

香港統計月刊

Hong Kong Monthly Digest of Statistics

2022 年 2 月
February 2022

專題文章
Feature Article

空運貨物統計
Air Cargo Statistics

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Air Cargo Statistics

香港國際機場是世界上最繁忙及設備最先進的機場之一，它鞏固了香港作為國際商業樞紐的地位，亦在香港成為國際物流中心的發展上擔當一個重要角色——以國際空運貨物吞吐量計算，香港國際機場在 2020 年繼續居世界首位。本文就 2016 年至 2020 年的香港空運貨物統計數字作詳細分析；亦會根據 2019 年第 1 季至 2021 年第 3 季的按季空運貨物統計數字，簡述這個行業較近期的表現，以及 2019 冠狀病毒病疫情對這個行業的影響。

The Hong Kong International Airport is one of the busiest and most advanced airports. It consolidates Hong Kong's position as a hub of international commerce and plays a very important role in the development of Hong Kong as an international logistics centre - in terms of international air cargo throughput, the Hong Kong International Airport continued to rank first globally in 2020. This article provides a detailed analysis of the air cargo statistics of Hong Kong from 2016 to 2020 and briefly highlights the more recent performance of the industry and the impact of COVID-19 to the industry by making reference to the quarterly air cargo statistics from the first quarter of 2019 to the third quarter of 2021.

如對本文有任何查詢，請聯絡政府統計處貿易資料處理組
(電話：(852) 2582 5039；電郵：tsp_1@censtatd.gov.hk)。

Enquiries on this article may be directed to the Trade Statistics Processing Section,
Census and Statistics Department
(Tel. : (852) 2582 5039; E-mail : tsp_1@censtatd.gov.hk).

空運貨物統計

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1. 引言

1.1 香港國際機場是世界上最繁忙及設備最先進的機場之一，它鞏固了香港作為國際商業樞紐的地位，亦在香港成為國際物流中心的發展上擔當一個重要角色——以國際空運貨物吞吐量計算，香港國際機場在 2020 年繼續居世界首位。

1.2 本文就 2016 年至 2020 年的香港空運貨物統計數字¹ 作詳細分析；亦會根據 2019 年第 1 季至 2021 年第 3 季的按季空運貨物統計數字，簡述這個行業較近期的表現，以及 2019 冠狀病毒病疫情對這個行業的影響。

2. 資料來源

2.1 香港空運貨物統計數字是民航處根據香港機場管理局所提供的數據編製而成。其他機場的國際空運貨物吞吐量資料則是由國際機場協會提供。此外，香港貿易統計數字是由政府統計處所編製。

1. Introduction

1.1 The Hong Kong International Airport is one of the busiest and most advanced airports. It consolidates Hong Kong's position as a hub of international commerce and plays a very important role in the development of Hong Kong as an international logistics centre - in terms of international air cargo throughput, the Hong Kong International Airport continued to rank first globally in 2020.

1.2 This article provides a detailed analysis of the air cargo statistics of Hong Kong¹ from 2016 to 2020 and briefly highlights the more recent performance of the industry and the impact of COVID-19 to the industry by making reference to the quarterly air cargo statistics from the first quarter of 2019 to the third quarter of 2021.

2. Data sources

2.1 Air cargo statistics of Hong Kong are compiled by the Civil Aviation Department based on the information provided by the Airport Authority Hong Kong. The information of the international air cargo throughput of other airports is obtained from the Airports Council International. Besides, trade statistics of Hong Kong are compiled by the Census and Statistics Department.

1 本文所載的空運貨物統計數字不包括郵遞。

1 The air cargo statistics presented in this article exclude mail.

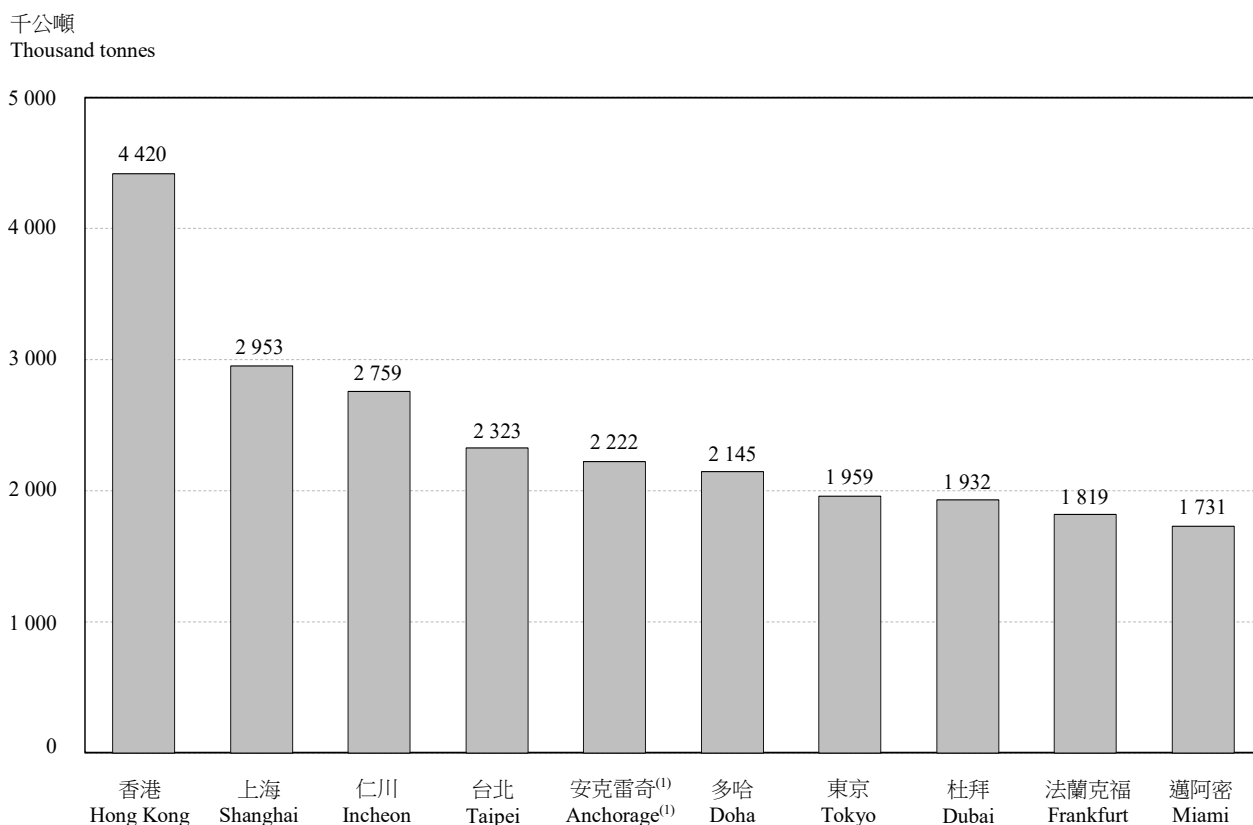
3. 國際空運貨物吞吐量排名次序

3.1 香港國際機場在 2020 年的貨物吞吐量為 442 萬公噸，佔世界各地機場² 的國際空運貨物吞吐量³ 首位。而緊接着的是上海、仁川、台北及安克雷奇，它們的吞吐量分別是 295 萬公噸、276 萬公噸、232 萬公噸及 222 萬公噸。（圖1）

3. International air cargo throughput ranking

3.1 The cargo throughput of the Hong Kong International Airport in 2020, at 4.42 million tonnes, was the largest in terms of international air cargoes handled among all airports² in the world³. This was followed by airports in Shanghai, Incheon, Taipei and Anchorage. Their respective figures on throughput were 2.95 million tonnes, 2.76 million tonnes, 2.32 million tonnes and 2.22 million tonnes. (Chart 1)

圖 1 2020 年國際機場按國際空運貨物吞吐量的排名次序（首 10 位）
Chart 1 Ranking of international airports by international air cargo throughput in 2020 (Top 10)



註釋： (1) 包括過境貨運。

資料來源：國際機場協會

Note: (1) Includes transit freight.

Source: Airports Council International

2 只包括提供了境內和境外的空運貨物分項數字的機場。

3 不包括境內的空運吞吐量。

2 Includes only airports with international/domestic breakdown.

3 Excluding domestic air cargo throughput.

4. 香港的空運貨物吞吐量

2016 年至 2020 年按年空運貨物吞吐量

4.1 香港的空運貨物吞吐量由 2016 年的 452 萬公噸上升至 2018 年的 502 萬公噸，但其後受中美貿易摩擦及 2019 冠狀病毒病疫情影響而下跌至 2020 年的 442 萬公噸。由 2016 年起計，空運貨物吞吐量的平均按年減少率為 0.6%。而包括所有主要運輸方式的總貨物吞吐量在同期間平均按年下跌 0.9%。（圖 2）

4.2 抵港和離港空運貨物吞吐量個別發展。抵港空運貨物由 2016 年的 165 萬公噸減少至 2020 年的 145 萬公噸，平均按年減少率為 3.2%。同期間，離港空運貨物由 287 萬公噸增加至 297 萬公噸，平均按年增長率為 0.9%。（圖 2）

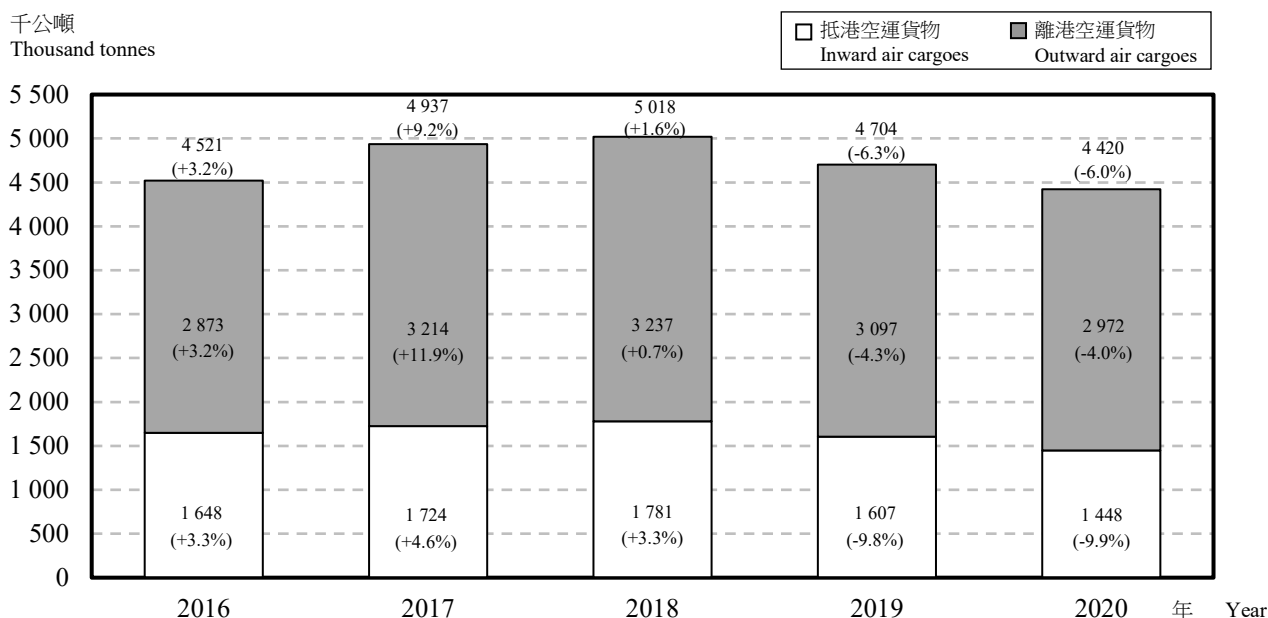
4. Air cargo throughput of Hong Kong

Annual air cargo throughput from 2016 to 2020

4.1 The air cargo throughput of Hong Kong increased from 4.52 million tonnes in 2016 to 5.02 million tonnes in 2018, and then declined to 4.42 million tonnes in 2020 due to the impact of the Sino-US trade conflicts and the COVID-19 epidemic. The average annual decrease rate was 0.6% for air cargo throughput from 2016 to 2020. At the same time, the total cargo throughput covering all main modes of transport recorded an average annual decline of 0.9% within the same period. (Chart 2)

4.2 Different trends in cargo throughput were registered for inward and outward air cargoes. Inward air cargoes decreased from 1.65 million tonnes in 2016 to 1.45 million tonnes in 2020, with an average annual decline rate of 3.2%. Over the same period, outward air cargoes increased from 2.87 million tonnes to 2.97 million tonnes, with an average annual growth rate of 0.9%. (Chart 2)

圖 2 2016 年至 2020 年的空運貨物吞吐量
Chart 2 Air cargo throughputs, 2016 to 2020



註釋：括號內的數字指與去年比較的變動百分率。

由於四捨五入關係，個別數字加起來可能與總數不符。

資料來源：民航處

Notes: Figures in brackets refer to the percentage change over preceding year.

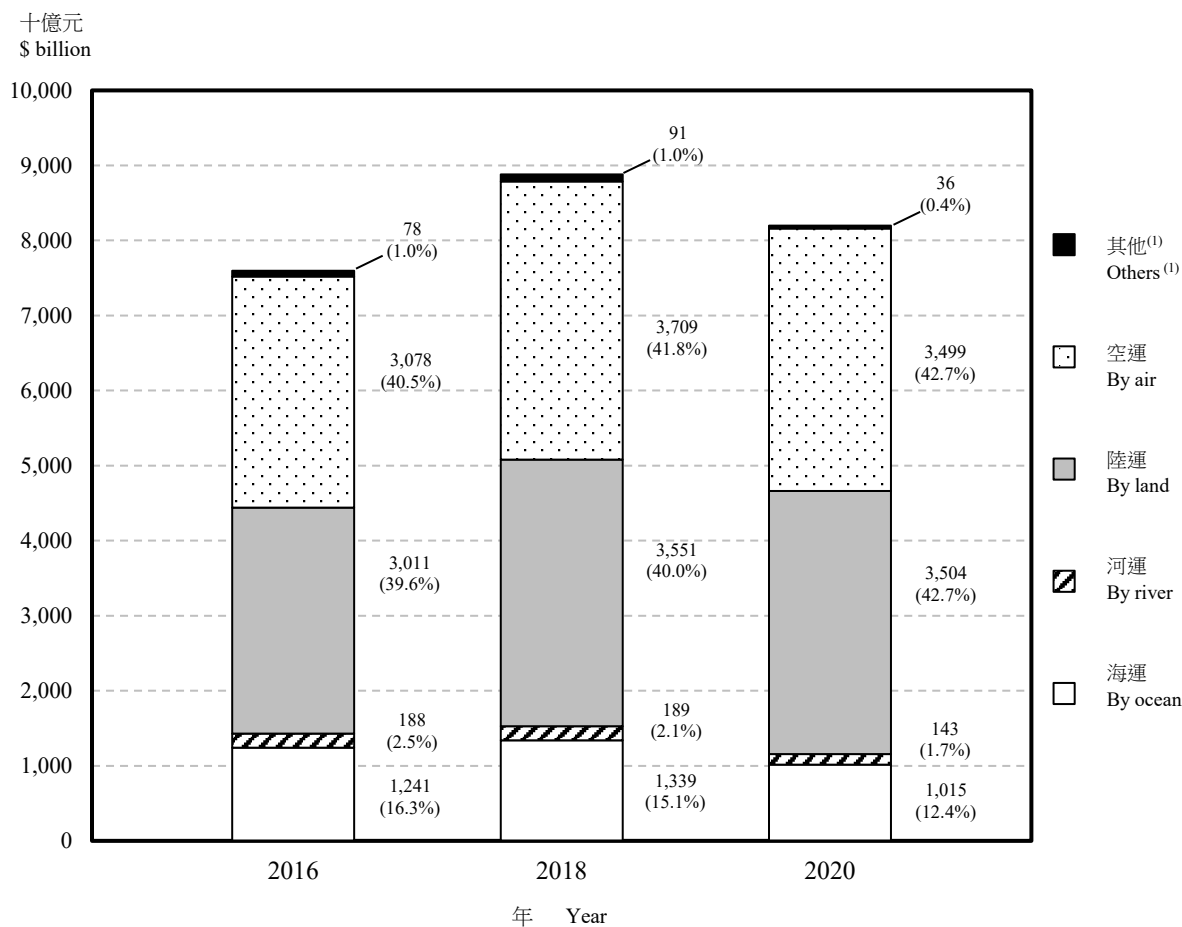
Figures may not add up to total due to rounding.

Source: Civil Aviation Department

4.3 以貨物噸量計算，空運貨物只佔2020年香港總貨物吞吐量的1.6%。雖然空運貨物在總貨物吞吐量中所佔的比重很小，但其在香港總貿易貨值中所佔的比重則由2016年的40.5%升至2020年的42.7%。這反映航空貨運業在香港經濟中所扮演的角色日益重要。（圖3）

4.3 In terms of tonnage, cargoes transported by air constituted only 1.6% of the total cargo throughput of Hong Kong in 2020. Despite the small share of air cargoes in the total cargo throughput, they accounted for about 40.5% of the total trade value of Hong Kong in 2016 and the proportion further rose to 42.7% in 2020. This reflected the growing importance of the air freight industry in the Hong Kong economy. (Chart 3)

圖3 2016年、2018年及2020年按運輸方式劃分的對外商品貿易統計
Chart 3 External merchandise trade statistics by mode of transport, 2016, 2018 and 2020



註釋： (1) 包括手提運送及郵遞。
 括號內的數字指在相應的總計中所佔的百分率。由於四捨五入關係，個別數字加起來可能不等於100%。

資料來源：政府統計處

Notes: (1) Include trade by hand carried and parcel post.
 Figures in brackets refer to the percentage share of the respective total. They may not add up to 100% due to rounding.

Source: Census and Statistics Department

2019年第1季至2021年第3季的按季空運貨物吞吐量

4.4 隨著2019冠狀病毒病於2020年第1季爆發，該季的空運貨物吞吐量按年下跌10.3%。隨後經濟逐漸復甦，航空貨運吞吐量在2021年第1季至第3季分別錄得13.9%、11.0%及15.5%的按年上升。（圖4）

4.5 在2021年第3季的129萬公噸空運貨物吞吐量中，88萬公噸為離港空運貨物，而抵港空運貨物則有42萬公噸，按年上升百分率分別為15.6%及15.3%。（圖4）

4.6 從圖4可見，空運貨物吞吐量在每年均會有季節性的模式。這是由於部分在港裝貨及卸貨的貨物會提前在年底及春節前付運。

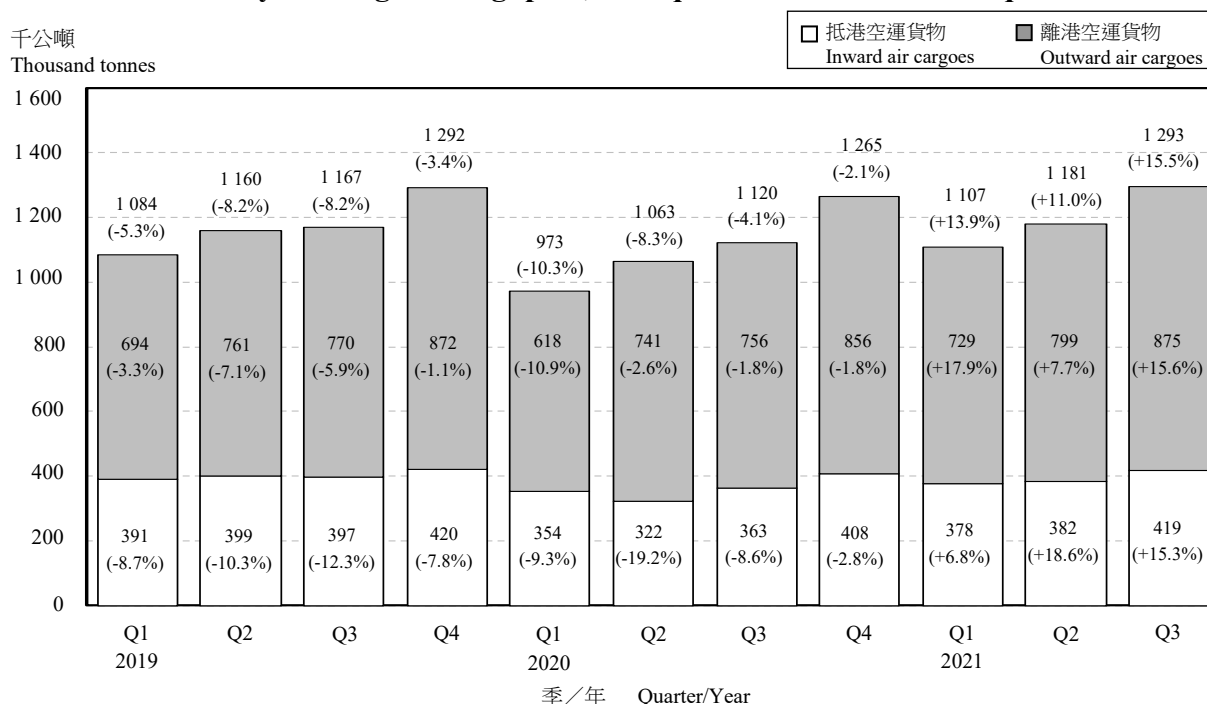
Quarterly air cargo throughput from the first quarter of 2019 to the third quarter of 2021

4.4 Amid COVID-19 pandemic in the first quarter of 2020, the air cargo throughput recorded a year-on-year decrease of 10.3% in that quarter. In the wake of economic recovery, the air cargo throughput recorded year-on-year increases of 13.9%, 11.0% and 15.5% respectively in the first three quarters of 2021. (Chart 4)

4.5 Of the 1.29 million tonnes of the total air cargo throughput in the third quarter of 2021, 0.88 million tonnes were outward air cargoes and 0.42 million tonnes were inward air cargoes, with the year-on-year rates of increase being 15.6% and 15.3% respectively. (Chart 4)

4.6 As observed from Chart 4, there exists a seasonality for the air cargo throughputs every year. This is caused by a portion of cargoes being delivered in advance before the end of year and Lunar New Year.

圖4 2019年第1季至2021年第3季的按季空運貨物吞吐量
Chart 4 Quarterly air cargo throughputs, first quarter of 2019 to third quarter of 2021



註釋：括號內的數字指與去年同期比較的變動百分率。

由於四捨五入關係，個別數字加起來可能與總數不符。

資料來源：民航處

Notes: Figures in brackets refer to the percentage change over the same period of preceding year.

Figures may not add up to total due to rounding.

Source: Civil Aviation Department

主要的裝貨地區

4.7 抵港的空運貨物主要來自亞洲國家／地區。在 2020 年第 1 季至 2021 年第 1 季期間，來自亞洲國家／地區的抵港貨物由 23 萬公噸上升至 26 萬公噸；其所佔的比重亦由 64.3% 升至 69.3%。（圖 5）

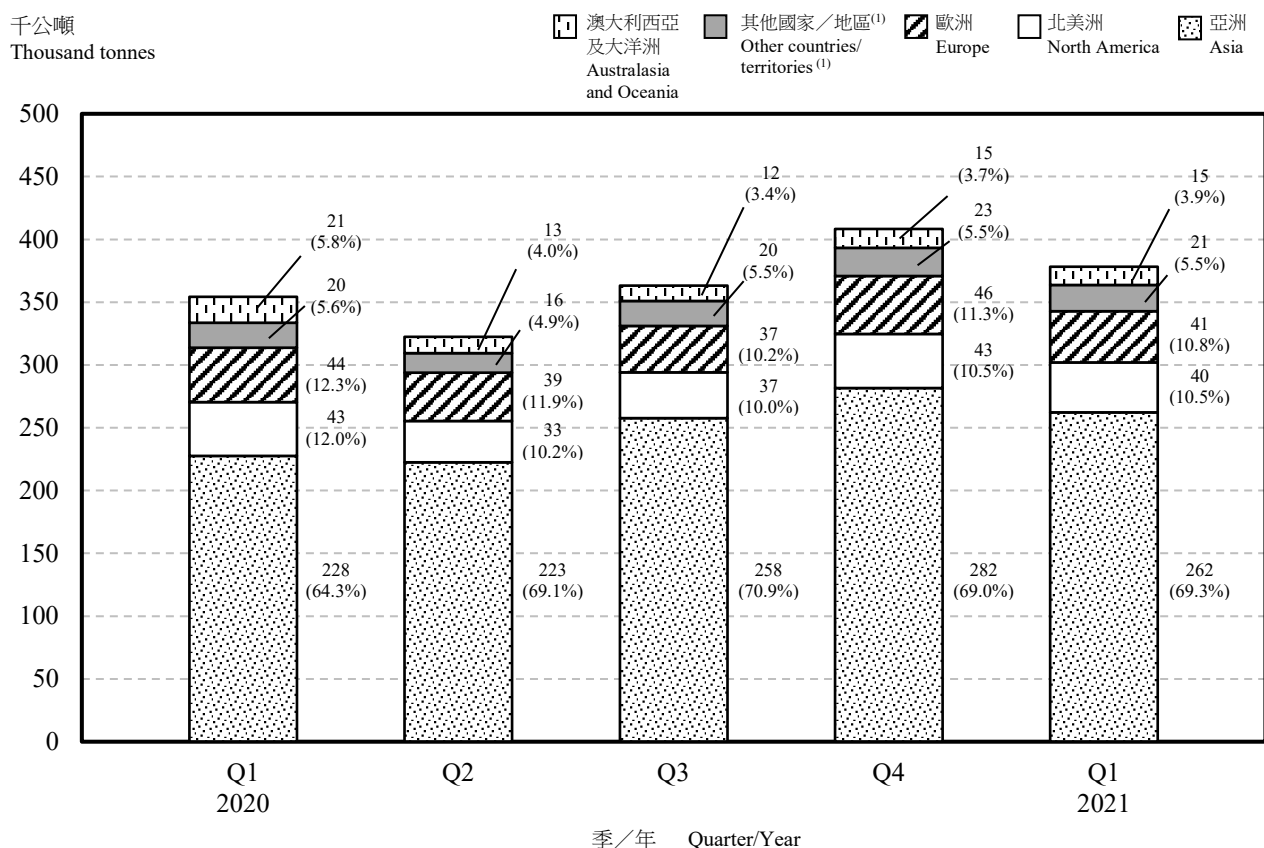
4.8 其他主要裝貨國家／地區為歐洲和北美洲。它們所佔的比重較 2020 年第 1 季的比重略為減少，在 2021 年第 1 季均只佔約 11%。（圖 5）

Major regions of loading

4.7 Inward air cargoes came mainly from countries/territories in Asia. From the first quarter of 2020 to that of 2021, inward cargoes from Asia increased from 0.23 million tonnes to 0.26 million tonnes and its share increased from 64.3% to 69.3%. (Chart 5)

4.8 Other major countries/territories of loading included Europe and North America. Their shares were slightly lower than those of the first quarter of 2020 and both accounted for around 11% of the total inward cargoes in the first quarter of 2021. (Chart 5)

圖 5 2020 年第 1 季至 2021 年第 1 季的按主要裝貨地區劃分的抵港空運貨物
Chart 5 Quarterly inward movement of air cargoes by major region of loading, first quarter of 2020 to first quarter of 2021



註釋： (1) 包括中東地區。
 括號內的數字指在相應的總計中所佔的百分率。由於四捨五入關係，個別數字加起來可能不等於 100%。

資料來源： 民航處

Notes: (1) Include Middle East.
 Figures in brackets refer to the percentage share of the respective total. They may not add up to 100% due to rounding.

Source: Civil Aviation Department

主要的卸貨地區

4.9 與抵港貨物相似，在離港空運貨物中，有很大部分是於亞洲的國家／地區卸貨。在2021年第1季，有關的離港貨物達32萬公噸，與2020年第1季的30萬公噸比較，按年增加率約為6.3%。（圖6）

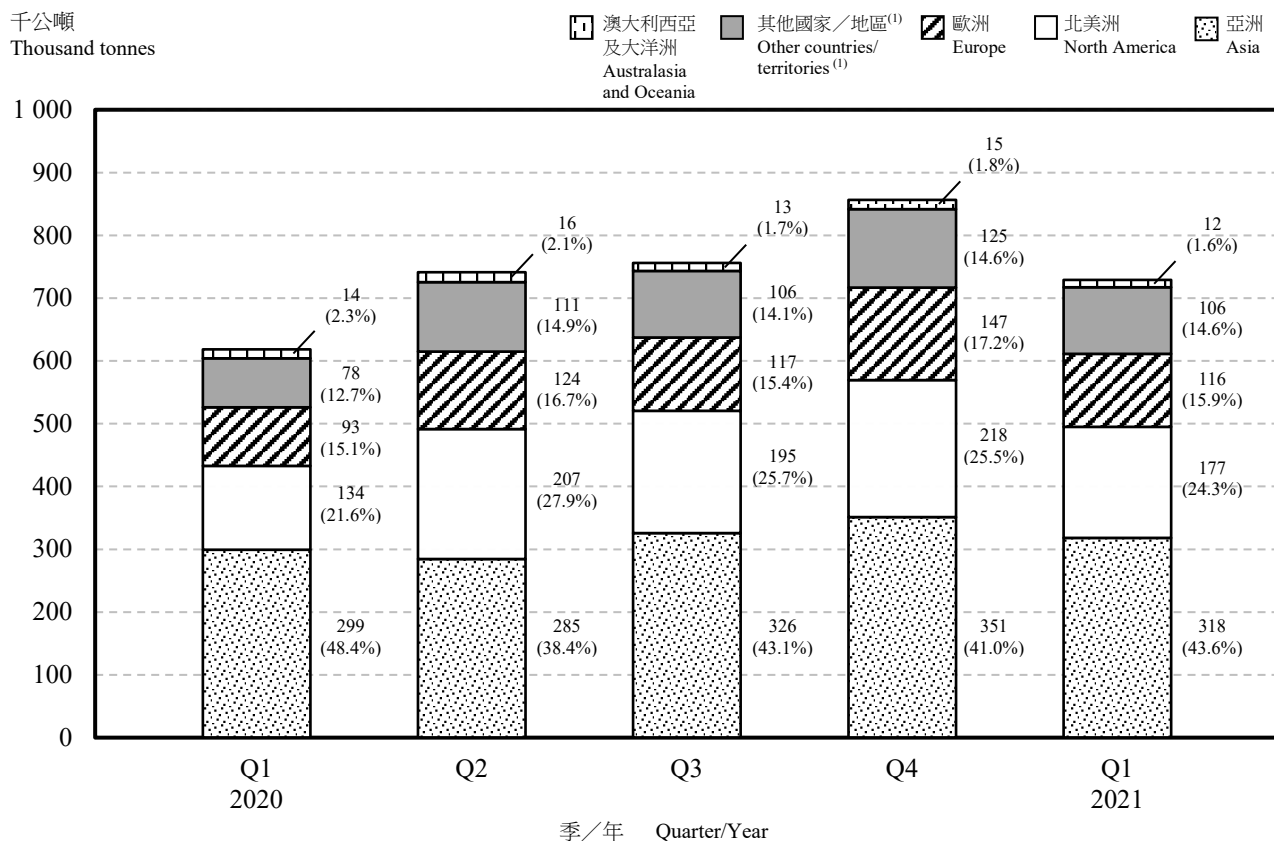
4.10 僅次於亞洲的主要卸貨國家／地區是北美洲和歐洲。離港至北美洲及歐洲的貨物所佔的比重均有所上升，前者所佔比重由2020年第1季的21.6%上升至2021年第1季的24.3%，而同期間後者所佔的比重亦由15.1%上升至15.9%。（圖6）

Major regions of discharge

4.9 Like inward cargoes, a significant proportion of outward air cargoes were discharged in countries/territories in Asia. In the first quarter of 2021, there were 0.32 million tonnes, an annual increase rate of 6.3% when compared with the 0.3 million tonnes in that of 2020. (Chart 6)

4.10 North America and Europe were the major countries/territories of discharge right after Asia. The shares of outward cargoes to North America and Europe both increased, the former from 21.6% in the first quarter of 2020 to 24.3% in that of 2021 and the latter from 15.1% to 15.9% during the same period. (Chart 6)

圖6 2020年第1季至2021年第1季的按主要卸貨地區劃分的離港空運貨物
Chart 6 Quarterly outward movement of air cargoes by major region of discharge, first quarter of 2020 to first quarter of 2021



註釋： (1) 包括中東地區。

括號內的數字指在相應的總計中所佔的百分率。由於四捨五入關係，個別數字加起來可能不等於100%。

資料來源： 民航處

Notes: (1) Include Middle East.

Figures in brackets refer to the percentage share of the respective total. They may not add up to 100% due to rounding.

Source: Civil Aviation Department