



The Chartered
Institute of Logistics
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全球供應鏈政策研究所
POLICY RESEARCH INSTITUTE OF
GLOBAL SUPPLY CHAIN
香港恒生大學
THE HANG SENG UNIVERSITY
OF HONG KONG

2022 年 5 月 19 日

新聞稿

提升物流競爭力，迎接機遇與挑戰

香港運輸物流學會 (CILTHK) 聯同香港恒生大學 (HSUHK) 全球供應鏈政策研究所及香港立法會易志明議員於 2022 年 5 月 19 日在立法會綜合大樓 502 室舉行新聞發佈會，促請香港政府在即將發展的北部都會區及屯門西提供足夠土地以作香港物流業的必要發展。此要求是建基於近期業界一個專項調查，並充份反映物流業界共 200 位主要持份者的共同觀點。

新聞發佈會由香港運輸物流學會資深會員及副會長梁啟元博士工程師主持。新聞發佈會的主要講者包括香港運輸物流學會資深會員及物流政策委員會主席張泰業先生及香港恒生大學全球供應鏈政策研究所所長黃彥璋博士工程師。

新聞發佈會的主要內容

1. 發展香港物流業長期存在的問題

供物流業發展的土地長期短缺

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發展，但土地供應總量與其向物流業的公開承諾相差甚遠。《香港 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。

2. 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。



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”。

3. 應用新設計以提升物流業的競爭力

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。

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。



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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。

關於問卷調查及其完整報告

相關問卷調查的完整報告可在以下網址查閱

<https://www.cilt.org.hk/en-US/News/Doc.aspx?id=147>。



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香港運輸物流學會簡介

香港運輸物流學會 (CILTHK) 是運輸物流學會一個主要分會，而運輸物流學會 (CILT) (網址：<https://www.ciltinternational.org>) 是一國際性的非牟利專業組織，現時超過 30 個分會，全球超過 30,000 名會員，遍布 100 多個國家及地區。學會於 1919 年在英國成立，並於 1926 年獲頒皇家特許狀。

香港運輸物流學會則於 1968 年成立。學會成立宗旨是推廣及提升供應鏈、物流以及運輸等各範疇的科學及技術。學會涵蓋多個不同行業，包括海陸空的客運和貨運。現時香港學會由約 1,900 名會員組成，當中包括資深行政人員、政府公務員、公私營機構及顧問公司的專業人士。學會定期為會員舉辦專業認可培訓及專業活動，例如研討會、論壇、大型會議、參觀活動及持續專業發展計劃；並制定及推行專業守則，確保並維護業內的專業水平。

香港恒生大學中的全球供應鏈管理政策研究所簡介

香港恒生大學中的全球供應鏈管理政策研究所就供應鏈、運輸及物流管理相關議題，進行深入分析研究，為政府、業界和持份者提供互相交流資訊和經驗的平台，並因應市場環境轉變，向政府提出政策建議。香港恒生大學是香港一所非牟利、私立並以博雅教育為主導的大學，提供多元化的學士及碩士學位課程。(網址：<https://prisc.hsu.edu.hk/>)

進一步查詢

如有任何查詢，請致電 31148033/28666336 或發送電子郵件 info@cilt.org.hk 與本會行政經理 - 梁美皓女士聯繫。

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19th May 2022

For immediate release

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

The Chartered Institute of Logistics and Transport in Hong Kong (CILTHK), the Office of the Hon Frankie Yick – Member of the Legislative Council of Hong Kong and The Policy Research Institute of Global Supply Chain of the Hang Seng University of Hong Kong (HSUHK) held a press conference in Room 502 of the Legislative Council Complex on 19th May 2022 to openly urge the Hong Kong Government to allot sufficient land in the soon-to-be-developed Northern Metropolis and the Tuen Mun West for essential development of the Logistics Industry, basing on their findings of a recent professional survey to reflect consolidated view from 200 key stakeholders in the Industry.

The press conference was chaired by Ir Dr. Kelvin Leung, FCILT – Vice President of CILTHK. And speakers of the press conference were Mr. Keno Cheung, FCILT – Chairman of the Logistics Policy Committee of the CILTHK and Ir Dr. Eugene Wong, CMILT, Director, The Policy Research Institute of Global Supply Chain of the HSUHK.

Key information of the press conference

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

Shortage of land supply for logistics development

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 attest 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.



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Altogether, Trading and Logistics account for 20% of HK's GDP, creating 610,000 employment; Logistics alone contributes 3.2% (HK\$82.8 bln), 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

2. The needs of land in Northern Metropolis and Tuen Mun West 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 (DEVB & 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 (NM) and Tuen Mun West (TMW) 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.



Finding Highlights

- 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.
- The essential need of seamless transition from brownfield operation to multi-storey warehouse (MSW).
- 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”*.
- **“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”**.
- 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”*.
- 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”.

3. Applications of new design for the Logistics Industry to enhance its competitiveness

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”.

Advanced technologies should be employed in facilitating operation and supporting computerised 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 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.

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 minimising 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.

About the questionnaire survey and its full report

The full report of the related questionnaire survey can be accessed at

<https://www.cilt.org.hk/en-US/News/Doc.aspx?id=147>.



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About The Chartered Institute of Logistics and Transport in Hong Kong

The Chartered Institute of Logistics and Transport in Hong Kong (CILTHK) is a major branch of The Chartered Institute of Logistics and Transport (CILT). The Chartered Institute of Logistics and Transport (www.ciltinternational.org) is an organisation with an established international pedigree with over 30,000 members working in over 100 countries. It was formed in the United Kingdom in 1919 and granted a Royal Charter in 1926.

CILTHK (www.cilt.org.hk) was set up in 1968 and is one of the CILT global chapters. CILT is presented worldwide and we all share the common cause to promote and advance the art and science of supply chain, logistics and transport. Currently, the membership of CILTHK is around 1,900 and broadly ranges from experienced senior manager to junior staff in the industries of shipping, logistics, airline, railway, road, public transport, government, educational institutes and consultancy. The Institute regularly organises professional programmes and activities for members, such as seminars, forums, conferences, technical visits; formulates and implements professional codes to ensure and uphold the professional standards in the industry

About the Policy Research Institute of Global Supply Chain at the Hang Seng University of Hong Kong

The Policy Research Institute of Global Supply Chain (PRISC), established in the Hang Seng University of Hong Kong (HSUHK), conducts in-depth research on supply chain, transport and logistics management related issues, provides a platform for information and experience exchanges among the government, different sectors and stakeholders, and submits policy proposals to the government in response to market changes. HSUHK is a non-profit private liberal-arts-oriented university in Hong Kong, offering a wide range of undergraduate and taught postgraduate degree programmes. (PRISC's website: <https://prisc.hsu.edu.hk/>)

Further enquiry

Please feel free to contact our Ms. Harriet Leung – Executive Manager at tel: 31148033/28666336 or by email at info@cilt.org.hk for any further enquiry.

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