare Bureau
31. Mother's Choice
32. New Life Psychiatric Rehabilitation Association
33. Rehabilitation Advisory Committee
34. Richmond Fellowship of Hong Kong
35. SAHK
36. Senior Citizen Home Safety Association
37. Social Welfare Advisory Committee
38. Social Welfare Department
39. Stewards
40. Suen Mei Speech and Hearing Centre
41. The Boys' and Girls' Clubs Association of Hong Kong
42. The Child Development Centre
43. The Hong Kong Council of Social Service
44. The Hong Kong Council of the Church of Christ in China
45. The Hong Kong Society for the Blind
46. The Hong Kong Society for the Deaf
47. The Hong Kong Student Aid Society Limited
48. The Mental Health Association of Hong Kong
49. The Methodist Church Hong Kong
50. The Neighbourhood Advice-Action Council
51. The Tsung Tsin Mission of Hong Kong Social Service
52. Wai Ji Christian Service
53. Watchdog Limited
54. Yan Chai Hospital
55. Yang Memorial Methodist Social Service

Tourism

1. Hong Kong Association of China Travel Organisers
2. Hong Kong Tourism Board
3. Hongkong International Theme Parks Limited
4. International Chinese Tourist Association
5. Ocean Park Corporation
6. Sin Ma Tours Limited
7. The Federation of Hong Kong Chinese Travel Agents
8. The Hon YIU Pak-leung, MH, JP
9. Tourism Commission
10. Travel Industry Authority
11. Travel Industry Council of Hong Kong
12. Well Contact Travel Company Limited

Others

1. Agriculture, Fisheries and Conservation Department
2. ALBA Integrated Waste Solutions (Hong Kong) Ltd.
3. Civil Service Bureau
4. Electrical and Mechanical Services Department
5. Environment and Ecology Bureau
6. Environmental Protection Department
7. Hong Kong Fishermen Consortium
8. Hong Kong Johnson Holdings Company Limited
9. Hong Kong Recycled Materials & Reproduction Business General Association Limited
10. Housing Department
11. Kerry Property Management Services Limited
12. Li Hing Environmental Services Company Limited
13. Smart Farming HK Limited
14. Sunrise Diagnostic Centre Limited
15. Swire Waste Management Limited
16. The Hon Steven HO Chun-yin, BBS, JP
17. The Hong Kong and China Gas Company Limited
18. The Hong Kong Veterinary Association Limited
19. Water Supplies Department

Appendix VI: List of Abbreviations

Abbreviations

AI	Artificial intelligence
Aviation hub	International aviation hub
C&SD	Census and Statistics Department
CCIs	Cultural and creative industries
E&M	Electrical and mechanical services
EICE centre	East-meets-West centre for international cultural exchange
ESG	Environmental, social and governance
FDHs	Foreign domestic helpers
Financial centre	International financial centre
GBA	Guangdong-Hong Kong-Macao Greater Bay Area
GDP	Gross Domestic Product
HSIC v2.0	Hong Kong Standard Industry Classification Version 2.0
I&T	Innovation and technology
I&T centre	International innovation and technology centre
IP trading centre	Regional intellectual property trading centre
IT	Information technology
LWB	Labour and Welfare Bureau
Legal & ADR centre	Regional centre for international legal and dispute resolution services
LFPR	Labour force participation rate
MP	Manpower projection
R&D	Research and development
The Resolution	The Resolution of the Central Committee of the Communist Party of China on Further Deepening Reform Comprehensively to Advance Chinese Modernisation
Trade centre	International trade centre
Transportation centre	International transportation centre

Appendix VII: Definitions and Terms

Education level

The 2023 MP adopts a four-level education classification by considering the highest education level completed, namely 1) Upper secondary and below; 2) Diploma (including craft) and Sub-degree; 3) Degree; and 4) Postgraduate.

Eight centres

They are the eight areas under the National 14th Five-Year Plan for the development of Hong Kong, namely the East-meets-West centre for international cultural exchange (EICE centre); international aviation hub; international financial centre; international innovation and technology centre (I&T centre); international trade centre; international transportation centre, regional centre for international legal and dispute resolution services (Legal & ADR centre); as well as regional intellectual property trading centre (IP trading centre).

Knowledge

Knowledge means the outcome of the assimilation of information through learning. Knowledge is the body of facts, principles, theories and practices related to a field of work or study.

Manpower requirements

Manpower requirements refers to the job opportunities (i.e. employment cum vacancies) in various industries and economic sectors available in Hong Kong and excluding foreign domestic helpers (FDHs).

Manpower supply

Manpower supply is virtually equivalent to the labour force comprising both the employed persons and unemployed persons of our economy and excluding FDHs.

Manpower balance

Manpower balance refers to the difference between manpower supply and requirements. A negative figure indicates manpower shortage, signalling that manpower supply is less than manpower requirements. A positive figure means manpower surplus, with manpower supply exceeding manpower requirements. If manpower supply is more or less the same as manpower requirements, the manpower situation is said to be no shortage or stable. In addition, as unemployed persons have been taken into account to assess the manpower balances, a negative manpower balance (i.e. a manpower shortage) is not the same as the number of vacancies in the labour market.

Nine significant sectors

They refer to sectors supporting local services and city operation, including accommodation and food; city operation; construction; education; health services; manufacturing; retail; social services; and tourism. City operation covers seven specific categories namely automobile; beauty care and hairdressing; electrical and mechanical services; electronics and telecommunications; information technology; real estate services; and security services.

Skill

Skill means the ability to apply knowledge and use know-how to complete tasks and solve problems.

Vacancy rate

It refers to the proportion of job vacancies to the respective manpower requirements. In 2023, a broader definition of the job vacancy rate was adopted. This definition not only encompasses data on job openings that were being actively recruited as of the reference date of C&SD's relevant statistical surveys, but also includes estimates from sectoral consultations regarding vacancies that have yet to be actively filled under staffing plan. The broader definition aims to provide a more holistic picture of potential job vacancies in the market.

