

Imperative Need of Land for Logistics Industry in Northern Metropolis and Tuen Mun West

Assuring Hong Kong as a key regional logistics hub in GBA

提升物流競爭力，迎接機遇與挑戰

確保香港成為大灣區內其中一個重要物流區域樞紐



QUESTIONNAIRE ON NORTHERN METROPOLIS AND THE WEST TUEN MUN LAND USE FOR LOGISTICS

– REPORT AND RECOMMENDATION

北部都會區及屯門西物流用地問卷調查 – 報告和建議

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1. Introduction

One of the key directions in the Northern Metropolis Development Strategy being mentioned in “Policy Address 2021” is to take proactive steps to redress home-job imbalance (i.e. the development of multi-storey modern logistic centres). The approach is to accommodate brownfield operations, promote upgrading of the logistics industry, as well as to create relevant employment opportunities. These actions combined with the provision of land for logistics in the proposed near-shore reclamation of Lung Kwu Tan in Tuen Mun West will help alleviate the land shortage problem threatening the continuous development of the logistics industry in Hong Kong.

In light of this situation and as an initiator, this report aims to provide actual perspectives in how the government could act on by diagnosing and, therefore fully revealing the content collected from a survey conducted with logistics industry on:

- Northern Metropolis and the West Tuen Mun land use for logistics;
- Financial incentives for the land use (rent for warehouse);
- Re-location of logistics operations currently on the Brownfields in Northwest New Territories (NWT);
- Land supply for modern logistics development and handling of special cargoes; and
- Provision of multimodal transport service facilities.

2. Background and Initiatives

Long-standing problem in the development of Logistics Industry in Hong Kong

Land for logistics operation is most important but is perennially in short supply in the past. Over the years, the sporadic and small parcels of land supplied by the Hong Kong Government attests a huge shortfall of its commitment for essential support to the Industry. The HK 2030+ Report forecasts an overall long-term demand for economic land is 457 hectares; but land supply could only be available at around 200 hectares, incl. those for logistics use. Altogether, Trading and Logistics account for 20% of HK’s GDP, creating 610,000 employments; Logistics alone contributes 3.2% (HK\$82.8 billion), employing 175,000 people.

According to the available records, the Government merely released 6.9 hectares in Kwai Tsing in 2010-2015, 3.5 hectares in Tuen Mun Area 49 and 5.3 hectares on the Airport Island in 2018 and 5.5 hectares in Kwai Chung in 2022 (still under tendering process) for the use of the Industry. The Government actually committed to provide 100.5 hectares of land for the development of the Industry, but only provided 21.2 hectares up to this moment. The critical problem of lean land supply faced by the Industry is further aggravated by the notable resumption of brownfields for residential use recently.

The evidence clearly proves that the development of Logistics Industry in Hong Kong is hamstrung by the chronic shortage of land supply. The shortage of land supply effectively emasculates the role of the Industry as a key regional logistic hub to support the economic development of its neighboring cities in the Greater Bay Area. It is an essential need of sufficient land to assure that the Logistics Industry is able to serve its role as a key regional hub to support the economic development of the GBA.

The needs of land in Northern Metropolis and West Tuen Mun and government support for sustainable development of the Logistics Industry in Hong Kong

As per the information from the Government in its final report of the Hong Kong 2030+ Report (DEV & Planning Department), proposed sites in Ping Che-Ta Kwu Ling are suitable for the non-house development. In the 2020 Policy Address, it mentions Tuen Mun West would be re-planned in near future, incl. the near-shore reclamation at Lung Kwu Tan.

As both the Northern Metropolis and West Tuen Mun are in their detailed planning stage, CILTHK and HSUHK consider that it is a right time to address the long-standing problem in the Industry, and had thus conducted a professional survey in the Hong Kong Logistics Industry in Q4 of 2021 and had successfully received 200 responses from key stakeholders in the Industry who duly expressed their views, expectations and operation priorities in relation to their expected development in the soon-to-be-developed NM and TMW.

3. Methodology

This survey has 48 questions which intend to evaluate the logistics land use in the Northern Metropolis (Ping Che, Ta Kwu Ling) and the West Tuen Mun (Lung Kwu Tan Reclamation) for the development of advanced modern logistics. The questionnaire has three sections, namely (1) Government support to logistics, (2) Company Operations, and (3) Demographic Information.

The empirical data were gathered after the questionnaire has been distributed to the industry practitioners who mainly work in the logistics and transport sector. The questionnaire was designed with the consideration of Hong Kong as an international cosmopolitan city with a mixed of language being used in workplaces and daily communication. To reach the majority of the practitioners as well as to encourage more participants to complete the survey, the questionnaire has both versions in English and Chinese. The majority of respondents (68%) have over 15 years of industrial experience; 62% of them work in a company with over 200 employees.

4. Report Highlights

The findings of the survey are highlighted as follows:

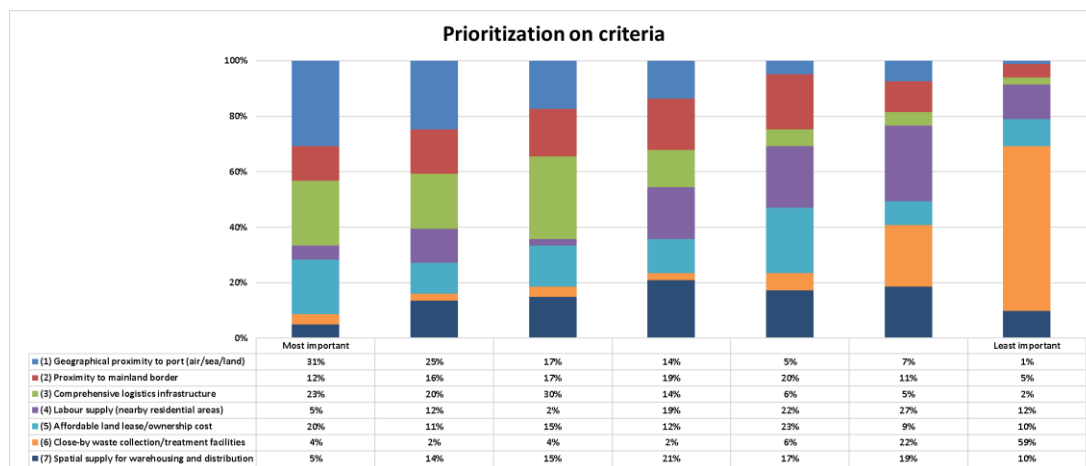
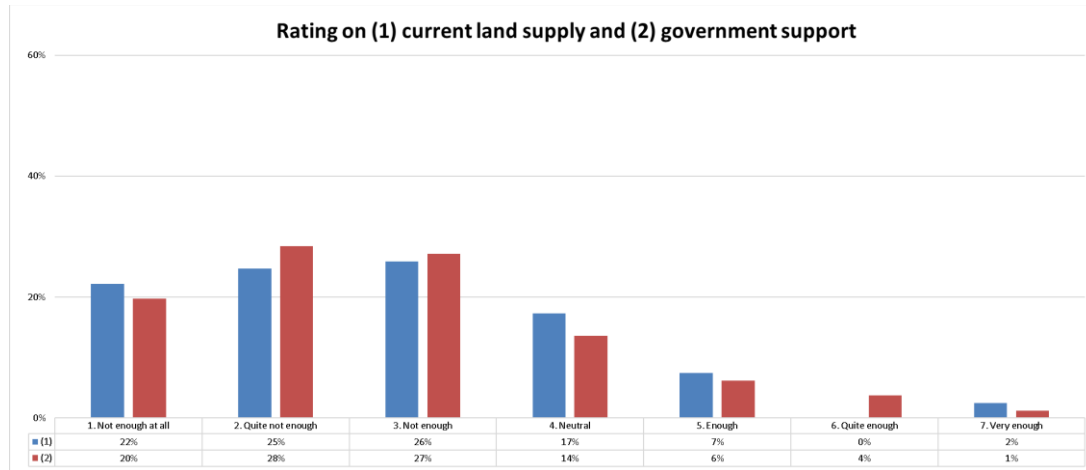
- **Government support:** Over 77% of respondents expressed that there is not enough land supply for Logistics use and 76% opined lack of government support for the Logistics and Transport Industry.
- **Seamless Transition:** The essential need of seamless transition from brownfield operation to multi-storey warehouse (MSW).
- **Decisive factors in logistics sites selection:** When choosing a logistics operations site in NM and TMW, “geographical proximity to the port and comprehensive logistics infrastructure” are most important as compared with other decisive factors. Other decisive factors for viable development of the Industry are “proximity to mainland border”, “labour supply”, “affordable warehouse rental cost and reasonable land rental term”,

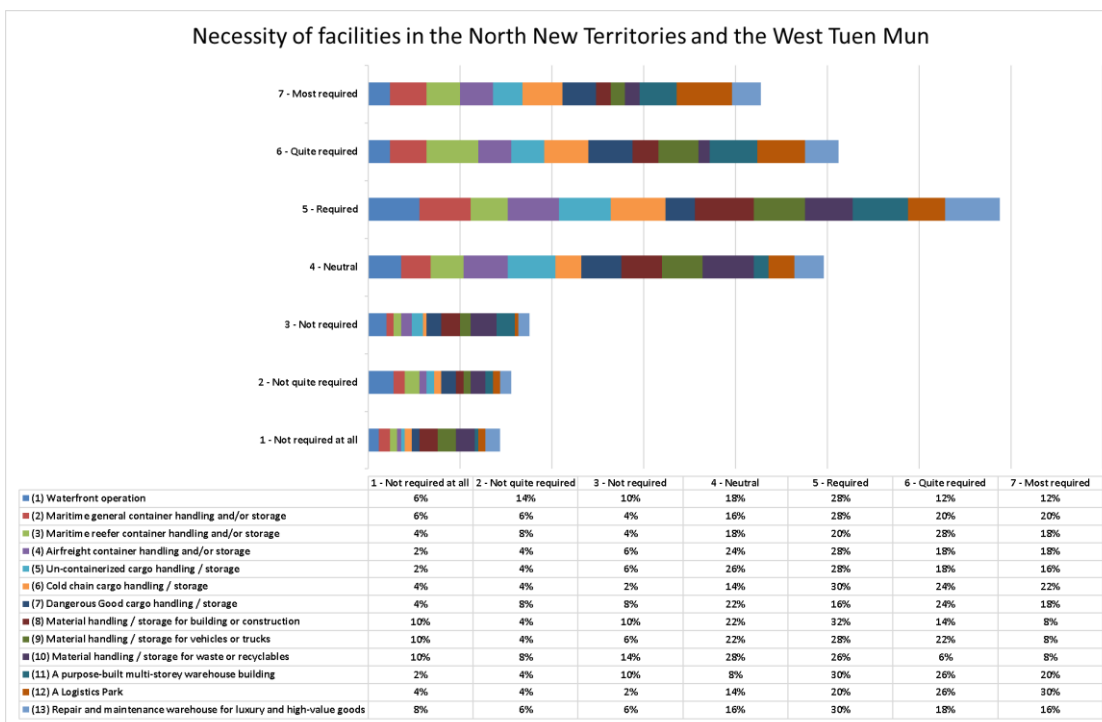
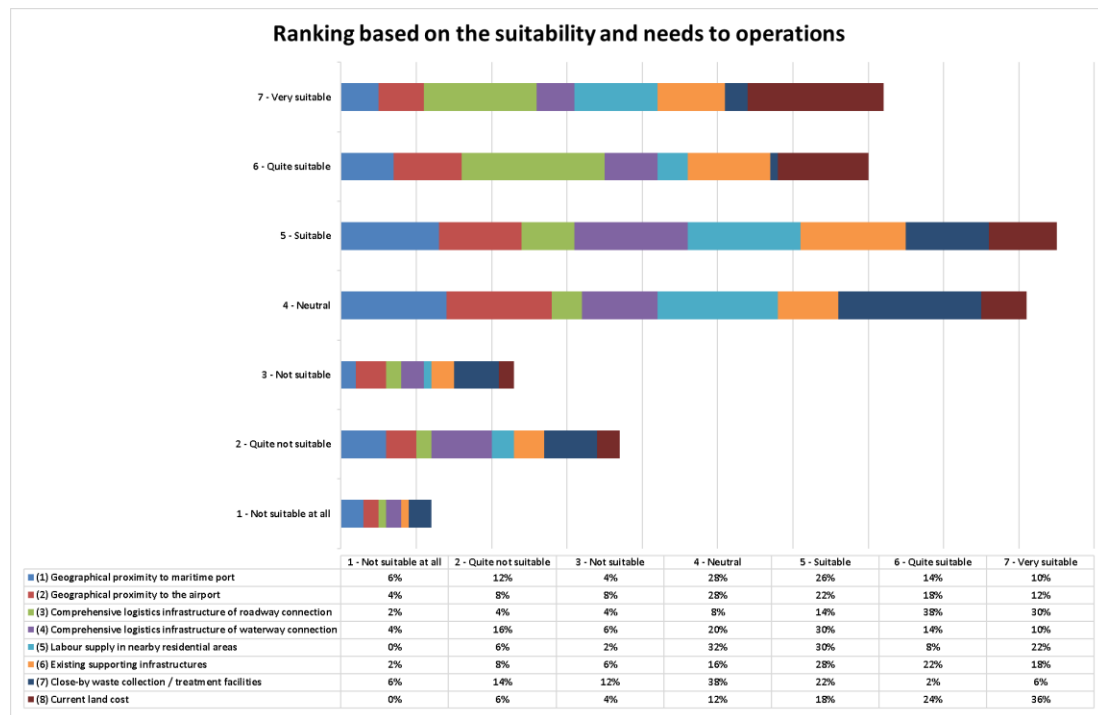
“proximity to waste treatment facilities” and “spatial supply for warehouse and distribution”.

- **Desirable logistics facilities:** “Logistics Park” is considered as the most desirable logistics facility to be established in NM and TMW, followed by “purpose-built multi-storey warehouse building”, “cold chain facilities” and “airfreight container storage facilities”.
- **Critical factors for multi-storey warehouse (MSW) design:** As for the development of MSW in NM and TMW, the below factors are most important in attracting the Industry to move into there, they are “strong communication network (e.g., 5G infrastructure)”, “connectivity of road and sea infrastructure”, “sufficient loading bays and parking space for container trucks”, “easy access for cold storage”, “high building ceiling and sufficient floor loading for accommodating goods vehicles”, “comprehensive road infrastructure”, “connectivity to Kwai Chung container port and International Airport”, “food court”, “freeway connection”, “cluster of Container Freight Station (CFS) operators”, “Container Yard (CY) depots of common carriers”, and “manpower supply from nearby districts”. The responses emphasise that the multi-storey warehouse (MSW) should be designed to provide “container storage on the ground floor”, “circular ramps of sufficient width for effective two-way container truck traffic for access to upper levels” and “sufficient ceiling height and floor loading capacity even catered for high-cube container movements”.
- **Logistics Park design:** If Logistics Park is to be built in NM and TMW, the important decisive factors from the Industry are “sufficient manpower supply”, “warehouse transport network via sea and roads”, “cold chain warehouse facilities”, “sufficient ceiling height and floor loading capacity”, “ramp access for fast moving goods”, “advanced technology (e.g. 5G infrastructure) and equipment supporting for logistics operation and development”. There are also suggestions on general facilities such as “washrooms (possible showers)”, “canteen”, “office environment”, “gas station and electric-hydro charging for truck”, and “repair shops”.
- **Needs of advanced technologies:** Advanced technologies, should be employed in facilitating operation and supporting computerized systems of individual companies for the deliverables of modern logistics, thereby enhancing the industry’s competitiveness. Warehousing automation, such as “robotic transfer” and “automated racking system” are essential to increase operational efficiency and to ease shortage of manpower supply.
- **Environmental sustainability:** Environmental caring by ways of “using electrical forklifts”, “energy saving and/or recycling designs” and “other green initiatives” is required to help sustain our environment and to demonstrate social responsibilities of individual companies.

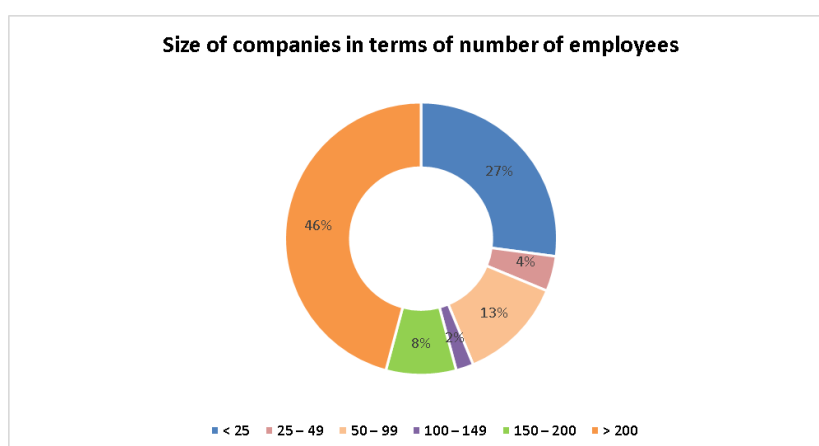
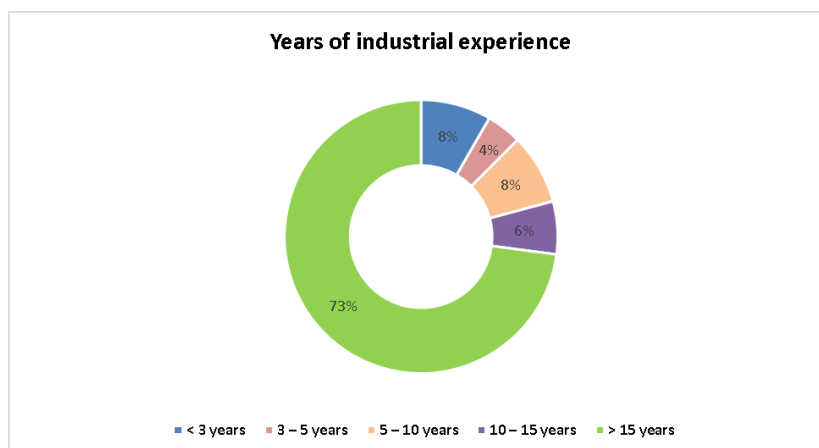
5. Survey Figures

The results of the questionnaire are analysed statistically and validated. Their correlation and reliability have been tested. Some of the findings from the responses are highlighted below:





The demographic characteristics of the sample obtained in the survey are highlighted below:



6. Key Recommendations

Based on the survey results, our key recommendations to the Hong Kong Government are:

(1) Need of Seamless Transition

Due arrangement for seamless transition from brownfield operation to MSW is essential to avoid the choke-to-death to the Logistics Industry.

(2) Comprehensive allocation of logistics land

Allocation of sufficient open space for those cargo operations which cannot be operated in MSW.

(3) Affordable rental policy

Affordable rental in MSW shall be around HK\$10-15 per sq. ft. (actual flood area) to enable viable logistics operation, special terms for facilitating viable business operation of SME.

(4) Reasonable leasing term for land

Land lease term for STT should be at least 7 years for viable investment planning.

(5) Employment-traffic-living in same area

Creation of employment opportunities for local community thereby minimizing cross district commuting and lessening pressure on public transport and trunk roads traffic.

(6) Comprehensive supporting facilities

Provision of comprehensive supporting facilities to attract Logistics Industry to move into new development areas, such as catering service, fuel station, bank service and the like.

(7) Effective Connectivity

Provision of direct highways linking border (Shenzhen) for cargo hauling and comprehensive public transport for commuters.

(8) Comprehensive consultation

Government is suggested consulting logistics operators to deeply understand the real needs of the Industry.

1. 簡介

《2021 年施政報告》中提及，北部都會區發展戰略的主要方向之一，是採取積極措施糾正家庭就業失衡（即發展多層現代物流中心）。此舉是為了配合棕地運營、促進物流業升級、以及創造相關的就業機會。除此之外，在屯門西擬建的龍鼓灘近岸填海區所提供的物流用地，將有助紓緩香港物流業之持續發展的土地短缺問題。

有見及此，本報告旨在向政府對於如何採取實際行動提供觀點和建議。調查中收集的內容包括：

- 北部都會區及屯門西的物流用地
- 土地使用的經濟誘因（倉庫租金）
- 將現前物流業務搬進新界西北部棕地 (NWT) 的可行性
- 現代物流發展和特殊貨物處理的土地供應
- 提供多模式服務設施

2. 主要內容

發展香港物流業長期存在的問題

用地對物流業運作極為重要，但過去長期供應不足。多年來，香港政府只是不定時地提供零星小塊土地作業界發展，但土地供應總量與其向物流業的公開承諾相差甚遠。HK 2030+ 報告預測經濟用地的整體長期需求將達到 457 公頃，但同期供應量則僅約為 200 公頃，包括用於物流用途。貿易和物流合計佔香港 GDP 的 20%，創造 610,000 個就業機會；僅物流業就佔 3.2% (828 億港元)，僱用 175,000 名員工。

根據現有記錄，在 2010-2015 政府在葵青只提供 6.9 公頃土地，在 2018 年在屯門第 49 區提供 3.5 公頃及在機場島提供 5.3 公頃土地。並將在 2022 年在葵涌撥出 5.5 公頃土地作物流業用途。政府曾公開承諾提供 100.5 公頃土地用作物流業的發展，但到目前為止，則只能共提供 21.2 公頃土地。因近年收回棕地作住宅用途有明顯增加，導致物流業所面對土地供應不足的嚴重問題進一步惡化。

有證據顯示，香港物流業的發展主要因為土地供應長期不足而明顯受挫。而土地供應短缺的問題，亦實際削弱業界作為區域物流樞紐的地位以及支援大灣區周邊城市經濟發展所肩負的應有關鍵角色。因此，香港必須要有足夠土地以應物流業發展所需。

北部都會區及屯門西的土地需求及政府對物流業的應有支援

根據政府在其《香港 2030+報告》(發展局及規劃署)的總結報告所提供的資料，建議坪輦-打鼓嶺作發展非住房用途。在《2020 年施政報告》中，提到政府將在可見未來對屯門西重新規劃，包括龍鼓灘的近岸填海工程。

有見北部都會區及屯門西正處於政府規劃階段，香港運輸物流學會認為現時是解決業界長期存在土地短缺問題的合適時機，因而於 2021 年第四季度進行一個對香港物流業的專項調查，並成功收集到 200 份業界主要持份者的回應。他們就業界對即將開發的北部都會區及屯門西所期待的發展表達明確觀點、提出合理期望及指出營運重點。

3. 研究方向

本次調查共有 48 條問題，旨在評估北部都會區（坪輦、打鼓嶺）和屯門西（龍鼓灘填海區）的物流用地發展情況，以有效發展先進的現代物流業。問卷分為三個部分，即（1）政府對物流業界的支持，（2）公司運營，以及（3）統計調查。

問卷主要分發給在物流和運輸部門工作的行業從業者。問卷的設計考慮到香港是國際大都會，行業從業者在工作場所和日常交流中會使用多種語言。為覆蓋廣大從業人員，並鼓勵更多參與者完成調查，問卷提供中英文兩種版本。大多數受訪者 (68%) 擁有超過 15 年的行業經驗，其中 62% 的受訪者在有超過 200 名員工的公司工作。

4. 報告重點

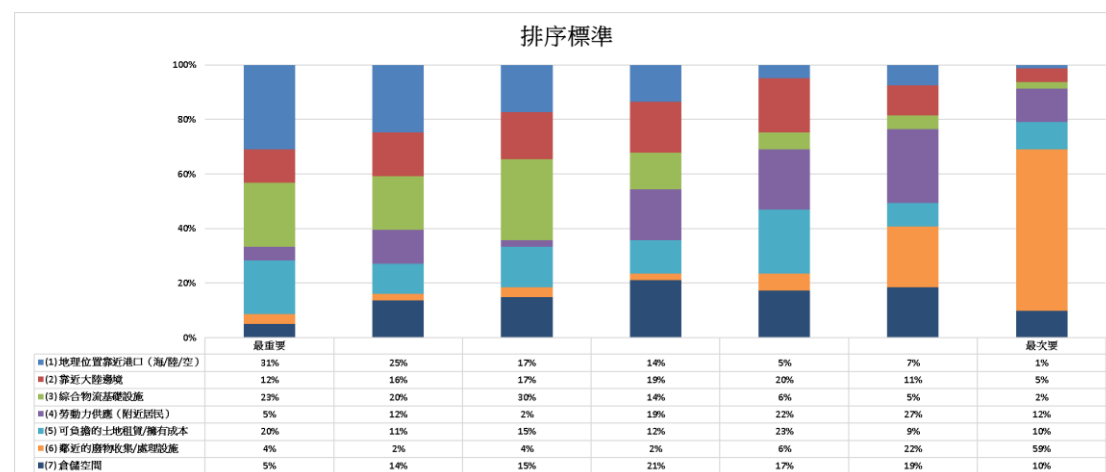
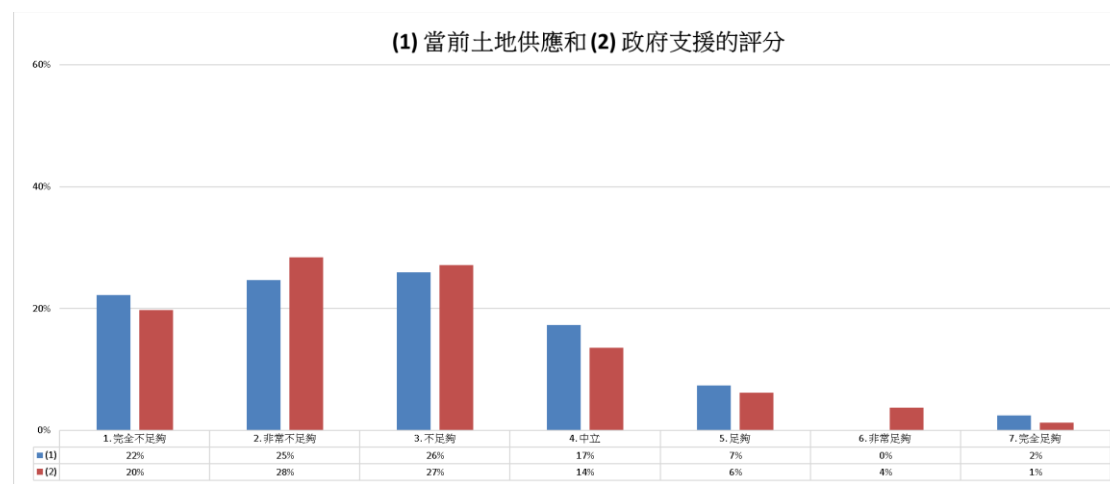
以下為調查結果要點：

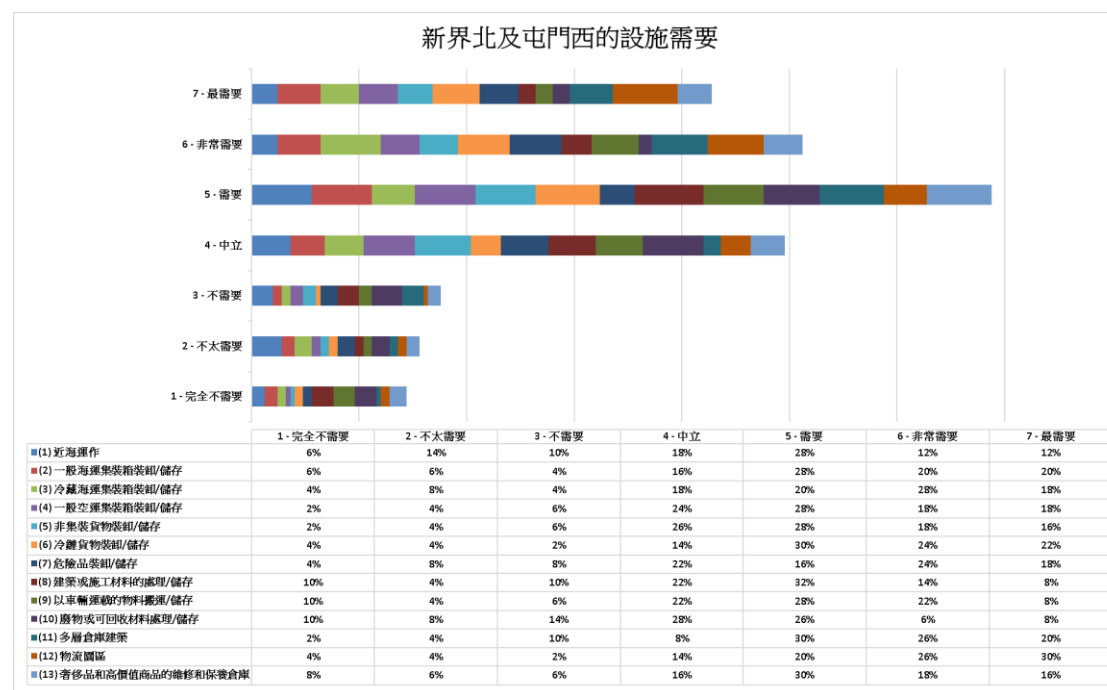
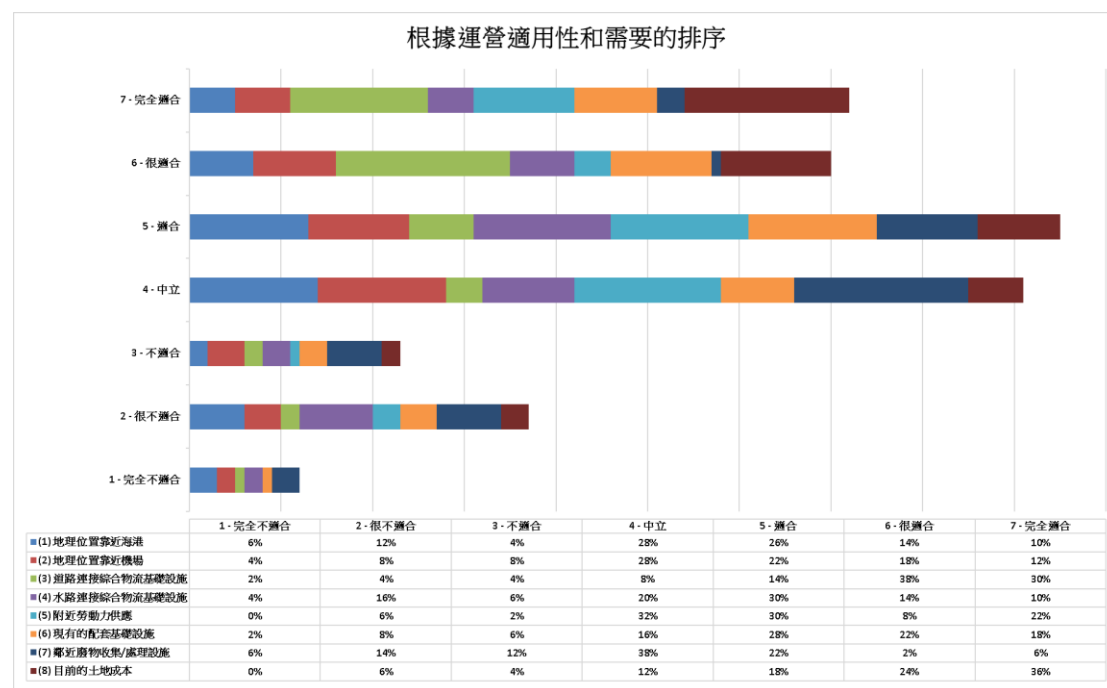
- 超過 77% 的受訪者表示物流用地供應不足，76% 的受訪者認為政府對物流運輸業的支援不足。
- 從棕地營運轉型到多層物流倉庫營運所需的無縫交接。
- 選擇在北部都會區和屯門西作物流運營地點時，與其他決定性因素相比，“地理位置靠近港口和綜合物流基本配套設施”最為重要，其他決定性因素包括“靠近內地邊境”、“充足勞動力供應”、“可承擔倉庫租金及合理土地租約條款”、“靠近廢物處理設施”和“倉庫和配送的供應空間”。
- “物流園”被認為是在北部都會區和屯門西最為優先考慮的物流設施，其次是“多層物流倉庫”、“冷鏈設施”和“空運集裝箱儲存設施”。
- 至於在北部都會區和屯門西投資設立多層物流倉庫 (MSW)，以下為業界首要考慮的因素，包括“完善的通訊網絡 (例如 5G 基礎設施)”、“與陸路和海岸基礎設施的連接能力”、“足夠的裝載區和集裝箱拖車停泊位”、“通往冷藏庫的快捷通道”、“足夠的樓底高度及樓面承載能力以容納重型車輛行駛”、“完善的道路基礎設施”、“與葵涌貨櫃碼頭及國際機場的連接能力”、“餐飲設施”、“與高速公路的連接能力”、“提供集裝箱貨運站 (CFS) 的營運條件”、“提供集裝箱碼頭堆場 (CY) 的營運條件”及“鄰近地區的人力供應”。
- 如果要在北部都會區和屯門西設立物流園，業界認為決定性的因素是“充足的人力供應”、“海陸空的倉儲運輸網絡”、“冷鏈倉庫設施”、“足夠的樓底高度和樓面承載能力”、“完善的貨車通道直達各樓層”、“先進科技 (例如 5G 基礎設施) 和相關設備作支援物流業發展”。其他一般設施還包括“洗手間 (包括淋浴設備)”、“食堂”、“辦公室環境”、“加油站及車輛充電設施”、“維修服務”。
- 調查亦重點指出，多層物流倉庫 (MSW) 應引入新設計構思，包括“充足並位於底層的集裝箱存儲”、“雙向環形通道以便集裝箱貨車能直達各層”和“足夠的樓底高度和樓面承載能力，包括容許超高身貨櫃的運輸”。通過應用如“機械人運送”和“自動化貨架系統”實現倉儲自動化，此對於提高運營效率及緩解人力短缺問題至關重要。

- 就保護環境方面，應通過“普及使用電動叉車”、“引入節能及/或可循環回收設計”及“其他綠色措施”，以落實環境保護及體現公司對社會的責任。

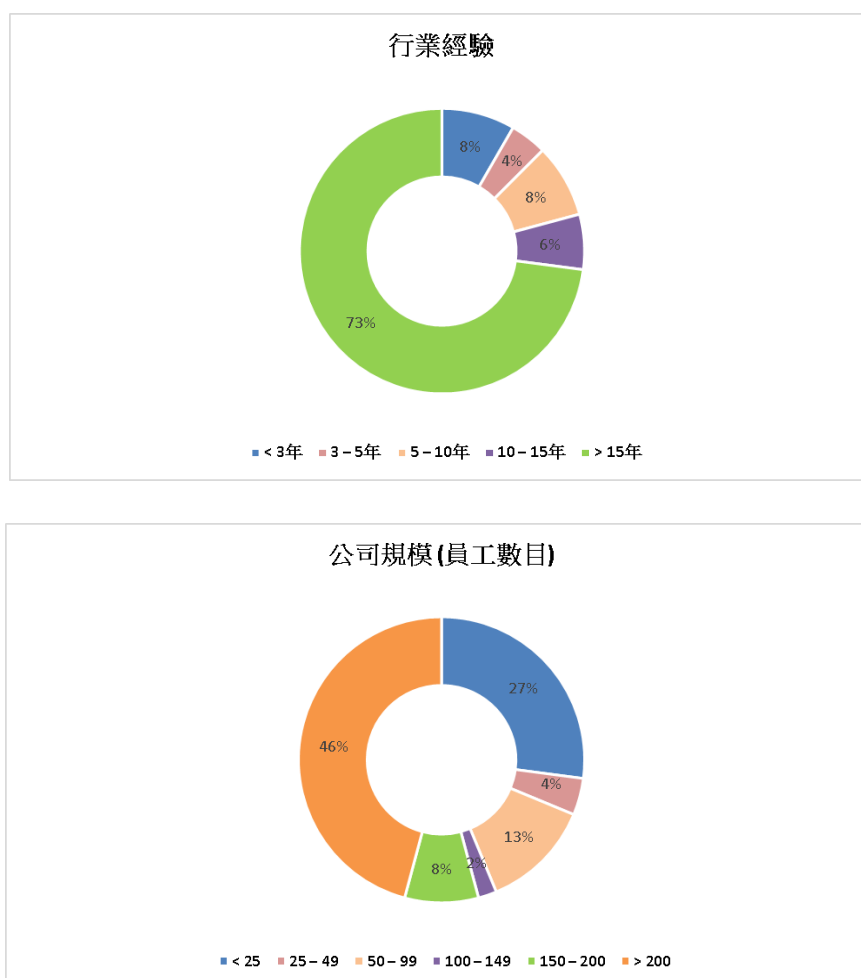
5. 調查數據

問卷的結果經過統計分析和驗證。它們的相關性和可靠性已經過測試。下面重點介紹了答復中的一些調查結果：





下文重點介紹了調查中獲得的樣本的人口統計特徵：



6. 主要建議

根據調查結果，我們向政府所提供的主要建議如下：

(1) 無縫交接

從棕地的物流業務無縫交接到多層物流倉庫(MSW)，並提供可行安排以保障中小企的生存空間。

(2) 合理分配物流用地

為多層物流倉庫(MSW)所無法容納的貨物提供土地以作露天操作。

(3) 可負擔的租賃政策

物流業務使用多層物流倉庫的可負擔租金應低於每平方呎 10-15 港元(以實用面積計算)，並引入保障中小企營運的特別條款。

(4) 合理用地租期

用地租期(短期租約)應最少有 7 年以求可行的投資。

(5) 原區就業

為社區創造就業機會，從而大幅度減少跨區工作，以減輕公共交通系統和使用幹道的壓力。

(6) 完善基礎配套設施

充足的倉儲基礎配套設施及設計將有助吸引其他相關支援行業加入新開發區，例如餐飲、油站、銀行等。

(7) 高效交通設施

建立從北部都會區和屯門西到跨境(深圳)的直達高速幹道以實現有效的貨物運輸，並且提供完善的全日公共客運交通服務。

(8) 全面性諮詢

建議政府諮詢物流業界以深入了解行業實際需求。

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