

二零零一年十月二十九日會議
討論文件

立法會經濟事務委員會

香港港口發展

背景

一九八九年完成的港口及機場發展策略研究，就本港港口和機場的發展，擬訂整體長遠規劃大綱。此後，當局進行了三次檢討，確保港口發展策略能夠因時制宜。

2. 對上一次(第三次)港口發展策略檢討在一九九八年進行，當時的結論是屯門西是另一個可考慮闢建港口設施的地點，惟須再經獨立的可行性研究加以確定。當局為要求撥款進行可行性研究，於二零零零年一月二十六日向財務委員會轄下的工務小組委員會提出申請。工務小組委員會委員質疑一九九八年港口貨運量預測的準確性，認為預測過於樂觀，並且指出，有關方面應考慮一至九號貨櫃碼頭在處理能力方面可作的改善，或深圳港口發展所產生的影響。委員因而要求當局檢討港口設施的未來需求及闢建策略，包括對屯門西以外的其他選址進行評估。

3. 當局在二零零零／零一年度港口貨運量預測，以及在二零零一年展開的第四次港口發展策略檢討中，進行重新檢討，有關工作最近已完成。

研究結果

4. 二零零一年港口發展策略檢討的主要結果載於隨附的報告摘要。要點如下：-

- (a) 我們的策略，是拓展和推動香港成為國際和地區首選貿易、運輸及物流樞紐，以及融匯全球和地區供需鏈服務供應商的基地。港口及航運業的未來發展，正是這策略的一部分。
- (b) 港口政策的主要目標，是確保與港口有關基建的規劃切合實際，並能適時關建港口設施，以應付本港的預測貨運量。
- (c) 市場情況瞬息萬變，港口規劃成功與否，關鍵在於能否準確掌握市況。為了緊貼市場變化，日後的港口貨運量預測和港口發展策略檢討，將會由每三年改為每兩年修訂一次。
- (d) 我們應盡量提高葵涌貨櫃港設施的生產力。港口及航運局已成立了專責小組，負責制訂措施，改善葵涌貨櫃港池整項設施的生產力。專責小組亦會探討方法，促進公營和私營機構相互合作，令葵涌港口的生產力更上層樓。
- (e) 根據目前的推算，港口發展策略檢討建議 —
 - (i) 到接近 2010 年才須增闢貨櫃碼頭設施；
 - (ii) 未來十年也不須增闢內河貨運設施；
 - (iii) 短期內不須增闢中流作業設施；以及
 - (iv) 除了重置須遷移的設施之外，不會增闢公眾貨物裝卸區。
- (f) 我們為港口的持續發展釐定方向時，必須在經濟效益和環境影響之間取得平衡。由於有關的研究只是初步研究，所以欠缺持續發展進程及投資評估所需，讓我們得以就未來港口發展計劃作出結論性的充分數據。有關方面有需要於稍後展開跟進研究，務求定出最佳策略方案，以落實在九號貨櫃碼建成後本港港口的發展計劃。

- (g) 港口發展策略檢討所得，將納入規劃署現正進行的《香港 2030：規劃遠景與策略》研究中。

徵詢意見

5. 二零零一年港口發展策略檢討由政府內部進行，期間曾徵詢業界人士的意見。檢討結果已獲港口及航運局確認。

經濟局
二零零一年十月

二 零 零 一 年 港 口 發 展 策 略 檢 討
PORT DEVELOPMENT STRATEGY
REVIEW 2001

摘 要

Executive Summary

二 零 零 一 年 九 月

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Introduction

The Port and Airport Development Strategy (PADS), completed in 1989, set out an overall long-term planning framework for port and airport development in Hong Kong. Since then, three Port Development Strategy Reviews (PDSR) had been carried out to ensure that Hong Kong's port development can keep up with the times and global development, and can maintain a competitive position. The current fourth review (Port Development Strategy Review 2001(PDSR2001)), carried out in-house by the Port and Maritime Division of the Economic Services Bureau (PMD/ESB), the Planning Department and the Marine Department, seeks to update the Third PDSR based on the report findings of the Port Cargo Forecasts (PCF) 2000/01 (completed in Feb. 2001).

引言

一九八九年，當局制訂了「港口及機場發展策略」，為本港港口及機場的整體發展定下長遠的規劃大綱。自此，當局先後三次進行港口發展策略檢討，以確保香港港口的發展能夠掌握時代脈搏和全球發展趨勢，並能保持競爭力。現時的第四次檢討（「二零零一年港口發展策略檢討」），是政府運用內部資源進行。檢討工作由經濟局港口及航運部、規劃署和海事處共同負責，目的是根據二零零一年二月完成的「香港港口貨運量預測二零零零／零一」的報告，修訂第三次港口發展策略檢討的結果。





Objectives of the Fourth Review

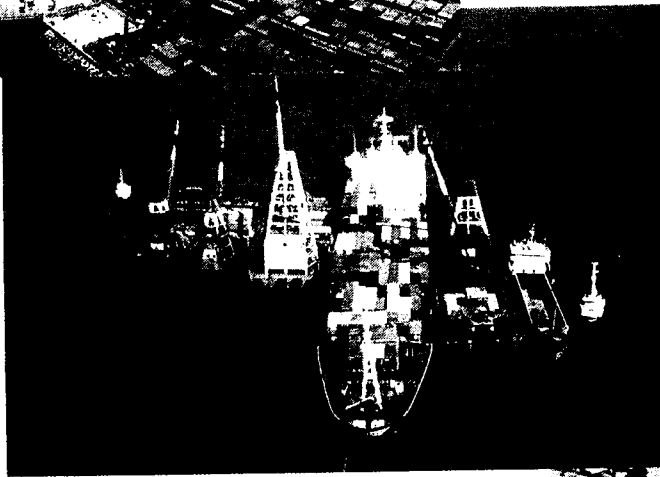
The primary objective of the Study is :

- to form an updated port facility development strategy so as to provide a conceptual planning framework for the future development of port facilities and timely reservation of land for those facilities.

第四次檢討的目的

這項研究的主要目的是：

- 重新修訂港口設施的發展策略，以便當局制定日後港口設施的規劃大綱及在適當時間預留土地，供發展港口設施之用。





Main Tasks of the Fourth Review

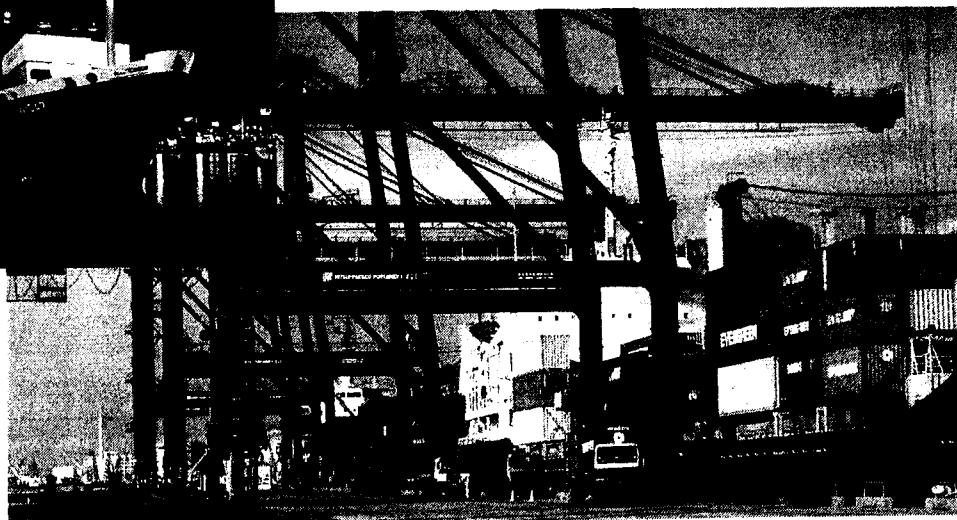
In order to achieve the objectives, the study comprises the following main tasks:

- (i) to take stock of the existing/planned port and port related facilities;
- (ii) to update the productivity levels in cargo handling of various port facilities;
- (iii) to update the assumptions on the distribution of ocean and river cargo handled at various port facilities;
- (iv) to translate findings of the above tasks by taking account of the results of the PCF 2000/01, and to update demand for port and port-related facilities;
- (v) to review the supply and demand situation of off-port container back-up land; and
- (vi) to broadly identify potential sites for long-term development of port facilities.

第四次檢討的主要工作

為達到上述目的，這項研究會包括下列主要工作項目：

- (i) 統計現有／已計劃的各種港口及相關設施；
- (ii) 更新各種港口設施的貨物處理量生產水平；
- (iii) 更新各種港口設施所處理海運及河運貨物量的分布假設；
- (iv) 把上述工作項目的結果及「香港港口貨運量預測二零零零／零一」的推算，轉化為港口及相關設施的需求量；
- (v) 檢討港口以外的貨櫃後勤用地的供求情況；以及
- (vi) 概略揀選可能適合用作港口設施長遠發展的地點。





The Study Process

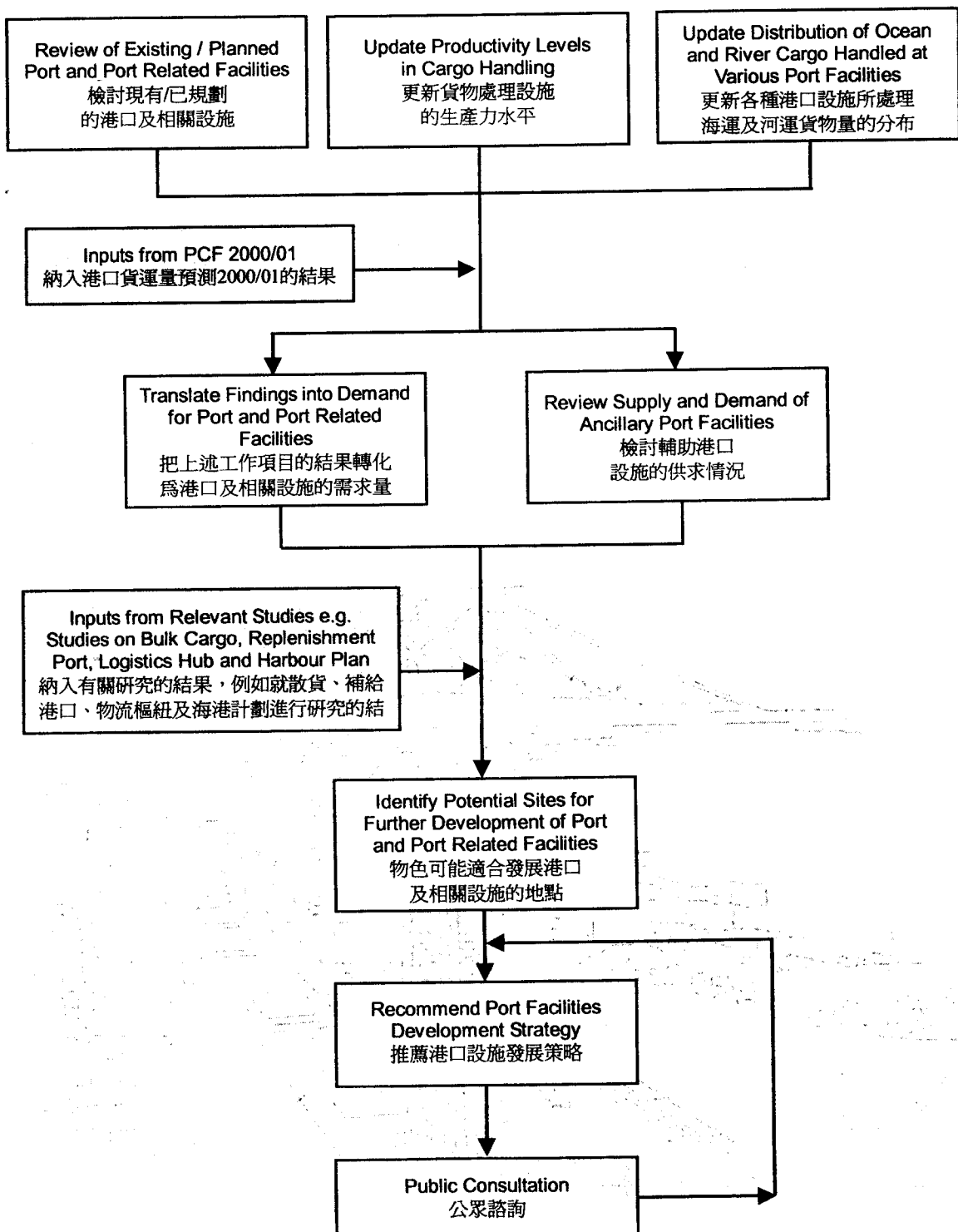
研究過程

The study process includes a series of discrete but inter-related tasks. The study process is illustrated in Figure 1.

研究過程包括一系列性質獨立而又互相相關的課題研究，研究過程見圖表一。

Figure 1 : Port Development Strategy Review 2001 Study Process

圖表一：二零零一年港口發展策略檢討的研究過程





Hong Kong Port Cargo Forecasts 2000/01

The Port Cargo Forecasts (PCF) 2000/01 is the main input to the PDSR 2001. It is to review and update the port cargo forecasts up to the year 2020 by taking account of past port traffic pattern, macro-economic context, impact of Mainland's accession to the World Trade Organization (WTO), development in the Pearl River Delta (PRD) region, direct trade link between Mainland and Taiwan, determinants of cargo routing and Hong Kong's port competitiveness.

As compared with the previous PCF 1997/98, PCF 2000/01 predicted a slightly higher magnitude of total container traffic (Table 1). The comparison of the two PCFs is shown in Table 2. The higher throughputs projected in the 2000/01 forecast are mainly due to the anticipated strong export growth of Southern part of the Mainland, which will be further boosted by the Mainland's accession to the WTO.

Hong Kong port is forecast to become increasingly reliant on cargo originating from the PRD area as the main source of cargo. The volume of containers carried by ocean-going vessels is forecast to reach 30.2 million TEUs by 2020 and another 10.4 million TEUs will be handled by river trading vessels. This reflects a gradual increase in the share of river containers from 24 % in 1999 to 26 % in 2020.

香港港口貨運量預測二零零零／零一

「二零零一年港口發展策略檢討」所根據的資料，主要來自「香港港口貨運量預測二零零零／零一」。此研究的目的，是參考過往的港口貨運模式、宏觀經濟環境、內地加入世界貿易組織(下稱世貿)的影響、珠江三角洲地區的發展、內地與台灣直接通商、貨運路線的選擇及香港港口的競爭力，檢討及更新直至二零二零年的港口貨運量預測。

「香港港口貨運量預測二零零零／零一」所預計的總貨櫃運輸量升幅，較先前「香港港口貨運量預測一九九七／九八」所估計的稍高(表一)。兩次預測的比較見表二。

至於二零零零／零一年度的預測推算貨櫃吞吐量會有增加，主要是因為估計華南地區的出口增長迅速，而在內地加入世貿的影響之下，預料出口增長會更為強勁。

香港港口預料日後會更加倚賴珠江三角洲地區這個主要貨源地。預測到二零二零年，用遠洋輪船載運的貨櫃會達到3020萬個標準貨櫃單位，而另有1040萬個標準貨櫃單位則會用內河船載運。這數字顯示，河運貨櫃量所佔比率會逐漸上升，將由一九九九年的24%增至二零二零年的26%。

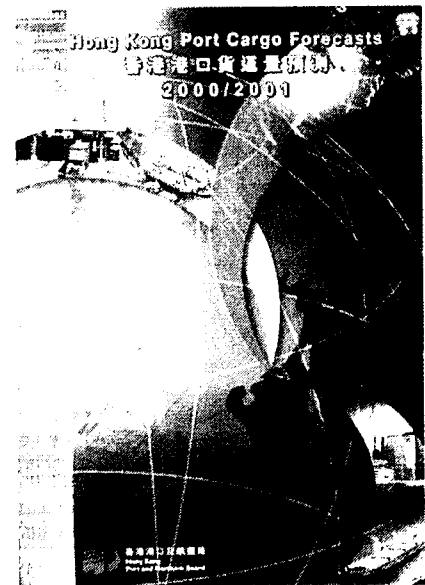


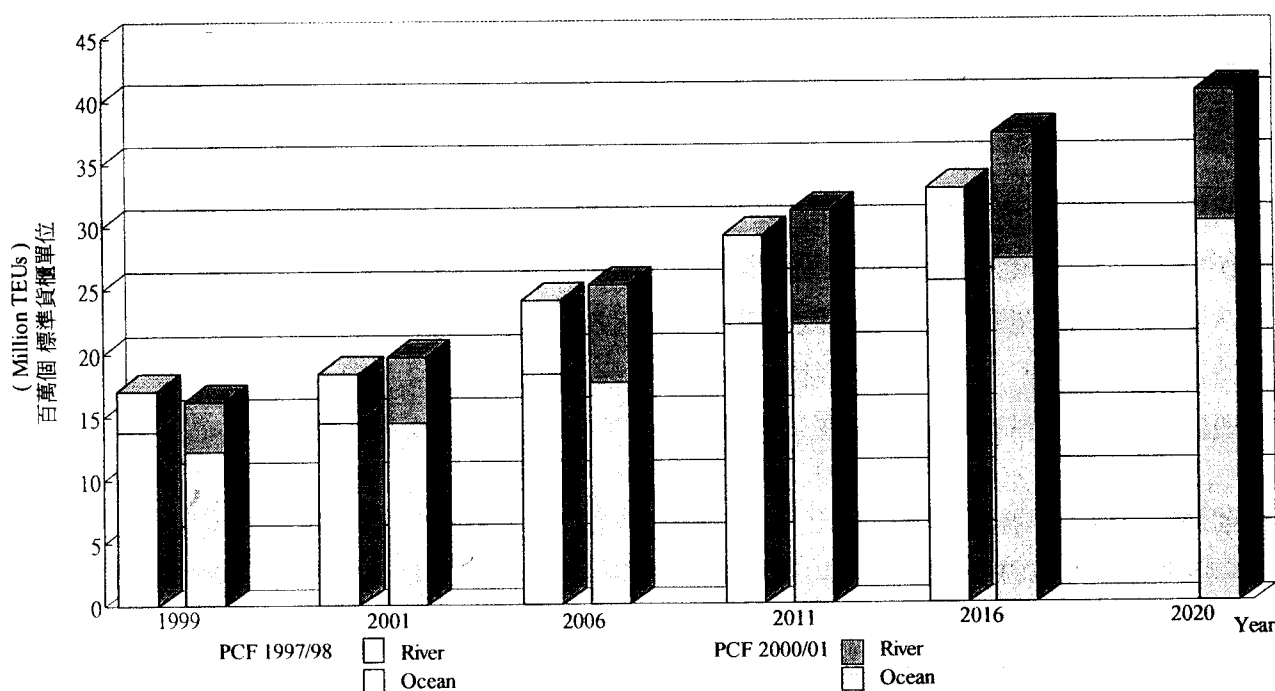


Table 1 : Comparison of PCF 97 / 98 and PCF 2000 / 01
 表一：一九九七 / 九八與二零零零 / 零一的港口貨運量預測比較

(百萬個標準貨櫃單位)
 (Million TEUs)

年份 Year	海運貨物 Ocean		河運貨物 River		合計 Total	
	港口貨運 量預測	港口貨運 量預測	港口貨運 量預測	港口貨運 量預測	港口貨運 量預測	港口貨運 量預測
	PCF	PCF	PCF	PCF	PCF	PCF
	97/98	2000/01	97/98	2000/01	97/98	2000/01
	13.8	12.3	3.2	3.6	17.0	
	14.4	14.4	3.9	5.2	18.3	
	18.2	17.6	5.9	7.7	24.1	
	22.1	22.1	7.1	9.6	29.2	
	25.5	27.2	7.3	10.0	32.8	
	-	30.17	-	10.36	-	

Table 2 : Comparison of PCF 97 / 98 and PCF 2000/01
 表二：一九九七 / 九八與二零零零 / 零一的港口貨運量預測比較





Requirements for Cargo Handling Facilities

Based on the projected distribution of port cargo to each of the cargo handling facilities and the assumed productivity of the facilities, the cargo volumes projected in the PCF 2000/01 are then translated into requirements for various port facilities, which include container terminals, mid-stream sites, river trade terminals and public cargo working areas.

As there are inherent uncertainties of the future development like cargo share between Hong Kong and Mainland ports, different port throughput scenarios (i.e. Base, High and Low cases) have been derived from the PCF 2000/01 for sensitivity testing purposes. For the assessment of the future requirements for various cargo handling facilities, the "Base Case" of the PCF 2000/01 was adopted. The requirements for various cargo handling facilities are indicated in Table 3.

貨物處理設施的需求量

根據每種貨物處理設施所處理不同種類貨物的推算，以及這些設施的貨物處理能力的假設，「香港港口貨運量預測二零零零／零一」內所估計之貨物數量可轉化為各種港口設施的需求量；這些貨物處理設施計有貨櫃碼頭、中流作業用地、內河貨運碼頭和公眾貨物裝卸區。

日後的發展難免存在種種不明朗因素，香港與內地港口的貨運佔有率即為一例。因此，當局根據「香港港口貨運量預測二零零零／零一」，就港口吞吐量的發展情況作出不同假設方案(即基本、偏高及偏低增長情況)，以測試吞吐量在不同經濟情況下所受到的影響。評估各種貨物處理設施日後的需求量時，我們採用了「香港港口貨運量預測二零零零／零一」的「基本增長情況」。各種貨物處理設施日後的需求量載於表三。





Table 3 : Requirements for Various Cargo Handling Facilities

表三: 各種貨物處理設施的需求量

Additional Facility 新增設施	Year 年份			
	2005	2010	2015	2020
Container Terminal Berth (assumed berth length=320m) 貨櫃碼頭泊位 (假設泊位長度=320米)	0	2	9	13
Mid-stream Berth ¹ (assumed berth length=55m) 中流作業泊位 ¹ (假設泊位長度=55米)	0	0	0	0
River Trade Terminal Berth (assumed berth length=50m) 內河碼頭泊位 (假設泊位長度=50米)	0	0	20	29

¹ On the assumption that two mid-stream sites will be provided in Tsing Yi South (ex power plant) and Tsing Yi Southeast by 2005.
假設當局會在二零零五年之前提供兩幅中流作業用地，分別位於青衣南(發電廠舊址)及青衣東南。



Container Terminals (CT)

Based on the current PCF prediction, it is estimated that the first berth of the next Container Terminal (i.e. CT 10) will be required towards the end of this decade. At present, CT9 is being constructed on Tsing Yi. The first berth is expected to be available in 2002 and all six berths to be completed by 2004.

Sites originally earmarked for CTs 10 and 11 were lost to the development of the Disney Theme Park project. In view of the continuous cargo growth and in order to give more flexibility in planning Northeast Lantau to become a major tourism/recreation area, there is a need to consider other sites for container terminal.

Our port policy seeks to ensure that port facilities can be provided in a timely manner to meet forecast demand. From a sustainable planning perspective, port operation places strain on the land resource, infrastructure system and environmental capacity of the territory. So we need to assess if the physical and environmental capacity of Hong Kong could cater for the growth of economic activities which are relying on cargo trade. The follow-up study will assess the sustainable development implications, among other things, of building another container terminal.

貨櫃碼頭

根據今回港口貨運量預測的結果，估計約在未來十年之末期，本港會需要另一個新貨櫃碼頭(即10號貨櫃碼頭)的首個泊位。目前，位於青衣島的9號貨櫃碼頭正在施工，首個泊位定於二零零二年啓用，全數六個泊位則會在二零零四年完成。

原定規劃供興建作為10號及11號貨櫃碼頭用途的土地，已改為發展迪士尼主題公園計劃。鑑於貨運量不斷增長，以及更具彈性把大嶼山東北地方，規劃為旅遊／康樂為主的地區，我們有需要另覓地方作興建貨櫃碼頭之用。

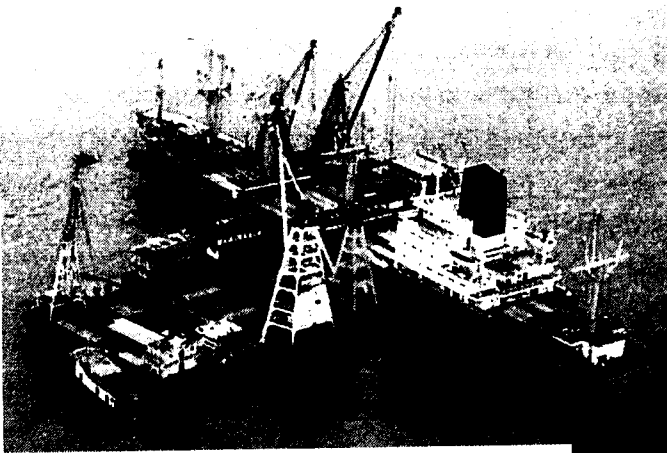
我們的港口政策，是確保能夠在適當的時候提供港口設施以應付預測的需求。從可持續發展規劃的角度看來，港口作業對本港的土地資源、基礎建設系統和環境承受能力均構成壓力。因此，我們有需要評估本港的土地資源及環境承受能力，能否應付端賴貨運帶來的經濟活動增長。跟進研究的其中一個目的，是評估興建另一個貨櫃碼頭對可持續發展的影響。





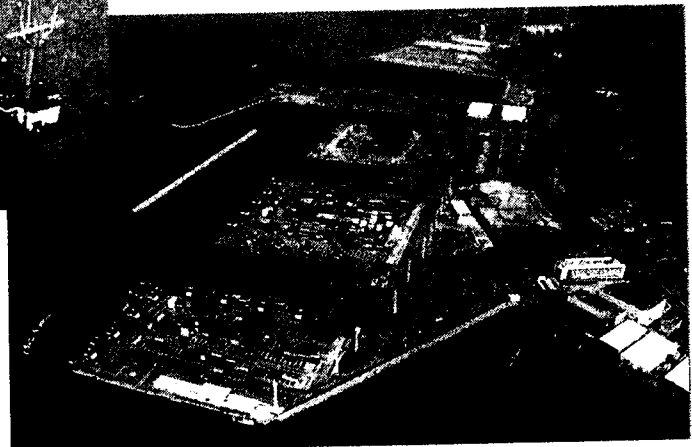
Mid-stream Sites (MSS)

It is anticipated that the demand for MSS will be quite steady in the foreseeable future. Except the planned sites, no new sites are required for at least the next 10 years. The situation would be monitored and the demand and provision of sites would be reviewed from time to time.



中流作業用地

中流作業用地的需求量預料短期內會頗為穩定。除了已規劃作此用途的土地外，最少在未來十年內無須再闢拓新用地作此用途。我們會監察有關情況，並不時檢討這類用地的供求。



River Trade Terminals (RTT)

With the full completion of the first Tuen Mun RTT in end 1999, it is expected that the second RTT would not be required until the next decade. The location of the second RTT, originally proposed at Northshore Lantau, has now been recommended for tourism/recreation use. To facilitate movement of containers, it is suggested that future river trade facilities should be provided as part of container terminal facilities. Accordingly, the future provision of river trade facilities would be investigated in conjunction with the proposed feasibility study for the container terminal (see Way Forward below).

內河貨運碼頭

本港首個位於屯門的內河貨運碼頭，於一九九九年年底全面落成後，預料在未來十年再無須興建第二個內河貨運碼頭。大嶼山東北岸原建議為第二個內河貨運碼頭的選址，現擬改作旅遊／康樂發展用途。為方便貨櫃的運送，現建議日後的河運處理貨櫃設施，應設於貨櫃碼頭內作為貨櫃碼頭處理貨櫃設施的一部分。因此，有關提供新河運設施的研究，會連同擬議的貨櫃碼頭可行性研究一併進行(見下文實施方針段)。

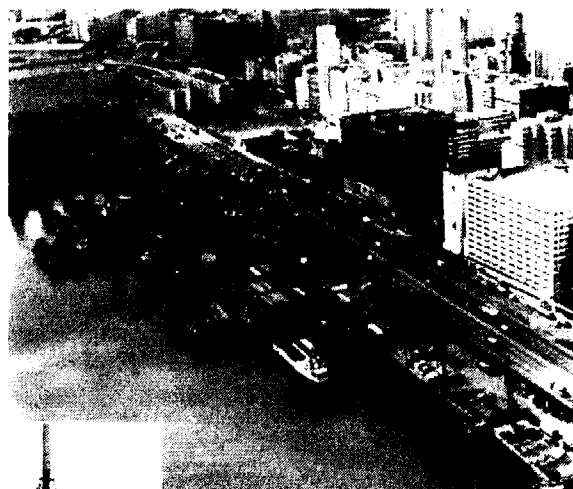


Public Cargo Working Areas (PCWA)

The emergence of the first RTT has provided an alternative to PCWAs to pick up both river and bulk cargo. It is recommended that no new public cargo working area should be provided except for the re-provisioning of displaced facilities. However, finding replacement sites are extremely difficult now within the Victoria Harbour. Progressive implementation of PCWA Management Reform should be continued with a view to enhancing the productivity of PCWAs and thus reducing their requirement in the inner harbour. Due to the competing waterfront uses and the need to provide land for major infrastructure, open space and tourism related developments, the Government has notified the operators of Wan Chai, Western District, Kwun Tong and Cha Kwo Ling PCWAs that these PCWAs would be affected by development plans/projects in the respective areas.

公眾貨物裝卸區

首個內河貨運碼頭的建成，為河運和散裝貨物的裝運提供了在公眾貨物裝卸區以外的另一個選擇。所以我們建議除重新安置現有設施外，不需要再闢設新的公眾貨物裝卸區。不過，在現時的維多利亞港內，已極難找到重置用地。公眾貨物裝卸區的管理改革，應繼續逐步實施，以提高此貨運設施的生產力，逐步減少它們在港口內港的需求。由於各類海旁用途競求土地，以及有需要提供土地進行主要基礎建設、闢設休憩用地，以及發展旅遊業，政府已通知灣仔、西區、觀塘及茶果嶺公眾貨物裝卸區的營運商，這些公眾貨物裝卸區會受到日後有關地區的發展計劃／工程項目影響。





Requirement of Other Port Related Facilities

Port Back-up (PBU) Land

Gross land area taken up by PBU uses has now stabilized, and even declined from 364 ha in 1997 to 331 ha in 2000¹. It is estimated that the current and planned supply of PBU land could meet the demand for the next decade².

It is worth to note that efforts over recent years have helped to reduce the area of off-port problematic sites, and improve the environmental aspects. Sites in suitable locations, including those in Kwai Chung, Tsing Yi and North Western New Territories, have been zoned for PBU uses, or tendered out for PBU uses through Short Term Tenancies. Supply of off-port PBU land would also come from temporary permissions through the planning application system, under which each application would be considered on its individual merits. For future container terminal, additional PBU land would be planned near to the new port facilities. In the long term, it is expected that some PBU services would be located in the Mainland.



其他港口相關設施的需求

港口後勤用地

近年港口後勤用地所佔土地的總面積日趨穩定，甚至已由一九九七年的 364 公頃減至二零零零年的 331 公頃¹。估計現有及已規劃提供的港口後勤用地，可以應付未來十年的需求²。

值得注意的是，我們近年所作的努力，有助減少有問題的港口後勤用地的面積和改善環境。當局又把合適的地點，包括位於葵涌、青衣和新界西北的土地，劃為港口後勤用途，或以短期租約方式經招標程序出租作港口後勤用途。另一方面，供應港口後勤用地，亦可透過規劃申請程序發出臨時規劃許可；根據這個程序，當局會個別考慮每一宗申請。當局計劃在日後興建的貨櫃碼頭附近提供更多港口後勤用地。長遠而言，預料有些港口後勤服務會遷往內地。

1 Source : Survey on Container Back-up Land Use, 1998 and 2000, TFB, LandsD.

資料來源：貨櫃後勤土地用途調查，1998 及 2000 年，地政總署清理環境專責組。

2 Source : Study on Port Back-up Facilities and Land Requirements, 2000, PMB.

資料來源：港口後勤設施及土地需求研究，2000 年，港口及航運局。

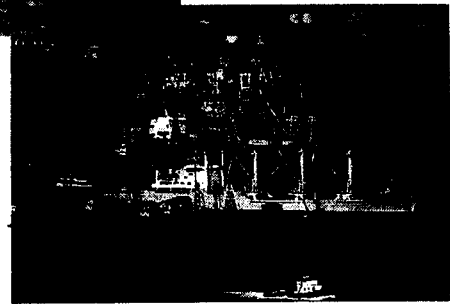


Buoys and Anchorages (B&A)

There are at present 59 buoys and 11 anchorages designated for cargo working. The current demand represents about 50% of the supply and it is estimated that the surplus will drop to 20% by 2020. In view of this, it is recommended that the utilization of B&A should be further improved.

浮標和碇泊處

本港現有 59 個浮標和 11 個碇泊處供船隻作貨運作業之用。目前的需求約佔設施供應能力的 50%。估計到二零二零年，設施供應能力過剩的比率會跌至 20%。因此，我們建議有進一步改善浮標和碇泊處的使用情況之必要。

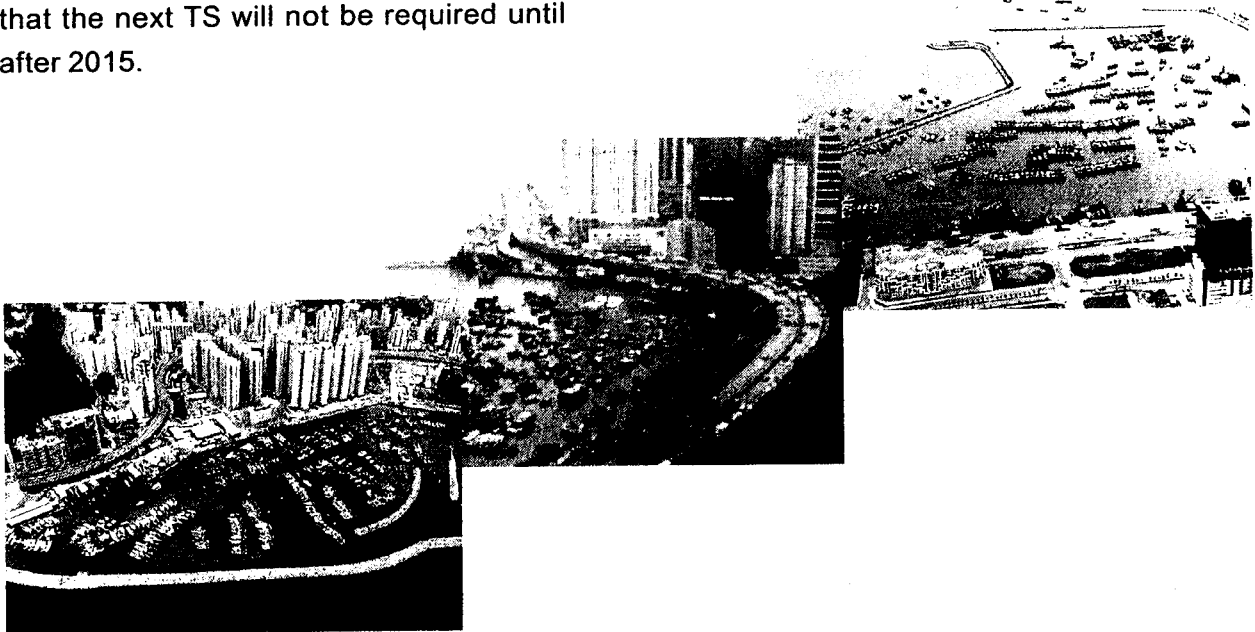


Typhoon Shelter (TS)

The PADS had recommended the development of TS at Hei Ling Chau, Siu Lam and Peng Chau to cater for the shortage. With the commissioning of the Hei Ling Chau TS last year, it is estimated that the next TS will not be required until after 2015.

避風塘

「港口及機場發展策略研究」曾建議在喜靈洲、小欖和坪洲闢設避風塘，以解決避風塘不足的問題。喜靈洲避風塘於去年開始使用後，估計本港直至二零一五年後才再需要闢設新的避風塘。



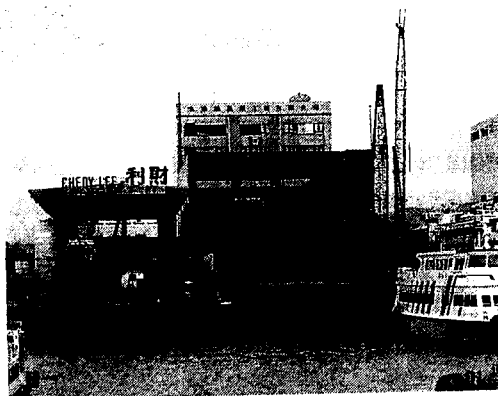
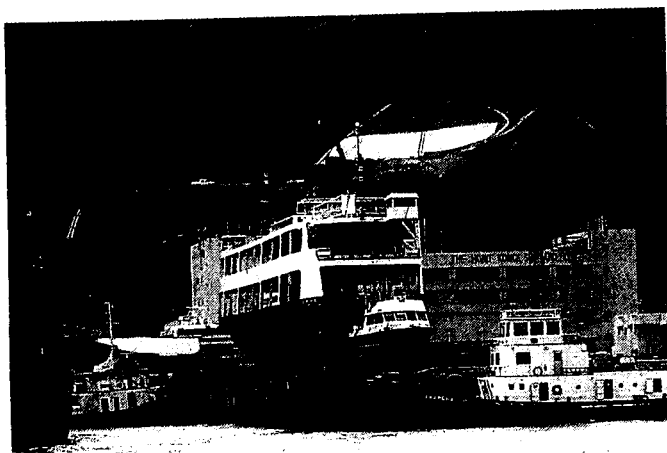


Ship Repair Yards

It is found that the business of local ship repair yards have been declining over the past few years, mainly due to the competition from the Mainland. At present, the local ship repair industry has a 46% excess capacity and the excess is expected to gradually increase to 53% by 2016. There is no plan to introduce new sites for ship repair yards.

船廠

過去幾年來，本地船廠的業務日走下坡，主要原因是受到內地競爭的影響。目前，本地修船業的服務能力過剩，超過需求的46%，預料到二零一六年，服務能力過剩更會逐漸增至53%。因此，當局沒有計劃提供新的船廠用地。



Bunker Terminal and Bulk Cargo Terminal

The commercial viability and market demand for bunker terminals and bulk cargo terminals should be further assessed. Should there be a market demand in future, the land requirement and location for such facilities would be further studied. Possible sites include Tuen Mun Area 38 and Tsing Yi Island.

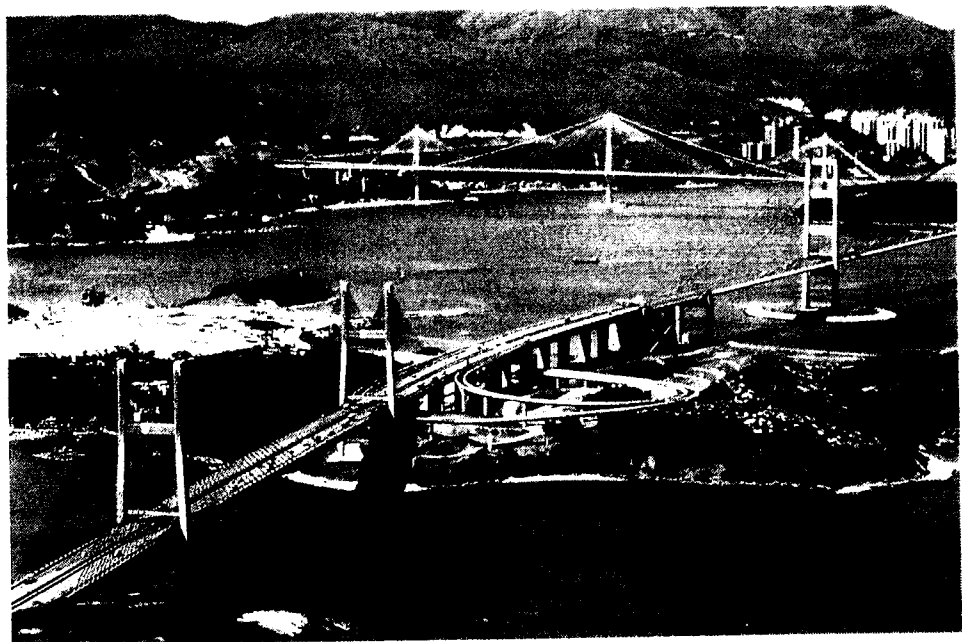
添加燃料碼頭和散貨碼頭

添加燃料碼頭和散貨碼頭的商業可行性和市場需求應再作評估。日後如有市場需求，當局會進一步研究這些設施的土地需求和選址，當中可能包括屯門第38區及青衣島。



Logistics Facilities

In his 2000 Policy Address, the Chief Executive announced his vision to develop Hong Kong's logistics services to serve the entire PRD region. Recognising the complementary role of logistics facilities and port development, the "Study to Strengthen Hong Kong's Role as the Preferred International and Regional Transportation and Logistics Hub in Asia" commissioned by the Port and Maritime Board was to assess, inter alia, the development potential for the establishment of "Value Added Logistics Parks"³. Subject to confirmation of commercial viability and market demand, identifications of location for such facility would be undertaken. At present, the Hong Kong International Airport has already awarded development rights for a logistics center on the airport island. Other possible sites including the back-up land adjacent to CT9, Tuen Mun Area 38 and Tsing Yi Island could also be considered for logistics development.



物流設施

行政長官在發表他的二零零零年施政報告時表示，他計劃發展香港的物流業，為整個珠江三角洲地區提供服務。基於物流設施與港口發展的關係密切，港口及航運局所進行的「如何加強香港作為全球及區域首選的亞洲區運輸及物流樞紐地位研究」的其中一個目的，是評估發展「增值物流園」³的可能性。如果這類設施證實在商業上是可行的而且具市場需求，當局將會就其選址作進一步研究。除香港國際機場已批出一個位於機場內的物流中心發展權外，物流園的其他可能選址包括九號貨櫃碼頭旁的後勤用地、屯門第38區和青衣島。

³ Value Added Logistics Parks not only provide conventional warehousing services but perform value added logistics activities, time sensitive processing and e-commerce. This requires the Value Added Logistics Parks to be served by multiple (land, sea, air) transportation modes.

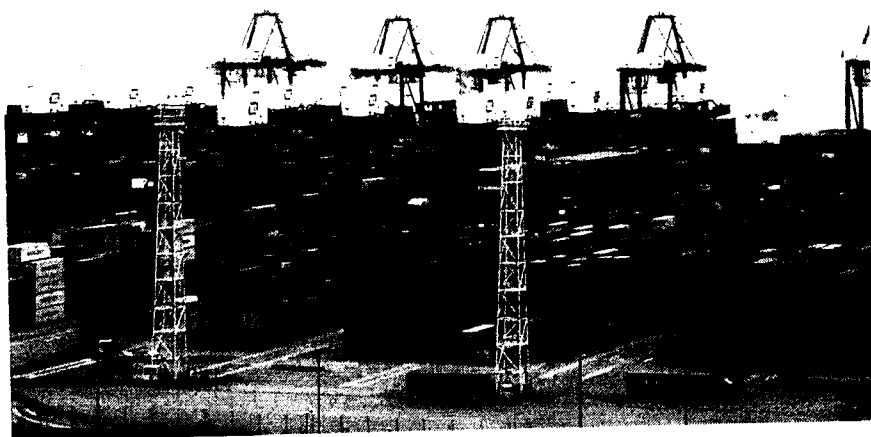
增值物流園不僅提供一般的存倉服務，而且提供各種物流增值服務、時間必須準確的貨物處理服務及電子商貿服務。要提供這些服務，增值物流園須有多種交通運輸（海陸空聯運）的配合。



Identification of Sites for New Container Terminal

Based on the findings of PCF 2000/01, it is anticipated that new container terminal berths will be required towards the end of this decade, new river trade berths will not be required until the next decade, and there is no immediate demand for other port and port-related facilities.

In view of the growing public concern on large-scale reclamation and environmental impacts, further port development in Hong Kong could be a contentious issue, albeit the port can bring in substantial economic return. Meanwhile, we should explore ways to enhance the productivity of the Kwai Chung



Container Port Basin to ensure that the current assets can be used to their full productivity. A task force is recommended to be set up by the Port and Maritime Board and the Hong Kong Container Terminal Operators Association (HKCTOA) to look into the issue. On the other hand, although we need not commit ourselves to build another container terminal for the time being, we need to continue the planning process to identify suitable sites for future use. The associated impacts should be critically assessed and timely adjustments should be made on the pace of development whilst ensuring that sufficient port facilities are available in time to handle the cargo passing through the Hong Kong port.

Given that the planned container terminal sites at North Lantau have been taken over by the Disney Theme Park, new potential sites for container terminal development would need to be identified. To this end, a preliminary territorial site search has been conducted based on the information contained in the previous PADS and a preliminary study of the coastal areas. After some initial assessment and screening of several potential sites, the following four sites are shortlisted for more detailed assessment (Locations shown in Plan 1) :

-  West Tuen Mun
-  North-west Lantau
-  East Lantau
-  South-west Tsing Yi



物色新貨櫃碼頭選址

根據「香港港口貨運量預測二零零零／零一」的估計結果，預料在未來十年之末期，我們便需要一個新的貨櫃碼頭泊位，而新的內河貨運泊位將會在未來十多二十年後才会有需求，而對其他港口及相關設施，則沒有即時的需求。

大型填海計劃及其帶來的環境影響日益受到市民關注，儘管港口貨運服務能帶來可觀的經濟回報，但進一步發展港口卻可能引起公眾爭議。同時，我們亦應探討提高葵涌貨櫃港區生產力的方法，以確保可以充份發揮現有設施的生產能力。當局建議由港口及航運局和香港貨櫃碼頭商會成立一個專責小組，負責研究這課題。另一方面，雖然我們目前無須作出確實決定去興建另一個貨櫃碼頭，但仍有需要繼續進行規劃，以物色適合的用地供日後興建貨櫃碼頭使用。我們應嚴格評估各方面有關影響，並按需求調整發展步伐，並同時確保能按時提供足夠的港口設施，以處理運經本港港口的貨物。

大嶼山北部原先計劃發展為貨櫃碼頭的 land 現今已改為興建迪士尼主題公園。我們有需要另覓貨櫃碼頭選址。為此，當局已根據先前「港口及機場發展策略」載述的資料及對海岸地區進行的初步研究，初步在全港各處嘗試物色合適的土地。對一些有初步可能性的選址，我們作出概略的首階段評估和篩選後，揀選了以下四個地點作較詳細的評估(選址位置見圖一)：

- ☛ 屯門西
- ☛ 大嶼山西北
- ☛ 大嶼山東
- ☛ 青衣西南

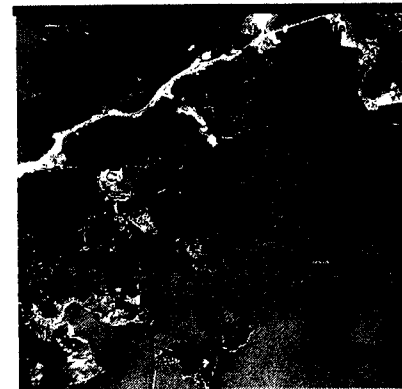
West Tuen Mun 屯門西



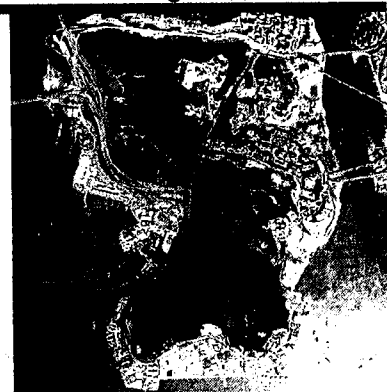
North-west Lantau 大嶼山西北



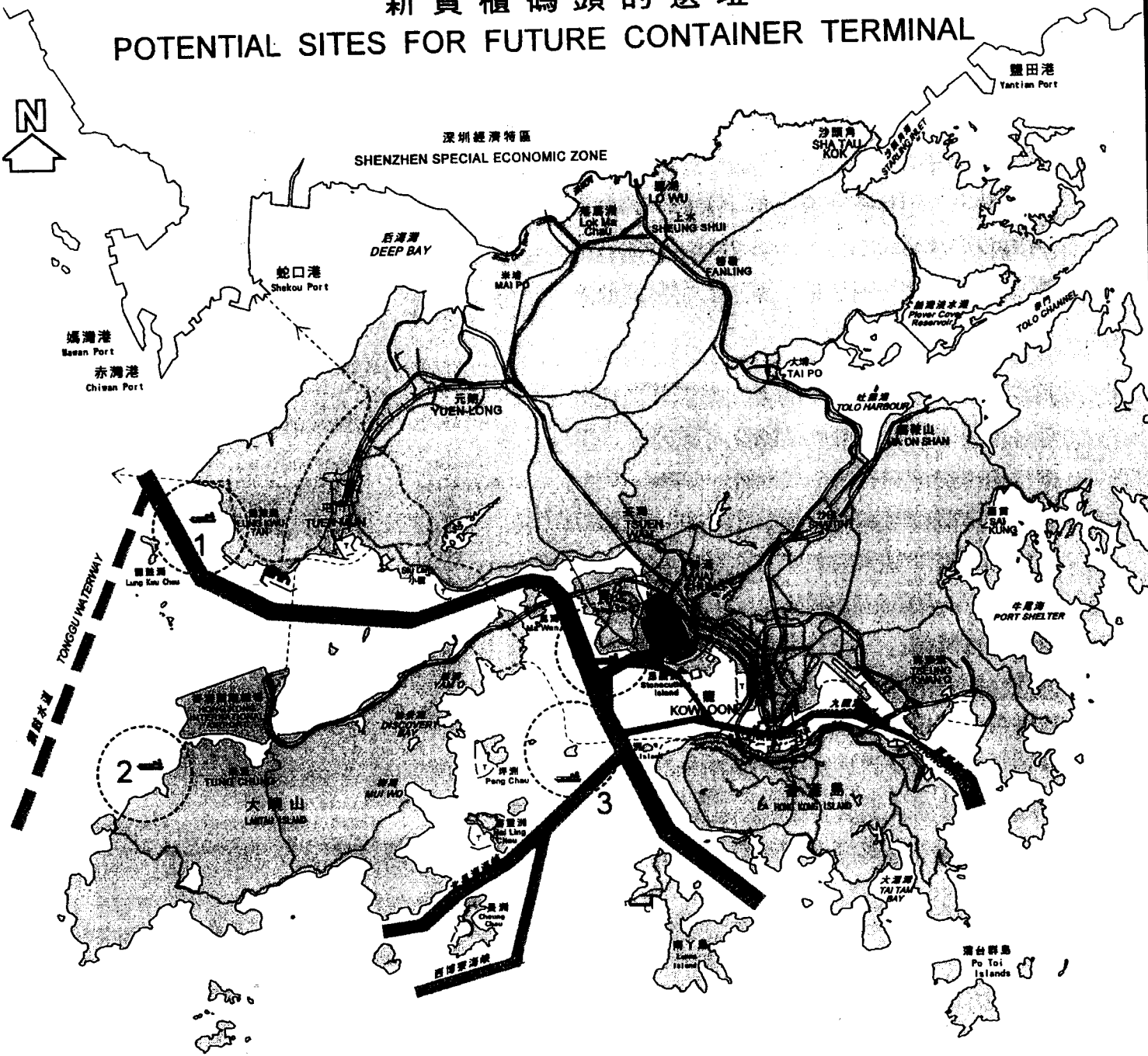
East Lantau 大嶼山東



South-west Tsing Yi 青衣西南



新貨櫃碼頭的選址 POTENTIAL SITES FOR FUTURE CONTAINER TERMINAL



圖例 LEGEND

現有及已承諾的設施 EXISTING/ COMMITTED FACILITIES

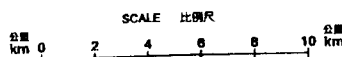
- 主要公路
PRINCIPAL HIGHWAYS
- 主要鐵路
PRINCIPAL RAILWAYS
- 船舶航道 (現有)
SHIPPING CHANNEL (EXISTING)
- 防波堤及避風塘
BREAKWATER / TYPHOON SHELTER
- 貨櫃碼頭
CONTAINER TERMINAL
- 港口後勤用地
CONTAINER BACK-UP AREA
- 內河貨運碼頭
RIVER TRADE TERMINAL
- 中流作業用地
MID-STREAM SITE

建議設施 PROPOSED FACILITIES

- 主要公路
PRINCIPAL HIGHWAYS (UNDER STUDY)
- 主要鐵路
PRINCIPAL RAILWAYS (UNDER STUDY)
- 船舶航道
SHIPPING CHANNEL

待進一步研究的用地及設施 PROJECT TO BE FURTHER EXAMINED

- 可能的港口發展地點
POTENTIAL PORT DEVELOPMENT AREA
- 1 屯門西
WEST TUEN MUN
- 2 大嶼山西北
NORTH-WEST LANTAU
- 3 大嶼山東
EAST LANTAU
- 4 青衣西南
SOUTH-WEST TSING YI





A preliminary assessment of these four shortlisted sites based on the following set of criteria have been carried out. The results are shown in Table 4. The sustainability principals have been applied in the evaluation process of different site options.

- **Locational Preference, Land and Marine Access:** container terminal development at the site should be compatible with the surrounding land-uses, the site should have good intermodal links, good road access and easy access to deep marine channel;
- **Environmental and Ecological Impact:** the site should be environmentally acceptable;
- **Size and Development Potential:** the site should be able to accommodate future container vessels and have potential for expansion. Sites with sufficient land for off-terminal back-up and logistics centers development are considered to be more attractive;
- **Economic Consideration and Investment Attractiveness:** the site should be able to increase our port's relative competitiveness and be attractive to potential investors; and
- **Programme and Implementation:** the site should be implementable and the development of the port facilities should be available in time to meet forecast demand.

我們已根據下列準則對揀選的四個選址作一些初步評估，結果載於表四。此項初步評估是遵照可持續發展的原則進行。

- **水陸交通是否適合碼頭發展：**貨櫃碼頭發展的選址應與四周的土地用途相配合及協調，亦應具備完善的交通聯運服務、良好的陸上通路和方便通往深水海上航道的海上通道；
- **環境和生態影響：**選址對環境及生態的影響應在可接受的範圍內；
- **面積和發展潛力：**選址應能容許未來新型號的貨櫃船靠泊，並且具擴展的潛力。如在碼頭外圍有足夠土地供後勤及物流中心發展之用，這樣的選址會較優勝；
- **經濟考慮和投資吸引力：**選址應能促進本港港口的相對競爭力，並能吸引準投資者；及
- **發展進度和實施：**選址應位於一個沒有太大發展障礙和容易發展的地點，並可按時發展港口設施以應付預測的需求。



Table 4 : General Performance of the Four Potential Sites

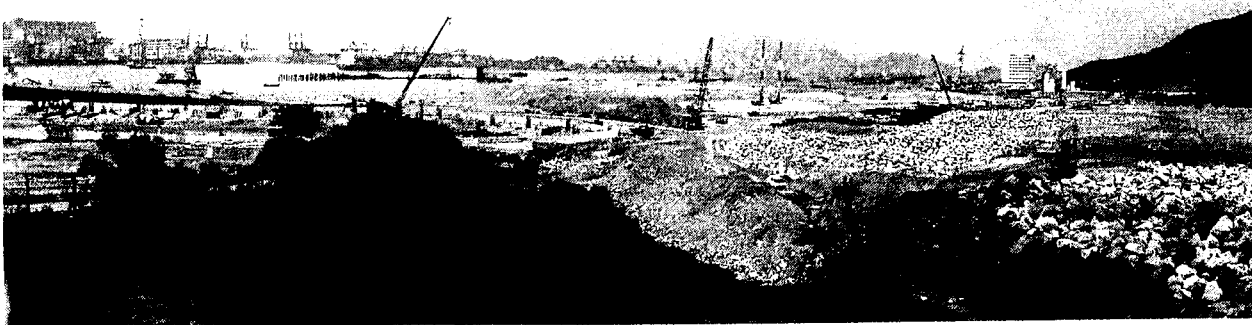
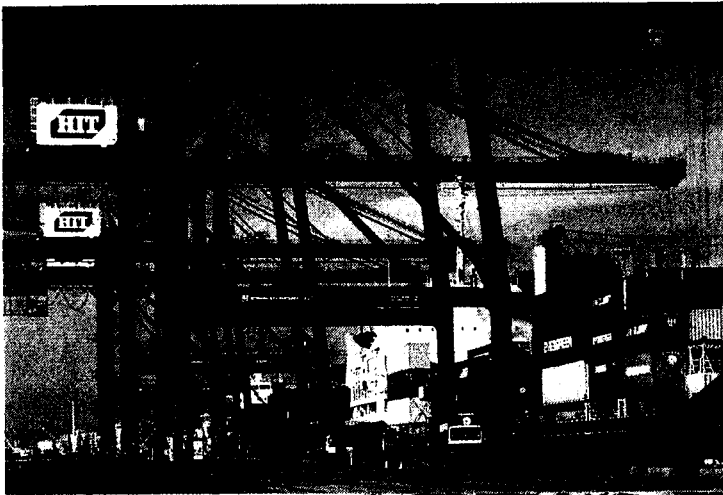
表四：四個選址的發展條件概覽

Site Criteria 選址準則	West Tuen Mun 屯門西	East Lantau 大嶼山東	North-West Lantau 大嶼山西北	South-West Tsing Yi 青衣西南
Locational Preference, Relationship with Adjacent Uses, Land and Marine Access 位置是否適合、 與毗鄰用途的關係、 水陸交通聯繫	Fair to Good 普通至良好	Poor 差	Poor 差	Good 良好
Environmental and Ecological Impact 環境和生態影響	Medium to High 中至高	High 高	Significant 極高	Medium to High 中至高
Size and Development Potential 面積和發展潛力	Fair 普通	Fair 普通	Fair to Poor 普通至差	Poor 差
Economic Consideration and Investment Attractiveness 經濟考慮和投資吸引力	Fair 普通	Fair 普通	Fair 普通	Fair 普通
Programme and Implementation 發展進度和實施	Fair 普通	Fair 普通	Poor 差	Very Poor 甚差



To ensure that the sustainable development and economic implications of container terminal development are fully examined, and to assess if the physical and environmental capacities of Hong Kong could cater for further port development, a follow-up study is required to examine in detail and recommend the best strategic option for developing and locating Hong Kong's new container terminal facilities (see Way Forward below).

我們必須詳細研究貨櫃碼頭發展對可持續發展及經濟的影響，以及衡量本港的土地資源及環境承受能力可否應付進一步的港口發展。因此，我們須有一個跟進研究，以詳細評估及建議在本港發展及選地興建新貨櫃碼頭設施的最佳策略方案，(見下文實施方針段)。

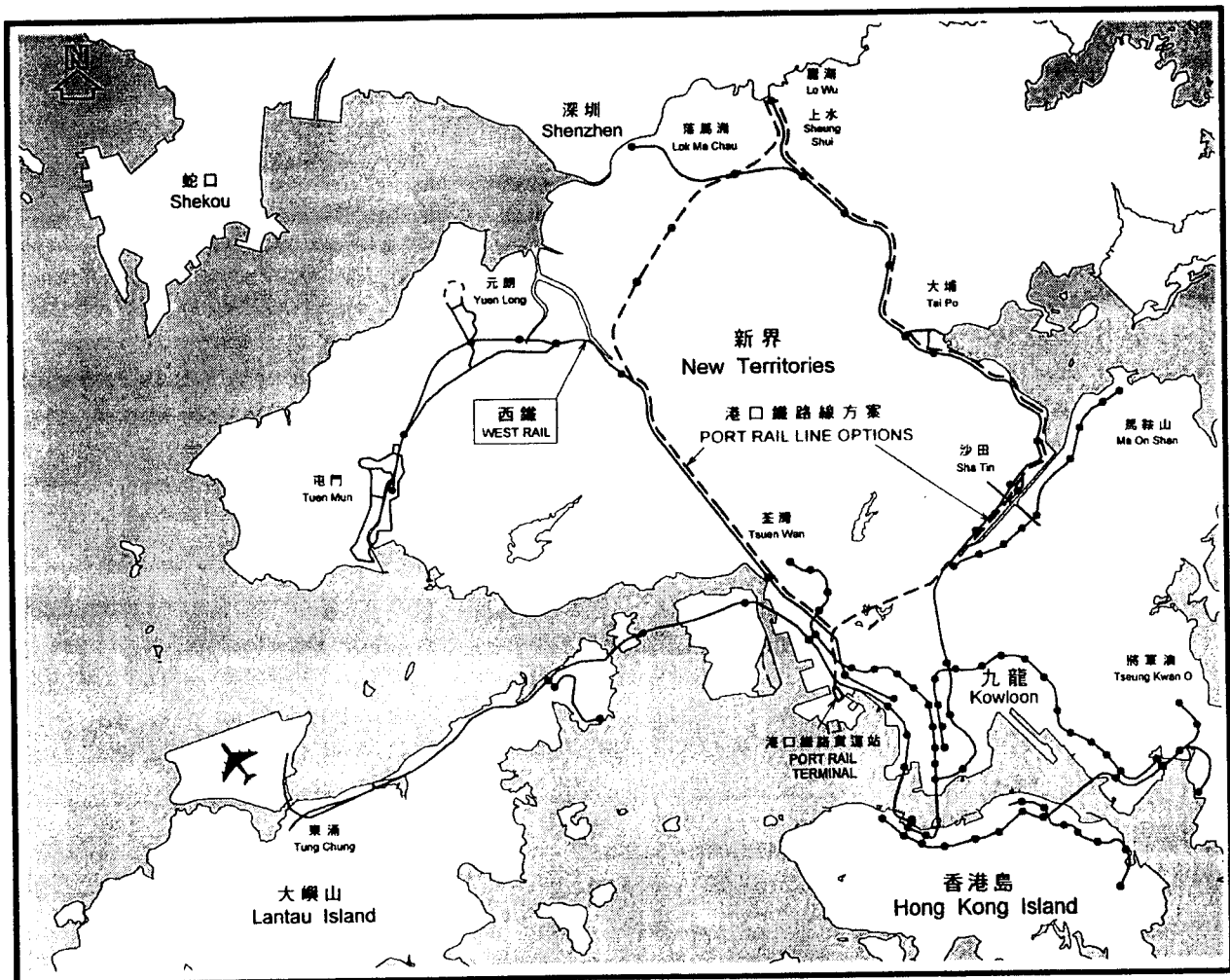




Intermodal Links to the Port

Hong Kong's port handles 80% of Hong Kong's total freight. It is estimated that close to 80% of our container cargo come from the PRD Region of the Mainland. To maintain our competitive edge, we need to monitor the development and progress of various road, waterway and rail link projects that can increase the connectivity of our port to our cargo sources.

Strengthening of the railway link will provide an opportunity for Hong Kong to gain deeper penetration into the inland cargo sources further north of the PRD Region. A Port Rail Line (PRL) has been proposed in the Railway Development Study 2000 (RDS-2000) which was completed in mid-2000. Kowloon-Canton Railway Corporation is examining its viability based on commercial consideration and the best way to take forward the proposal for the development of the PRL. Meanwhile, an administrative rail reserve has been drawn up to protect the alignment of the proposed rail.

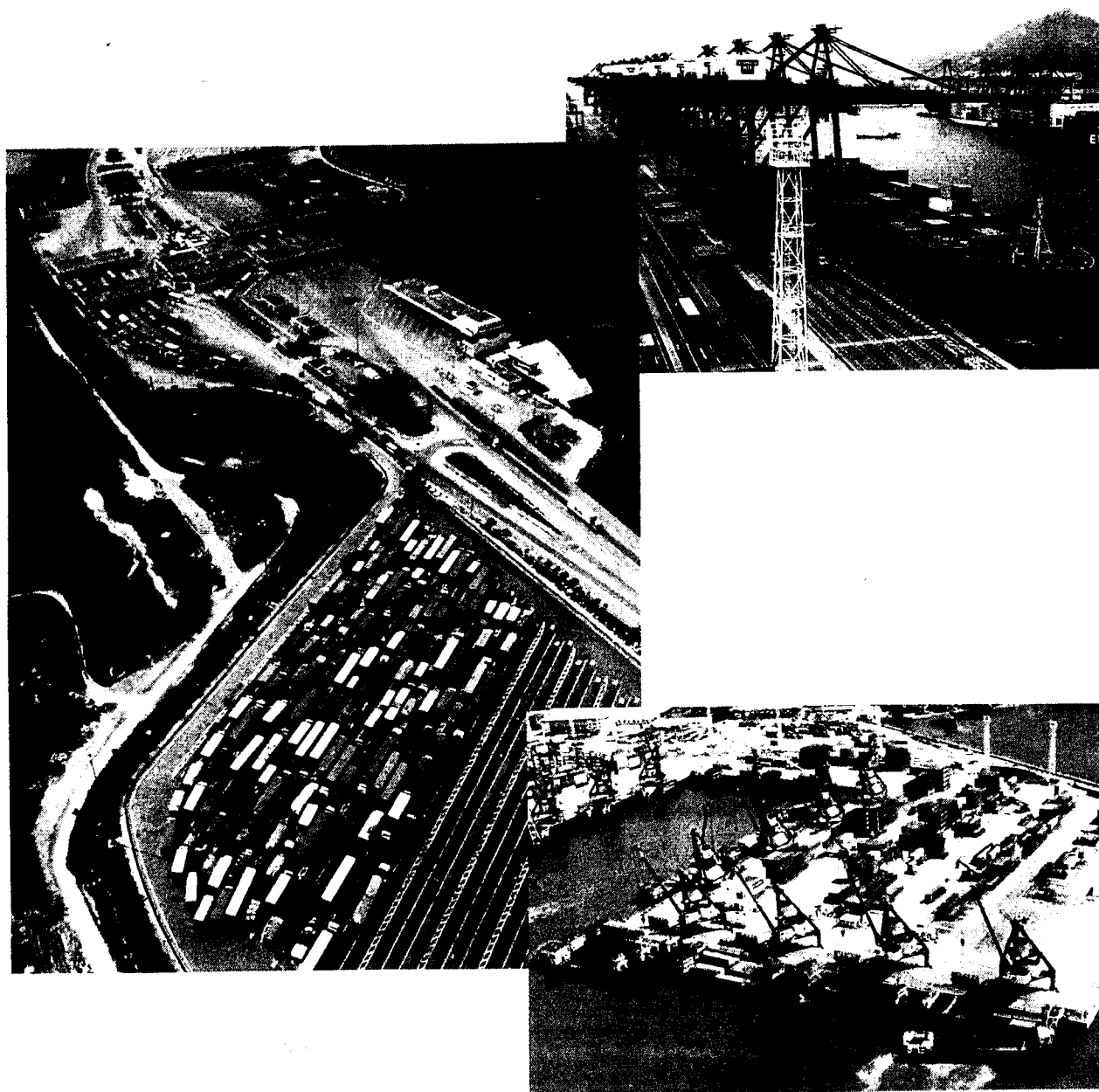




港口的各種交通連繫

本港的總貨運量約 80% 是經港口處理。而估計我們處理的貨櫃貨物，接近 80% 是來自內地珠江三角洲地區。為維持本港的競爭力，我們有需要密切注意本港港口與貨源區的道路、航道和鐵路線發展計劃和進度，以改善本港港口與貨源區的交通連繫。

為使香港有機會爭取珠江三角洲地區以北之內陸的貨源，我們有必要加強鐵路的連繫。在二零零零年年中完成的《鐵路發展策略 2000》曾建議興建一條連接港口鐵路線。九廣鐵路公司現正根據商業考慮，研究這條港口鐵路線建議的可行性，以及落實這項建議的最佳方案。同時，當局已藉行政措施劃定這條鐵路線的專用範圍，以保護擬議鐵路的路線不受其他發展影響。





Long Term Strategic Development Issues

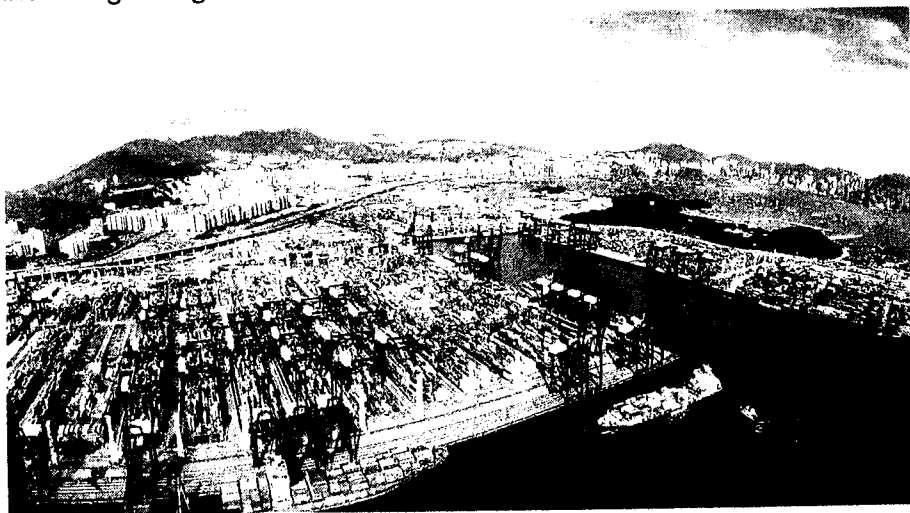
In the long term planning of Hong Kong's port facilities, a number of strategic development issues would need to be monitored and assessed. These include :-

- Mainland's accession to WTO which would bring more trade and investment flows to the Mainland in the long term and hence would increase the area of cargo source and the volume of cargo flow passing through the Hong Kong port. Simultaneously, WTO accession would also speed up custom reforms in the Mainland, which would strengthen the competitiveness of Shenzhen ports.
- Development of the Western Region in the Mainland would bring about improvement to transport infrastructure and growth of manufacturing and trading activities in the Western Province in the long term. This would provide more business opportunities to Hong Kong businessmen and hence facilitate more cargo flow between these areas and Hong Kong.

長遠的策略性發展課題

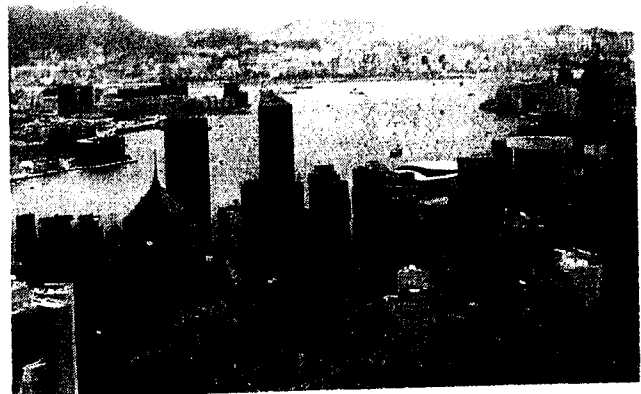
為香港的港口設施進行長遠規劃時，我們須密切留意和評估一些對策略性發展有影響的課題，當中包括：

- 長遠而言，中國加入世貿會為內地帶來更多貿易和吸引更多外國投資，因此帶來之經濟發展會擴闊香港貨源地區的範圍和增加運經香港港口的貨物量。同時，加入世貿亦會促使內地加快海關改革，從而加強深圳港口的競爭力。
- 開發內地西部的政策，長遠而言可以促進這些地區運輸基礎建設的發展及製造業和貿易的增長。這些轉變都會為港商提供更多商機，同時這些地區與香港之間的貨物運輸亦會因此增加。
- 內地(尤其是珠江三角洲地區)運輸基礎設施的發展，會加強我們與內地之間的連繫，並有助促進貨運業。





- Transport infrastructure developments in the Mainland especially in the PRD Region would reinforce our linkages with the Mainland and facilitate cargo flows.
- Maintaining constant dialogue and communication with Mainland planning, port, transport and customs authorities, especially Shenzhen authorities, is essential. It helps both sides to understand more about each other's future planning needs.
- Sustainable development is the key to a good quality of life. The future port development strategy would need to be based on the principle of sustainable development which seeks to balance social, economic and environmental needs. The sustainability implications of any future port expansion plans would need to be examined in the planning and development process.
- Hong Kong 2030 : Planning Vision and Strategy (HK2030) Study being carried out by the Government to update the previous Territorial Development Strategy Review (completed in 1998). The HK2030 Study provides a long term land use-transport-environment planning framework for Hong Kong in the next 30 years. The PDSR 2001 will form an input to scenario testing in the HK2030 Study.
- 我們必須與內地（尤其是深圳市政府）的規劃、港口，交通及海關當局經常保持對話和溝通。此舉有助雙方加深了解對方日後的規劃需要。
- 可持續發展的原則是平衡社會、經濟和環境的需要，它是維持良好生活質素的關鍵。未來的港口發展策略有需要根據這些原則來制定。同時，日後任何港口擴展計劃，我們有需要在其規劃及建設過程中，就計劃對可持續發展的影響進行研究。
- 政府正在進行「香港 2030：規劃遠景與策略」(下稱：「香港 2030」)的研究，藉以修訂先前於一九九八年完成的「全港發展策略檢討」。「香港 2030」研究是為香港的未來 30 年作出一個長遠的土地用途-運輸-環境的規劃大綱。「二零零一年港口發展策略檢討」的研究結果，會納入「香港 2030」研究的發展假設中進行測試。





Way Forward

A follow-up study should be commissioned to recommend the best strategic option for locating and developing Hong Kong's new container terminal facilities outside the Kwai Chung basin. Further river trade facilities should be incorporated in the future container terminal development. This study should also take into account rapidly changing developments in the shipping and logistics industry and the demand from port users for the capability to handle mega vessels and for a "total logistics solution" to meet their logistics needs within the global supply chain.

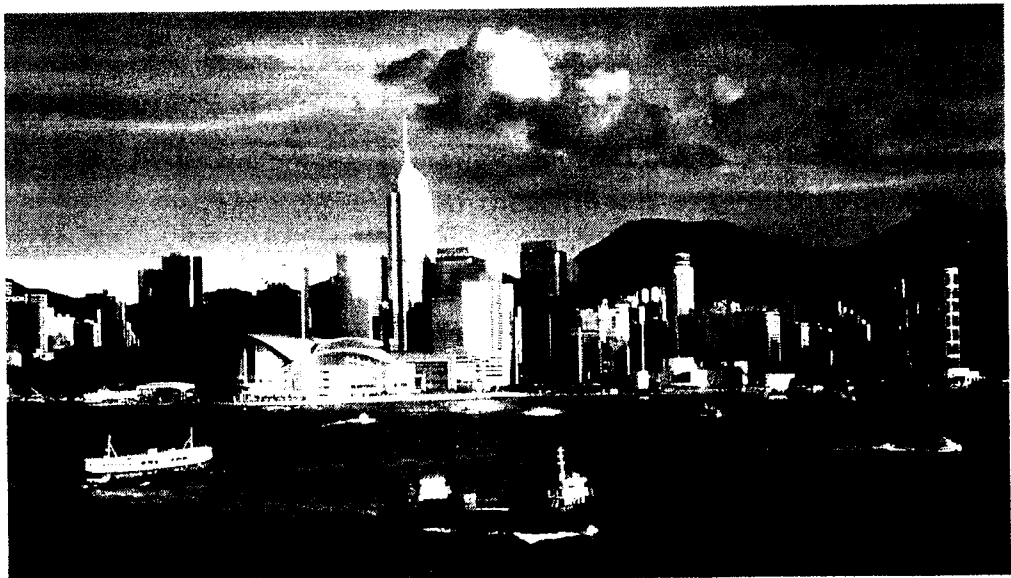
Market conditions are changing fast. Uncertainties in forecasting port cargo volume mean that timely knowledge is critical to successful port planning. It is proposed that the next review of PCF and PDSR should be updated every two years instead of three. The PCF and PDSR are suggested to be carried out in 2003 so that the timing of the requirement for new container terminal development could be further assessed before a final decision is made on plan for new container terminal facilities.

實施方針

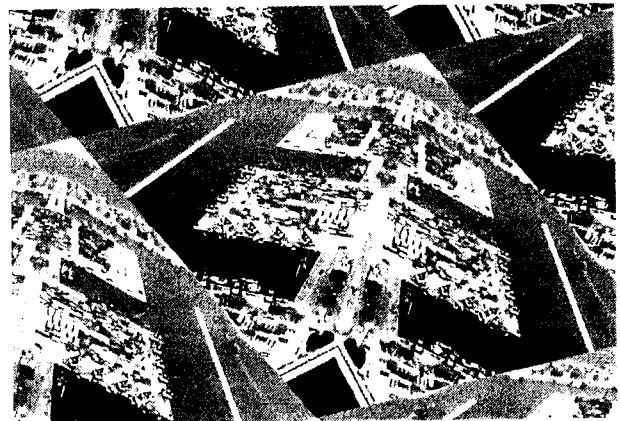
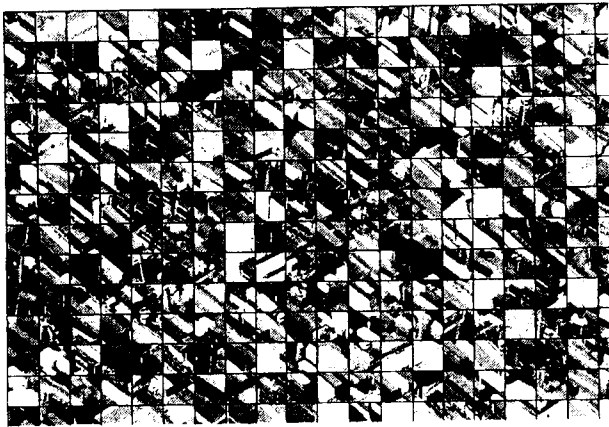
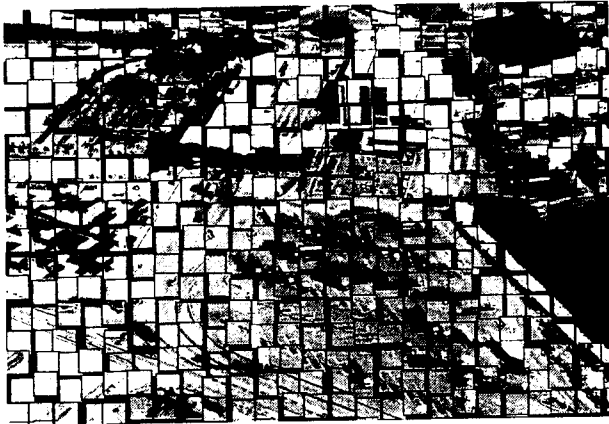
我們建議一個跟進的研究應展開，就在葵涌港區以外地方尋覓地點發展新貨櫃碼頭設施，建議最佳的發展方案，日後河運處理貨櫃設施亦應與貨櫃碼頭一併發展。這項研究亦應顧及其他因素如航運業與物流業急劇轉變的發展，用戶對未來港口設施的要求以應

付未來巨型貨輪，以及提供「整體物流管理解決方案」以應付全球供應鏈體系內用戶對物流服務的要求。

市場情況瞬息萬變。港口貨運量的預測存在很多不明朗因素，因此在進行港口規



劃時，掌握市場變化的資訊是成功的關鍵。我們建議，港口貨運量預測和港口發展策略檢討，應由每三年修訂一次改為每兩年修訂一次。我們並建議在二零零三年進行下一次的港口貨運量預測和港口發展策略檢討，以便在決定興建新貨櫃碼頭設施作出任何定案前，對新貨櫃碼頭發展的需求時間，作進一步評估。



經濟局港口及航運部
Economic Services Bureau
Port and Maritime Division



規劃署
Planning Department



海事處
Marine Department