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LEGISLATIVE COUNCIL
PANEL ON DEVELOPMENT

Overview of Land Supply

PURPOSE

This paper provides Members with an updated overview on the Government's multi-pronged strategy on land supply and the latest progress of the various initiatives for land supply over the short, medium and long term.

LAND FOR HONG KONG'S DEVELOPMENT

2. Land is pivotal to sustaining Hong Kong's housing, economic and social development. Supplying Hong Kong with adequate land that it needs to house our growing population, to support our continued economic development and to provide the necessary infrastructures and facilities tops the agenda of the Government. Given the unique and mountainous topography of our city and the major shifts in demographic and economic structures our city has undergone over the decades, planning and land development have been challenging, not only in ensuring adequate and timely supply of land in tandem with population and economic growth, but also in providing land for the mix of different uses.

3. From the 1970s to 1990s, we saw a steady and substantial growth in the area of developable land in Hong Kong mainly as a result of the large-scale new town developments through reclamation and land formation in the rural New Territories (NT) so as to cater for the housing and social needs of the rapidly growing population[1] and to cope with the rapid and diversified growth of the economy[2]. Since the 1970s, the Government has developed nine new

[1] Over the three decades between 1970 and 2000, the total population in Hong Kong had increased from about 3.96 million to about 6.67 million, or by about 2.71 million/68%, at an average of about 90 000 or 1.8% per annum. The number of households had been increasing at an even higher rate: between 1971 and 2000, the number of domestic households increased from about 0.861 million to about 2.04 million, or by about 1.18 million/1.4 times, at an average of about 41 000 or 3.0% per annum, due to the rapid decline in average household size from 4.5 persons to 3.3 persons during the period.

[2] Over the three decades between 1970 and 2000, the GDP in Hong Kong had increased from about HK$200.9 billion to about HK$1,342.8 billion, or by about 5.7 times or at about 6.5% per annum.

towns, namely Tsuen Wan, Sha Tin, Tuen Mun, Fanling/Sheung Shui, Yuen Long, Tai Po, Tin Shui Wai, Tseung Kwan O and Tung Chung. It has been over two decades since our last new town (Tung Chung) was planned and built.

4. In response to the slump in Hong Kong's economy and property market during the late 1990s and early 2000s due to the Asian Financial Crisis and the subsequent economic downturn, a series of property market stabilisation measures were taken in 2003 and 2004. As a consequence, land supply and housing development were curtailed and many land planning and development initiatives recommended in the Territorial Development Strategy Review completed in 1996 were shelved. Land development through reclamation and site formation had drastically slowed down since then, which led to a significant reduction in the supply of new developable land. Taking reclamation as an example, between 1985 and 2000, we had created over 3 000 hectares (ha) of land through reclamation, i.e. an average of about 200 ha (2 km^2) per annum. Over the period between 2000 and 2015, only about 690 ha of land, or an average of some 40 ha per annum, were reclaimed.

5. The slowdown in land planning and development since early 2000s has made supply of adequate land for various purposes challenging nowadays, especially in catching up with the demand for land for housing development. ***Annex A*** shows past statistics and latest projections of Hong Kong's population, domestic households, household size and Gross Domestic Product (GDP), as well as past figures on other drivers and indicators of land demand. ***Annex B*** shows past figures on land formation, reclamation, land utilisation, stock and vacancy rates of various types of property as drivers and indicators of land supply. Comparison between the two sets of figures suggests that housing land and flat supply has lagged behind the growth in population and households since the new millennium. Likewise, the growth of non-domestic floorspace has apparently slowed down much more significantly and by a much greater proportion than the slowing down of the rate of our economic growth.

DEMAND FOR LAND

6. Land is required not only for housing the population, but also for meeting the diverse needs of the society including "Government, Institution & Community" (G/IC) uses, open space, economic activities, roads and railways, infrastructural support, as well as for conservation, recreation and public enjoyment. Land demand is thus driven and determined by a host of demographic, social and economic factors, population growth being but only one of the drivers. For example, household size has declined from 3.3 persons

to 2.9 persons between 2000 and 2015. It follows that more domestic units would be required to accommodate the increasing number of smaller households even if the total population had remained the same. Public rental housing (PRH) is a case in point: between 2000 and 2015, the number of PRH units has increased by about 95 000 or 14% (from about 688 000 units to about 783 000 units), but the population living in PRH had declined by about 80 000 or 3.6% (from about 2.22 million to about 2.14 million), largely due to the decline in average household size from 3.5 persons to 2.7 persons for PRH during the same period.

7. According to the Census and Statistics Department's (C&SD) latest population and household projections, Hong Kong's population and households are projected to continue to increase, albeit at a slower pace, and the declining trend in average household size will continue. Thus even though the population is projected to increase only at an average annual rate of 0.4% until its peak at about 8.22 million in 2043 and then to decline slowly to 7.81 million in 2064, the number of households will increase at a faster rate than the population due to the declining average household size, from 2.43 million in 2014 to 2.93 million in 2044, by about 500 000 or at an average annual rate of 0.6%, and thereafter decreasing only slightly to 2.91 million in 2049. It should be noted that this represents only the baseline case of C&SD's population projections, whereas C&SD's high population projections indicates that the population would increase to 8.94 million in 2043 and continue to increase to 9.12 million in 2064.

8. At the same time, our population is rapidly ageing – under the baseline case, the proportion of elderly population (i.e. 65+) will increase from 15% in 2014 to 31% in 2043 and then 33% in 2064. Meanwhile, our workforce is projected to shrink starting from 2018. All these are expected to pose huge challenges and bring significant uncertainties to our society and economy. The Population Policy - Strategies and Initiatives announced in January 2015 recognised the demographic challenges and the resultant challenges to the economy and public finance, and put forward a number of initiatives that aimed at addressing such challenges. The latest population and household projections have not taken into account the effect of such initiatives. As these initiatives materialise and take effect, some of them, such as facilitating the return of the second generation of Hong Kong emigrants and attracting talents entered under the current admission schemes to settle in Hong Kong, are expected to have the effect of increasing the future population of Hong Kong.

9. A major challenge in land planning, development and supply is thus to plan for adequate land to meet current and anticipated demand, to provide

buffer to improve liveability and capture opportunities, and to allow for contingency to cater for future uncertainties and unforeseen circumstances. The ensuing paragraphs set out in detail the current state of land supply and the continued major sources of demand for land.

Housing

10. As the economy revives, property rent and price have picked up substantially in the past decade. According to the Rating and Valuation Department (RVD), the private domestic rental index peaked at 177.5 in September 2015 and remained high at 171.0 in November 2016; while the price index reached a record high of 306.6 in November 2016 after moderation between Q4 2015 and Q1 2016[3]. RVD's statistics also indicated a vacancy rate of about 3.7% as at end-2015 (or about 42 000 vacant private domestic flats), the lowest since 1997.

11. As a result of property market stabilisation measures in 2003 and 2004, new completion of private housing units[4] had contracted from around 26 000 in 2004 to 10 500 in 2007. With the gradual increase in housing land supply, new completion of private housing units had picked up to about 11 300 in 2015 and about 12 100 for the first 11 months of 2016. The projected supply from the first-hand residential property market for the coming three to four years reached 94 000 units as at end-2016, a record high since the first release in September 2004 of the quarterly statistics on supply.

12. On public housing, as at end-September 2016, there were about 152 500 general PRH applicants (i.e. family and elderly one-person applicants) and about 134 000 non-elderly one-person applicants under the Quota and Points System (QPS). The average waiting time[5] for general applicants was 4.5 years. Based on the latest information, the total public housing production

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[3] For comparison, the rental index was 73.6 and the price index was 61.6 in 2003, which were the lowest in the past 20 years.

[4] Private domestic units are defined as independent dwellings with separate cooking facilities and bathroom (and/or lavatory). Public sector developments, including domestic units built under the Private Sector Participation Scheme for subsidised sale, and all units built under the Home Ownership, Buy or Rent Option, Mortgage Subsidy, Sandwich Class Housing, Urban Improvement and Flat-for-Sale Schemes are not included. Besides, rental estates built by the HA and HS, units sold under the Tenants Purchase Scheme, and Government-owned quarters, and village houses are also excluded. Based on statistics by RVD.

[5] HA's target is to provide the first flat offer to general applicants at around three years on average. Waiting time refers to the time taken between registration for PRH and first flat offer, excluding any frozen period during the application period (e.g. when the applicant has not yet fulfilled the residence requirement; the applicant has requested to put his/her application on hold pending arrival of family members for family reunion; the applicant is imprisoned, etc.). The average waiting time for general applicants refers to the average of the waiting time of those general applicants who were housed to PRH in the past 12 months. The average waiting time target of around three years is not applicable to QPS applicants.

of the Hong Kong Housing Authority (HA) and the Hong Kong Housing Society (HS) in the five-year period from 2016/17 to 2020/21 is about 94 500 units, comprising 71 800 PRH units and 22 600 subsidised sale flats. This latest production forecast is higher than past forecasts of previous five-year periods starting 2012/13, 2013/14, 2014/15 and 2015/16.

13. As announced in the Long Term Housing Strategy (LTHS) Annual Progress Report 2016, the Government has updated the total housing supply target to 460 000 units for the coming 10 years (i.e. 2017/18 to 2026/27), with public housing accounting for 60%, i.e. 280 000 units, and private housing accounting for 40%, i.e. 180 000 units. The largest components of housing demand during the projected period are due to increase in number of households and the need to cater for inadequately housed households. Delivering the LTHS target will remain a huge challenge for the Government in view of the continued acute shortage of land supply, given the significant slowdown in land development in the past decade. We have to press ahead full steam to catch up on land supply to meet the housing demand of the Hong Kong community as projected.

14. For the longer term, our latest updating of the territorial development strategy, i.e. "Hong Kong 2030+: Towards a Planning Vision and Strategy Transcending 2030" (Hong Kong 2030+)[6] estimates that the total housing demand (i.e. gross demand for new housing units including redeveloped ones) for the period from 2016 to 2046 is about one million units, drawing reference from the methodology adopted for LTHS demand projection which has a projection horizon of 10 years. This includes 460 000 units for the first 10 years from 2016/17 to 2025/26 as announced in the LTHS Annual Progress Report 2015, and about 540 000 units for the period from 2026 to 2046 as estimated by the Planning Department (PlanD). For the latter period, apart from further increase in households, urban redevelopment is expected to become a major driver for housing demand.

15. It is estimated that, after taking into account the supply from the existing, committed and planned developments, together with redevelopment of existing built-up areas, broadly speaking there is still an anticipated overall housing land shortfall of about 200 ha (excluding land for transport, infrastructure and community facilities to support the population, as well as land for economic uses to provide job opportunities and necessary services) in the long run against the estimated land requirement for housing. It would also be

[6] Hong Kong 2030+ is jointly commissioned by the Development Bureau and PlanD. Its proposals are currently under public engagement until end-April 2017.

possible to consider room for improving the living space of housing units only if a surplus could be allowed in future land supply for housing development.

Economic Activities

16. Apart from housing land, we also need to provide land to meet the continued demand for more space for economic activities including land/space for commercial facilities and industrial development, so as to sustain Hong Kong's economic development, to capture new economic opportunities and to provide new employment opportunities. After a modest growth of 9% in real terms between 1997 and 2003, the GDP of Hong Kong had picked up and risen by about 40% in real terms between 2005 and 2015. During the same period, floor space for economic activities only recorded a modest increase. From 2005 to 2015, the total private office stock in terms of internal floor area (IFA) had increased by only about 15%. The vacancy rate of private offices, after soaring to a record high level of 14% in 2003, had been on a steady decline and reached 6.3% and 8.0% in 2014 and 2015 respectively. During the same period, the private office rental and price indices had been on a steady hike (from 78.1 and 99.3 in 2004 to 226.7 and 448.9 in 2015 respectively).

17. The private commercial stock (retail included)[7] had increased by about 15% over 2005 to 2015. After reaching its highest level of 10.8% in 2003 and 2004, the vacancy rate of private commercial stock had continued to decline and reached just 7.2%, 7.3% and 7.7% in 2013, 2014 and 2015 respectively. Similarly, the rental and price indices for private retail also continued to increase (from 92.8 and 119.3 in 2004 to 182.5 and 559.2 in 2015 respectively) during the same period. Meanwhile, the private flatted factories[8] stock had decreased slightly by 3.5% between 2005 and 2015, while its vacancy rate had declined from 8.7% in 2004 to 5.8%, 5.6% and 5% in 2013, 2014 and 2015 respectively. During the same period, the rental and price indices for private flatted factories had also been on a hike (from 77.3 and 88.6 in 2004 to 174.4 and 723.9 in 2015 respectively). Besides, the private storage stock had increased by about 7.2% during the same period, with its vacancy rate of 4.6%, 5.9% and 4.2% in 2013, 2014 and 2015 respectively.

18. PlanD engaged consultants to undertake the "Review of Land Requirement for Grade A Offices, Business and Industrial Uses" under Hong

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[7] Private commercial premises include retail premises and other premises designed or adapted for commercial use, with the exception of purpose-built offices. Commercial premises owned by The Link Real Estate Investment Trust (The Link REIT) had been included in RVD's statistics starting from 2006.

[8] Private flatted factories comprise premises designed for general manufacturing processes and uses, including offices, directly related to such processes, and normally intended for sale or letting by the developers.

Kong 2030+ to project the future land/space requirements for market-driven economic land uses. An econometric model based on statistical relationship between floorspace and relevant variables (such as growth rates of the GDP in Hong Kong and Guangdong) was formulated to assess the aggregate floorspace demand of five types of the economic land uses (i.e. Central Business District (CBD) Grade A Offices, Non-CBD Grade A Offices, General Business, Industries and Special Industries) over the projection horizon in the short (up to 2023), medium (up to 2033) and long terms (up to 2041). The overall new land requirement in the long term is estimated to be 201 ha in net site area. Taking into account all the committed and planned/under advance planning projects, CBD Grade A Offices, Industries and Special Industries are still expected to experience shortfalls over the whole projection period. A total shortfall of about 97 ha is estimated in the short term, to be increased to about 111 ha in the medium term, and then decreased to about 80 ha in the long term.

19. Apart from the market-driven economic uses, individual policy bureaux may have specific policy measures in support of various other economic uses[9] under their purview. Some of such measures may have land requirement implications. To enable appropriate land reservation in the long-term planning, the Development Bureau (DEVB) and PlanD have, in the context of Hong Kong 2030+, requested bureaux and departments (B/Ds) to confirm the policy-driven economic land uses falling under their respective purview, and their estimation of the likely short to medium term and long term land requirements. Taking into account all the committed and planned/under advance planning projects, a total shortfall of about 9 ha of land (plus 132 500 m^2 usable floorspace) is estimated in the short to medium term, to be increased to about 176 ha of land (plus 132 500 m^2 useable floorspace) in the long term for the other economic uses.

20. In the light of the above and given that the land uses included in the assessment are not exhaustive[10], after taking into account the supply from the existing, committed and planned developments, it is estimated that broadly speaking there is still an anticipated overall land shortfall for economic uses of over 300 ha (excluding land for transport, infrastructure and community facilities to support the population, as well as housing land) in the medium to long term against the estimated land requirement for supporting various market-driven and policy-driven economic uses. Ensuring forward planning

[9] Examples of other economic uses include Science Park, Industrial Estate, port back-up facilities, recycling industry, wholesale food market, convention & exhibition facilities, etc.

[10] The long-term demand for some market-driven economic uses such as retail is difficult to project. Besides, the Government is still studying the land requirements for a number of economic uses such as the construction-related uses and recycling facilities.

and adequate supply of land for economic uses at appropriate locations and allowing land reserve that could be deployed when needed would also enable us to better capture new economic opportunities and meeting land demand for such uses more flexibly.

G/IC Space, Open Space, Infrastructure Space and Liveability

21. Apart from housing and economic land, we also need to provide land and space to accommodate the necessary infrastructure, utilities, open space, government, community and recreational facilities, etc. to serve the population, especially in those areas with new housing supply. Moreover, providing a quality living environment is challenging for a high-density city such as Hong Kong. In pursuit of a liveable compact high-density city and guided by sustainability principles, Hong Kong 2030+ proposes to enhance the quality of the overall living environment and optimise the use of limited land and space through a two-pronged approach, i.e. optimising the new development areas and retrofitting the densely developed urban areas.

22. Among others, in order to plan for the ageing society, Hong Kong 2030+ proposes adopting the concepts of "age-friendly" planning and design and facilitating "ageing in place", which include promoting more diverse housing choices available for the elderly; facilitating the adoption of "universal design" in both public and private residential developments; and providing elderly services, particularly long-term care services, preferably on an estate basis complemented by district and community based services if deemed necessary and appropriate. Land supply is a pre-requisite for taking forward these proposals to cater for our ageing society.

23. We also see the scope to reinvent public space and enhance public facilities with a view to uplifting Hong Kong's liveability. To this end, Hong Kong 2030+ proposes to enhance the land and space provision for G/IC uses and open space, by adopting higher ratios of 3.5 m^2 and a minimum of 2.5 m^2 per person for the strategic planning of G/IC and open space land requirements respectively[11]. This would help meet the public aspirations for more community facilities and open space, enhance living space in general, and provide scope to meet specific policy initiatives to improve provision of certain

[11] For the older generation new towns such as Sha Tin, the provision of G/IC land uses (excluding those special uses/facilities which are considered as policy-driven), is estimated to be about 2.2 m^2 per person, while such provision for the newer generation new towns like Kwu Tong North New Development Area is higher at 3.5 m^2 per person. Separately, the current provision standard of open space under the Hong Kong Planning Standards and Guidelines is a minimum of 2 m^2 per person.

facilities. The enhanced provision of G/IC uses and open space will need to be taken into account in our future land supply and land use planning.

24. According to the estimation under Hong Kong 2030+, taking into account the need for both existing built-up areas and new development areas, broadly speaking there will still be a shortfall of more than 700 ha of land for G/IC, open space and transport facilities in the long term. This has yet to take into account the need for improvement, enhancement or redevelopment of some existing substandard G/IC facilities, as well as the changing demographic needs of our ageing society. Planning and provision of adequate land for such facilities is thus a pre-requisite for improving the living environment of our existing built-up areas and new development areas, and enhancing the overall liveability of our city through better public space shared by all.

Urban Regeneration

25. Hong Kong has a rapidly ageing building stock in large quantity, posing challenges for urban regeneration. The bulk of Hong Kong's existing building stock was erected in the 1970s to 80s (comprising about 41% of our total private residential building stock of about 1 140 000 units). ***Annex C*** shows the age profile of existing private housing stock. Based on the current age profile and assuming that no housing units are demolished, it is estimated that there will be about 326 000 private housing units aged 70 years or above by 2046, up from about 1 100 units at present (i.e. increase by nearly 300 times). Most of these buildings are concentrated in the older urban areas. In other words, our building stock will age rapidly over the coming decades, at a rate which is comparable to if not more acute than our ageing population. Given the magnitude of ageing building stock, and the current modest scale of urban regeneration, there would be a need for the community to step up its efforts to rejuvenate the extensive old urban fabric especially in the older urban areas to arrest urban decay and improve the living environment.

26. It is thus anticipated that the need for and scale of rejuvenation or redevelopment of existing buildings in the urban areas will escalate substantially over the years in future, especially in two or three decades when the bulk of the current stock of buildings enter their "old age". However, the redevelopment of residential buildings usually takes a long lead time mainly due to the protracted process for amalgamating the fragmented ownership, compensation and rehousing tenants/occupiers, and going through the necessary development processes. While the redeveloped buildings should contribute eventually to housing supply, the prolonged process and escalating scale of urban redevelopment would in effect give rise to net demand for additional

(gross) supply of housing units. This may arise from units in buildings undergoing redevelopment being kept unoccupied, existing occupants being displaced upon redevelopment, and reduction in housing units during the actual reconstruction. Thus in aggregate terms additional housing land would be needed to address the above needs arising from redevelopment. The need for such decanting space will increase as the scale of redevelopment escalates.

27. The overall need for decanting space for redevelopment could also be seen from the perspective of building development life-cycle. Over the life-cycle of a building on a piece of land, there will be a certain period during which the building would be redeveloped and hence the housing units of the building would be unavailable for that period of time. That would in effect mean that the housing capacity of the land on which the building stands would have to be discounted, and the discount rate would depend on the proportion of the redevelopment period to the usable life of the building. For instance, assuming that the period of redevelopment takes up about 10% of the life-cycle of a building, even with an evenly distributed age profile of building stock, at least an extra 10% land would be required at all times as decanting space so as to absorb the "down time" of the building stock over the lifetime of the buildings. If the age profile of the building stock is uneven, especially if there is a bunching of building age and in turn need for redevelopment, as in the case of Hong Kong, the need for decanting space would be greater when the need for redevelopment escalates.

28. At the same time, as older buildings with lower development intensity are progressively redeveloped, future cohorts of buildings requiring redevelopment would likely have a higher current development intensity already, and the scope for further increasing the development intensity to facilitate redevelopment would be more limited. Given the large number of ageing buildings and the scale of redevelopment likely to be needed, there would be a need to consider more innovative measures to enable and facilitate redevelopment. Moreover, the older urban areas where the older residential buildings are concentrated also often happen to be, generally speaking, among the built-up areas with higher population density, meagre provision of open space and G/IC space, narrower walkways, access roads and public space, less desirable living environment and lesser per capita living space. It is thus quite possible that future redevelopments might not be able to provide the same development capacity and build back the same number of housing units as before, so as to provide the extra space needed for open space, G/IC facilities or access roads, and to improve the existing urban environment. The planning and development of additional land as possible solution space to support urban redevelopment would thus be necessary.

29. In projecting the future housing demand over the next 10 years, Hong Kong 2030+ has adopted the housing demand between 2016/17 and 2025/26 as estimated in the LTHS Annual Progress Report 2015, i.e. 460 000 units which include about 38 000 units arising from the number of households in private housing units to be displaced by redevelopment. Hong Kong 2030+ has further assessed the land requirement over the long run, including demand for housing land arising from redevelopment, based on the age profile of existing buildings and taking into account the past trend of demolition of private housing buildings by age cohorts. It is estimated that the demolition and redevelopment of private housing units between 2026 and 2046 would give rise to housing demand of about 258 000 units. This implies redevelopment of about 13 000 private housing units per year on average, or a redevelopment rate equivalent to about 0.8% of the total private housing stock in 2046 (compared with the average demolition of just 1 900 units per year in five years from 2010 to 2014). Even at this assumed rate of redevelopment, it is estimated that there would still be about 250 000 private housing units aged 70 or above by 2046 (compared with about 326 000 by 2046 assuming no demolition).

LAND SUPPLY

30. Our current acute land shortage to cope with the demand for land for housing development and for meeting other needs to cater for our growing population and economy is a direct result of the slowdown in land development since the new millennium. This could be traced back to the scaling back of planning and development of housing and land in response to economic downturn and financial austerity in the late 1990s and early 2000s. The acute land shortage now is a painful lesson for us that we could not afford to halt or slow down land planning and development especially for the medium to long term, which takes a long lead time from inception to realisation. In particular, given the long lead time required, there is a practical need for land planning to be done well in advance of actual needs and to be flexible enough to cater for not only foreseeable land use demands but also potential new requirements and unforeseen circumstances. This is a main reason for the key direction of capacity-creating approach for strategic planning proposed in Hong Kong 2030+.

31. Past experience indicates that planning and implementing high density comprehensive developments of a sizeable area with provision of land for housing, economic, G/IC and infrastructure uses would usually require at least 11 to 14 years for the land planning and development process alone. The

time is required for a comprehensive planning and engineering (P&E) study, multiple stages of public engagement (PE) to solicit the views of local communities and relevant stakeholders, various technical assessments including traffic and environmental impact assessments to ensure that the acceptability of the development, the statutory processes for town planning and infrastructure works, and other necessary procedures including funding application to the Legislative Council (LegCo), before actual works could commence. For smaller-scale developments in individual areas or on individual sites, some 3 to 8 years would still be required for conducting technical assessments, undertaking consultations with local communities and relevant stakeholders, going through planning and other development processes, providing necessary supporting infrastructure, and implementing actual engineering works.

32. To avoid a repeat of the past, we must be steadfast in pursuing our land supply initiatives regardless of the short-term economic fluctuations, and land planning and development must be taken forward well ahead of time and be sustained. Not only should the Government press ahead full steam to catch up on the shortage in land supply and avert the current demand-supply imbalance, but also to continue land use planning for sustainable development, in order to map out a development strategy and provide a land reserve that could be tapped to support Hong Kong's future needs. In undertaking planning and development of land, the Government will continue to uphold the principle of sustainable development and strike an appropriate balance between development and conservation, having regard to the established planning guidelines and standards to achieve sustainable development; adopt a multi-pronged strategy to create development capacity and provide land supply, including optimising the use of existing developed land and the creation of new land for development through multiple means; and at the same time to create, enhance and regenerate environmental capacity through conservation and environmental improvements.

Multi-Pronged Strategy to Increase Land Supply

33. In planning land for development, the Government has been adopting a holistic strategy to identify suitable areas and sites for development, determine the priority of utilisation and development of land, conduct appropriate P&E studies or land use reviews, and undertake necessary improvement and mitigation measures, thereby providing land for development in an technically and environmentally acceptable, efficient and cost-effective manner. It should be noted that vacant land does not mean developable land, and as explained above a rigorous but lengthy process is required to make a piece of land developable. Given that resources are limited, there is a need for the Government to set priorities for land use planning and development in

accordance with the established mechanism. Generally speaking, it is more cost-effective and efficient, in terms of economy of scale or infrastructure/facilities provision, to plan and develop comprehensively a sizeable area for high density development with provision of land for housing, economic uses, GIC uses, open space and other supporting facilities, and to plan and develop sites that are within or near existing built-up areas and infrastructure which would allow better clustering of developments and utilisation of existing infrastructure. On the other hand, reviewing and developing individual and fragmented sites scattered over different parts of the territory, far away from existing built-up areas or infrastructures, would be inefficient as developing them might not be able to unleash much development potential and would likely require much more time and resources in terms of planning, infrastructure support and engineering works.

34. DEVB together with relevant government departments including PlanD, the Civil Engineering and Development Department (CEDD) and Lands Department (LandsD) have been pressing ahead the various initiatives under the multi-pronged approach with a view to increasing land supply and building up a land reserve. There is no single measure that could address the land shortage problem and provide sufficient land to meet all the development needs over the short, medium and long term. There is a clear need of a multi-pronged, robust and flexible approach to create the development capacity smartly. In particular, land with high ecological, landscape and/or historical value needs to be preserved. Degraded and deserted areas, land at the fringe of built-up areas and near existing infrastructure, and strategic growth areas should be considered for development. These land supply measures cover the short, medium and long term, and can be broadly classified into the following five categories –

(a) **increase development intensity of developable land**: this mainly concerns allowing the development intensity of individual housing sites to be increased by up to 20% where planning terms permit, and lifting development restrictions applied long since to specific areas where it is considered justified and acceptable to do so;

(b) **change of use of existing land and convert idling reserved sites**: this mainly involves conducting land use reviews of existing land (e.g. government sites and green belt, etc.) to identify potential sites suitable for housing development and initiate change of their uses, and converting to housing and other uses reserved sites with no development plan or for which the original purpose is no longer pursued;

(c) **facilitate/expedite development/redevelopment on existing land**: this mainly involves expediting the railway property development projects and urban renewal projects, streamlining the development processes and continuing with the Pilot Scheme for Arbitration on Land Premium to facilitate private development/redevelopment;

(d) **take forward major land development projects**: this mainly concerns taking forward P&E studies and works for comprehensive development of new development areas and new town extensions, including the conversion of vast tracts of "brownfield" sites and squatter areas in the rural NT for high density development; and

(e) **explore new sources of developable land/space**: this mainly involves conducting studies to explore new mode or source of providing developable land/space including reclamation outside Victoria Harbour, potential caverns in the territory, underground space in existing built-up areas, and planning for the two strategic growth areas (SGAs) (i.e. East Lantau Metropolis (ELM) and New Territories North (NTN)).

35. All the short, medium and long term land supply initiatives are of importance to meeting the housing demand of the community and the on-going economic and social development needs of Hong Kong, and to improve living environment for our community in the long run through both optimising the use of developable land and creating more new land for development. Apart from providing land for housing development, we have to at the same time provide adequate supporting infrastructure and community facilities, address the impacts of developments on various aspects including traffic and environment, provide land resources for different economic activities so as to create job opportunities, and address the existing unbalanced spatial distribution of homes and jobs across the territory, by way of comprehensive planning including creating more jobs in the NT.

Latest Progress of Various Land Supply Initiatives

36. Generally speaking, the initiatives in paragraphs 34(a) to (c) aim at increasing short to medium-term land supply, while major land development projects and exploration of new land/space under paragraphs 34(d) to (e) would take time to plan and implement, and will provide land supply for the medium and long-term. In all cases, making land available for development is subject to consideration of various technical factors, including traffic impact, environmental (e.g. noise and air quality) impact, air ventilation and visual impact, infrastructural capacity, re-provisioning of affected facilities, site

clearance, etc. In many cases, the development may require infrastructural works (e.g. site formation, access road or other infrastructure provision). ***Annex D*** shows the map of Hong Kong indicating various major land supply initiatives. The latest estimated developable land area, flat production, economic use gross floor area (GFA), population/employment/development capacity, and years of population intake/GFA availability/development time of the various major land supply initiatives are set out at ***Annex E***. If all the short, medium and long-term land supply initiatives can be timely implemented, we estimate that a total of over 380 000 and over 220 000 housing units will be provided in the short to medium term, and medium to long term respectively (i.e. over 600 000 units in total), as well as a total of over 8.6 million m^2 floorspace for business, commercial and industrial uses.

(A) Short-to-medium-term Land Supply

37. The most immediate and effective way to augment housing land supply in the short to medium term is to make more optimal use of the developed areas in the existing urban areas and new towns, as well as nearby land in the vicinity of existing infrastructure, through land use reviews and increasing development intensity where planning terms permit.

Housing Land

(1) Land Use Reviews

38. As announced in the 2014 Policy Address, PlanD has conducted reviews on the government land currently vacant, under Short Term Tenancies or different short-term, G/IC and other government uses, as well as Green Belt sites. With the said efforts, we have identified in total some 150 potential housing sites, most of which we aim to make available in the five years of 2014/15 to 2018/19 for housing development with a view to providing over 210 000 flats, with over 70% for public housing, subject to timely amendments to their statutory plans. Separately, for the various initiatives to increase land supply announced in the 2013 Policy Address, a total of 42 sites were zoned or being rezoned for residential use in the short to medium term by end-2013, capable of providing about 40 000 flats in total, with over 60% for public housing. As at mid-January 2017, among these some 190 potential housing sites altogether, 93 sites had been zoned or rezoned for housing development, and are estimated to provide a total of about 112 100 housing units (providing about 65 500 public housing and 46 600 private housing units). Another 21 sites have their statutory rezoning procedures initiated and if completed, are estimated to provide a total of about 13 600 housing units (of which some

11 400 are public housing units and 2 200 are private housing units)[12].

39. PlanD has been undertaking land use reviews as part of the on-going efforts to identify more developable sites for housing and other uses in the short to medium term. Through the on-going land use reviews together with the identification of additional housing sites, there are some 25 additional sites which are mostly estimated to be made available for housing development in the next five years of 2019/20 to 2023/24, capable of providing over 60 000 flats with over 80% of which are public housing units, subject to timely amendments to the relevant statutory plans and/or completion of the necessary procedures. As with the established practice, we will consult the District Councils (DCs) and relevant stakeholders on the development of individual sites as and when they are ready, and submit for consideration by the Town Planning Board (TPB). A summary of these some 25 potential housing sites are at ***Annex F***. Maps showing the locations of these some 25 sites together with the above some 190 sites by district are at ***Annex G***[13].

40. Rezoning the aforesaid potential housing sites identified in land use reviews and increasing development intensity where planning terms permit are the key contributors towards achieving the 10-year housing supply target. In particular, rezoning suitable sites for residential use will be one of the important sources of land for achieving the latest housing supply target of 460 000 flats for the ten-year period from 2017/18 to 2026/27. Nonetheless, even assuming that local consultation and plan amendments could be completed in time, site formation and infrastructure still take time before housing flats could be produced. We expect the bulk of housing production from these sites will be available towards the latter part of the 10-year period, and some will come on stream only after this timeframe. Our current best estimates on public housing flat supply are about 236 000 flats for the ten-year period from 2017/18 to 2026/27, assuming that all sites identified can be delivered on time for housing construction.

(2) Increasing Development Intensity where Planning Terms Permit

41. The Government announced in the 2014 Policy Address that except for the north of Hong Kong Island and Kowloon Peninsula, which are more

[12] The 21 sites include three sites that were reverted to the original zonings or the proposed rezoning of which was not agreed by the Town Planning Board. The estimated flat production of 13 600 flats has excluded the flat production of these three sites.

[13] The some 25 potential housing sites are distributed across 11 districts including Tuen Mun, Yuen Long, North District, Tai Po, Sha Tin, Sai Kung, Tsuen Wan, Kwai Tsing, Wong Tai Sin, Sham Shui Po and Kwun Tong.

densely populated, the maximum domestic Plot Ratio (PR) that can be allowed for housing sites located in other Density Zones of the Main Urban Areas and New Towns would be raised generally by about 20% as appropriate. It should be noted that the increase in development intensity of individual housing sites is not automatic, and will continue to be subject to necessary approval by TPB under the statutory planning mechanism where applicable. The increase in the maximum domestic PR of a site will continue to be subject to relevant planning principles and considerations, and will be pursued only when there is scope in terms of development capacity, and the various constraints and impacts so arising, if any, could be addressed or mitigated through appropriate measures. Since the inauguration of current-term Government, TPB has, up to end-2016, approved applications to relax the development intensity of 44 housing sites, leading to an additional supply of about 8 640 units (which include about 4 920 units for the Kai Tak Development).

(3) Kai Tak Development

42. The Government has recently completed the review for further increasing the development intensity and enhancing the land use planning in Kai Tak Development (KTD). The review has confirmed the feasibility of providing about 11 000 additional flats in KTD through changing the land use and increasing the development density of various sites while keeping the overall urban design principles of KTD. Together with the earlier review completed in 2014 (which confirmed the feasibility of increasing the residential GFA production in KTD by about 20% on average), the two-stage review altogether recommended, among others, an increase of about 16 000 additional residential flats, yielding a total of about 50 000 flats in KTD for accommodating a total population of about 134 000. Public consultation on the recommended proposal is underway with a view to commencing the statutory planning procedures for the proposed amendments to the Kai Tak Outline Zoning Plan in early 2017.

(4) Government Land Sale

43. In 2016/17, a total of 22 residential sites, capable of providing about 14 700 flats, have been sold or will be put up for sale by the Government under the Land Sale Programme (LSP). This is the highest flat production capacity of government land sale sites since the Government-initiated Sale Mechanism was introduced in 2010/11. As at mid-January 2017, the aggregate supply of private housing land from government land sale in the five financial years from 2012/13 to 2016/17 was estimated to have a capacity to produce about 51 100 flats (as shown ***Annex H***), more than double that of the previous five financial

years.

44. Combining other private housing land supply sources, the aggregate private housing land supply in 2016/17 has an estimated capacity to produce over 19 000 flats, exceeding the annual target for the third consecutive year. As at mid-January 2017, the aggregate private housing land supply from various sources from 2012/13 to 2016/17 was estimated to be capable of providing about 96 600 flats[14] (see ***Annex H***). The Government will closely monitor the market situation and continue to supply more private housing sites to the market, with a view to promoting steady development of the property market. In 2017/18, our aim is to maintain land supply from various sources for about 18 000 private residential units. As per established practice, we will announce the forecast of private housing land supply from various sources when announcing the annual LSP at the beginning of each year. The relevant target is not a fixed target of housing land supply, but refers to the estimated number of private residential units which can be built on private housing land supplied to the market in a particular year. The aim is to build up a land reserve over a period of time to ensure steady land supply for the market. The actual housing supply is subject to a couple of market factors, such as the result of government land sales, the implementation progress and tender results of railway property development projects and projects of Urban Renewal Authority (URA), the initiatives of developers to proceed with private development and redevelopment projects, etc.

(5) Railway Property Developments

45. In addition to land sale by the Government, railway property development projects are an important source of private housing land supply. Since 2011/12, the flat production of successfully tendered railway property development projects has contributed significantly to the aggregate private housing land supply. The current-term Government has collaborated with the MTR Corporation Limited (MTRCL) and 15 projects have been successfully tendered so far, capable of providing about 23 900 units. MTRCL is a listed company and has the discretion in deciding how to take forward its own property development projects. In view of the tight private housing land supply, we continue to encourage MTRCL to implement its own projects and have received positive response from MTRCL. Other remaining committed railway property development projects pending tender[15] are capable of

[14] The forecast figures of the private housing land supply in 2016/17 will be adjusted after the end of 2016/17 in accordance with the actual land supply.

[15] Including the remaining packages of LOHAS Park, Package 2 of Homantin Station, Wong Chuk Hang Station, Yau Tong Ventilation Building site and West Rail Kam Sheung Road Station.

providing about 14 000 units in the short to medium term.

(6) Urban Renewal Projects

46. From 2005/06 to 2015/16, URA had tendered out 27 redevelopment projects for joint venture development. Upon completion, these projects will provide a total of about 9 400 flats. In 2016, URA awarded tenders for joint venture development of three projects at Kowloon City Road/Sheung Heung Road, Ma Tau Kok, Pine Street/Oak Street, Tai Kok Tsui, and Kowloon Road/Kiu Yam Street, Sham Shui Po in January, June and October 2016 respectively. These three projects will provide about 410 units upon completion. URA also commenced six redevelopment projects in 2016 which are expected to provide over 3 000 flats upon completion.

47. Last year, for the first time, URA introduced a holistic and district-based approach for implementing its redevelopment projects in To Kwa Wan, so as to raise the quality of the environment and improve the road networks by enhancing the overall planning for the community. While redeveloping dilapidated old buildings, we must also explore more effective ways of addressing the problem of ageing building stock. Having regard to the difficulty in increasing the development density or the lack of residual developable PR in some districts, URA plans to use the Yau Ma Tei and Mong Kok districts as a testing ground and conduct a district planning study in the second quarter of this year. The study aims to explore how to enhance the efficiency of existing land use and redevelopment potential of these districts. At the same time, URA will also conduct a study on building rehabilitation strategies to formulate appropriate and sustainable measures to prolong the life span of the buildings and explore the feasibility of "retrofitting" as a proposal for building rehabilitation.

(7) Development of Former Diamond Hill Squatter Areas and Quarry Sites

48. The development of the former Diamond Hill Squatter Areas (Tai Hom Village), as well as the former Cha Kwo Ling Kaolin Mine (CKLKM) and Anderson Road Quarry (ARQ) sites is in good progress. The CKLKM site will provide 2 270 flats, and the ARQ site is estimated to have a capacity to produce about 9 410 flats. On the other hand, in view of the suggestions from the DC and locals, we have revised the development proposal for the former Diamond Hill Squatter Areas, which will provide about 4 050 public housing (including both PRH and Home Ownership Scheme (HOS)) units, as well as other facilities. Altogether they could provide close to 16 000 housing units. We are also further studying the financial viability of the proposed development

of the former Lamma Quarry.

Economic Land

(8) Sale of commercial and industrial sites

49. In 2016/17, a total of 7 commercial/business sites (about 503 000 m^2 of GFA) were sold/will be put up for sale. This is a record high since 2010/11 when the Government refined the land sale arrangement to introduce Government-initiated Sale Mechanism. In addition, a total of 2 industrial sites (about 52 000 m^2 of GFA) were sold/will be put up for sale in 2016/17. Land sale by the Government for commercial and industrial uses in the current financial year can provide about 555 000 m^2 of floor area, exceeding the aggregate supply in the preceding four financial years. From 2012/13 to 2016/17, the Government has supplied a total of 23 commercial/business/industrial sites to the market, providing over one million m^2 of GFA. We will consider selling more industrial sites taking into account the market situation.

(9) Conversion of Suitable Government Sites in Core Business Districts into Commercial Use

50. By converting suitable government sites into commercial use, the sites so released will help increase the supply of commercial floor space, thereby facilitating the development of different types of economic activities. The Government is pursuing the conversion of suitable government sites in the CBDs. In 2016, the Murray Road Public Carpark site in Central and Queensway Plaza in Admiralty were rezoned for commercial/office uses. The government site on Caroline Hill Road in Causeway Bay will be released for commercial and other uses. Besides, we are examining the development potential of government sites at the junction of Sai Yee Street and Argyle Street adjacent to Mong Kok East Station for a comprehensive development. Public consultation on the proposed development options had been conducted in March to June 2016, and we are revising the development scheme to take into account the public comments.

(10) Energizing Kowloon East

51. Kowloon East (KE), being the Hong Kong's CBD2, has the potential to supply an additional commercial/office floor area of about 4.7 million m^2. We are considering relocating or rationalising the existing government facilities in the two action areas of KE. Two sites within the Kowloon Bay Action Area

which were made available earlier have already been sold for private commercial/office development. It is expected that these two action areas would provide about 547 000 m^2 of floor area in total for commercial/office and other uses. Another commercial site at King Yip Street providing about 115 000 m^2 floor space would also be made available after the reprovision of Shing Yip Street Garden. In the next 5 years, we estimate that another 900 000 m^2 of commercial/office use would be provided in KE. Moreover, the two-stage review on KTD also recommended an increase of about 400 000 m^2 of commercial/office floorspace in KTD, resulting in a total of about 2.3 million m^2 floor space for commercial use.

(11) New Central Harbourfront

52. Subject to the progress of various infrastructure works at the new Central harbourfront, the Government will make reference to the recommendations of the Urban Design Study for the New Central Harbourfront and offer sites suitable for commercial development in a timely manner. It is estimated that about 200 000 m^2 of commercial floor area can be provided in total.

(12) Redevelopment and wholesale conversion of industrial buildings

53. The Government introduced a series of time-limited revitalisation measures from 2010 to 2016 to optimise the use of old industrial buildings during the economic restructuring period, which have successfully reduced the vacancy rate of industrial buildings. During the six-year period, a total of 248 applications were received under the revitalisation scheme for industrial buildings. As at end-2016, 143 applications had been approved, involving about 1.67 million m^2 of converted or new floor space. Among the approved cases, 83 had been executed and the works of 40 had been completed. Major converted uses include hotel, office, shops and services, eating place, information technology and telecommunications, education institutions, and places of recreation, sports and culture. More cases would have their works completed in the coming few years to increase short-term floor space for more diversified uses.

(B) Medium-to-long-term Land Supply – Major Land Development Projects

54. Creating new land is an essential source of land supply in the medium to long term to address housing and other socio-economic development needs. The Government is striving to take forward as expeditiously as possible a number of land supply projects including but not limited to New Development

Areas (NDAs) and new town extensions, and the review of deserted agricultural land and brownfield sites in the NT. These NDAs and new town extensions are expected to provide close to 200 000 housing units and over 8.6 million m^2 of industrial and commercial floor area between 2023 and 2038. Potential railway property development projects can also provide over 21 000 residential units. In the longer term, we are exploring new sources of developable land such as reclamations on an appropriate scale outside Victoria Harbour, and rock cavern and underground space developments.

(13) Kwu Tung North and Fanling North NDAs

55. The Kwu Tung North (KTN) and Fanling North (FLN) NDAs, as extensions to the Fanling/Sheung Shui New Town, will provide about 60 000 new flats, with 60% for public housing (including both PRH and HOS), and about 840 000 m^2 of industrial and commercial floor area. Subject to further funding approval from the LegCo Finance Committee, the main construction works for the Advanced Works is expected to commence in 2018 with first population intake by 2023. The road and sewerage schemes of the Advance Works and the First Stage Works were gazetted in end-2015, and amendments to the road and sewerage schemes were gazetted in November 2016 to reflect the latest design of the works and to address some of the objections. To optimise the use of land resources, the Government is exploring the scope of appropriately increasing the development intensity of the public housing sites and hence the public housing supply.

(14) Tung Chung New Town Extension

56. We will take forward Tung Chung New Town Extension (TCNTE) by turning Tung Chung into a distinct community, and leveraging on the future economic opportunities brought by the anticipated completion of various transport infrastructural projects in Lantau, which would help create more jobs for local residents. The TCNTE will provide about 49 400 new flats and 877 000 m^2 of commercial floor area, with the first population intake expected in 2023, with full completion in 2030. The P&E study was completed in April 2016, and the statutory plans have been approved by TPB. With LegCo's funding approval in May 2016, detailed design and site investigation have already commenced in June 2016. The Government aims for the reclamation in Tung Chung East to start in 2018 subject to funding approval by LegCo.

(15) Hung Shui Kiu NDA

57. For the Hung Shui Kiu (HSK) NDA, a Revised Recommended

Outline Development Plan (Revised RODP) has been formulated for the area, which will provide about 441 ha of developable land. The LegCo Panel on Development was briefed on the Revised RODP on 8 November 2016 (LC Paper No. CB(1) 51/16-17(05)). The HSK NDA will be the next generation new town for a total population of about 218 000 (including a new population of about 176 000). It will provide about 61 000 additional flats and 6 370 000 m^2 of industrial and commercial floor area, creating 150 000 job opportunities. Based on the Revised RODP, we will propose amendments to the relevant Outline Zoning Plans. We will continue taking forward the planning for the HSK NDA as a regional hub in the North West NT to complement the new towns of Tin Shui Wai, Yuen Long and Tuen Mun for provision of housing, employment opportunities and civic facilities.

(16) Yuen Long South Development

58. We will continue taking forward the planning for deserted or damaged agricultural land and rural-based industrial sites in Yuen Long South (YLS) as an extension to the Yuen Long New Town for meeting housing and other development needs and improving the local environment. Stage 3 Community Engagement on the draft RODP of YLS was completed in April 2016. Based on the relevant technical assessments and the public views collected, we will finalise the RODP and formulate details of the proposals. The project will provide about 27 700 flats and 590 000 m^2 of industrial and commercial floor area.

(17) Re-planning of Tseung Kwan O Area 137

59. As part of the Government's on-going efforts in identifying suitable areas for the long-term development of Hong Kong, a P&E study was commissioned in end-2016 for the re-planning of Tseung Kwan O Area 137, which is a sizeable piece of land in the urban area with potential for large-scale developments. We will explore in the study the feasibility of residential, commercial and other developments, with a view to making more optimal use of this some 80 ha of formed land, after accommodating the desalination plant and taking into account considerations including the potential environmental impact, as well as traffic and infrastructural capacities.

(18) Siu Ho Wan Depot Site and Property Developments along Rail Lines

60. In the medium to long term, potential railway property development projects can provide over 21 000 residential units. Among others, Environmental Impact Assessment and various technical studies are being

carried out for the planned comprehensive residential and commercial development at the Siu Ho Wan Depot Site, which can provide no less than 14 000 residential flats in the medium to long term, with associated commercial and community facilities. The development parameters will be kept under review with regard to the results of on-going studies to optimise the utilisation of the site as far as possible. The Government plans to commence statutory planning procedures for the relevant area in 2017/18, and will follow up with the MTRCL as appropriate on the various technical matters and related details based on the results of the technical studies. Another medium to long term potential railway property development is the topside development above West Rail Pat Heung Depot, which can provide about 6 000 units. In collaboration with the MTRCL, the Government will continue to explore the development potential of railway stations and related sites along existing and new railway lines to make optimal use of such land.

(19) Development of Brownfield Sites and Deserted Agricultural Land in the NT

61. Making optimal use of brownfield sites is one of the main directions in the Government's multi-pronged land supply strategy alongside other land supply initiatives and sources. We will continue to plan and develop large-scale new development areas in the northwestern and northern parts of the NT where brownfield sites and deserted agricultural land are concentrated, with a view to releasing land for development under the new town development approach. Through comprehensive planning, the major land development projects of HSK NDA, YLS and KTN/FLN NDAs together will provide a total of some 940 ha of developable land and release about 340 ha brownfield sites. Meanwhile, it is important to consider how industrial operations currently relying on brownfield sites as their operating space could be accommodated in land efficient manner. CEDD will continue its studies on the possibility of consolidating brownfield operations in multi-storey buildings to optimise land utilisation, taking HSK as a pilot case.

62. At the same time, the Government is considering the appropriate policies and strategies for tackling brownfield sites in different areas, with a view to achieving the objectives of optimising land utilisation, releasing brownfields potential and improving the rural environment. To this end, PlanD will commence a comprehensive survey on the distribution and uses of brownfield sites in the NT. The study findings will provide a fuller picture of brownfield sites in the territory and the brownfield operations thereon. The latest position on the development of brownfield sites is set out at ***Annex I***.

63. In tandem with New Agriculture Policy, the Food and Health Bureau and DEVB will commence a study on Agricultural Priority Areas to identify relatively large area of quality agricultural land and formulate policies and measures for promoting the rehabilitation of fallow agricultural land and improving the rural environment. The study will also provide guidance on where deserted agricultural land no longer suitable or required for agricultural purposes could be released for consideration of other uses including comprehensive planning for integrated development. Separately, the engineering feasibility study of establishing an Agri-Park is underway and will also be completed soon.

(20) Developing and Conserving Lantau

64. In collaboration with the Lantau Development Advisory Committee, we have completed a three-month PE exercise on the proposed development strategies for Lantau in April 2016. As revealed by the public views collected, the majority are in general supportive of the broad direction of Lantau development and the principle of balancing between needs for conservation and development. Taking into consideration the public views received, we are preparing a new blueprint for Lantau development and conservation planned for publication in the first half of 2017.

65. All the suggestions collected during the PE exercise entail a great deal of work to be carried out in a short time. There is an urgent need to enhance our manpower and management steer by forming a new dedicated multi-disciplinary Sustainable Lantau Office in CEDD so that we could start the work immediately to seize the development and conservation opportunities in Lantau. With engineering, planning, conservation and other professionals working together, we could develop the implementation programme more effectively and efficiently.

(C) Medium-to-long-term Land Supply – Economic Land Uses

66. Planning of land for economic activities in general including commercial and industrial uses is essential for maintaining Hong Kong's competitiveness and its sustainable growth. Apart from the short to medium term measures set out in paragraphs 49 to 53 above, there is a need to take a longer term view on the planning of land for economic uses. With forward and effective planning for economic land, we can make advanced preparation for the necessary transport and infrastructural support, maximise locational advantages of strategic areas (e.g. proximity to port/airport or boundary control points), facilitate clustering effect for specific industries or sectors, contain externalities

arising from industrial operations, provide job opportunities for growth areas, and optimise spatial distribution of homes and jobs.

67. For the medium to long term, apart from continuing to dispose available sites at suitable locations for commercial and industrial uses and pressing ahead with the Energizing Kowloon East initiative to transform KE into CBD2, we have reserved land for general economic uses in various major development projects. The NDAs in KTN, FLN and HSK, as well as new town extensions in Tung Chung and YLS, will provide over 8.6 million m^2 of industrial and commercial floor area, and some 238 000 job opportunities. For instance, TCNTE will provide a commercial hub in Tung Chung East that is capable of providing a total GFA of about 877 000 m^2 for office, retail and hotel uses, and about 40 000 job opportunities, which could create synergy with the airport, the proposed North Commercial District (NCD) on the Airport Island, the topside development of the Hong Kong Boundary Crossing Facilities (HKBCF) Island and other tourist and business destinations on Lantau. In HSK NDA, we propose a regional hub around the proposed HSK Station for offices, hotels, retail and other commercial uses with a total GFA of about 1 108 000 m^2 and a district commercial node around Tin Shui Wai Station with a total GFA of about 635 000 m^2, which would play a pivotal role in fostering economic interaction with other fast growing areas in the Pearl River Delta area.

68. Under the direction of Lantau development, i.e. "development for the north, conservation for the south", the North Lantau will be for economic and housing developments, including the Airport NCD, TCNTE, the topside of HKBCF Island of Hong Kong-Zhuhai-Macao Bridge (HZMB) and Siu Ho Wan. The SKYCITY development project of the Hong Kong Airport Authority, which occupies an area of over 25 ha, will make the area a hotel, retail, dining and entertainment destination. The HKBCF Island of HZMB can also provide a floor area of 500 000 m^2 for economic uses. As for Northeast Lantau, it will be developed into an area for leisure, entertainment and tourism through reclamation in Sunny Bay, complemented by the Hong Kong Disneyland. All these together will provide a cluster of economic land uses with synergy effect in the medium to long term.

69. We also endeavour to meet the land requirements for innovation and technology development and new industries in support of the policy objectives of the Innovation and Technology Bureau and other relevant bureaux to promote development of relevant sectors and industries. At present, the Hong Kong Science Park, the three industrial estates in Tai Po, Yuen Long and Tseung Kwan O, the Cyberport and other related facilities cover a total area of about 250 ha for innovation and technology development. We have earmarked additional land in KTN NDA and Wang Chau, and have initially identified

suitable land near the Liantang/Heung Yuen Wai Boundary Control Point (LT/HYW BCP) for exploring the development of Science Park and/or Industrial Estate.

70. In addition, 87-ha of land in Lok Ma Chau (LMC) Loop has been reserved for the development of the Hong Kong/Shenzhen Innovation and Technology Park. Related higher education, cultural and creative, as well as other complementary facilities will also be provided at the LMC site, creating unprecedented space and opportunities for the development of innovation and technology in Hong Kong and Shenzhen. Other major land supply initiatives, including the NTN and the proposed Ma Liu Shui reclamation (together with its adjoining site to be vacated after relocation of the Sha Tin Sewage Treatment Works (STSTW)), will also offer opportunities for considering development of high technology and knowledge-based industries, among other uses.

71. In addition to innovation and technology development, we also need to plan ahead for suitable land for other industries in the longer run, including but not limited to logistics, storage/warehousing, port-back-up, recycling, waste treatment facilities, vehicle repair trade, construction industries, wholesale food markets, etc. We also need additional land and spaces to enable the diversification and upgrading of local industries. DEVB would explore potential sites suitable for appropriate industrial uses in areas such as Lam Tei Quarry, Tsing Yi, near-shore reclamation sites at Ma Liu Shui and Lung Kwu Tan, cavern developments and the SGAs in ELM and NTN. To facilitate long-term planning of land for supporting industrial uses, relevant bureaux are conducting studies on the land use requirements for construction industry, recycling industries and waste treatment facilities.

(D) Other Land Supply Initiatives

(21) Reclamation outside Victoria Harbour

72. We will complete the technical studies for the proposed Siu Ho Wan, Lung Kwu Tan and Ma Liu Shui reclamations this year. We intend to commence a P&E study for Ma Liu Shui reclamation of about 60 ha as soon as practicable which will also consider the future planning of the adjoining 28-ha site vacated after relocation of the STSTW into caverns, with a view to providing land for development of high technology and knowledge-based industries, housing and other uses. To provide land for industrial and other uses, we plan to commence a P&E study as soon as possible for Lung Kwu Tan reclamation of about 200 ha. We will also strive to seek funding approval for commencing a P&E study for the proposed Sunny Bay reclamation for leisure,

entertainment and tourism developments as early as possible.

(22) Rock Cavern Developments

73. We target to complete the investigation and design work of relocation of STSTW to caverns progressively from 2017 and onward, and then implement the works as soon as possible in order to release about 28 ha of land at the existing STSTW site for other development uses. We have also substantially completed the feasibility studies on the relocation of the Sai Kung Sewage Treatment Works, the Sham Tseng Sewage Treatment Works and the Diamond Hill Fresh Water and Salt Water Service Reservoirs to caverns, and will carry out PE exercises in due course to gauge public views on the land use options of the released sites of about 6 ha in total, in preparation for the next phase of works. Besides, we will implement the recommendations of the study on the long-term strategy for cavern development, including promulgation of the Cavern Master Plans and a set of guidelines to facilitate future cavern developments, setting priorities for relocation of suitable public facilities to caverns, and carrying out of a technical study on underground quarrying for cavern development.

(23) Underground Space Developments

74. We launched in November 2016 the Stage 1 PE (PE1) for the Pilot Study on Underground Space Development (USD) in Selected Strategic Urban Areas (SUAs), including Tsim Sha Tsui West, Causeway Bay, Happy Valley and Admiralty/Wan Chai. On completing the PE1 exercise in early 2017, we will develop conceptual schemes for the USD in the four SUAs with due consideration of views collected during the PE1 and carry out associated preliminary technical assessments, with a view to launching the Stage 2 PE for the conceptual schemes in early 2018.

(24) Streamlining Land Administration Process

75. LandsD has reviewed the processes under lease and implemented enhancement measures such as simplification of some lease conditions, alignment with the Buildings Department's standard in respect of a number of items in approving building plan submission under lease and streamlining the procedures in processing lease modification (including land exchange) applications. LandsD has also been reviewing its mechanism of processing building plans under lease.

(25) Pilot Scheme for Arbitration on Land Premium

76. In order to expedite land supply for housing and other uses, the Pilot Scheme for Arbitration on Land Premium was launched for a trial period of two years in October 2014 to facilitate agreement between the Government and private land owners on land premium payable for lease modification/land exchange applications through arbitration. Under the Pilot Scheme, the Government may select and offer certain cases for arbitration to determine the amount of land premium. Private land owners may also apply for arbitration in respect of their respective lease modification/land exchange applications under processing.

77. Until mid-December 2016, LandsD had extended a total of 18 invitations, including one completed arbitration case. While agreeing in principle to arbitration, an applicant in another case decided, after consideration, to accept the land premium proposed by LandsD, hence obviating the need for arbitration. The applicants of the remaining 16 cases chose to continue to negotiate premium with LandsD. In addition, LandsD had rejected an application for arbitration involving no increase in residential floor area. Given the limited number of completed arbitration cases, LandsD has extended the Pilot Scheme for two more years from end-October 2016 in order to accumulate more experience. A review will be conducted afterwards. LandsD will continue to select suitable lease modification/land exchange cases and invite relevant applicants to determine premium through arbitration.

SUSTAINABLE LAND SUPPLY FOR THE FUTURE

78. In an era of rapid social, economic and technological changes, Hong Kong as an international city in a globalised world is facing a number of challenges both externally and internally, including fierce global and regional competitions, changing drivers of economic growth, climate change, growing and ageing population[16], increasing but smaller domestic households[17], strong

[16] According to C&SD's latest population projections published in September 2015, Hong Kong's population is expected to reach its peak at 8.22 million by 2043 (an increase by 0.98 million from 2014) (see **Annex A**). Proportion of population aged 65 or above is projected to increase from about 15% in 2014 to about 36% in 2064, while that of aged 85 or above is projected to increase from about 2.2% to about 10.1% during the same period.

land demand for housing, economic activities and community facilities, a rapidly ageing building stock, demand for environmental protection, and rising aspiration for a better quality of life. For the sustainable development of Hong Kong, there is a need for the Government to adopt a visionary, pragmatic and action-oriented approach to tackle the planning issues critical to Hong Kong's future, and to formulate a robust territorial development strategy in the light of the latest planning circumstances and challenges ahead. Against this background and as announced in the 2015 Policy Address, PlanD commissioned the Hong Kong 2030+ study in January 2015 to provide an update to the "Hong Kong 2030: Planning Vision and Strategy" (HK2030) promulgated in 2007. The proposals under Hong Kong 2030+ are currently under PE until end-April2017.

79. Building upon the foundation of HK2030, Hong Kong 2030+ aims to examine the strategies and feasible options for the overall spatial planning, land and infrastructure development, and the shaping of the built and natural environment for Hong Kong beyond 2030. The positioning of Hong Kong as "Asia's World City" and the overarching goal of sustainable development as enshrined in HK2030 remain as the vision and planning goal in Hong Kong 2030+. We need a stronger focus on strengthening our position as a liveable, competitive and sustainable Asia's World City. To this end, three building blocks, namely "Planning for a Liveable High-density City", "Embracing New Economic Challenges and Opportunities" and "Creating Capacity for Sustainable Growth", and a conceptual spatial framework that translate these building blocks in spatial planning terms, are proposed under Hong Kong 2030+. More details of the proposals are set out in the LegCo paper No. CB(1)51/16-17(07).

Planning for a Liveable High-density City

80. According to an array of surveys and benchmarking indexes, while Hong Kong is maintaining its status as one of the leading global cities, our liveability has been gradually lagging behind the neighbouring major cities. Therefore, Hong Kong 2030+ proposes to enhance the quality of the overall living environment and optimise the use of limited land and space through a two-pronged approach, i.e. optimising the new development areas and retrofitting the densely developed urban areas. From the land use and planning

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[17] According to C&SD's latest domestic household projections published in October 2015, Hong Kong's domestic household is expected to reach its peak at 2.93 million by 2044 (an increase by 0.5 million from 2014), while the average household size is expected to decrease from 2.9 persons to 2.7 persons during the same period (see **Annex A**). As a comparison, the magnitude will be equivalent to 3.5 times the number of households in Shatin New Town (excluding Ma On Shan).

perspective, the following key strategic directions are proposed:

(i) promote a compact, integrated, unique, diverse, vibrant and healthy city with an urban form and urban design concepts appropriate for Hong Kong;

(ii) leverage our vast expanse and diversity of green and blue spaces[18] to enhance biodiversity, public appreciation and enjoyment as well as urban ecology;

(iii) reinvent the public space and enhance the public facilities in uplifting our liveability;

(iv) rejuvenate the urban fabric amid a large stock of rapidly ageing buildings; and

(v) promote an inclusive and supportive society through planning sensitively for all, irrespective of age and ability.

81. Among others, we emphasise the need to cater for the aging society, propose to increase quality living space (including G/IC facilities and open space) for our citizens, and highlight the need to timely address the large stock of rapidly ageing buildings. As pointed out in paragraphs 21 to 24 above, land supply is the pre-requisite for taking forward all these proposals to enhance the liveability of Hong Kong.

Embracing New Economic Challenges and Opportunities

82. The GDP growth in Hong Kong has been relatively modest in recent years, when our neighbouring cities are advancing quickly. While the four pillar industries continue to underpin the bulk of our economy and employment, there are emerging industries leveraging the global trends, and in which Hong Kong enjoys clear advantages over it regional counterparts On the other hand, our geographical connection and economic integration with the Mainland and Asia are expected to be fortified with the completion of several major regional transport infrastructure in the coming few years, new initiatives under the Guangdong Free Trade Zones and "Belt and Road", as well as the cooperation

[18] "Green assets" refers to the green spaces in Hong Kong such as country parks, open spaces and recreation spaces which are partly or completely vegetated and often used for nature conservation, recreational and/or amenity purposes. "Blue assets" refers to water bodies including harbour, rivers and streams, conservation-related water space (such as wetlands, marine parks and marine reserves), water sports centres, beaches, reservoirs and artificial lakes.

with member countries of the Association of Southeast Asian Nations.

83. To embrace future challenges and new opportunities, Hong Kong needs to move up the value chain and diversify our economic base. The building up of land reserve would also help enhance the capacity for coping with the economic opportunities and challenges, providing diversified choices of premises for our industries and services, and creating quality jobs with a range of skills.

Creating Capacity for Sustainable Growth

84. Hong Kong needs to create more development capacity with supporting transport and other infrastructure, and at the same time to enhance and regenerate our environmental capacity for sustainable growth. This requires an enhanced strategic planning approach to spatial development, embracing creation and regeneration of capacity in terms of more space for development, better living environment, transportation and other infrastructures, and the rich natural environment in a holistic manner.

85. The enhanced strategic planning approach of creating capacity proposed under Hong Kong 2030+ would not only allow us to meet the estimated long-term land requirements and cater for the unforeseen circumstances, but also provide us the room or buffer to turn the visions of improving living space, enhancing living quality, averting demographic challenges, strengthening community services, and capturing economic opportunities into reality. With capacity and contingency properly and adequately planned ahead, we will have the flexibility and room to adjust the pace and quantum of land development projects to tie in with changing circumstances over a time span of decades.

86. To meet the current and long-term land requirements, Hong Kong 2030+ proposes a multi-pronged, robust and flexible approach to create land for Hong Kong. In particular, five broad measures are proposed, including optimisation (e.g. upzoning/rezoning of sites for development, and increasing development intensity where planning terms permit, etc.); swopping (e.g. freeing up land by relocating land uses not requiring prime locations, and releasing land with low conservation value and public enjoyment value for other beneficial uses, etc.); innovation (e.g. exploring rock cavern, underground space and topside developments, etc.); creation (e.g. reclaiming waters with low ecological and environmental impact outside Victoria Harbour, and development of brownfield sites, etc.); and life-cycle planning (e.g. prudent planning of beneficial after-use of quarries, landfill sites or other uses of a

temporary nature, etc.)

87. The strategic planning of transportation and other infrastructures should also be geared towards generating sufficient and timely capacity with contingency in support of the spatial distribution of development capacity. For instance, the planning and development of transport infrastructure and public transport services should be considered in the context of the overall transportation system, and in turn the spatial development pattern should also be considered with regard to optimising the use of the transportation system. Apart from the transportation system, other major essential infrastructures such as water supply, waste management and sewage treatment would also have to be reviewed in support of the enhanced capacity-creating approach.

88. Besides, as environmental sustainability is key to planning for a compact and liveable high-density city, we should pursue means to create, enhance and regenerate the environmental capacity that would enable more development capacity to be accommodated in a sustainable manner. The concept of creating, enhancing and regenerating environmental capacity is part and parcel of the spatial development strategy to accommodate further development capacity, so as to ensure that overall spatial development strategy would provide an appropriate balance between development and conservation.

89. Taking into account all the above anticipated demand and foreseen circumstances for housing, economic uses, G/IC uses, open space and transport facilities, the base case aggregate land requirement under Hong Kong 2030+ is estimated to be more than 4 800 ha. It is estimated that the existing, committed and planned developments, together with redevelopment of existing built-up areas, could only meet about 3 600 ha of the land requirement. Broadly speaking there is an anticipated land shortfall of at least 1 200 ha in the long run against the estimated land requirement.

Two Strategic Growth Areas Beyond 2030

90. As a strategic blueprint to guide the territorial development and shaping of the built environment, Hong Kong 2030+ proposes a conceptual spatial framework focusing on future development with one Metropolitan Business Core, two SGAs and three development axes, while conserving the natural assets and enhancing liveability. The proposed framework would prepare Hong Kong for sustainable growth with better living environment, while meeting the various social and economic development needs. It could

also help redress the existing unbalanced spatial distribution of homes and jobs for the territory by creating more jobs in the NT[19]. More importantly, the two new SGAs could help meet the anticipated land shortfall of at least 1 200 ha in the long run.

91. Apart from meeting the housing needs of Hong Kong, these two new SGAs will allow room for improving liveability, including living space and quality of living environment; provide land/space for economic activities to capture opportunities and maintain our competitiveness; provide land/space for community facilities and public realm to cater for an ageing population and promote a healthy city; and provide decanting land/space to cater for the anticipated housing need arising from substantial scale of urban regeneration including redevelopment.

92. As a matter of fact, most of Hong Kong's seven million people or so are now concentrated in built-up areas which account for about 24% (around 268 km^2) of the total land area of Hong Kong. Our population density of over 27 000 persons per km^2 of built-up area is much higher than all other major cities or advanced economies such as Singapore and Seoul[20]. This is in stark contrast to our level of social and economic development. If we would like to increase Hong Kong's average living space per person by only 1 m^2, roughly 10 million m^2 of additional residential gross floor area(assuming a saleable area of about 70 to 80%) would be needed. That would be as big as about 10 Taikoo Shings. With the vision-driven strategic planning approach to proactively plan for development capacity in advance, the flexibility and buffer so allowed will help turn the visions of improving living space, enhancing living quality, and capturing economic opportunities into reality.

(i) New Territories North
(Population: about 255 000 or 350,000; Employment: about 215 000)

93. Through comprehensive planning and more efficient use of the brownfield sites and abandoned agricultural land in the NT, the NTN development would provide land for building new communities at Heung Yuen

[19] Based on the planned population and employment, the relative proportion of population and jobs in the Metro Area would be broadly reduced from about 59% to about 45% and from about 76% to about 62% respectively. The corresponding share in the NT would increase from about 41% to about 55% for population and from about 24% to about 38% for employment.

[20] The population densities of existing new towns like Tin Shui Wai and Fanling/Sheung Shui are even higher. Based on net land area (i.e. excluding the surface area of reservoirs), their population densities were 66 995 and 33 212 persons per km^2 respectively according to C&SD's 2011 Population Census. The population densities of future NDAs like FLN and HSK are also not low. Their planned population densities based on gross area are about 43 300 and 29 400 persons per km^2 respectively.

Wai/Ping Che/Ta Kwu Ling/Hung Lung Hang/Queen's Hill, together with two potential development areas at San Tin/Lok Ma Chau and Man Kam To, and developing modern industries and industries preferring a boundary location to capitalise the future LT/HYW BCP, while improving the overall environment of the existing area. A new town at Heung Yuen Wai/Ping Che/Ta Kwu Ling/Hung Lung Hang/Queen's Hill, together with two potential development areas at San Tin/Lok Ma Chau and Man Kam To have been identified. Strategically, with a focus on economic uses and job creation, NTN will provide space for development of economic and employment nodes outside the Metropolitan Business Core and redress the current home-job imbalance of the territory, thereby reducing the burden on the transport system. Spatially, it leverages the strategic transport infrastructure serving and being improved for the area, and its strategic proximity with Shenzhen to capture economic opportunities for Hong Kong. Through the concept of rural-urban integration and the identification of areas of high quality farmland as Agricultural Priority Areas under the New Agricultural Policy, the NTN will strike an appropriate balance between urban and rural uses. It is also expected that some 200 ha of brownfield sites would be released through the development of NTN.

(ii) East Lantau Metropolis
(Population: about 400 000 to 700 000; Employment: about 200 000)

94. The basic concept of ELM is to create artificial islands by reclamation in the waters near Kau Yi Chau and in the Hei Ling Chau Typhoon Shelter, and to make better use of the under-utilised land in Mui Wo, with the aim of creating a smart, liveable and low-carbon development cluster. Strategically, it provides expansion room for the Metropolitan Business Core with a new CBD3 and serve as a new metro front. With its proximity and connection to the existing urban areas concentrated with older buildings, the ELM would also provide much needed decanting space for the redevelopment of the existing urban areas, and could also serve as solution space for exploring more innovative thinking to enhance our urban renewal strategy and to facilitate urban redevelopment. It also provides a key stepping stone to extend the strategic transport (highway and railway) network bridging the main urban areas with Lantau Island and western NT. Spatially, it tallies with the overall westward shift in centrality of the regional development pattern, and serves as a new platform to leverage development potential spurred by the new and improved transport connections extending from the traditional CBD to the Pearl River Delta east and west. We will seek support to funding application for commencing strategic studies to explore the feasibility of constructing artificial islands in the central waters for developing the ELM at an appropriate time.

WAY FORWARD

95. With an acute shortage of land and the growing demand for housing, economic development and better living, we cannot afford the luxury of staying put, slowing or even halting the on-going land development initiatives, and feeling complacent with the progress in boosting land supply we achieved thus far. The challenges in planning and land development as encapsulated above are real, imminent and formidable. No single solution could help us overcome the challenges ahead. Neither is there magic solution that can increase land supply without impacting on the local community. All the above-mentioned initiatives, spanning short, medium to long term, must be pursued proactively and rationally, lest the problems with land shortage, high property price, long PRH waiting list, soaring rents for housing, offices and industrial land will persist and deteriorate.

96. Providing sufficient land to meet the needs of our society remains a huge challenge for both the Government and the community. An integral part of the land supply process is the support and understanding rendered by DCs, local communities, residents and relevant stakeholders. The community as a whole has to accept trade-offs in order to cope with the pressing housing needs of Hong Kong people, especially the pressing needs of those waiting to move into PRH or to improve their existing living environment. The Government will continue to maintain a close dialogue with all sectors of society with a view to building consensus, breaking through the bottlenecks and solving the problems of land shortage.

97. The Government appreciates different views on the development and use of land in the society. For land with potential for residential development or other uses that meet the more pressing needs in the community, we will review and assess the feasibility of the relevant development proposals under the established mechanism. For proposals which are considered feasible in increasing land supply, we will definitely consider exploring. For a number of land supply suggestions received in the past, our key responses are at **Annex J**. Generally speaking, those suggestions that are considered feasible have already been incorporated into our multi-pronged strategy to increase land supply. The Government has considered the circumstances of different land and districts, and prioritised the utilisation and development of land on the premise that resources are limited and an overall planning are relatively more cost-effective. Resources have thus been dedicated to taking forward a series of measures to increase land supply as mentioned above, including land use reviews and rezoning, as well as P&E studies in various districts, so as to increase the land supply in Hong Kong effectively and continuously.

ADVICE SOUGHT

98. We welcome Members' feedback and undertake to work closely with LegCo in taking forward the initiatives to increase land supply in the short, medium and long term, as well as the key strategic directions recommended under the Hong Kong 2030+ to plan for the future of Hong Kong.

Development Bureau
18 January 2017

Annex A

Drivers and Indicators of Land Demand

Table 1 Mid-year Population, Domestic Households, Average Household Size and Gross Domestic Product

Year	Mid-year Population	Domestic Households [1]	Average Household Size [1]	GDP in Real Terms [2]
	(in million persons)	(in million)	(in persons)	(in billion HK$)
1965	3.60	0.76	4.7	154.5
1970	3.96	0.86	4.5	200.9
1975	4.46	1.00	4.2	275.5
1980	5.06	1.24	3.9	475.4
1985	5.46	1.42	3.7	628.0
1990	5.70	1.56	3.5	911.3
1995	6.16	1.78	3.4	1,179.8
2000	6.67	2.04	3.3	1,342.8
2005	6.81	2.20	3.0	1,651.3
2010	7.02	2.33	2.9	2,001.3
2015	7.31	2.47	2.9	2,313.2
Projections [3]				
2020	7.58	2.60	2.8	-
2025	7.80	2.72	2.8	-
2030	7.97	2.81	2.8	-
2035	8.13	2.87	2.7	-
2040	8.21	2.91	2.7	-
2045	8.22	2.92	2.7	-
2050	8.16	-	-	-
2055	8.05	-	-	-
2060	7.91	-	-	-
2064	7.81	-	-	-

Compound Average Annual Growth Rates

Period	Mid-year Population	Domestic Households [1]	Average Household Size	GDP in Real Terms [2]	
	Compound Average Annual Growth Rate (in %)				
1965-1970	1.9	2.5	-	5.4	
1970-1975	2.4	3.1	-	6.5	
1975-1980	2.6	4.4	-	11.5	
1980-1985	1.5	3.4	-	5.7	
1985-1990	0.9	1.9	-	7.7	
1990-1995	1.5	2.7	-	5.3	
1995-2000	1.6	2.7	-	2.6	
2000-2005	0.4	1.5	-	4.2	
2005-2010	0.6	1.1	-	3.9	
2010-2015	0.8	1.2	-	2.9	
Projections [3]				Working Assumptions [2a]	
2015-2020	0.7	1.1	-	2017-2020	3.0
2020-2025	0.6	0.9	-	2021-2024	2.9
2025-2030	0.4	0.7	-	2025-2034	2.5
2030-2035	0.4	0.4	-		
2035-2040	0.2	0.3	-	2035-2044	2.3
2040-2045	0.0	0.1	-		
2045-2050	-0.1	-	-	-	-
2055-2060	-0.4	-	-	-	-
2060-2064	-0.3	-	-	-	-

Notes:

[1] Domestic households and average household size before 1985 are from the nearest Population Censuses/By-censuses of the year concerned. Hence, the data of 1965 is from the 1966 Population By-census and refers to the year of 1966, the data of 1970 is from the 1971 Population Census and refers to the year 1971, and so on. As such, the average annual growth rates before 1985 are referring to the periods of 1966-1971, 1971-1976, 1976-1981 and 1981-1985.

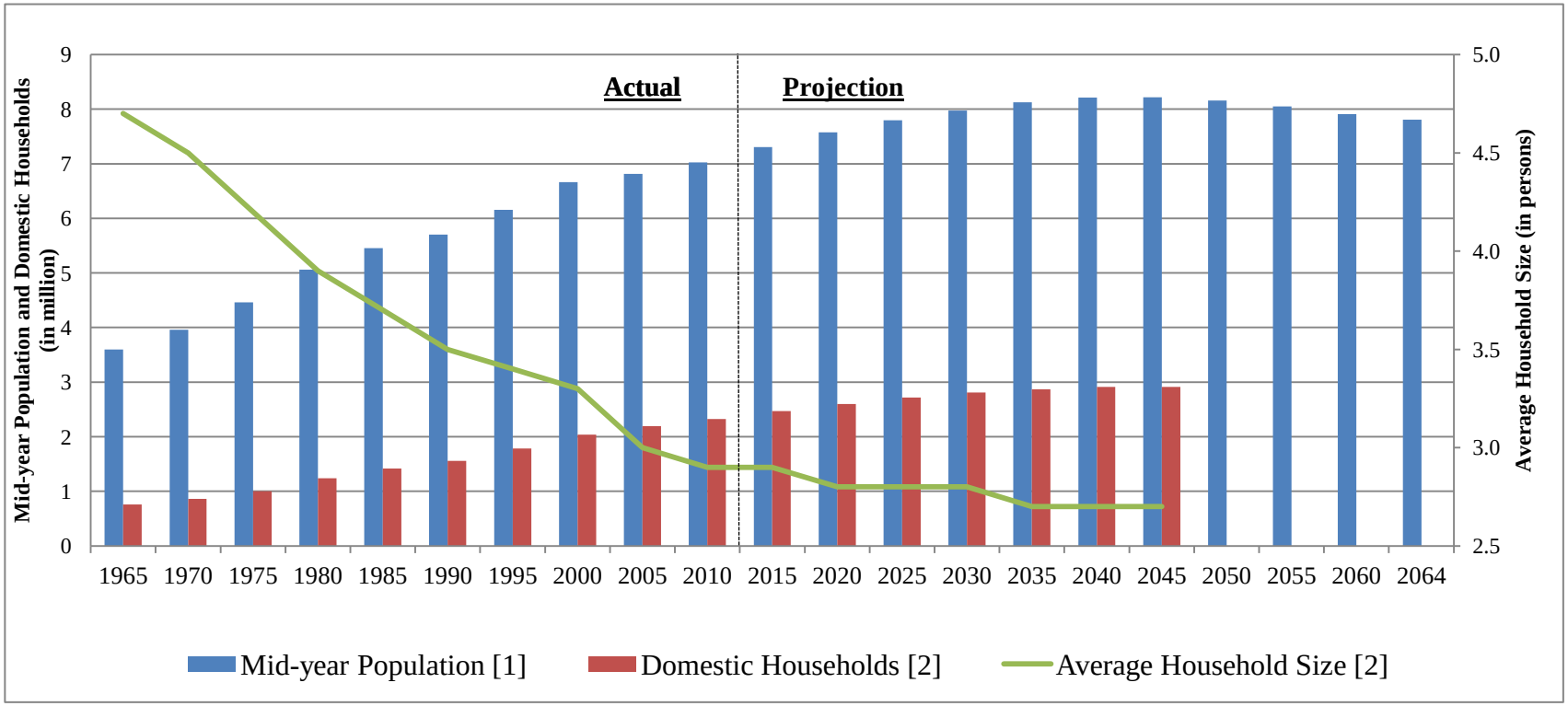
[2] GDP in real terms refer to GDP in chained (2014) dollars.

[2a] The trend growth rate for 2017-2020 follows the medium-term assumption as adopted in the 2016-17 Budget. The trend growth rates beyond the medium term (i.e. 2020-2044) are working assumptions only. They are to a certain extend judgemental and should not be taken as the official economic forecasts by the Government. The trend growth rates beyond 2044 are not available.

[3] Projected population and domestic households are based on the results of the Hong Kong Population Projections 2015-2064 and the Hong Kong Domestic Household Projections up to 2049 published by C&SD in September and October 2015 respectively. As such, projected domestic households and average household size for 2050, 2055, 2060 and 2064 are not available.

Annex A

Chart 1 Population (1965-2064), Domestic Households and Average Household Size (1965-2045)



Notes: [1] Projected population is based on the results of the Hong Kong Population Projections 2015-2064 published by C&SD in September 2015.

[2] Projected domestic households and average household size are based on the results of the Hong Kong Domestic Household Projections up to 2049 published by C&SD in October 2015. As such, their projected figures for 2050, 2055, 2060 and 2064 are not available.

Annex A

Table 2 Rental and Price Indices for Various Types of Property (1985-2015)

Year	Private Offices [1]		Private Retail [2]		Private Flatted Factories [3]		Private Domestic [4]	
	Rental Indices	Price Indices	Rental Indices	Price Indices	Rental Indices	Price Indices	Rental Indices	Price Indices
	(1999 = 100)							
1985	43.4	26.5	35.8	19.1	49.9	47.6	39.4	19.0
1986	51.2	30.9	38.2	21.8	52.5	49.0	42.7	21.3
1987	65.4	42.0	42.7	26.5	62.0	68.3	47.0	26.3
1988	83.1	63.5	50.0	35.6	86.6	95.3	54.8	31.9
1989	136.4	103.2	62.7	46.7	112.3	119.9	69.4	40.2
1990	137.3	99.1	70.1	52.4	117.6	127.3	76.7	44.8
1991	129.6	100.3	79.2	66.5	121.8	136.9	82.4	61.1
1992	136.8	137.1	92.3	93.3	131.3	175.9	90.4	85.2
1993	149.9	164.6	102.4	113.3	144.7	209.8	97.4	93.0
1994	181.8	230.3	116.5	133.5	149.5	223.7	118.1	114.9
1995	178.6	194.6	117.8	129.7	146.9	198.7	120.7	107.3
1996	152.3	188.4	117.8	134.0	132.4	171.4	119.0	116.9
1997	156.8	213.1	123.5	177.3	132.5	168.9	134.5	163.1
1998	135.9	134.5	111.2	128.3	118.1	131.8	112.6	117.1
1999	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
2000	98.5	89.9	101.3	93.6	95.4	91.2	98.1	89.6
2001	101.0	78.7	99.4	86.8	90.3	82.0	95.4	78.7
2002	85.4	68.4	92.9	85.0	82.7	74.8	83.4	69.9
2003	74.6	62.5	86.4	85.5	74.9	71.7	73.6	61.6
2004	78.1	99.3	92.8	119.3	77.3	88.6	77.7	78.0
2005	96.4	133.0	100.5	149.3	82.6	125.0	86.5	92.0
2006	117.4	139.3	104.3	153.5	91.0	158.5	91.6	92.7
2007	131.9	165.5	111.8	172.5	100.5	199.5	101.8	103.5
2008	155.5	199.0	116.2	192.2	109.3	235.9	115.7	120.5
2009	135.7	179.8	110.9	193.1	99.4	216.3	100.4	121.3
2010	147.6	230.4	122.9	257.2	108.9	284.4	119.7	150.9
2011	169.9	297.9	134.3	327.4	118.6	385.0	134.0	182.1
2012	188.3	334.7	151.3	420.5	131.9	489.8	142.6	206.2
2013	204.1	409.8	165.5	506.8	147.3	655.4	154.5	242.4
2014	213.7	423.0	173.1	521.2	160.1	668.0	159.5	256.9
2015	226.7	448.9	182.5	559.2	174.4	723.9	172.8	296.8
Latest Figure (November 2016 [5])	233.0	426.4	179.1	525.1	183.4	697.0	171.0	306.6

Notes:

[1] Based on RVD. Private Office premises comprise premises situated in buildings designed for commercial/business purposes. Excluded are non-domestic floors in composite buildings.

[2] Based on RVD. Premises owned by HA and HS are excluded. Following the divestment of selected commercial HA premises to Link Real Estate Investment Trust (Link REIT) at the end of 2005, these divested properties are classified as private sector properties and are included in the statistics from 2006 onwards.

[3] Based on RVD. Private Flatted Factories comprise premises designed for general manufacturing processes and uses, including offices, directly related to such processes, and normally intended for sale or letting by the developers. Specialised factories are excluded. Similar premises built by HA are not included.

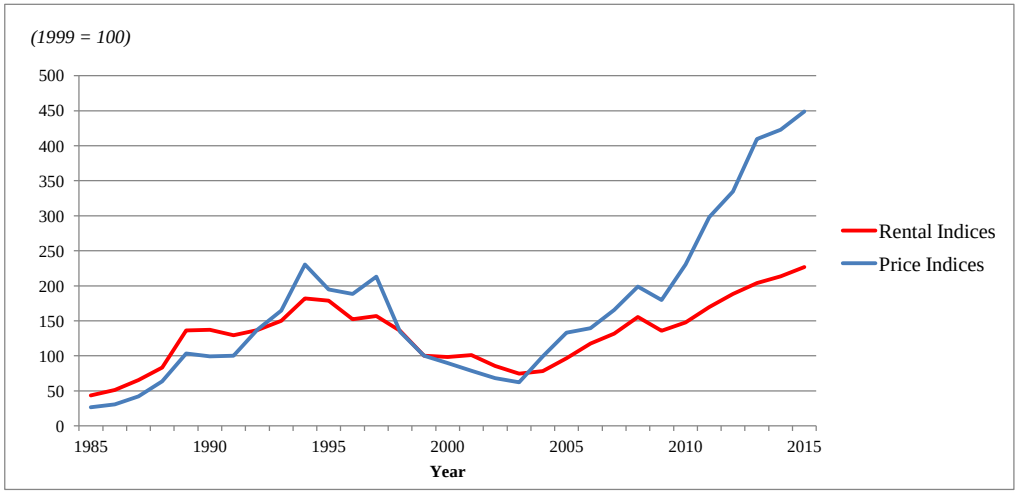
[4] Based on RVD. Private Domestic Units are defined as independent dwellings with separate cooking facilities and bathroom (and/or lavatory). Public sector developments, including domestic units built under the Private Sector Participation Scheme for subsidised sale, and all units built under the Home Ownership, Buy or Rent Option, Mortgage Subsidy, Sandwich Class Housing, Urban Improvement and Flat for-Sale Schemes are not included. Besides, rental estates built by HA and HS, units sold under the Tenants Purchase Scheme, and Government-owned quarters are also excluded. Village houses are not included in the stock, completions, demolition, take-up and vacancy figures except for the previous years of 2001 and before as specified.

[5] Provisional figures.

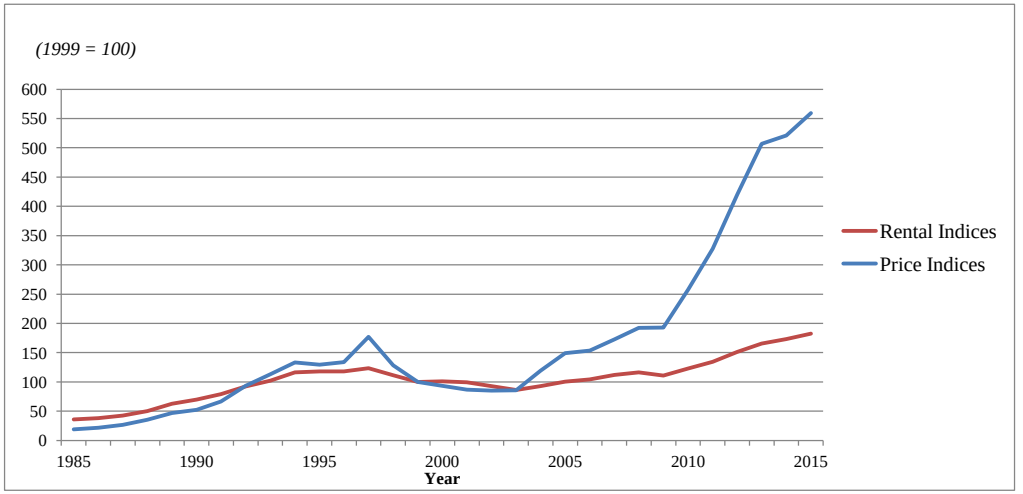
Annex A

Chart 2 Rental and Price Indices for Various Types of Property (2000-2015)

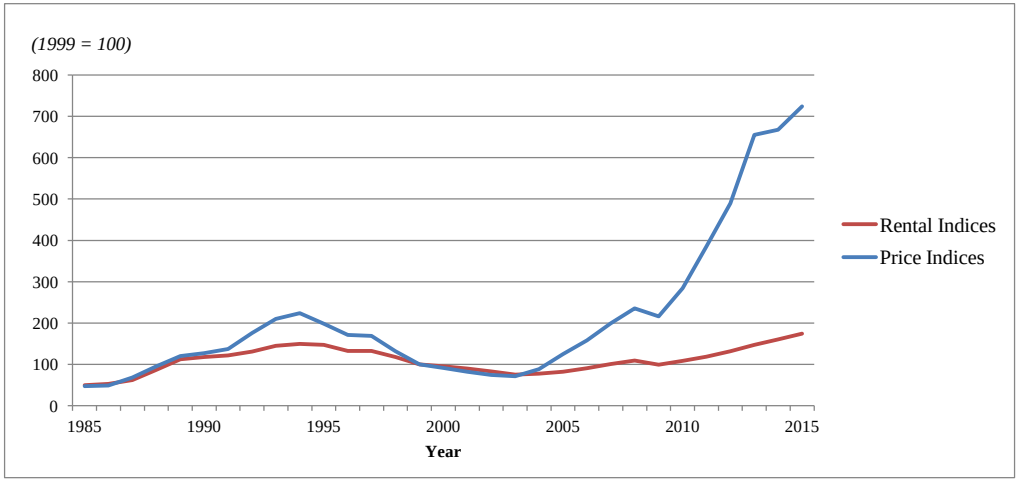
Private Offices



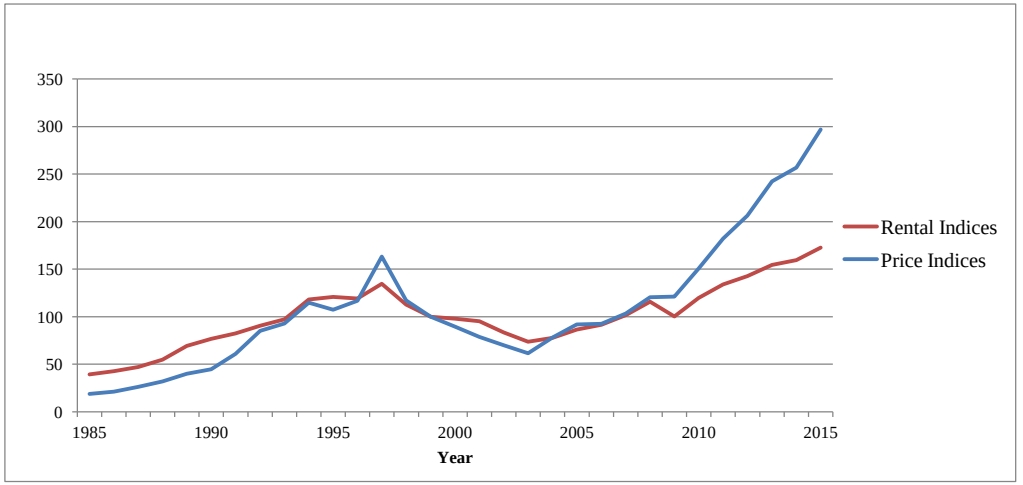
Private Retail



Private Flatted Factories



Private Domestic

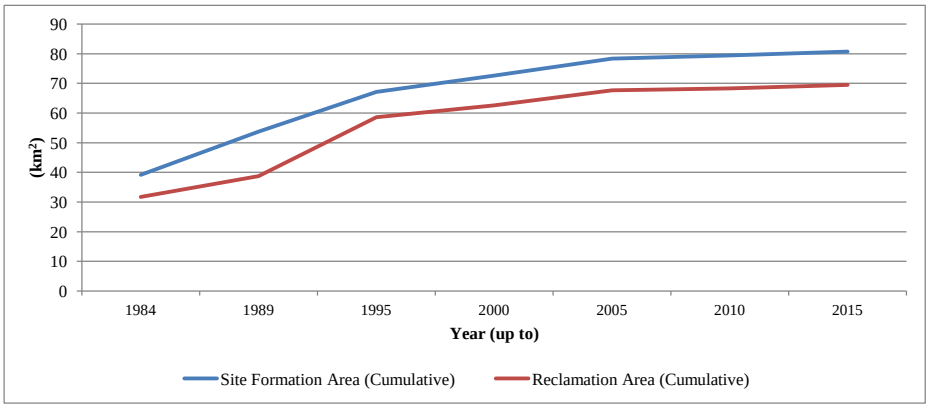


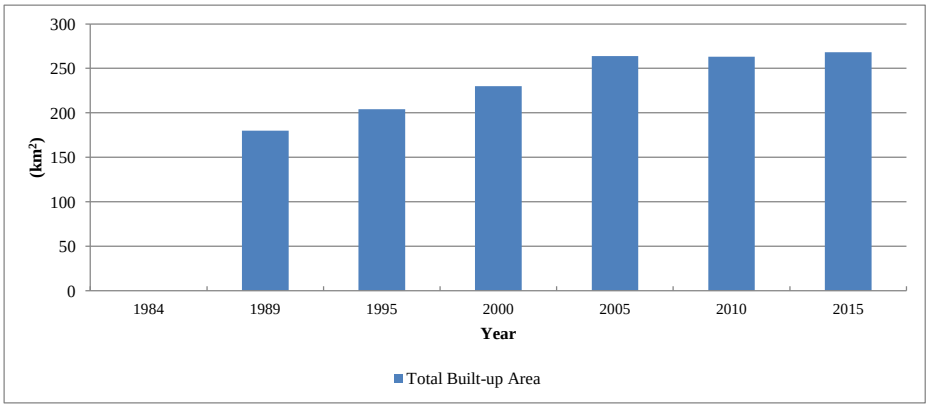
Annex B

Drivers and Indicators of Land Supply

Table 1 Land Formation Area, Reclamation Area and Total Built-up Area (1984-2015)

Year (up to)	Land Formation Area (Cumulative) [1]		Reclamation Area (Cumulative) [2]		Total Built-up Area [3]	
	(km^2)	Compound Average Annual Growth Rate (%)	(km^2)	Compound Average Annual Growth Rate (%)	(km^2)	Compound Average Annual Growth Rate (%)
1984	39.2	-	31.7	-	-	-
1989	53.8	6.5	38.7	4.1	180	-
1995	67.1	3.8	58.6	7.2	204	2.1
2000	72.6	1.6	62.6	1.3	230	2.4
2005	78.4	1.5	67.7	1.6	264	2.8
2010	79.4	0.3	68.3	0.2	263	-0.1
2015	80.7	0.3	69.5	0.3	268	0.4





Notes: [1] The figures comprise areas of land formed by general site formation and reclamation by CEDD (2005-2015), and the then Civil Engineering Department and Territorial Development Department (1984 to 2000).

[2] Based on "Hong Kong Geographic Data" prepared by LandsD.

[3] ◆ The land utilisation figures are available in Hong Kong Annual Reports/Hong Kong Yearbooks. Such figures are intended to show the existing broad land use pattern at a juncture of time in a small scale of 1:75 000 for general reference. It cannot reflect the "land supply" situation, e.g. it would not show the planned land uses or the prevailing land use zonings on town plans. The figure for 1984 is not included in the table as it was not compiled by PlanD and had adopted different methodologies/classification.

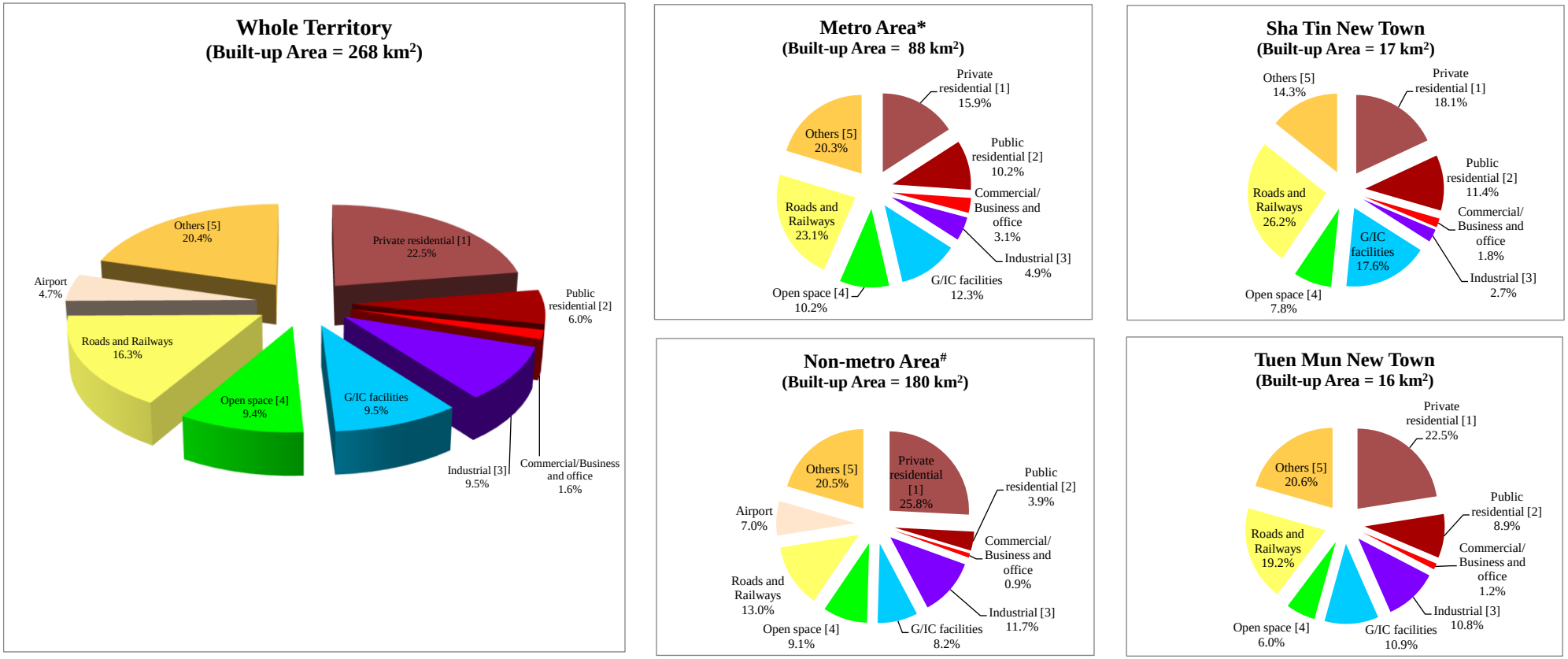
◆ The updating of the land utilisation figures is mainly based on satellite images (from 2000 onwards) and other relevant information from various Government departments. There were changes in data sources, classification and compilation methodology, as well as working assumptions over the years to suit the changing circumstances. While some figures have been aligned as far as possible, comparison of figures between years should be made cautiously.

◆ "Predominant use" methodology has been adopted in generalising the land use pattern. For sites with mixed land uses, the "non-predominant uses" will be screened out.

◆ The figures are only a two-dimensional expression of land use in Hong Kong. They cannot reflect the development intensity.

Annex B

Chart 1 Land Utilisation of Built-up Areas in 2015 - Whole Territory, Metro Area, Non-metro Area and Two Selected New Towns (i.e. Sha Tin and Tuen Mun)



Notes: The land utilisation data is compiled by PlanD based on satellite images dated February 2016 (© AIRBUS DS2016, all rights reserved), in-house survey information of PlanD up to end 2015 and other relevant information from various Government departments.

[1] Include residential land developed by private developers, village housing and temporary structures (exclude subsidised housing and temporary housing area).

[2] Include subsidised housing and temporary housing area.

[3] Include industrial land, industrial estate, warehouse and open storage.

[4] Include parks, stadiums, playgrounds and recreational facilities.

[5] Include cemeteries and crematoria, utilities, vacant land/construction in progress, and others.

* Cover built-up areas on Hong Kong Island and in Kowloon, Kwai Chung, Tsing Yi and Tsuen Wan.

\# Cover built-up areas in eight new towns (i.e. Sha Tin (including Ma On Shan), Tai Po, Fanling/Sheung Shui, Tseung Kwan O, Tuen Mun, Yuen Long, Tin Shui Wai and Tung Chung) and those in the rural areas.

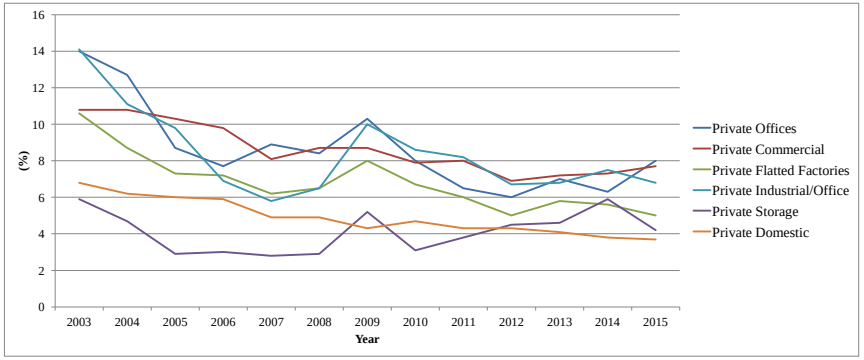
Annex B

Table 2 Stocks and Vacancy of Various Types of Property and Population in Private and Public Housing (1990-2015)

Year	Private Offices [1]		Private Commercial [2]		Private Flatted Factories [3]		Private Storage [4]		Private Industrial/Offices [5]	
	Stock (IFA in million m^2)	Vacancy Rate (in %)	Stock (IFA in million m^2)	Vacancy Rate (in %)	Stock (IFA in million m^2)	Vacancy Rate (in %)	Stock (IFA in million m^2)	Vacancy Rate (in %)	Stock (IFA in million m^2)	Vacancy Rate (in %)
1990	5.1	6.1	7.3	5.2	16.8	5.3	2.1	1.1	-	-
1991	5.5	9.2	7.5	4.6	17.1	6.2	2.8	10.3	-	-
1992	6.1	9.7	7.7	4.4	17.6	6.4	3.2	12.3	-	-
1993	6.4	6.7	7.9	6.1	17.8	6.0	3.3	6.4	-	-
1994	6.9	9.8	8.0	6.7	17.6	6.3	3.3	6.4	0.04	21.9
1995	7.2	9.4	8.2	7.8	17.7	7.9	3.2	8.2	0.12	58.4
1996	7.4	11.2	8.3	9.1	17.8	11.9	3.1	7.1	0.23	46.1
1997	7.9	11.5	8.5	8.9	17.9	10.0	3.3	9.4	0.32	25.9
1998	8.6	15.9	8.8	9.4	17.9	10.8	3.4	8.4	0.48	37.6
1999	9.0	14.0	9.0	9.2	17.9	9.7	3.5	8.1	0.52	28.0
2000	9.1	10.2	9.0	7.5	17.5	8.5	3.4	4.7	0.57	15.7
2001	9.2	11.1	9.1	8.2	17.6	10.9	3.4	7.1	0.60	15.0
2002	9.3	12.6	9.2	10.7	17.6	10.5	3.4	7.5	0.60	12.5
2003	9.5	14.0	9.3	10.8	17.5	10.6	3.4	5.9	0.61	14.1
2004	9.8	12.7	9.4	10.8	17.5	8.7	3.4	4.7	0.61	11.1
2005	9.8	8.7	9.5	10.3	17.5	7.3	3.4	2.9	0.62	9.8
2006	9.8	7.7	10.4	9.8	17.4	7.2	3.4	3.0	0.61	6.9
2007	10.1	8.9	10.5	8.1	17.3	6.2	3.4	2.8	0.61	5.8
2008	10.4	8.4	10.6	8.7	17.4	6.5	3.4	2.9	0.62	6.5
2009	10.5	10.3	10.7	8.7	17.3	8.0	3.4	5.2	0.61	10.0
2010	10.5	8.0	10.7	7.9	17.2	6.7	3.4	3.1	0.59	8.6
2011	10.8	6.5	10.8	8.0	17.2	6.0	3.5	3.8	0.59	8.2
2012	10.9	6.0	10.9	6.9	17.1	5.0	3.6	4.5	0.59	6.7
2013	11.0	7.0	10.9	7.2	17.2	5.8	3.6	4.6	0.59	6.8
2014	11.1	6.3	10.9	7.3	17.0	5.6	3.6	5.9	0.5*	7.5
2015	11.3	8.0	11.0	7.7	16.9	5.0	3.6	4.2	0.58	6.8

Year	Private Domestic [6]			Public Housing [7]		
	Stock (in million units)	Vacancy Rate (in %)	Population [8] (in million)	Stock (in million units)	Population [8] (in million) Public Rental Housing	Population [8] (in million) Subsidised Sale Flats
1990	0.75	3.5	-	-	-	-
1991	0.78	4.2	2.59	0.78	2.23	0.42
1992	0.81	4.2	-	-	-	-
1993	0.83	3.9	-	-	-	-
1994	0.86	4.7	-	0.87	-	-
1995	0.89	4.1	-	0.88	-	-
1996	0.91	3.7	2.91	0.92	2.39	0.71
1997	0.94	3.8	-	0.93	-	-
1998	0.96	4.5	-	0.95	-	-
1999	1.00	5.9	-	0.98	-	-
2000	1.03	5.4	-	1.02	-	-
2001	1.05	5.7	3.28	1.07	2.14	1.13
2002	1.09	6.8	-	1.06	-	-
2003	1.01	6.8	-	1.08	-	-
2004	1.03	6.2	-	1.08	-	-
2005	1.05	6.0	-	1.10	-	-
2006	1.07	5.9	3.38	1.11	2.13	1.22
2007	1.08	4.9	-	1.12	-	-
2008	1.09	4.9	-	1.12	-	-
2009	1.09	4.3	-	1.14	-	-
2010	1.10	4.7	-	1.14	-	-
2011	1.11	4.3	3.64	1.14	2.09	1.21
2012	1.12	4.3	-	1.16	-	-
2013	1.12	4.1	-	1.16	-	-
2014	1.14	3.8	-	1.18	-	-
2015	1.15	3.7	-	1.18	-	-

Vacancy Rate (2003-2015)



Notes: [1] Based on RVD. Private Office premises comprise premises situated in buildings designed for commercial/business purposes. Excluded are non-domestic floors in composite buildings.

[2] Based on RVD. Private Commercial premises include retail premises and other premises designed or adapted for commercial use, with the exception of purpose-built offices. Carparking space is excluded. Commercial premises owned by HA and HS are excluded. Following the divestment of selected commercial HA premises to Link Real Estate Investment Trust (Link REIT) at the end of 2005, these divested properties are classified as private sector properties and are included in the statistics from 2006 onwards.

[3] Based on RVD. Private Flatted Factories comprise premises designed for general manufacturing processes and uses, including offices, directly related to such processes, and normally intended for sale or letting by the developers. Specialised factories are excluded. Similar premises built by HA are not included.

[4] Based on RVD. Private Storage premises comprise premises designed or adapted for use as godowns or cold stores and include ancillary offices. Premises located within container terminals are included.

[5] Based on RVD. Private Industrial/Office premises are floor space designed or certified for industrial/office use.

[6] Based on RVD. Private Domestic Units are defined as independent dwellings with separate cooking facilities and bathroom (and/or lavatory). Public sector developments, including domestic units built under the Private Sector Participation Scheme for subsidised sale, and all units built under the Home Ownership, Buy or Rent Option, Mortgage Subsidy, Sandwich Class Housing, Urban Improvement and Flat for-Sale Schemes are not included. Besides, rental estates built by HA and HS, units sold under the Tenants Purchase Scheme, and Government-owned quarters are also excluded. Village houses are not included in the stock, completions, demolition, take-up and vacancy figures except for the previous years of 2001 and before as specified.

[7] Based on C&SD's Hong Kong Annual Digest of Statistics published in various years. Include HA's and HS's public rental housing and subsidised sale flats. HA's private sector participation scheme and middle income housing are included for the figures in 1994 and 1995. As from 2002, the figures exclude subsidised sale flats that can be traded in open market. Figures for 1990, 1992 and 1993 are not available.

[8] Refer to population in private residential flats identified in the Population Censuses/By-censuses of the year concerned. Private residential flats generally include all flats and apartments in multi-storey blocks or houses built by the private sector mainly for residential purpose.

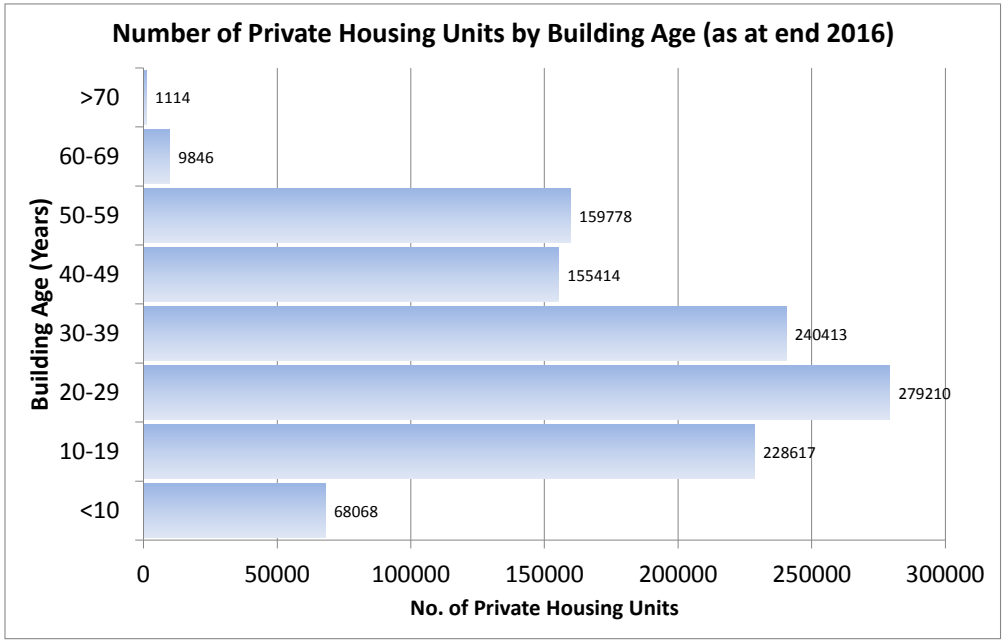
[9] Refer to population in public rental housing units and subsidised sale flats identified in the Population Censuses/By-censuses of the year concerned.

Annex C

Age Profile of Existing Private Housing Stock

Table 1 Number of Private Housing Units by Building Age and District Council (as at end 2016)

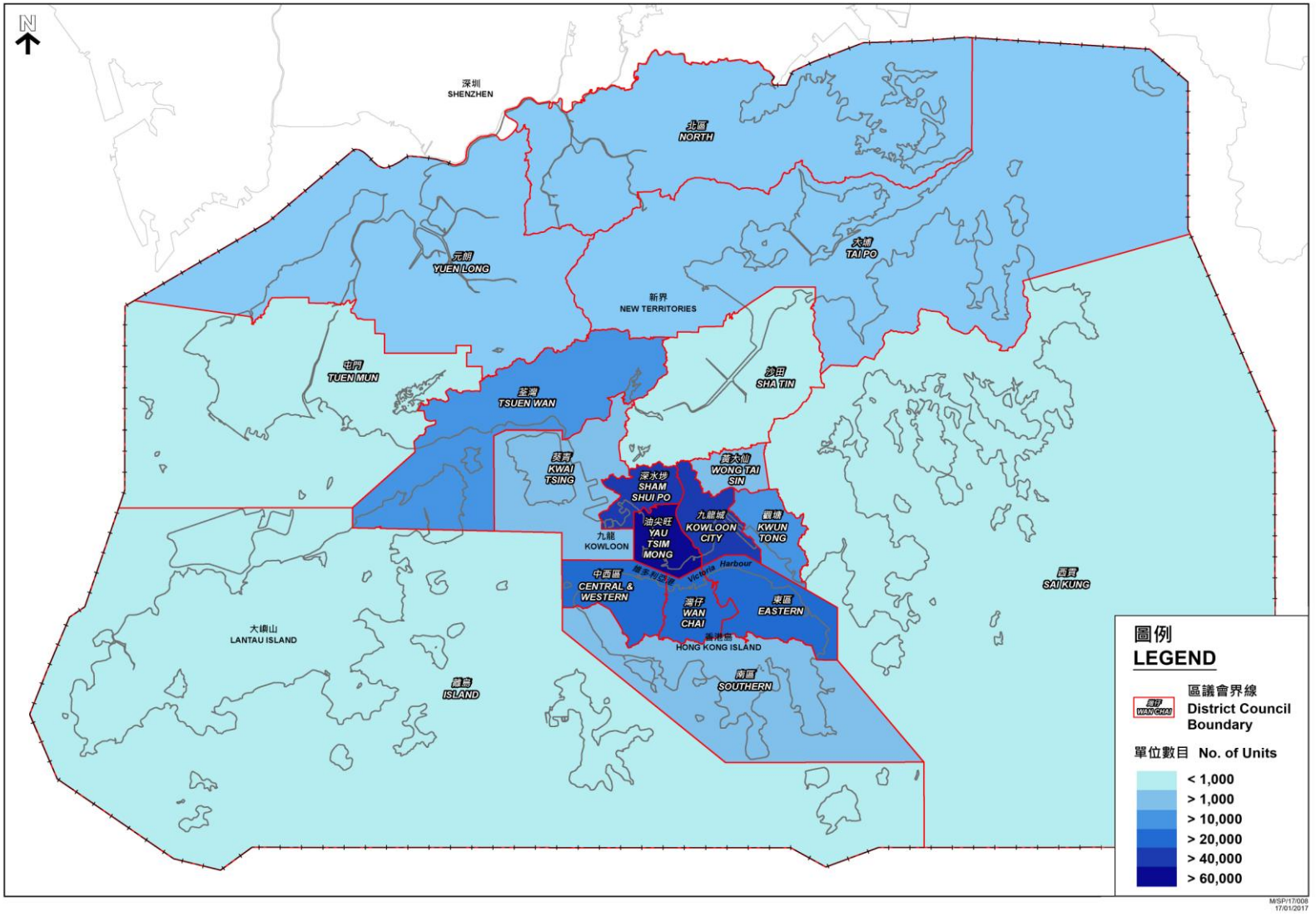
District Council	Building Age (Years)																Total	
	Below 10		10-19		20-29		30-39		40-49		50-59		60-69		70 or Above			
	No. of Units	%	No. of Units	%	No. of Units	%	No. of Units	%	No. of Units	%	No. of Units	%	No. of Units	%	No. of Units	%	**No. of Units**	***%***
Central and Western	3 075	*3.3*	12 591	*13.4*	25 801	*27.5*	21 400	*22.8*	18 424	*19.6*	11 487	*12.2*	890	*0.9*	151	*0.2*	**93 819**	***100.0***
Wan Chai	2 611	*4.4*	3 924	*6.6*	10 170	*17.0*	11 349	*19.0*	13 680	*22.9*	16 811	*28.1*	1 057	*1.8*	139	*0.2*	**59 741**	***100.0***
Eastern	1 492	*1.2*	9 913	*8.0*	30 402	*24.5*	44 681	*36.0*	20 142	*16.2*	16 703	*13.5*	727	*0.6*	34	*0.0*	**124 094**	***100.0***
Southern	2 257	*5.7*	4 591	*11.7*	15 008	*38.2*	13 207	*33.6*	2 498	*6.4*	1 417	*3.6*	277	*0.7*	65	*0.2*	**39 320**	***100.0***
Sham Shui Po	2 522	*3.1*	13 491	*16.6*	7 560	*9.3*	13 486	*16.6*	19 674	*24.3*	22 422	*27.7*	1 788	*2.2*	135	*0.2*	**81 078**	***100.0***
Kowloon City	3 308	*3.1*	19 794	*18.5*	14 464	*13.5*	17 515	*16.3*	20 032	*18.7*	28 744	*26.8*	3 187	*3.0*	232	*0.2*	**107 276**	***100.0***
Wong Tai Sin	3 417	*17.5*	3 359	*17.2*	2 665	*13.6*	2 591	*13.3*	4 317	*22.1*	3 188	*16.3*	0	*0.0*	4	*0.0*	**19 541**	***100.0***
Kwun Tong	607	*1.3*	559	*1.2*	14 467	*29.8*	15 607	*32.2*	9 439	*19.4*	7 862	*16.2*	0	*0.0*	0	*0.0*	**48 541**	***100.0***
Yau Tsim Mong	7 158	*5.9*	25 128	*20.9*	6 433	*5.3*	13 470	*11.2*	21 531	*17.9*	44 962	*37.4*	1 496	*1.2*	190	*0.2*	**120 368**	***100.0***
Kwai Tsing	927	*2.6*	10 483	*29.4*	5 312	*14.9*	10 546	*29.6*	7 809	*21.9*	459	*1.3*	126	*0.4*	2	*0.0*	**35 664**	***100.0***
Tsuen Wan	4 385	*5.5*	21 217	*26.5*	25 761	*32.2*	18 538	*23.2*	6 669	*8.3*	3 263	*4.1*	136	*0.2*	4	*0.0*	**79 973**	***100.0***
Tuen Mun	2 674	*5.2*	14 659	*28.5*	27 528	*53.5*	5 558	*10.8*	884	*1.7*	97	*0.2*	9	*0.0*	6	*0.0*	**51 415**	***100.0***
Yuen Long	9 393	*13.8*	15 006	*22.1*	25 321	*37.3*	12 593	*18.6*	5 060	*7.5*	368	*0.5*	90	*0.1*	36	*0.1*	**67 867**	***100.0***
North	2 076	*7.0*	9 425	*31.8*	14 356	*48.4*	1 115	*3.8*	1 266	*4.3*	1 323	*4.5*	14	*0.0*	58	*0.2*	**29 633**	***100.0***
Tai Po	2 680	*8.6*	4 631	*14.9*	13 298	*42.8*	7 707	*24.8*	2 332	*7.5*	384	*1.2*	43	*0.1*	15	*0.0*	**31 090**	***100.0***
Sha Tin	12 854	*16.8*	12 870	*16.8*	22 954	*30.0*	26 814	*35.1*	867	*1.1*	59	*0.1*	4	*0.0*	11	*0.0*	**76 433**	***100.0***
Sai Kung	5 848	*12.2*	33 283	*69.2*	6 321	*13.1*	1 702	*3.5*	695	*1.4*	220	*0.5*	1	*0.0*	32	*0.1*	**48 102**	***100.0***
Islands	784	*2.8*	13 693	*48.0*	11 389	*40.0*	2 534	*8.9*	95	*0.3*	9	*0.0*	1	*0.0*	0	*0.0*	**28 505**	***100.0***
Total	**68 068**	***6.0***	**228 617**	***20.0***	**279 210**	***24.4***	**240 413**	***21.0***	**155 414**	***13.6***	**159 778**	***14.0***	**9 846**	***0.9***	**1 114**	***0.1***	**1 142 460**	***100.0***



Source: PlanD

圖 1　　2016年底私人房屋單位樓齡達40年或以上(按區議會)

Figure 1　Private Housing Units Aged 40 or Above by End 2016 (by District Council)



深圳
Shenzhen

香港特別行政區界線
Boundary of HKSAR

N

落馬洲河套地區
Lok Ma Chau Loop

古洞北新發展區
Kwu Tung North NDA

潛在的科學園/工業邨用地
Potential Sites for Science Park / Industrial Estate

匯境/香園圍管制站(興建中)
Liantang/ Heung Yuen Wai Control Point (under construction)

香園圍 / 坪輋 / 打鼓嶺 / 恐龍坑 / 皇后山
Heung Yuen Wai / Ping Che / Ta Kwu Ling / Hung Lung Hang / Queen's Hill

文錦渡
Man Kam To

粉嶺北新發展區
Fanling North NDA

匯境/香園圍口岸連接路
Link Road to Liantang / Heung Yuen Wai Boundary Control Point

擬議古洞站
Proposed Kwu Tung Station

古洞南
Kwu Tung South

新田/落馬洲
San Tin / Lok Ma Chau

北環線(錦上路站-古洞站)
Northern Link (Kam Sheung Road Station - Kwu Tung Station)

擬議洪水橋站
Proposed Hung Shui Kiu Station

洪水橋新發展區
Hung Shui Kiu NDA

元朗南
Yuen Long South

Guangzhou-Shenzhen-Hong Kong Express Rail Link (Hong Kong Section)
廣深港高速鐵路(香港段)

新界
New Territories

錦田南
Kam Tin South

藍地石礦場(不包括岩洞區域)
Lam Tei Quarry (excluding the cavern area)

十一號幹線(藍地至大欖涌隧道)
Route 11 (Lam Tei - Tai Lam Chung Tunnel)

屯門西繞道
Tuen Mun Western Bypass

龍鼓灘
Lung Kwu Tan

屯門40及46區和毗連地區
Tuen Mun Areas 40 & 46 and Adjoining Areas

屯門南延線
Tuen Mun South Extension

深井污水處理廠
Sham Tseng Sewage Treatment Works

青衣西北
Tsing Yi Northwest

馬料水
Ma Liu Shui

沙田污水處理廠
Sha Tin Sewage Treatment Works

西貢污水處理廠
Sai Kung Sewage Treatment Works

鑽石山食水及海水配水庫
Diamond Hill Fresh Water and Salt Water Service Reservoirs

鑽石山綜合發展區
Diamond Hill CDA Site

安達臣道石礦場
Anderson Road Quarry

啟德發展區
Kai Tak Development

九龍
Kowloon

中九龍幹線
Central Kowloon Route

東九龍線
East Kowloon Line

九龍東 T2主幹線
Kowloon East Trunk Road T2

將軍澳至藍田隧道
Tseung Kwan O - Lam Tin Tunnel

將軍澳跨灣連接路
Tseung Kwan O Cross Bay Link

將軍澳第137區
Tseung Kwan O Area 137

尖沙咀西
Tsim Sha Tsui West

前茶果嶺高嶺土礦場
Ex-Cha Kwo Ling Kaolin Mine

中環灣仔繞道和東區走廊連接路
Central - Wan Chai Bypass & Island Eastern Corridor Link

北港島線
North Island Line

金鐘(灣仔)
Admiralty (Wan Chai)

銅鑼灣及跑馬地
Causeway Bay and Happy Valley

香港島
Hong Kong Island

南港島線(西段)
South Island Line (West)

機場島北商業區
North Commercial District on Airport Island

港珠澳大橋香港口岸人工島上蓋發展
Topside Development at HKBCF Island of HZMB

屯門至赤鱲角連接路
Tuen Mun - Chek Lap Kok Link

青龍橋
Tsing Lung Bridge

欣澳
Sunny Bay

小蠔灣
Siu Ho Wan

機場三跑道系統
Hong Kong International Airport Three-runway System

香港國際機場
Hong Kong International Airport

小蠔灣車廠
Siu Ho Wan Depot

擬議東涌東站
Proposed Tung Chung East Station

東涌新市鎮擴展
Tung Chung New Town Extension

東涌西延線
Tung Chung West Extension

港珠澳大橋
Hong Kong - Zhuhai - Macao Bridge

港珠澳大橋香港接線
Hong Kong - Zhuhai - Macao Bridge Hong Kong Link Road

梅窩
Mui Wo

交椅洲
Kau Yi Chau

喜靈洲
Hei Ling Chau

大嶼山
Lantau Island

前南丫石礦場
Ex-Lamma Quarry

比例尺 SCALE
公里 km 2 0 2 4 6 8 公里 10 km

圖例 LEGEND

- 現有鐵路〔輕鐵除外〕 Existing Railway Line (excluding Light Rail)
- 已落實鐵路 Committed Railway Line
- 規劃中的鐵路 Major Railway under Planning
- 現有主要道路 Existing Major Road
- 已落實主要道路 Committed Major Road
- 規劃中的主要道路 Major Road under Planning
- 已建設土地 Built-up Area
- 維多利亞港 Victoria Harbour
- 現有/擬議的海岸公園或海岸保護區 Existing / Proposed Marine Park or Marine Reserve
- 為綜合廢物管理設施第一期而擬建的海岸公園的初步界線（或會作改動） Draft Boundary of the Proposed Marine Park for the IWMF Phase 1 (subject to amendment)
- 主要保育地區 Major Conservation Areas
- 擬議郊野公園 Proposed Country Park
- 短、中期土地供應 Short to Medium Term Land Supply
- 起動九龍東 Energizing Kowloon East
- 中、長期土地供應 Medium to Long Term Land Supply
- 策略增長區 Strategic Growth Areas
  - 新界北 New Territories North (NTN)
  - 東大嶼都會 East Lantau Metropolis (ELM)
- 維港以外的近岸填海地點 Near-shore Reclamation Outside Victoria Harbour
- 擬議遷往岩洞的政府設施 Proposed Government Facilities for Relocation to Caverns
- 城市地下空間發展：策略性地區先導研究 Pilot Study on Underground Space Development in Selected Strategic Urban Areas
- 擬議運輸走廊（有待進一步研究） Proposed Transport Corridors (subject to further study)

★ 2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地
Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)

★ 2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地
Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)

★ 2013年施政報告公布多項增加土地供應措施下短中期房屋用地
Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

規劃中的地點及交通走線只供參考，或有修改
The sites and alignment of the transport links under planning are indicative only, may be subject to change

主要土地供應措施
Major Land Supply Initiatives

圖則編號 Plan No. : M / SP / 16 / 473

日期 Date : 17. 1. 2017

附件 D
Annex D

Annex E

Overview of Land Supply Initiatives

(I) Short to Medium Term Land Supply Initiatives			
	Estimated Developable Land Area (about) (ha)	**Estimated Flat Production / Economic Use GFA (about)**	**Estimated Population Intake/GFA Availability**
Land Use Reviews - Some 25 Potential Housing Sites (2019/20-2023/24) (2017 Policy Address)	~100 (including about 10 Green Belt sites of about 50 ha)	60 000+ units (>80% public housing units)	Depending on circumstances of individual sites
Land Use Reviews - Some 150 Potential Housing Sites (2014/15-2018/19) (2014 Policy Address)	~350 (including about 70 Green Belt sites of over 150 ha)	210 000+ units (>70% public housing units)	Depending on circumstances of individual sites
Increasing Land Supply – 42 Potential Housing Sites (2013 Policy Address)	~50	40 000 units (>60% public housing units)	Depending on circumstances of individual sites
Kai Tak Development	320 (total planning area)	Flat no.: 50 000 units Commercial GFA: 2.3 million m^{2+}	2014 and after
Diamond CDA Site	7.42	4 050 units (all public housing)	Starting from 2020/21
Ex-Cha Kwo Ling Kaolin Mine (included in the some 150 sites announced in 2014 Policy Address)	3.29 (residential area)	2 270 units (public/private: about 1:6)	Starting from 2023/24
Anderson Road Quarry (included in the some 150 sites announced in 2014 Policy Address)	40	9 410 units (public/private: about 2:8)	Starting from 2023/24
Ex-Lamma Quarry	20	1 900 units (public/private: about 4:6)	2024 - 2025

(I) Short to Medium Term Land Supply Initiatives			
	Estimated Developable Land Area (about) (ha)	**Estimated Flat Production / Economic Use GFA (about)**	**Estimated Population Intake/GFA Availability**
Kam Tin South Public Housing Development (included in the some 150 sites announced in 2014 Policy Address)	19	7 900 units	2024 and after
Railway Property Developments – Committed Projects*	25	14 000 units	Depending on circumstances of individual sites
Urban Redevelopments Implemented by URA#	2.38	3 310 units	Depending on circumstances of individual sites
Energizing Kowloon East	4.76	Business GFA: 547 000 m^2	Starting from 2023/24
New Central Harbourfront	10	Commercial GFA: 200 000 m^2	Depending on circumstances of individual sites
Total (approximate)	-	**Flat no.:** **380 000+ units** **Economic use GFA:** **2 million+ m^2**	-

Notes:

* Excluding West Rail Pat Heung Maintenance Depot site and potential property developments (e.g. Siu Ho Wan Depot).

\# Based on URA's commenced residential projects with projected tender invitation timetable in the 5 years from 2017/18 to 2021/22.

\+ This is the estimated total commercial GFA in KTD, which comprises about 1.75 million m^2 of commercial floor area and about 133 000 m^2 of government office floor space under planning, as well as about 420 000 m^2 of commercial floor space currently in use by the private sector.

The estimated developable land area, flat production, economic use GFA, population intake and GFA availability are subject to changes.

(II) Medium to Long Term Land Supply Initiatives			
	Estimated Developable Land Area (about) (ha)	**Estimated Flat Production / Economic Use GFA (about)**	**Estimated Population Intake/GFA Availability**
Kwu Tung North and Fanling North New Development Areas	320	Flat no.: 60 000 units (public/private: about 6:4) Commercial/Industrial GFA: 840 000 m^2	2023 - 2031
Tung Chung New Town Extension	196	Flat no.: 49 400 units (public/private: about 6:4) Commercial GFA: 877 000 m^2	2023 - 2030
Hung Shui Kiu New Development Area	441	Flat no.: 61 000 units (public/private: about 5:5) Commercial/Industrial GFA: 6.37 million m^2	2024 - 2037
Yuen Long South Development	183	Flat no.: 27 700 units (public/private: about 6:4) Commercial/Industrial GFA: 590 000 m^2	2027 and after
Tseung Kwan O Area 137	80+	Subject to study	Subject to study
Railway Property Developments – Potential Projects in Medium/Long Term (including Pat Heung Maintenance Depot and Siu Ho Wan Depot)	54	21 000+ units	Subject to study
Topside Development at HKBCF Island of HZMB	HKBCF: 150	Commercial GFA: up to 500 000 m^2	Subject to study
Total (approximate)	-	**Flat no.: 220 000+ units** **Economic use GFA: 8.6 million+ m^2**	-

Note:
The estimated developable land area, flat production, economic use GFA, population, population intake and GFA availability are subject to changes.

(III) Longer Term Land Supply Initiatives			
	Approximate Land Area Involved (about) (ha)	**Approximate Population / Employment / Development Capacity**	**Approximate Development Time**
Reclamations Outside Victoria Harbour (including Sunny Bay, Lung Kwu Tan, Siu Ho Wan, Tsing Yi Southwest, Ma Liu Shui, artificial islands in central waters including ELM)	Sunny Bay: 60 to 100 Lung Kwu Tan: 220 to 250 Siu Ho Wan: 60 to 80 Tsing Yi Southwest: subject to study Ma Liu Shui: 60 artificial islands in central waters: subject to study ELM: see item below	All (except ELM) : subject to study ELM: see item below	Sunny Bay, Lung Kwu Tan and Ma Liu Shui: before 2030 Tsing Yi Southwest, Siu Ho Wan, artificial islands in central waters: subject to study ELM: see item below
Cavern and Underground Space Developments	(a) Sha Tin Sewage Treatment Works (STW): 28 (b) Sai Kung STW, Diamond Hill Fresh Water & Salt Water Service Reservoirs, and Sham Tseng STW: 6	Subject to study	Subject to study
(IV) Strategic Growth Areas Proposed under Hong Kong 2030+			
ELM	~1 000	Population: ~400 000 - 700 000 Employment: ~200 000	Beyond 2030
NTN	~720	Population: ~255 000 / 350 000 Employment: ~215 000	Beyond 2030

Note:
The estimated land area involved, population, employment, development capacity and development time are subject to changes.

Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24
約 25 幅可於 2019/20 至 2023/24 五年間供發展的具房屋發展潛力用地

District 地區		Estimated Land Availability Year 預計用地可供發展年份 Note 註 1	Location 地點	Existing Zoning 目前土地用途地帶	Planned Zoning 規劃土地用途地帶 Note 註 1	Housing Type 房屋類型 Note 註 1
Tuen Mun 屯門 (Plan 圖 1)	1.	2018-19	Hang Fu Street, Area 16, Tuen Mun 屯門第 16 區恆富街	G/IC	R(A)	Public 公營
	2.	2018-19	South of Tuen Mun Town Lot No. 423, Castle Peak Road, Area 48, Tuen Mun 屯門第 48 區青山公路屯門市地段第 423 號以南	GB	R	Private 私營
	Total 總數: 2 sites 幅 (about 約 1,500 flats 個單位)					
Yuen Long 元朗 (Plan 圖 2)	3.	2019-24	Near Junction of Castle Peak Road and Kam Tin Road, Au Tau, Yuen Long 元朗凹頭近青山公路與錦田公路交界處	GB	R(A)	Public 公營

District 地區		Estimated Land Availability Year 預計用地可供發展年份 Note 註 1	Location 地點	Existing Zoning 目前土地用途地帶	Planned Zoning 規劃土地用途地帶 Note 註 1	Housing Type 房屋類型 Note 註 1
	4.	To be confirmed 待定	Wang Chau Phases 2 and 3, Yuen Long 元朗橫洲第二及三期	GB, OS	R	Public 公營
	5.	2022-23	Tai Yuk Road, Area 13, Yuen Long 元朗第 13 區體育路	GIC, R(B)	R	To be confirmed 待定
	6.	2022-23	Tung Shing Lei, Yuen Long 元朗東成里	U	R	Public 公營
	7.	2022-23	"REC" site, Ping Shan, Yuen Long 元朗屏山康樂用地	REC	R	Public 公營
	Total 總數: 5 sites 幅 (about 約 27,000 flats 個單位)					
North 北區 (Plan 圖 3)	8.	2022-23	Fan Garden Site B1, Fanling 粉嶺芬園 B1 地盤	G/IC, R(C)1	R(B)	Private 私營
	9.	2022-23	Fan Garden Site B2, Fanling 粉嶺芬園 B2 地盤	G/IC, R(C)1	R(B)	Private 私營

District 地區		Estimated Land Availability Year 預計用地可供發展年份 Note 註 1	Location 地點	Existing Zoning 目前土地用途地帶	Planned Zoning 規劃土地用途地帶 Note 註 1	Housing Type 房屋類型 Note 註 1
	10.	2022-23	Fan Garden Site A and its Adjoining Area, Fanling 粉嶺芬園 A 地盤及毗連用地	G/IC, R(C)1	R(A)	Public 公營
	11.	2019-20	Po Shek Wu Road, Fanling 粉嶺寶石湖路	O	R(A)	Public 公營
	12.	2022-23	Junction of Castle Peak Road - Kwu Tung and Fan Kam Road, Near Tai Tau Leng, Fanling 粉嶺近大頭嶺青山公路 - 古洞段與粉錦公路交界處	GB, G/IC	R(A)	Public 公營
	13.	2019-24	Tong Hang, Fanling 粉嶺塘坑	GB, G/IC	R(A)	Public 公營
	Total 總數: 6 sites 幅 (about 約 14,000 flats 個單位)					
Tai Po 大埔 (Plan 圖 4)	14.	2024-25 or beyond (或以後)	Nam Wa Po, Kau Lung Hang, Tai Po 大埔九龍坑南華莆	GB, AGR, OS	R(A)	Public 公營

District 地區		Estimated Land Availability Year 預計用地可供發展年份 Note 註 1	Location 地點	Existing Zoning 目前土地用途地帶	Planned Zoning 規劃土地用途地帶 Note 註 1	Housing Type 房屋類型 Note 註 1
	15.	2024-25 or beyond (或以後)	Tai Wo, Kau Lung Hang, Tai Po 大埔九龍坑大窩	GB, AGR	R(A)	Public 公營
	Total 總數: 2 sites 幅 (about 約 10,000 flats 個單位)					
Sha Tin **沙田** **(Plan 圖 5)**	16.	2019-24	Lower part of Ma On Shan Tsuen Road, Ma On Shan 馬鞍山馬鞍山村路下部分	GB	R(A)	Public 公營
	17.	2019-24	Upper part of Ma On Shan Tsuen Road, Ma On Shan 馬鞍山馬鞍山村路上部分	GB	R	Private 私營
	Total 總數: 2 sites 幅 (about 約 3,000 flats 個單位)					
Sai Kung **西貢** **(Plan 圖 6)**	18.	2018-19	Nam Wai (Eastern Portion), Hebe Haven, Sai Kung 西貢白沙灣南圍(東面部分)	GB	R(C)	Private 私營
	Total 總數: 1 site 幅 (about 約 100 flats 個單位)					

District 地區		Estimated Land Availability Year 預計用地可供發展年份 Note 註 1	Location 地點	Existing Zoning 目前土地用途地帶	Planned Zoning 規劃土地用途地帶 Note 註 1	Housing Type 房屋類型 Note 註 1
Tsuen Wan **荃灣** **(Plan 圖 7)**	19.	2021-22	South of Ma Wan 馬灣以南	OU (Recreation & Tourism Related Uses)	R(B)	Private 私營
	Total 總數: 1 site 幅 (about 約 4,500 flats 個單位)					
Kwai Tsing **葵青** **(Plan 圖 8)**	20.	To be confirmed 待定	Public Transport Interchange near Lai Yiu Estate, Kwai Chung 鄰近葵涌麗瑤邨的公共運輸交匯處	R(A)	R(A)	To be confirmed 待定
	21.	To be confirmed 待定	Public Transport Interchange near Cheung Ching Estate, Tsing Yi 鄰近青衣長青邨的公共運輸交匯處	R(A)	R(A)	To be confirmed 待定
	Total 總數: 2 sites 幅 (Flat no. to be confirmed 單位數目待定)					
Wong Tai Sin **黃大仙**	22.	2018-19	Fung Shing Street, Ngau Chi Wan 牛池灣豐盛街	G/IC, O	R(B)	Public 公營

District 地區		Estimated Land Availability Year 預計用地可供發展年份 Note 註 1	Location 地點	Existing Zoning 目前土地用途地帶	Planned Zoning 規劃土地用途地帶 Note 註 1	Housing Type 房屋類型 Note 註 1
(Plan 圖 9)	23.	2023-24	Wong Tai Sin Community Centre, Ching Tak Street, Wang Tau Hom 橫頭磡正德街黃大仙社區中心	G/IC	R(A)	Public 公營
	Total 總數: 2 sites 幅 (about 約 900 flats 個單位)					
Sham Shui Po **深水埗** **(Plan 圖 10)**	24.	2019-20	Chak On Road Driving Test Centre and its Adjoining Area, Sham Shui Po 深水埗澤安道駕駛考試中心及毗連用地	G/IC, R(A)	R(A)	Public 公營
	Total 總數: 1 site 幅 (Flat no. to be confirmed 單位數目待定)					
Kwun Tong **觀塘** **(Plan 圖 11)**	25.	To be confirmed 待定	Public Transport Interchange near Kwong Tin Estate, Lam Tin 鄰近藍田廣田邨的公共運輸交匯處	R(A)	R(A)	To be confirmed 待定
	26.	To be confirmed 待定	Public Transport Interchange near Lam Tin Estate, Lam Tin 鄰近藍田邨的公共運輸交匯處	R(A)	R(A)	To be confirmed 待定
	Total 總數: 2 sites 幅 (Flat no. to be confirmed 單位數目待定)					

Total 總數	**Total 總數:**	**26 sites 幅**	**(about 約 61,000 flats 個單位)**
	Public 公營：	**15 sites 幅**	**(about 約 53,000 flats 個單位 (about 約 87%)** Note 註 3
	Private 私營：	**6 sites 幅**	**(about 約 8,000 flats 個單位 (about 約 13%)**
	To be confirmed 待定：	**5 sites 幅**	**(flat no. to be confirmed 單位數目待定)**

Abbreviation 縮寫:

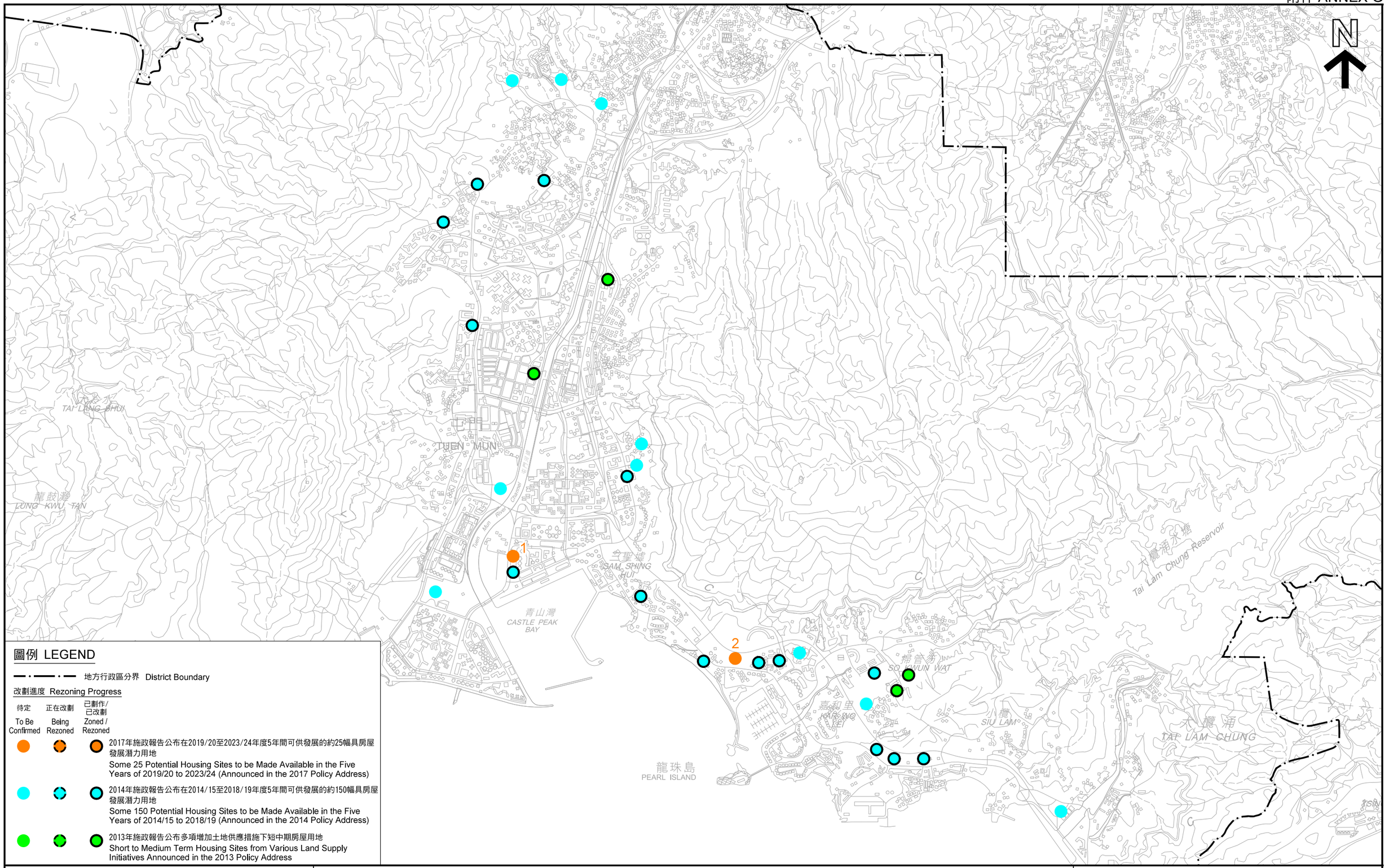
AGR	Agriculture 農業
GB	Green Belt 綠化地帶
G/IC	Government, Institution or Community 政府、機構或社區
R/R(A)/ R(B)/ R(C)	Residential住宅/ Residential (Group A) 住宅(甲類)/ Residential (Group B) 住宅(乙類)/Residential (Group C) 住宅(丙類)
REC	Recreation 康樂
O	Open Space 休憩用地
OU (Recreation & Tourism Related Uses)	Other Specified Uses annotated Recreation & Tourism Related Uses 「其他指定用途」 註明 「康樂及與旅遊業有關的用途」
OS	Open Storage 露天貯物
U	Undetermined 未指定用途

Notes 註:

1: The estimated land availability year, planned zoning and housing type are for reference only, and may be subject to changes depending on practical considerations.
預計用地可供發展年份、規劃土地用途地帶及房屋類型僅供參考，可能會因應實際考慮而有所更改。

2: The estimated site and flat numbers may be subject to changes depending on the technical and other assessments.
預計用地及住宅單位數目會視乎技術及其他評估，並可能會有所更改。

3. The Chak On Road Driving Test Centre and its Adjoining Area in Sham Shui Po is one of proposed public housing sites. Its estimated flat number is to be confirmed and hence not counted in the total flat number.
深水埗澤安道駕駛考試中心及毗連用地是其中一幅擬議公營房屋用地。其預計住宅單位數目仍有待確定，因此並未計算在單位數目的總數內。



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	●	●	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	●	●	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	●	●	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

土地用途檢討下所物色的屯門區具房屋發展潛力用地(截至2017年1月中)

POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN TUEN MUN DISTRICT (POSITION AS AT MID-JANUARY 2017)

SCALE 1 : 30 000 比例尺

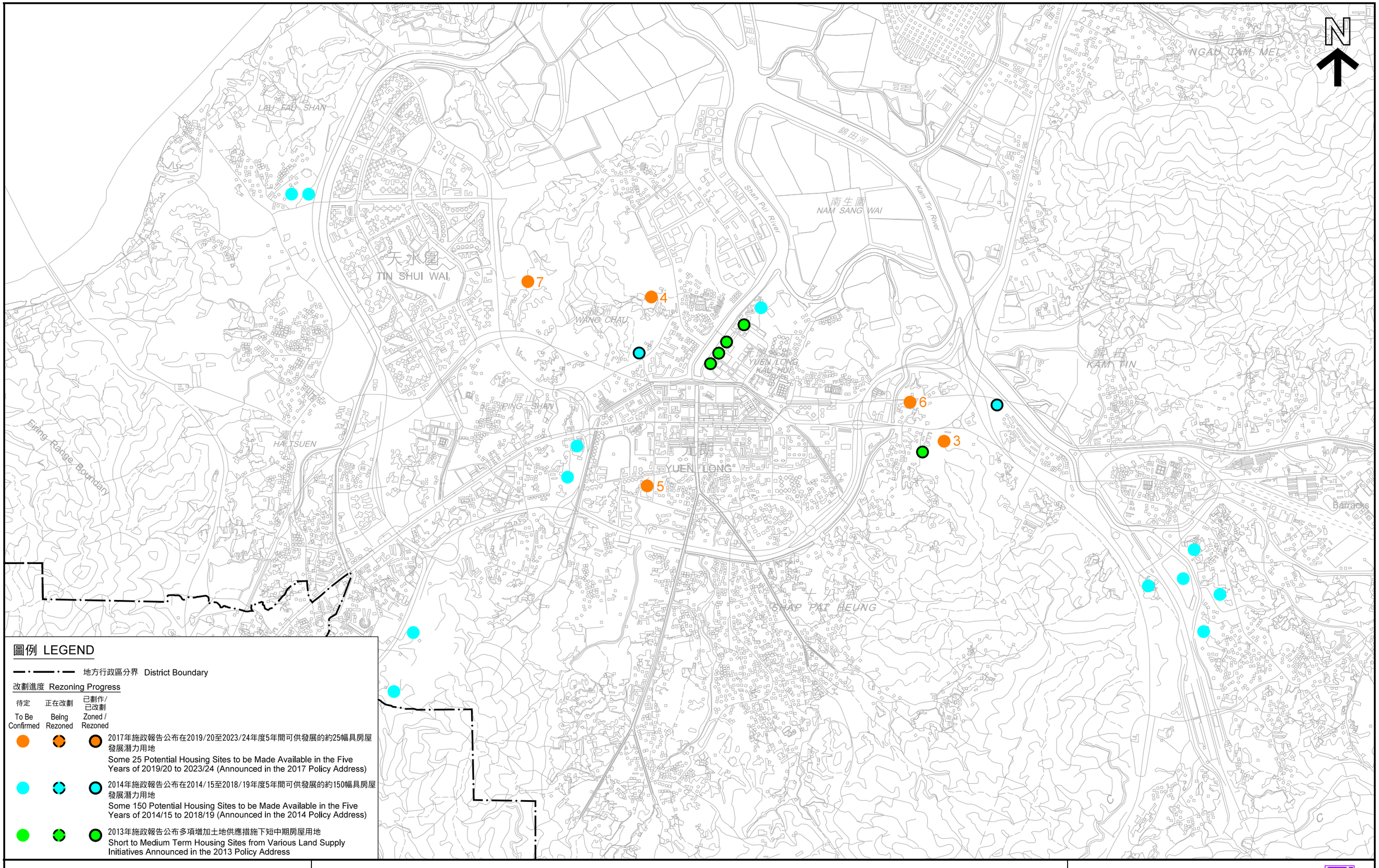
米METRES 500 0 500 1 000 1 500 2 000 METRES 米

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

規劃署
PLANNING DEPARTMENT

參考編號
REFERENCE No.
M/HOLS/17/02

圖 PLAN
1



土地用途檢討下所物色的元朗區具房屋發展潛力用地(截至2017年1月中)

POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN YUEN LONG DISTRICT (POSITION AS AT MID-JANUARY 2017)

SCALE 1 : 30 000 比例尺

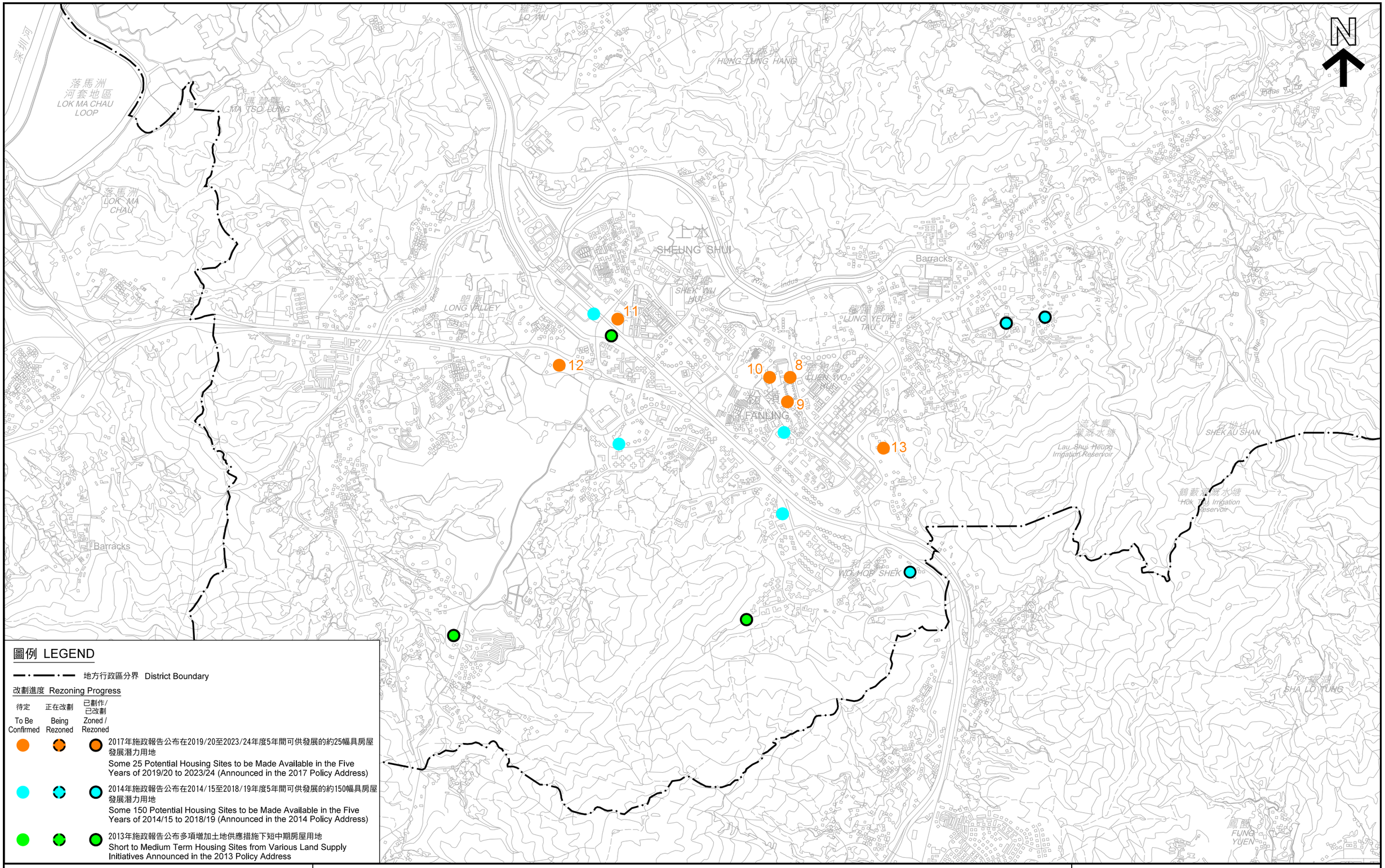
米METRES 500 0 500 1 000 1 500 2 000 METRES 米

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

規 劃 署
PLANNING DEPARTMENT

參考編號
REFERENCE No.
M/HOLS/17/02

圖 PLAN
2



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◆	◉	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◆	◉	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◆	◉	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

土地用途檢討下所物色的北區具房屋發展潛力用地(截至2017年1月中)

POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN NORTH DISTRICT (POSITION AS AT MID-JANUARY 2017)

SCALE 1 : 30 000 比例尺

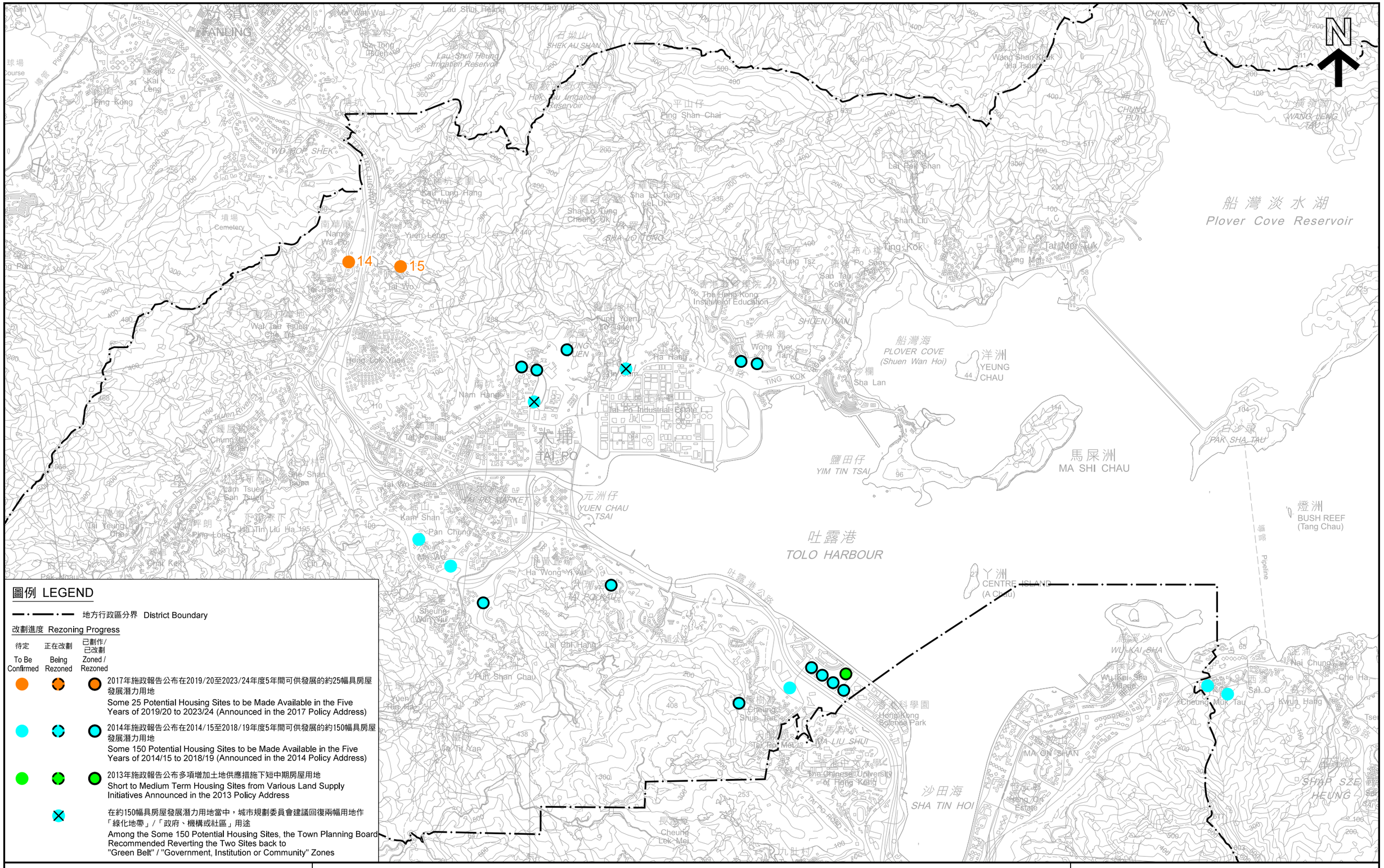
米 METRES 500 0 500 1 000 1 500 2 000 METRES 米

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

規劃署
PLANNING DEPARTMENT

參考編號 REFERENCE No.
M/HOLS/17/02

圖 PLAN
3



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◐	●	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◐	●	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◐	●	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address
	✕		在約150幅具房屋發展潛力用地當中，城市規劃委員會建議回復兩幅用地作「綠化地帶」/「政府、機構或社區」用途 Among the Some 150 Potential Housing Sites, the Town Planning Board Recommended Reverting the Two Sites back to "Green Belt" / "Government, Institution or Community" Zones

本摘要圖於2017年1月17日擬備
EXTRACT PLAN PREPARED ON 17.1.2017

土地用途檢討下所物色的大埔區具房屋發展潛力用地(截至2017年1月中)
POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN TAI PO DISTRICT (POSITION AS AT MID-JANUARY 2017)

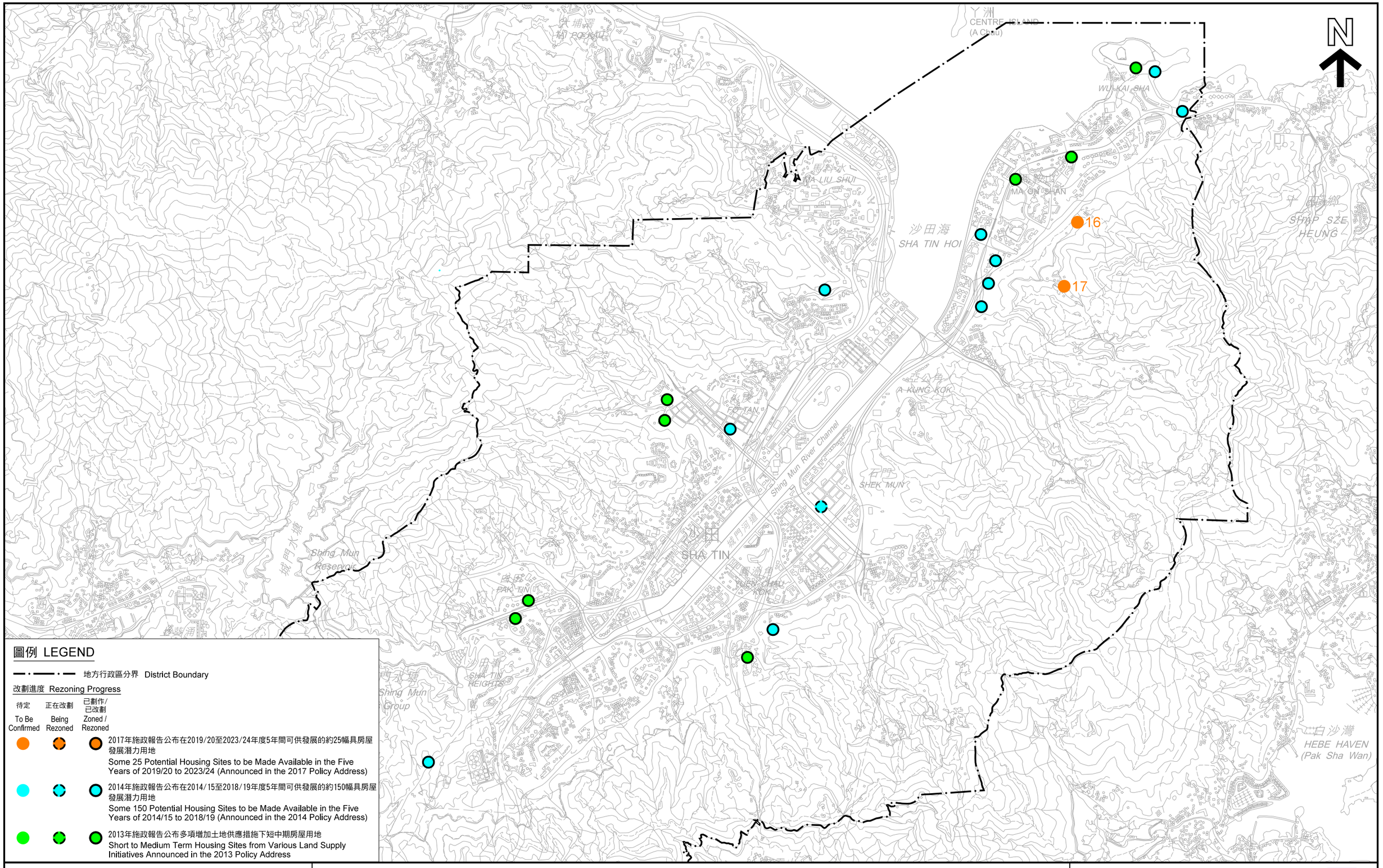
SCALE 1 : 40 000 比例尺

米METRES 500 0 500 1 000 1 500 2 000 2 500 METRES 米

規劃署
PLANNING DEPARTMENT

參考編號 REFERENCE No.
M/HOLS/17/02

圖 PLAN 4



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◆	●	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◆	●	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◆	●	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

土地用途檢討下所物色的沙田區具房屋發展潛力用地(截至2017年1月中)
POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN SHA TIN DISTRICT (POSITION AS AT MID-JANUARY 2017)

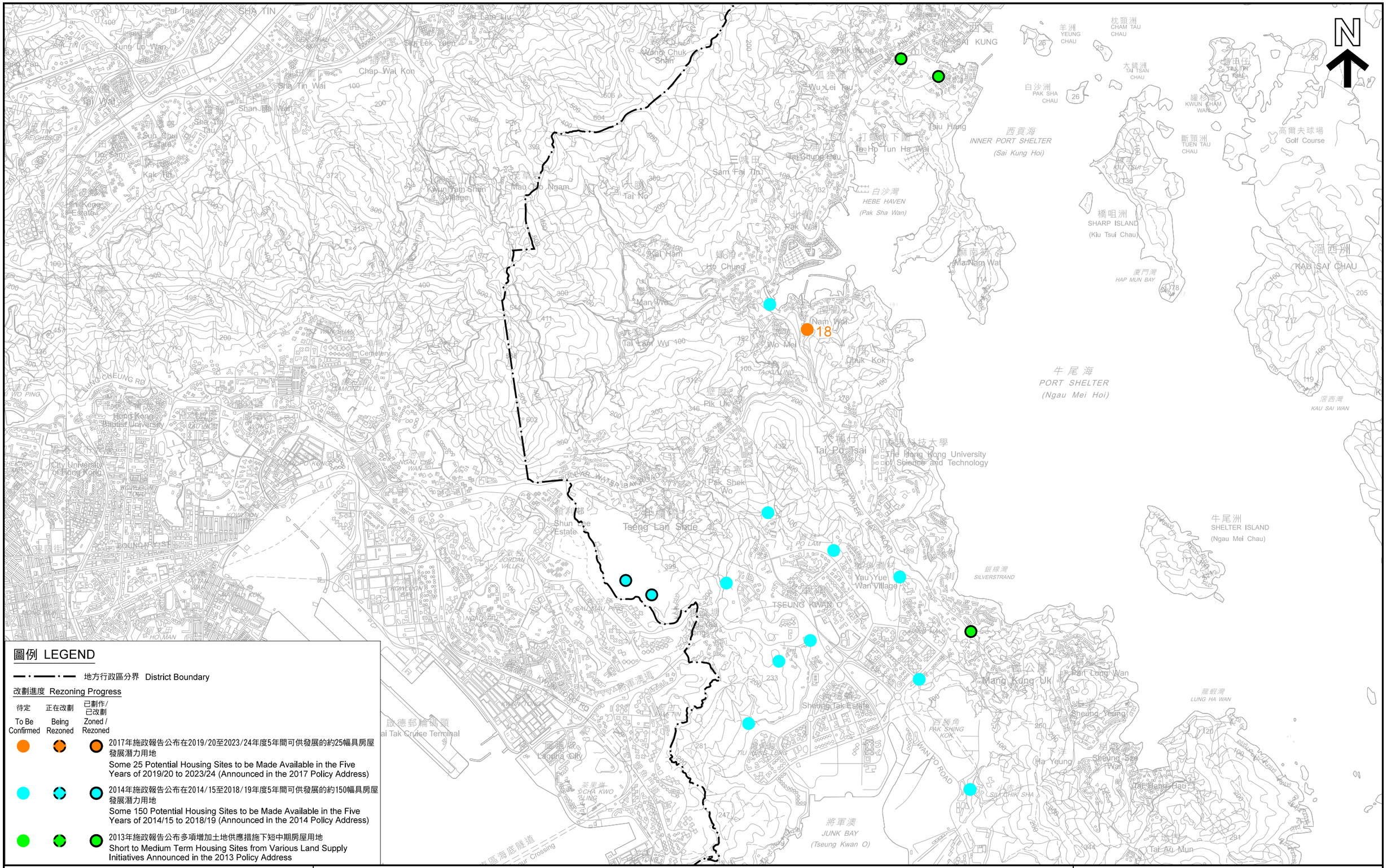
SCALE 1 : 40 000 比例尺

米METRES 500 0 500 1 000 1 500 2 000 2 500 METRES 米

規劃署
PLANNING DEPARTMENT

參考編號 REFERENCE No.
M/HOLS/17/02

圖 PLAN 5



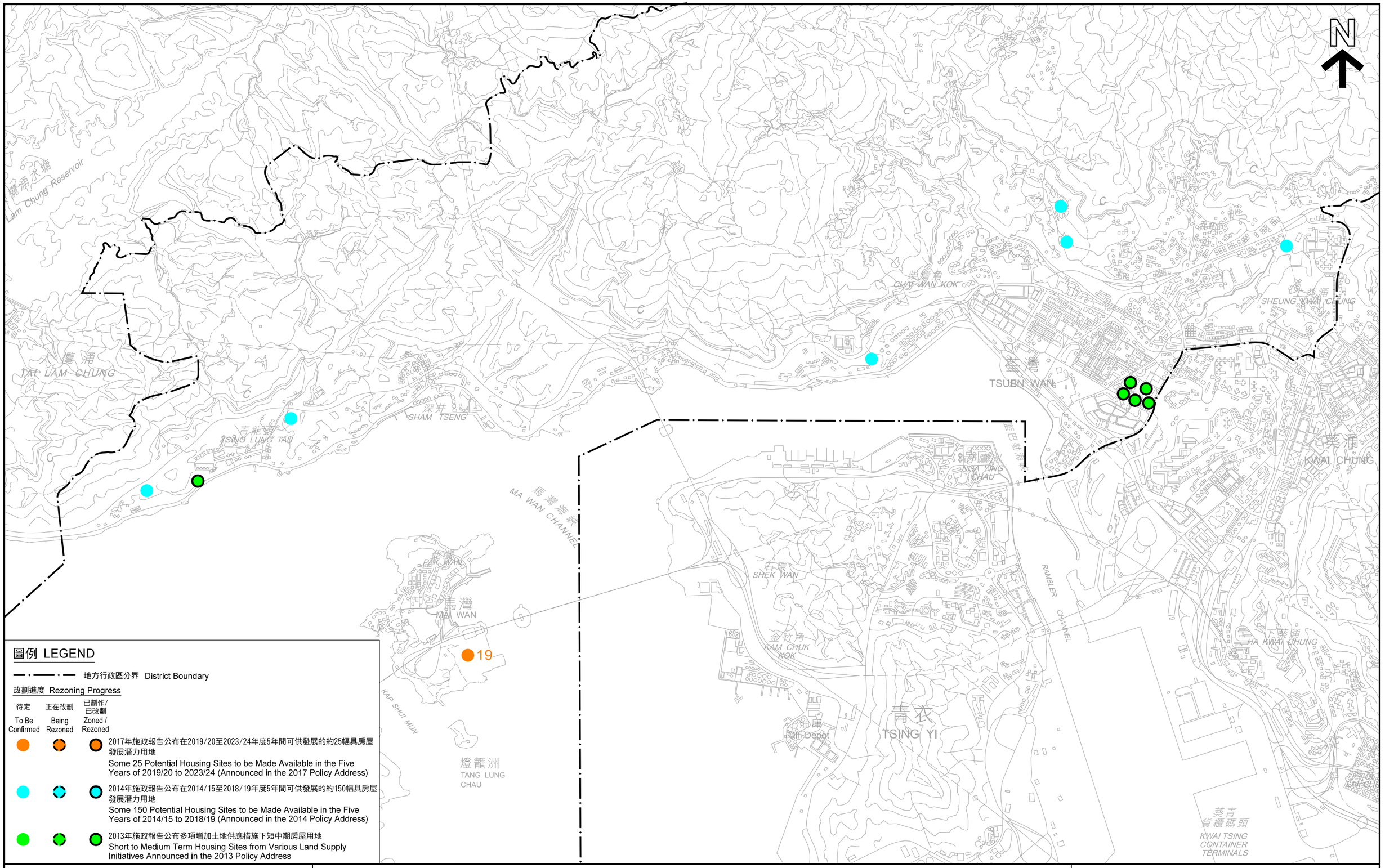
土地用途檢討下所物色的西貢區具房屋發展潛力用地(截至2017年1月中)
POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN SAI KUNG DISTRICT (POSITION AS AT MID-JANUARY 2017)

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

規 劃 署
PLANNING DEPARTMENT

參考編號
REFERENCE No.
M/HOLS/17/02

圖 PLAN
6



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◐	●	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◐	●	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◐	●	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

土地用途檢討下所物色的荃灣區具房屋發展潛力用地(截至2017年1月中)
POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN TSUEN WAN DISTRICT (POSITION AS AT MID-JANUARY 2017)

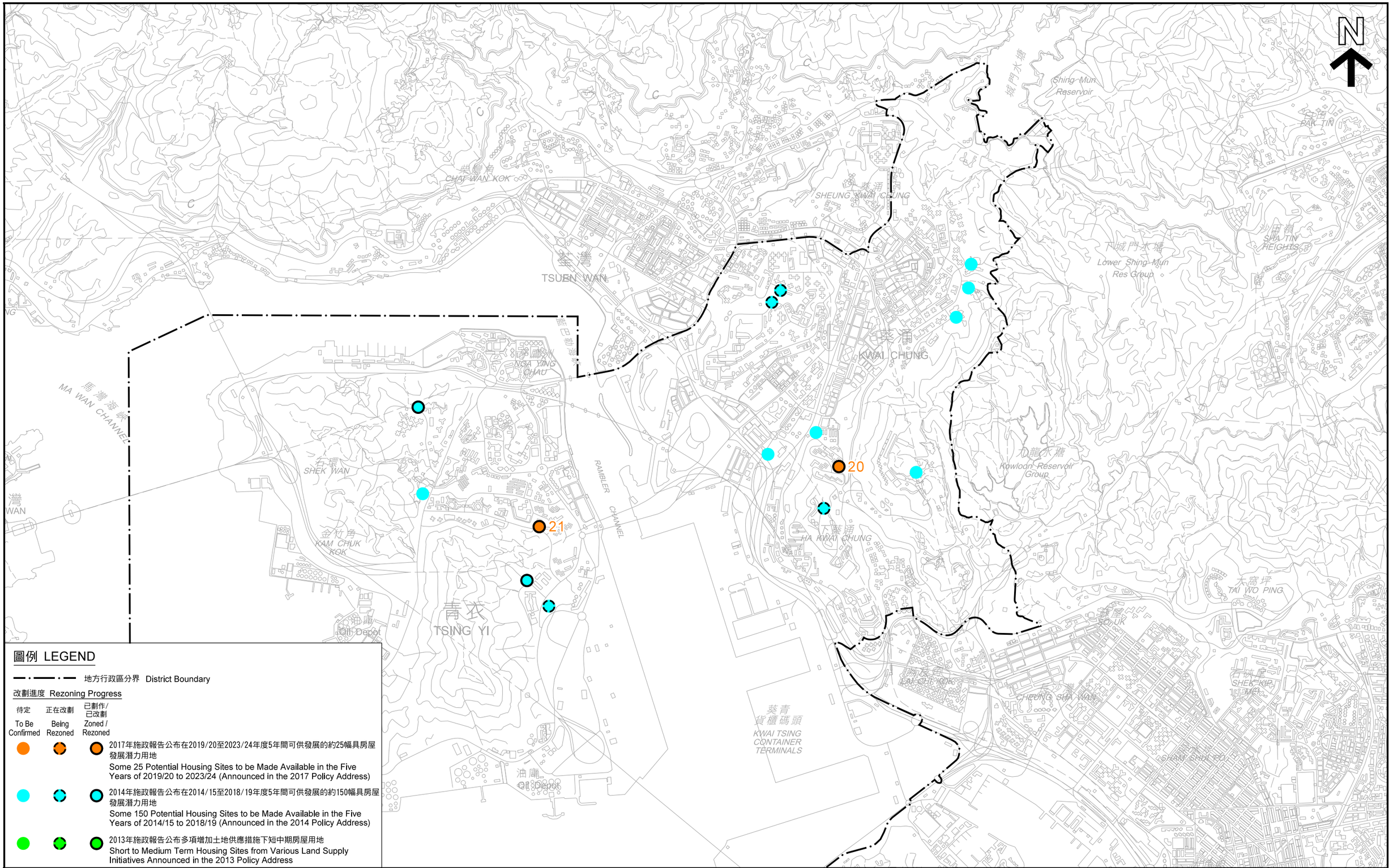
SCALE 1 : 30 000 比例尺

米 METRES 500 0 500 1 000 1 500 2 000 METRES 米

規 劃 署
PLANNING DEPARTMENT

參考編號 REFERENCE No.
M/HOLS/17/02

圖 PLAN
7



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◐	◉	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◐	◉	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◐	◉	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

土地用途檢討下所物色的葵青區具房屋發展潛力用地(截至2017年1月中)
POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN KWAI TSING DISTRICT (POSITION AS AT MID-JANUARY 2017)

SCALE 1 : 30 000 比例尺

米 METRES 500 0 500 1 000 1 500 2 000 METRES 米

規劃署
PLANNING DEPARTMENT

參考編號
REFERENCE No.
M/HOLS/17/02

圖 PLAN
8

N

22

23

圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◐	◉	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◐	◉	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◐	◉	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

土地用途檢討下所物色的黃大仙區具房屋發展潛力用地(截至2017年1月中)
POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN WONG TAI SIN DISTRICT (POSITION AS AT MID-JANUARY 2017)

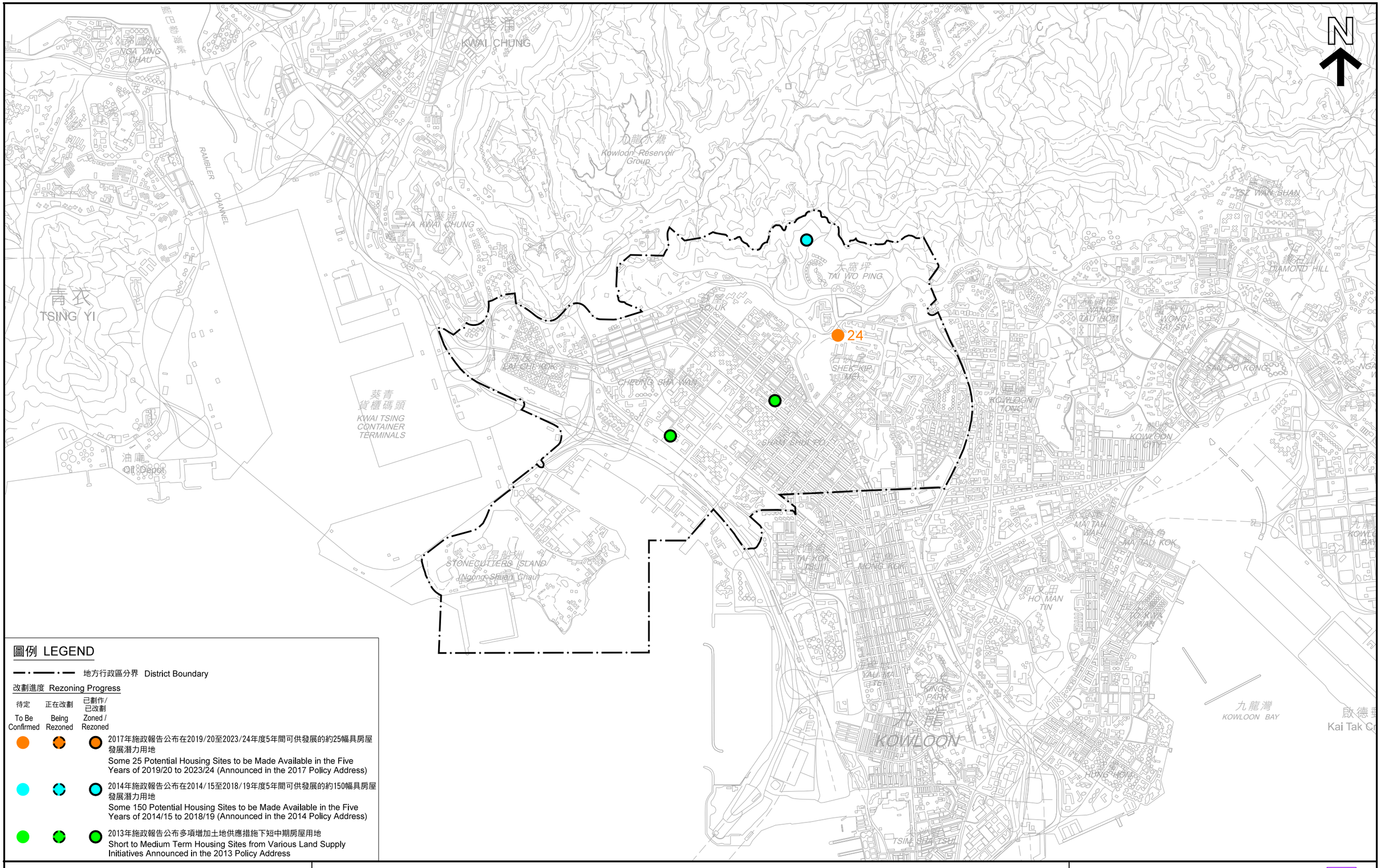
SCALE 1 : 30 000 比例尺

米 METRES 500 0 500 1 000 1 500 2 000 METRES 米

規劃署
PLANNING DEPARTMENT

參考編號 REFERENCE No.
M/HOLS/17/02

圖 PLAN
9



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◆	◎	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◆	◎	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◆	◎	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

土地用途檢討下所物色的深水埗區具房屋發展潛力用地(截至2017年1月中)
POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN SHAM SHUI PO DISTRICT (POSITION AS AT MID-JANUARY 2017)

SCALE 1 : 30 000 比例尺

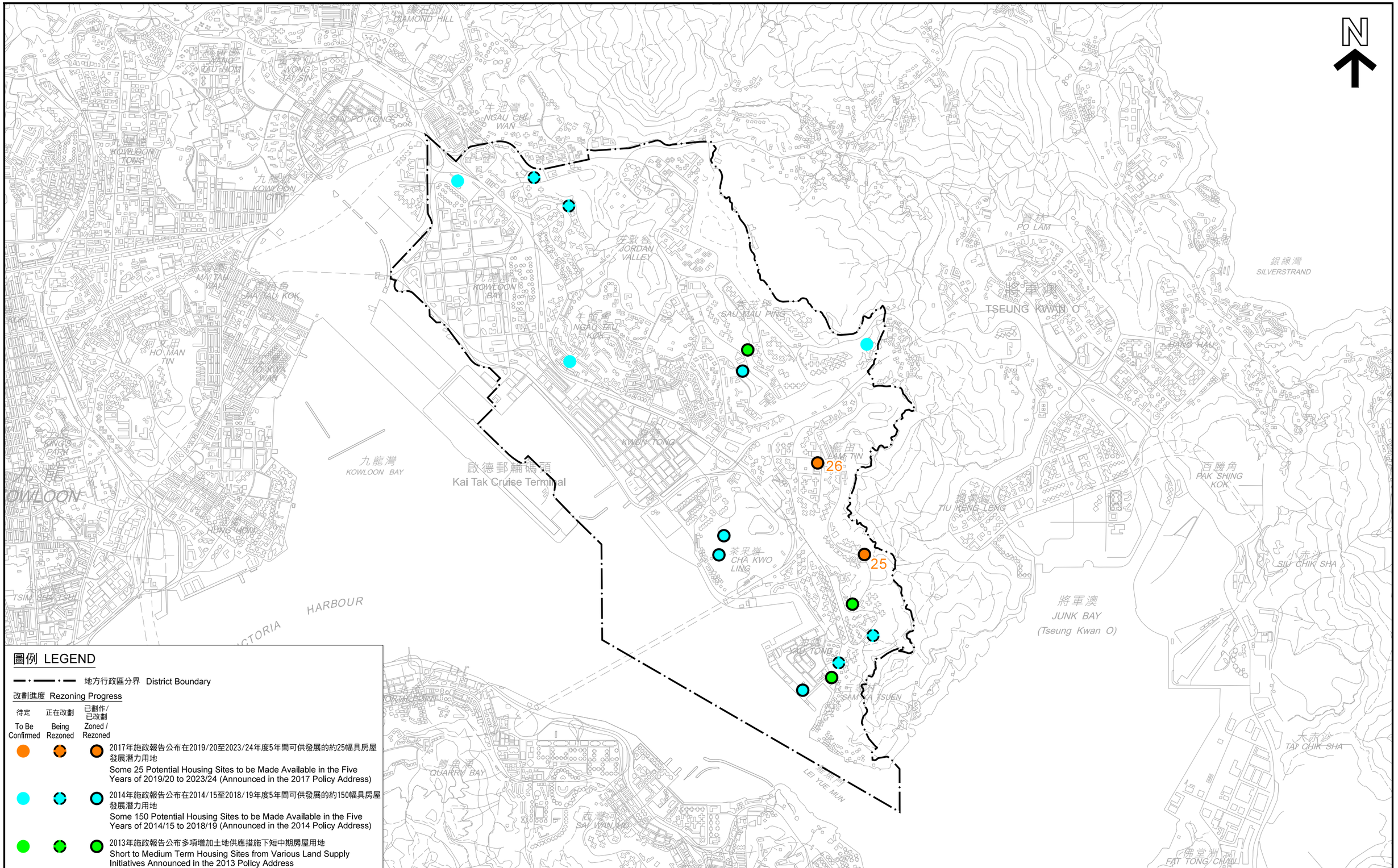
米 METRES 500 0 500 1 000 1 500 2 000 METRES 米

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

規劃署
PLANNING DEPARTMENT

參考編號
REFERENCE No.
M/HOLS/17/02

圖 PLAN
10



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◐	●	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◐	●	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◐	●	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

土地用途檢討下所物色的觀塘區具房屋發展潛力用地(截至2017年1月中)
POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN KWUN TONG DISTRICT (POSITION AS AT MID-JANUARY 2017)

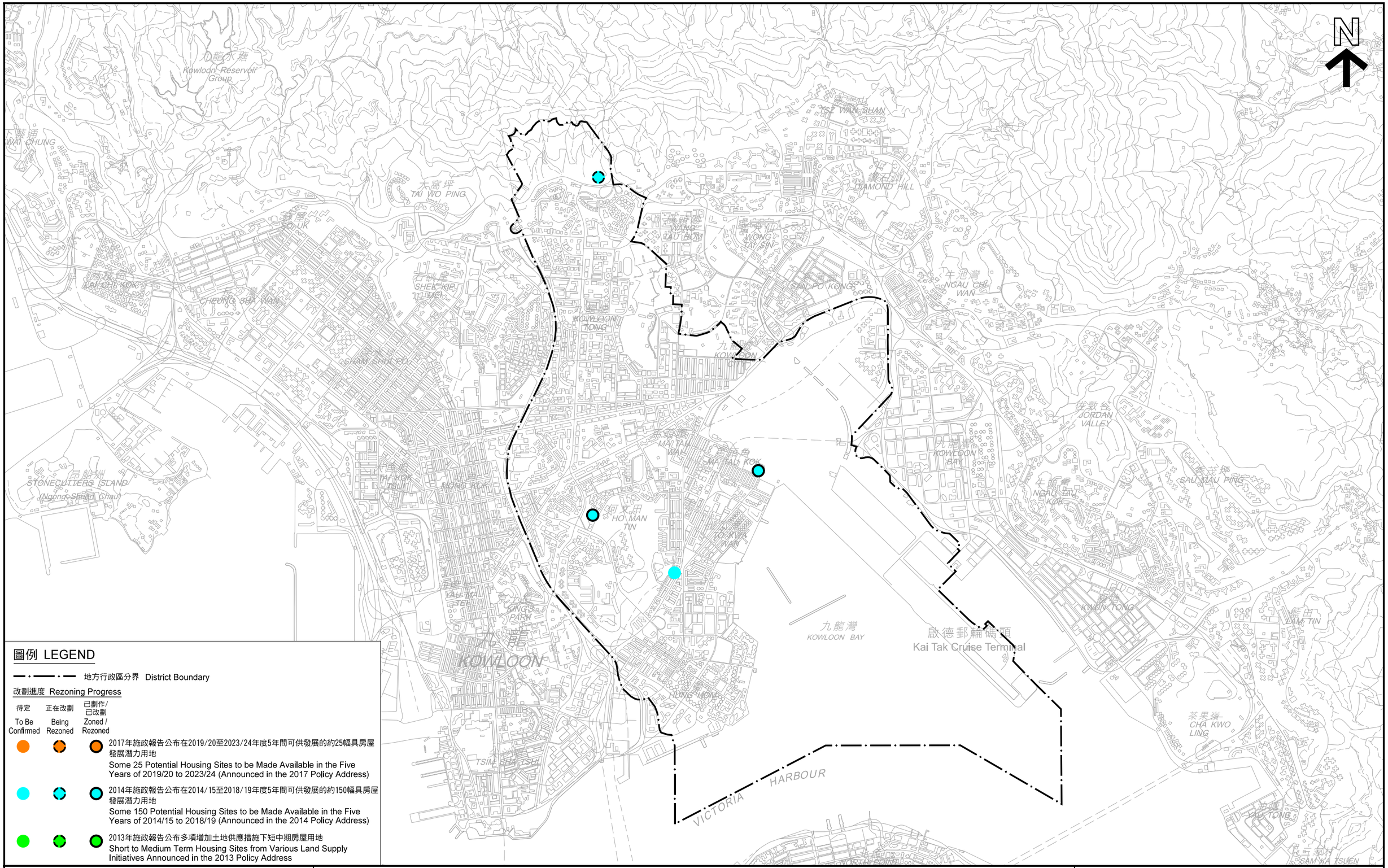
SCALE 1 : 30 000 比例尺

米METRES 500 0 500 1 000 1 500 2 000 METRES 米

規 劃 署
PLANNING DEPARTMENT

參考編號
REFERENCE No.
M/HOLS/17/02

圖 PLAN
11



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◆	◉	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◆	◉	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◆	◉	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

土地用途檢討下所物色的九龍城區具房屋發展潛力用地(截至2017年1月中)
POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN KOWLOON CITY DISTRICT (POSITION AS AT MID-JANUARY 2017)

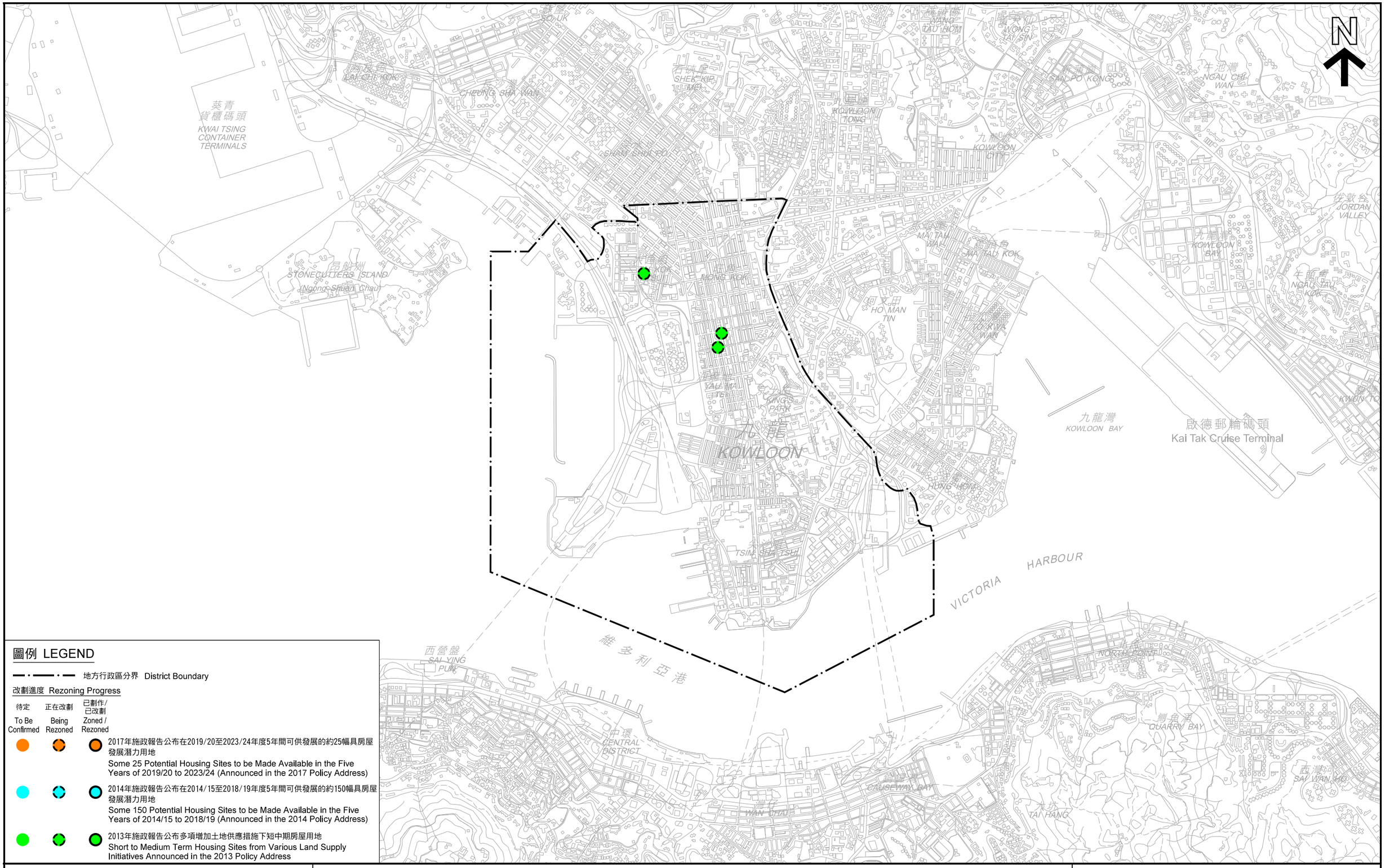
SCALE 1 : 30 000 比例尺

米 METRES 500 0 500 1 000 1 500 2 000 METRES 米

規劃署
PLANNING DEPARTMENT

參考編號
REFERENCE No.
M/HOLS/17/02

圖 PLAN
12



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◆	◉	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◆	◉	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◆	◉	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

土地用途檢討下所物色的油尖旺區具房屋發展潛力用地(截至2017年1月中)

POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN YAU TSIM MONG DISTRICT (POSITION AS AT MID-JANUARY 2017)

SCALE 1 : 30 000 比例尺

米 METRES 500 0 500 1 000 1 500 2 000 METRES 米

本摘要圖於2017年1月16日擬備

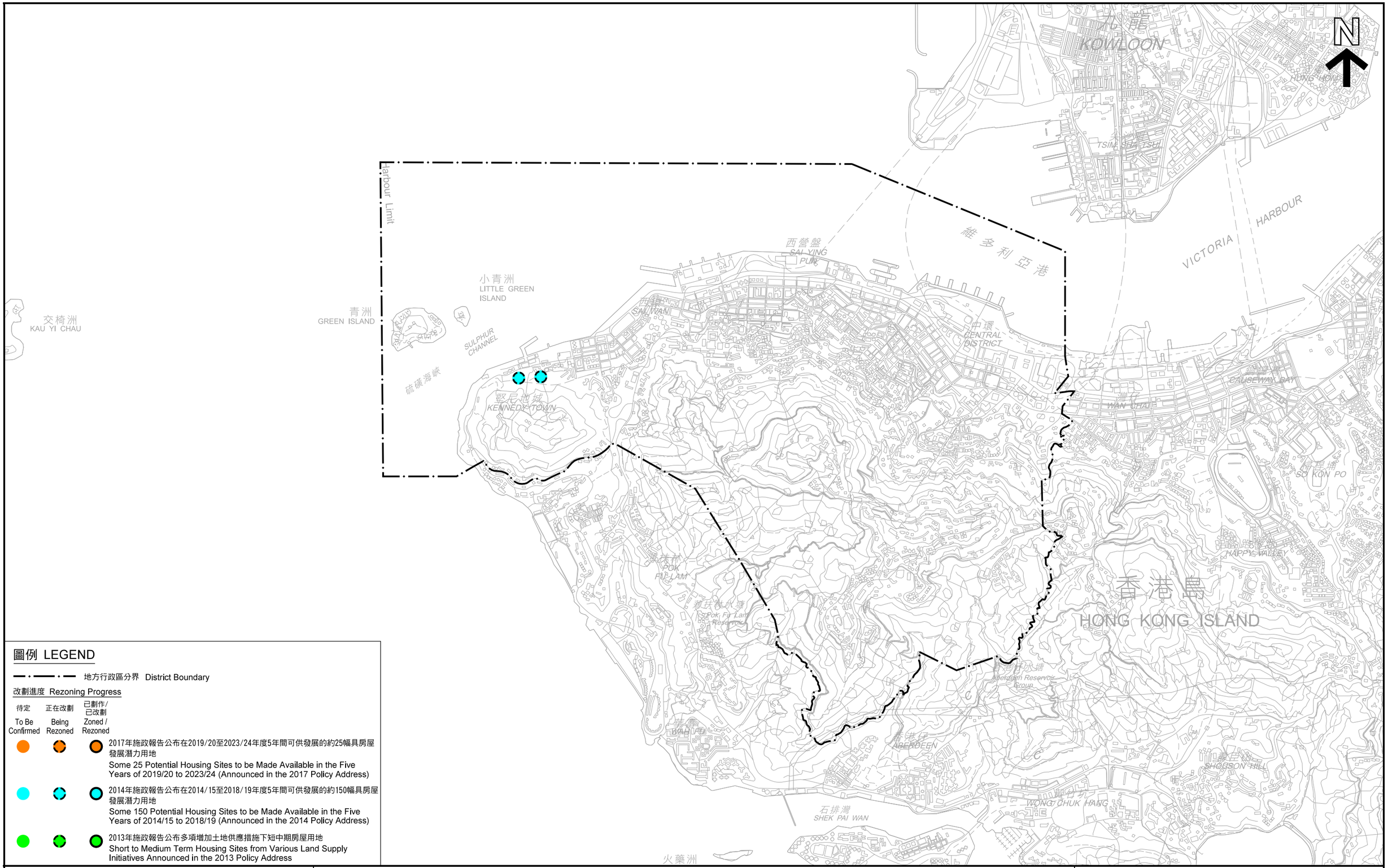
EXTRACT PLAN PREPARED ON 16.1.2017

規劃署

PLANNING DEPARTMENT

參考編號 REFERENCE No. M/HOLS/17/02

圖 PLAN 13



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◐	●	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◐	●	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◐	●	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

土地用途檢討下所物色的中西區具房屋發展潛力用地(截至2017年1月中)

POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN CENTRAL AND WESTERN DISTRICT (POSITION AS AT MID-JANUARY 2017)

SCALE 1 : 30 000 比例尺

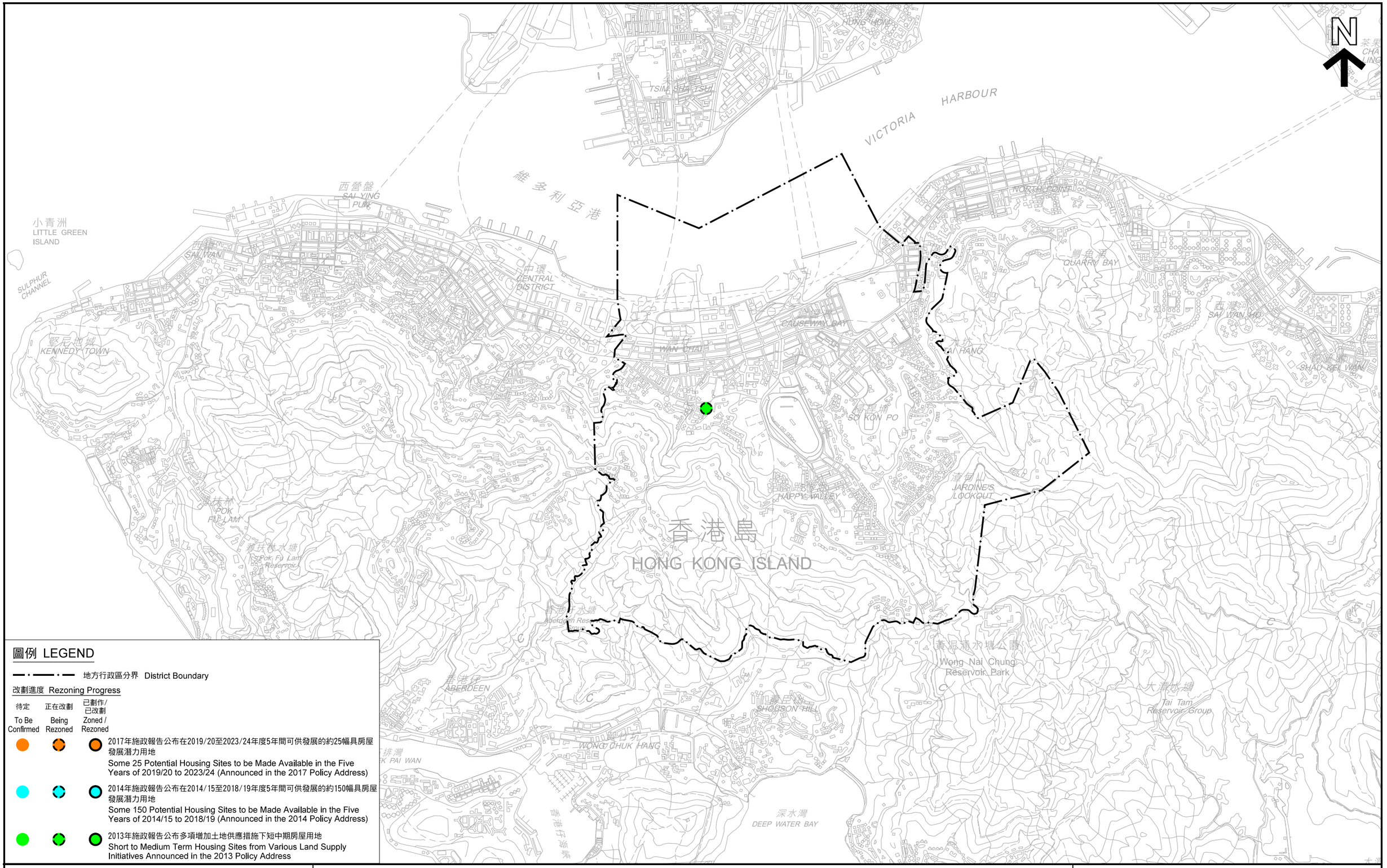
米 METRES 500 0 500 1 000 1 500 2 000 METRES 米

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

規劃署
PLANNING DEPARTMENT

參考編號 REFERENCE No.
M/HOLS/17/02

圖 PLAN
14



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◆	◉	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◆	◉	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◆	◉	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

土地用途檢討下所物色的灣仔區具房屋發展潛力用地(截至2017年1月中)
POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN WAN CHAI DISTRICT (POSITION AS AT MID-JANUARY 2017)

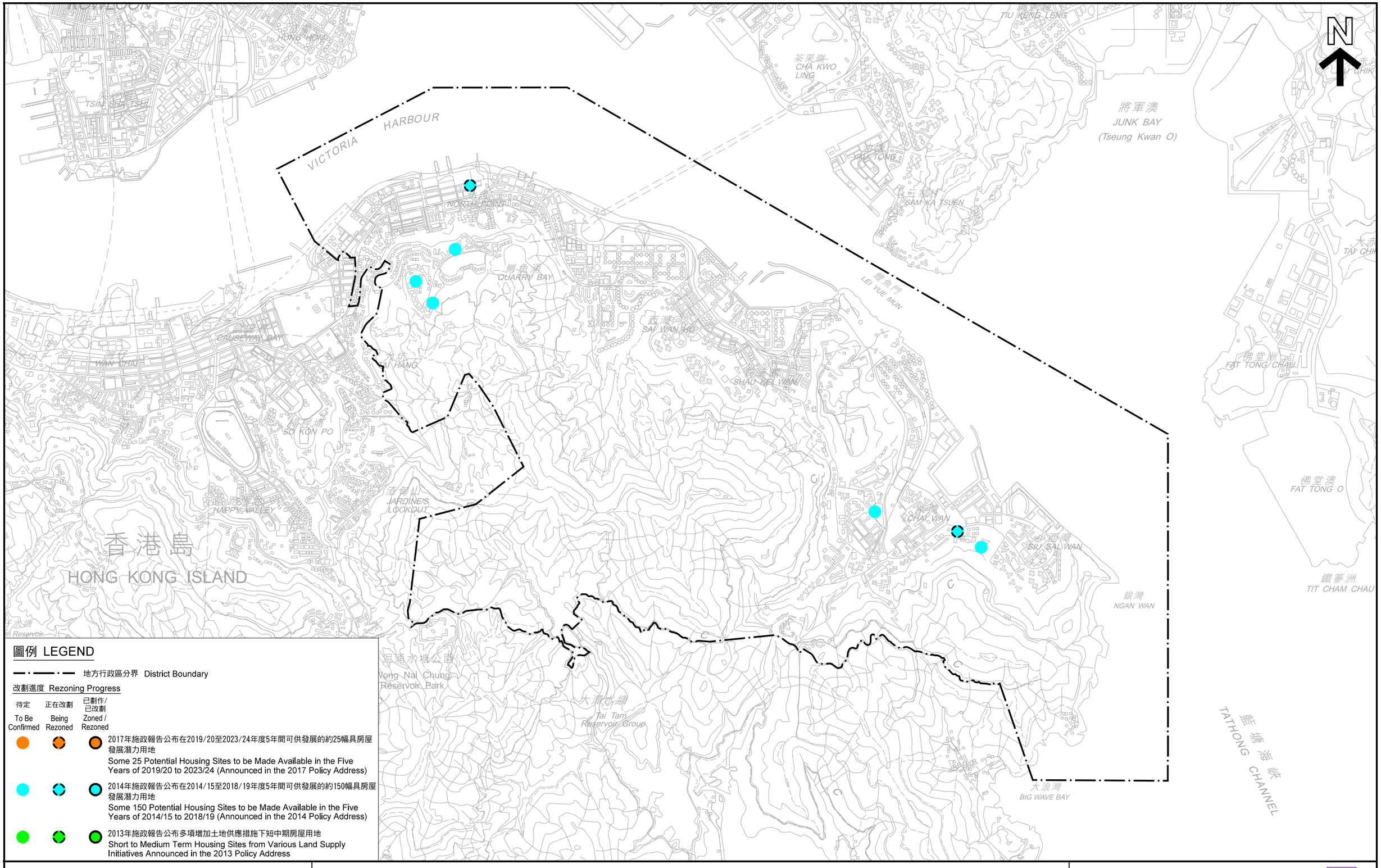
SCALE 1 : 30 000 比例尺

米 METRES 500 0 500 1 000 1 500 2 000 METRES 米

規劃署
PLANNING DEPARTMENT

參考編號 REFERENCE No.
M/HOLS/17/02

圖 PLAN
15



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◆	●	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◆	●	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◆	●	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

土地用途檢討下所物色的東區具房屋發展潛力用地(截至2017年1月中)
POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN EASTERN DISTRICT (POSITION AS AT MID-JANUARY 2017)

SCALE 1 : 30 000 比例尺

米 METRES 500 0 500 1 000 1 500 2 000 METRES 米

規 劃 署
PLANNING DEPARTMENT

參考編號
REFERENCE No.
M/HOLS/17/02

圖 PLAN
16

香港島
HONG KONG ISLAND

N

POK FU LAM
薄扶林水塘
Pok Fu Lam Reservoir
華富
WAH FU
香港仔水塘
Aberdeen Reservoir
香港仔
ABERDEEN
黃泥涌水塘公園
Wong Nai Chung Reservoir Park
大潭水塘
Tai Tam Reservoir Group
黃泥涌
WONG NAI CHUNG
跑馬地
HAPPY VALLEY
黃竹坑
WONG CHUK HANG
石排灣
SHEK PAI WAN
小欖洲
MAGAZINE ISLAND
鴨脷洲
AP LEI CHAU
香港仔海峽
ABERDEEN CHANNEL
深水灣
DEEP WATER BAY
淺水灣
REPULSE BAY
大潭港
TAI TAM HARBOUR
東博寮海峽
EAST LAMMA CHANNEL
鹿洲灣
LUK CHAU WAN
鴨脷排
AP LEI PAI
鹿洲
LUK CHAU
熨波洲
MIDDLE ISLAND
(Tong Po Chau)
南灣
SOUTH BAY
大潭灣
TAI TAM BAY
赤柱
CHUNG HOM KOK
春坎灣
CHUNG HOM WAN
銀洲
ROUND ISLAND
(Ngan Chau)
赤柱
STANLEY (Chek Chue)
赤柱灣
STANLEY BAY
東頭灣
TUNG TAU WAN
羅洲
LO CHAU

圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
●	◆	◉	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
●	◆	◉	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
●	◆	◉	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address
	✕		在約150幅具房屋發展潛力用地當中，城市規劃委員會決定保留用地作「綠化地帶」用途 Among the Some 150 Potential Housing Sites, the Town Planning Board Decided to Retain the "Green Belt" Zone of the Site

本摘要圖於2017年1月17日擬備
EXTRACT PLAN PREPARED ON 17.1.2017

土地用途檢討下所物色的南區具房屋發展潛力用地(截至2017年1月中)
POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN SOUTHERN DISTRICT (POSITION AS AT MID-JANUARY 2017)

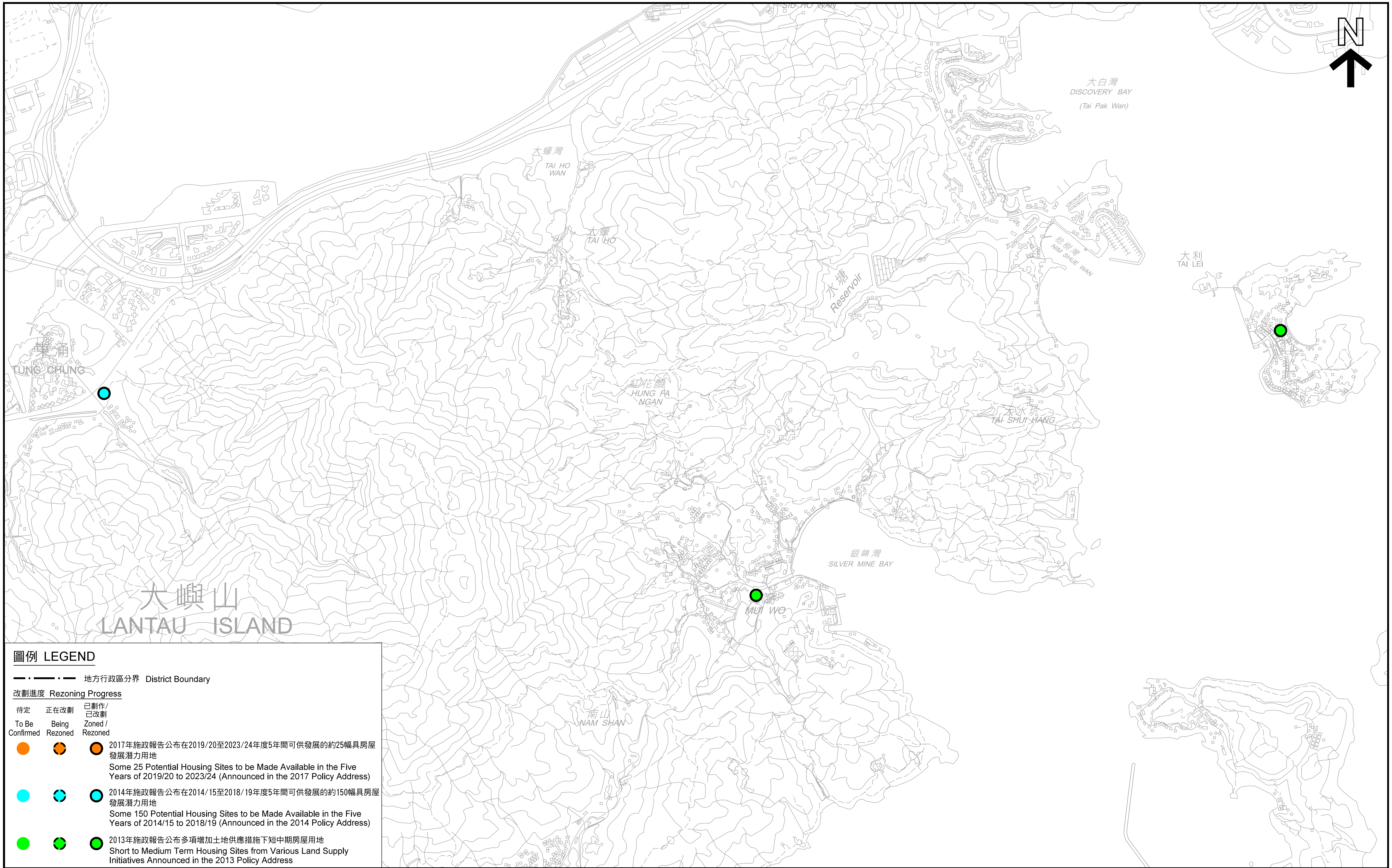
SCALE 1 : 30 000 比例尺

米 METRES 500 0 500 1 000 1 500 2 000 METRES 米

規劃署
PLANNING DEPARTMENT

參考編號
REFERENCE No.
M/HOLS/17/02

圖 PLAN
17



圖例 LEGEND

地方行政區分界 District Boundary

改劃進度 Rezoning Progress

待定 To Be Confirmed	正在改劃 Being Rezoned	已劃作/已改劃 Zoned / Rezoned	
● (orange)	● (orange, dashed)	● (orange, outlined)	2017年施政報告公布在2019/20至2023/24年度5年間可供發展的約25幅具房屋發展潛力用地 Some 25 Potential Housing Sites to be Made Available in the Five Years of 2019/20 to 2023/24 (Announced in the 2017 Policy Address)
● (cyan)	● (cyan, dashed)	● (cyan, outlined)	2014年施政報告公布在2014/15至2018/19年度5年間可供發展的約150幅具房屋發展潛力用地 Some 150 Potential Housing Sites to be Made Available in the Five Years of 2014/15 to 2018/19 (Announced in the 2014 Policy Address)
● (green)	● (green, dashed)	● (green, outlined)	2013年施政報告公布多項增加土地供應措施下短中期房屋用地 Short to Medium Term Housing Sites from Various Land Supply Initiatives Announced in the 2013 Policy Address

本摘要圖於2017年1月16日擬備
EXTRACT PLAN PREPARED ON 16.1.2017

土地用途檢討下所物色的離島區具房屋發展潛力用地(截至2017年1月中)
POTENTIAL HOUSING SITES IDENTIFIED UNDER LAND USE REVIEWS IN ISLANDS DISTRICT (POSITION AS AT MID-JANUARY 2017)

SCALE 1 : 30 000 比例尺

米METRES 500 0 500 1 000 1 500 2 000 METRES 米

規劃署
PLANNING DEPARTMENT

參考編號
REFERENCE No.
M/HOLS/17/02

圖 PLAN
18

Annex H

Private Housing Land Supply from 2012/13 to 2016/17
(estimated as at mid-January 2017)

	Estimated Flat No. (About)					
Financial Year	**Government Land Sale**	**Railway Property Development Projects**	**Projects of the Urban Renewal Authority**	**Private Development / Redevelopment Projects Subject to Lease Modification / Land Exchange**	**Private Development / Redevelopment Projects Not Subject to Lease Modification / Land Exchange**	**Total**
2012/13	8 200	4 100	900	700	2 700	**16 600**
2013/14	13 000	2 900	250	90	1 800	**18 040**
2014/15	6 300	8 400	2 700	100	3 700	**21 200**
2015/16	8 900	7 500	1 100	600	1 800	**19 900**
2016/17[Note]	14 700	3 500	300	600	1 800	**20 900**
Total	**51 100**	**26 400**	**5 250**	**2 090**	**11 800**	**96 640**

Note: The forecast figures of the private housing land supply in 2016/17 will be adjusted after the end of 2016/17 in accordance with the actual land supply.

Annex I

Development of Brownfield Sites

Purpose

This note gives a brief introduction of the development of brownfield sites in Hong Kong and an update of work undertaken by the Government in optimising the use of brownfield sites.

Background

2. There is no formal and standard definition for brownfield sites at present. In Hong Kong, the term generally refers to agricultural or rural land in the NT, predominantly privately owned, that is deserted and converted to uses such as container yards, vehicle depots, vehicle repair workshops, logistics operations, rural workshops, open storage, recycling yards, construction machinery and materials storage, which are incompatible with the surrounding environment. These agricultural or rural land are mostly of irregular shape and size, often intermingled with villages, squatters, both active and fallow farmland, alongside vegetation clusters and small knolls.

3. The evolution of the brownfield sites can be traced back to the history of rural land development in the NT. In the NT, most of the private land is held under "Old Schedule" lots contained within the Block Government Leases (BGL, formerly known as Block Crown Leases) and is described as "agricultural land". The BGL reflected the state of farming when it was executed in 1905. In 1983, the High Court ruled in the "Melhado" case that lots granted under the BGLs are subject to no restriction on the use of land, other than the clause preventing "Noisome or Offensive Trades". Accordingly, so long as the development does not include any buildings, the agricultural lot owner under BGLs may use the land for purposes other than agriculture.

4. In 1991, the Town Planning Ordinance (TPO) was amended to extend statutory planning control to the rural areas. The TPB was empowered to prepare statutory plans to cover the rural NT and enforcement action against

unauthorized developments on land in designated "Development Permission Areas" (DPA) could be taken by the Planning Authority under the TPO, unless the development is an "existing use" or permitted under the relevant statutory town plans or subject to valid planning permission. For those brownfield operations that were in existence immediately before the first publication of the draft plan of the DPA, they will be regarded as an "existing use" under the TPO and are permitted for their continual existence.

5. Over the years, in recognition of the demand for open storage, port back-up and rural industrial uses and their contribution to our economy, the TPB designated "Open Storage", "Other Specified Uses" annotated "Port Back-up Uses" and "Industrial (Group D)" zones in appropriate areas on statutory plans. In the process, all relevant considerations, including land use compatibility, availability of transport infrastructure, impacts on transport, environment, drainage and local residents etc., are taken into account. These areas include mainly HSK and Ha Tsuen area, Wang Chau area, Tong Yan San Tsuen and other areas to the south of Yuen Long, Kam Tin, Ngau Tam Mei, Pat Heung and Shek Kong area, San Tin/Lok Ma Chau area, and Ping Che and Ta Kwu Ling area. The designation of suitable sites for open storage, port back-up and rural industrial uses can help regularise the haphazard proliferation of such uses in the NT, prevent further uncontrolled sprawl of such activities and minimise adverse traffic and environmental impacts resulting from these land uses.

Distribution and Nature of Brownfield Operations

6. In 2015, a survey was conducted in the NDA in HSK that covers some 190 ha of brownfield sites, so as to understand the distribution and types of operation of existing brownfield sites. The key survey findings, as tabulated below, were reported to the LegCo Council Panel on Development on 8 November 2016 -

Type of brownfield operations	**Area (% of total)**	**No. of sites/ Average site size**	**Rental range (R) / Median (M)** (Based on responded cases only)
Container storage	52 ha (26%)	24 / 2.17 ha	R: \$0.20/ft^2 – \$29.46/ ft^2 M: \$1.61/ft^2
Open Storage (excluding container storage) [Note 1]	29 ha (14%)	49 / 0.59 ha	R: \$0.19/ft^2 – \$9.32/ft^2 M: \$2.37/ft^2
Warehouses [Note 2]	46 ha (23%)	105 / 0.44 ha	R: \$0.08/ft^2 – \$33.53/ft^2 M: \$1.90/ft^2
Logistics operations	30 ha (15%)	43 / 0.70 ha	R: \$0.0012/ft^2 – \$25.25/ft^2 M: \$4.68/ft^2
Vehicle repair workshops	18 ha (9%)	62 / 0.29 ha	R: \$0.07/ ft^2 – \$9.98/ ft^2 M: \$1.51/ ft^2
Vehicle parking	7 ha (3%)	12 / 0.58 ha	R: \$0.09/ ft^2 – \$5.48/ ft^2 M: \$0.55/ ft^2
Vehicle body building workshops	2 ha (1%)	10 / 0.20 ha	R: \$1.29/ ft^2 – \$9.29/ ft^2 M: \$3.75/ ft^2
Other workshops (excluding vehicle repair workshops and vehicle body building workshops) [Note 3]	13 ha (7%)	39 / 0.33 ha	R: \$0.10/ ft^2 – \$17.41/ ft^2 M: \$1.95/ ft^2
Other operations	4 ha (2%)	24 / 0.17 ha	R: \$0.36/ ft^2 – \$45.12/ ft^2 M: \$1.55/ ft^2
Overall	**202 ha (100%)**	**368 / 0.55 ha**	**R: \$0.0012/ ft^2 – \$45.12/ ft^2 M:\$1.91/ ft^2**

Note 1: Including storage of construction materials, construction plant/equipment, vehicles/vehicle parts and recycling materials.

Note 2: Including warehouse for construction materials, construction plant/equipment, vehicles/vehicle parts, recycling materials, dangerous goods and other goods.

Note 3: Including recycling industry, construction industry, food processing, vehicle scrapping and other workshops.

7. The survey shows that brownfield operations are scattered, and the types of industries and nature of operations on brownfield sites vary widely. There are passive open storages of containers, vehicles, machineries, construction materials etc., and active industrial operations of various kinds (e.g. logistics, vehicle repairing, recycling and scraping, wood-cutting). The site size and rental level vary with the nature of operations, and the median rent is about \$1.91 per square feet. The brownfield sites are providing large open-air land at relatively lower cost for industrial operations that might have difficulty in finding similar space or accommodation in urban areas.

8. Apart from some 190 ha of brownfield sites covered in HSK NDA mentioned above, there are about 50 ha of brownfield sites in KTN and FLN

NDAs and over 100 ha in YLS Development. There are hence altogether some 340 ha of brownfield sites covered in the relevant NDA projects being taken forward that would be released for high-density development through comprehensive planning and infrastructure upgrading. In addition, the "Preliminary Feasibility Study on Developing the New Territories North" now underway also cover clusters of brownfield sites of about 200 ha, which is proposed under "Hong Kong 2030+" to be a SGA for development of new towns and employment nodes.

9. To gauge a comprehensive picture of brownfield sites in the territory and the brownfield operations thereon, PlanD will commission a study in 2017 on the existing profile and operations of brownfield sites in the NT.

Comprehensive Planning to Release Brownfield Sites

10. Releasing land occupied by brownfield sites is one of the main directions in the Government's multi-pronged land supply strategy alongside other land supply initiatives and sources. Developing land in the northwestern and northern part of NT where brownfield sites are concentrated through NDA projects is an important part of the Government's multi-pronged approach to increase land supply in the medium to long term.

11. The development of brownfield sites under the NDA approach has the merits of optimising the use of land through comprehensive planning and infrastructure upgrading. Due to their unplanned development, brownfield sites are usually mingled with other rural land uses including village houses, squatters, livestock farms as well as fallow and active agricultural land. Developments of individual brownfield sites in a piecemeal manner would be difficult to support high-density developments including public housing to release the full development potential of suitable sites. Without comprehensive planning, it would also be challenging to fully address the environmental problems caused by brownfield sites and to provide spaces for those operations still in demand.

Land-Efficient Means to Accommodate Brownfield Operations

12. Brownfield operations are basically industrial operations. It is recognised that many of these operations are serving support functions for various economic sectors or industries such as port back-up, logistics, recycling, construction industry, vehicle repairing/body building, etc., which are considered necessary in Hong Kong. In parallel with the comprehensive development of brownfield sites, it is important to consider how these industrial operations currently relying on brownfield sites as their operating space could be accommodated in a more land efficient manner in the long run.

13. As announced in the 2014-15 Budget and the Policy Addresses in 2015, 2016 and 2017, the Government would improve land utilisation by exploring feasible measures to accommodate brownfield operations through land efficient means such as multi-storey buildings (MSBs), taking HSK NDA as a pilot case. CEDD has commissioned relevant feasibility studies on MSBs for brownfield operations in 2016, which cover the conceptual design, planning, engineering, environmental and financial assessments, and explore possible mode of operation and management. Relevant stakeholders, including existing operators, trade representatives and locals, will be consulted during the feasibility studies in order to understand their operational needs and listen to their views. The studies are targeted for completion in around mid-2018.

14. Apart from MSBs, we also would not rule out the possibility and need for accommodating certain operations which could not be practically feasible to move into MSBs on suitable open-air sites with provision of proper infrastructure and segregation from sensitive receivers. We have reserved about 24 ha of land in the HSK NDA for accommodating brownfield operations to be affected by development. We would also explore other sites which may be suitable for accommodating brownfield operations.

Way Forward

15. As mentioned above, the major new development areas underway would cover a total of some 340 ha of brownfield sites and the proposed SGA of NTN under "Hong Kong 2030+" would cover another 200 ha of brownfield sites. Other smaller scale development projects such as Wang Chau would

also convert brownfield sites to high-density development to meet the society's needs. The Government is also exploring means to accommodate brownfield operations that are still needed in Hong Kong in a more land-efficient manner. Meanwhile, the Government is considering how best to tackle brownfield sites on a more holistic basis and will consider the necessary policies and strategies with a view to achieving the objectives of optimizing land utilisation, releasing brownfields potential and improving the rural environment. The outcomes of the territory-wide survey of brownfield sites and operations as well as the pilot studies on MSBs for accommodating brownfield operations would provide the necessary inputs for formulating the appropriate policies and strategies for tackling brownfield operations.

Development Bureau
January 2017

Annex J

Various Suggestions on Land Supply and Development

Introduction

Under the Government's multi-pronged approach to land supply, we would consider all possible land supply measures carefully, and would leave no stone unturned in optimising land utilisation and increasing land supply. Wherever feasible, the land supply measures would be pursued as part of the multi-pronged approach having regard to technical, resources and priority considerations. In this regard, various ideas and suggestions on land supply and development have been made over time by the community and stakeholders, with a view to increasing land supply to meet the housing and other needs of the society, or providing alternatives to land use or development proposals. This note summarises the Government's considerations and views on key suggestions on land supply and development received in the past.

(i) Using Unleased or Unallocated Residential Land, Short Term Tenancy and Temporary Government Land Allocation Sites

2. It should be noted that the various land use reviews that are undertaken by the Government as part of the land supply measures under the multi-pronged approach already cover government land currently vacant, under Short-Term Tenancies (STTs) or different short-term or government uses[1]. Suitable sites have been identified through these land use reviews for housing and other developments, with a view to achieving the optimal use of land and providing more land for developments in the short to medium term. For individual sites of unleased or unallocated government land identified with potential for residential or other developments, we will review and assess its development feasibility in accordance with the established mechanism. When a plot of land is identified as suitable and available for permanent development, we will make appropriate arrangements for its disposal, such as land sale, disposal for public housing development or other uses.

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[1] We earlier replied to LegCo on 4 July 2012 and 17 October 2012 to clarify why the simple arithmetic calculation of unleased and unallocated land in certain land use zonings does not mean all such land readily developable. Where there are individual sites with reasonable size and configuration, their suitability for development would depend on a series of factors, such as the adequacy of related infrastructural facilities, and compatibility with neighbouring land uses (e.g. whether the site is too close to the existing or planned buildings), etc. To facilitate public understanding, the relevant consolidated and analysed land information together with the maps showing the boundaries of the land concerned have been uploaded since October 2012 onto the website of DEVB for public inspection (http://www.devb.gov.hk/en/issues_in_focus/the_land_area_analysis/ index.html).

3. Developable land not yet leased or allocated for long-term development uses and other government land which has yet to be planned for long-term development uses is put to gainful temporary uses as far as practicable. LandsD may allocate such sites through Temporary Government Land Allocation to various government departments for temporary uses, mostly as maintenance depots and works areas for public works projects; or let out sites for temporary uses by way of STT through tender (e.g. fee-paying public carpark) or through direct grant of the site to particular organisations or bodies for temporary uses that support specific policy objectives (e.g. works sites for railway construction). If an individual piece of government land fulfills the criteria for direct grant (including the criteria that the land cannot be leased on its own to persons other than the applicant and has no general commercial value in the open market due to its location, topography, area, etc.), LandsD may also consider granting the relevant site directly to the applicant.

4. Moreover, a list of government sites that are available for application by non-profit-making, and/or community organisations for greening and community uses is updated regularly, circulated to DCs, District Social Welfare Offices and is also available for inspection at LandsD. In considering the duration of temporary uses to be allowed for government sites, the Government will take into account whether the site has any designated long-term use and planned development programme, and if so the timetable for such.

5. As for sites currently designated for provision of communal facilities, if no specific implementation plan is available after a period of time, the Government will re-consider the uses of these sites under the established mechanism, including consideration of their suitability for housing and other developments.

(ii) Developing "Village Type Development" Zones

6. "Village Type Development" ("V") zonings on statutory plans scatter across the territory (there are about 700 "V" zones across 95 statutory plans) and cover mainly recognised villages in the NT. Such "V" zones normally reflect the extent of pre-existing rural villages (including villages that had been resited in the past to make way for new town development). Under the small house policy, in general, a male indigenous villager aged 18 years old or above who is descended through the male line from a resident in 1898 of a recognised village in the NT may apply to the authority once during his lifetime for permission to build for himself a small house on a suitable site within his own village. Land in "V" zones on statutory plans is generally within the environs of the recognised villages in the NT, and therefore the planning intention of such "V" zones is mainly for small house development by

indigenous villagers. In general, these sites are not suitable for large-scale development because of the infrastructural and other logistical constraints and their sporadic locations[2].

7. The small house policy has been implemented for more than 40 years. The Government recognises the need to review the small house policy in the context of prevailing land use planning as well as optimal utilisation of land resources. Such review will inevitably involve complicated issues in various aspects such as legal, environment, land use planning and demand on land, all of which require careful examination. The Government will continue to handle this review carefully and judiciously, engaging stakeholders as well as the wider community in dialogue over the relevant issues as and when necessary.

(iii) Developing "Comprehensive Development Area" Sites

8. "Comprehensive Development Area" ("CDA") is a zoning that is normally applied for certain sites at strategic or prominent locations, whereby the comprehensive planning and development of the sites would be essential for overall development of the locality, especially when various public facilities are to be provided or integrated therein. To expeditiously implement or facilitate developments for the optimisation of land resources, thereby meeting the housing and various other needs of Hong Kong people, the Government has been monitoring closely the planning and development situations of sites zoned "CDA".

9. According to "TPB Guidelines No. 17 - Designation of "CDA" Zones and Monitoring the Progress of "CDA" Developments", TPB will conduct a first review of each "CDA" site at the end of the third year after its zoning, and subsequently conduct a review biennially. In general, to optimise land use in response to the changing land development and planning circumstances, TPB will consider subdividing suitable "CDA" sites, including "CDA" sites which have significant implementation difficulties and with slim chances of successful implementation, into smaller sub-zones, or to rezone them to other land use zonings to facilitate early implementation. For example, TPB in November 2014 decided to subdivide a "CDA" site in the Yau Tong Industrial Area into five smaller "CDA" sub-zones, and in April 2015 proposed amendments to the approved Ma Tau Kok Outline Zoning Plan (OZP), mainly to rezone a "CDA(3)" site to "Residential (Group A)" and "Government, Institution or

[2] As part of the information on unleased and unallocated government land within various land use zonings (see footnote above), we have also uploaded the map of the unleased or unallocated government land in "V" zones to the website of DEVB since October 2012.

Community" so as to expedite the development progress.

(iv) Developing Open Space

10. The standard for provision of open space as suggested in Chapter 4 of the Hong Kong Planning Standards and Guidelines is a minimum of 2 m^2 per person, apportioned as 1 m^2 per person for district open space and 1 m^2 per person for local open space. In planning for open space, apart from population capacity, the Government will take into account other important factors, including the population distribution, geographical and historical factors, public commitment, people's aspirations, geographical location, distribution, quality and function of open space, as well as the characteristics of the district and location, etc. During the planning process, the Government will optimise the use of land by planning for open space properly, having regard to the varying factors in all districts. As noted by the Audit Commission in Chapter 4 of its Report No. 60, the existing and planned provision of local and district open space exceeds the current minimum standards in all 18 districts except for shortfalls in four districts in either local or district open space provision[3].

11. Nevertheless, to meet the development needs of the community, the Government carries out land use reviews from time to time to ensure the optimisation of land resources, and may re-zone suitable government land in "Open Space" land use zonings and other government sites with no development plan for other uses that meet more pressing community needs including housing needs. Concerned B/Ds will be consulted during the reviews, and if they consider that there is a need to re-provide existing or planned facilities, suitable sites will be identified, or co-location of facilities within the proposed development will be considered. Relevant DCs will also be consulted on rezoning proposals and the arrangements for the facilities concerned.

(v) Developing "Undetermined" Sites

12. "Undetermined" ("U") zones on statutory plans mainly cover those sites which are subject to land use reviews. This zoning is intended to denote areas where further detailed planning study is required to identify the future land uses. For example, the long-term planning of the sites is affected by infrastructure such as railways, trunk roads or drainage system. Technical studies and environmental impact assessments are required. If necessary, a

[3] The open space information quoted in the Audit Report No. 60 (http://www.aud.gov.hk/pdf_e/e60ch04.pdf) refers to the projections made in 2008. Based on the latest projections made in 2012, the existing and planned provision of local and district open space exceeds the current minimum standards in all 18 districts except for shortfalls in three districts in either local or district open space provision.

detailed layout plan has to be drawn up having regard to the local characteristics, infrastructure and ancillary facilities (such as detailed design and review of transport networks) before deciding the suitable land use in the long term, with a view to achieving the objective of effective use of land resources.

13. To ensure that development in a "U" zone would not pre-empt the recommendations of land use reviews, any proposed development in a "U" zone will require a planning permission from TPB. Upon completion of the review, PlanD will amend the relevant OZP according to the established procedures to ascertain the zoning of the site. For example, the amendments of the "U" site at the waterfront of Kennedy Town according to the "Land Use Review of the Western Part of Kennedy Town" had been completed, and the OZP with the relevant amendments incorporated was exhibited in March 2016 for public inspection. The P&E study underway to formulate the development plans for YLS also covers a large area of "U" zone occupied by brownfield sites.

14. We will continue to closely monitor the use of all "U" sites, and will amend their zoning for suitable developments as soon as possible after completion of the relevant land use reviews or planning and engineering studies.

(vi) Relocation of Kwai Tsing Container Terminals

15. Hong Kong Port (HKP) is one of the busiest container ports in the world. The Kwai Tsing Container Terminals (KTCT) is renowned for efficient cargo handling operations with very good supporting infrastructure facilities, fairway operation and service network, as well as the Kwai Tsing Container Basin with deep water and natural protection. As a key infrastructure in Hong Kong, KTCT handled about 78% of Hong Kong Port's container throughput in 2015, playing an important role in supporting the cargo operation, economic activities and providing employment opportunities in Hong Kong. The port and related sectors directly contribute 1.2% ($ 26 billion) to Hong Kong's GDP and 2.3% (87 000 jobs) of total employment. HKP is also vital in supporting the trading and logistics sector, which is one of Hong Kong's four key economic pillars, accounting for 22% ($ 517 billion) of Hong Kong's GDP and 20% (748 000 jobs) of total employment.

16. Relocation of the KTCT would involve the reprovisioning of the container terminals, port back-up land and related supporting infrastructure and transportation networks, as well as suitable relocation sites. With an area of about 279 ha and a deep water frontage of about 7 694 metres, identifying a replacement site is formidable. Moreover, there will be serious implications to Hong Kong's economy as a whole, bearing in mind that the mainstays of our economy, notably retail and trading, hinges on a thriving port. The

Government must carefully and comprehensively consider the case by taking into account all related factors. We have no plan to relocate the container terminals at this juncture.

(vii) Use of Military Sites

17. Article 14 of the Basic Law states that the Central People's Government (CPG) shall be responsible for the defence of the Hong Kong Special Administrative Region (HKSAR). Article 5 of the Law of the People's Republic of China on the Garrisoning of the HKSAR (the Garrison Law) provides that one of the defence functions and responsibilities of the Hong Kong Garrison is to control military facilities. The use of military sites is a matter of national defence for which the CPG and the Hong Kong Garrison have sole responsibility. Article 13 of the Garrison Law provides that any land used by the Hong Kong Garrison for military purposes, when approved by the CPG to be no longer needed for defence purposes, shall be turned over without compensation to the HKSAR Government for disposal. If the HKSAR Government requires for public use any part of the land used for military purposes by the Hong Kong Garrison, it shall seek approval of the CPG. Where approval is obtained, the HKSAR Government shall in return provide land and military facilities for the Hong Kong Garrison at such sites as agreed to by the CPG, and shall bear all the expenses and costs entailed. All existing sites of the Hong Kong Garrison are currently used for defence purposes. The Government has no plan to seek any change to the use of these sites.

(viii) Resumption of Private Recreation Sites and Relocation of Large-Scale Recreation Facilities

18. The Government has set up an inter-departmental working group to conduct the comprehensive review of the Private Recreational Lease (PRL) policy. Based on the current progress, the Government aims to complete the review in 2017. It will then conduct public/stakeholders' consultations and brief the LegCo Panel on Home Affairs on the review findings. A site currently used for PRL may be released for consideration of alternative use if it is confirmed that the PRL is no longer required under the PRL policy.

19. Hong Kong has a shortage of public sports facilities. According to the standards set out in the Hong Kong Planning Standards and Guidelines, there is a shortfall of major sports facilities including football pitches, sports grounds and sports centres across the territory. From time to time, we receive requests from Members of LegCo and the DCs, urging us to speed up the construction of sports and recreation facilities, and to increase the number of such facilities, in order to meet the needs of the community. We currently have

no concrete plan to relocate any of our large-scale sports and recreation facilities.

(ix) Country Parks

20. Covering a total area of about 44 300 ha, which is about 40% of Hong Kong's land area, our country parks and special areas comprise scenic hills, woodlands, reservoirs and coastline in all parts of Hong Kong. Apart from offering protection to our natural landscape and conserving wildlife, these areas also serve the vital purpose of providing outdoor education and countryside recreation to the people in Hong Kong. Robust laws are in place to protect country parks. The Country Parks Ordinance (Cap. 208) provides a legal framework for the designation, control and management of country parks and special areas. At this stage, the Government has no specific plan to convert any particular area of country parks and special areas to other uses. To meet the imminent housing needs of Hong Kong people, our priority is to convert suitable green belt sites in the fringe of built-up areas that are closer to existing urban areas and new towns, which have relatively low conservation value and buffering effect.

Concluding Remarks

21. We would like to emphasise that the Government leaves no stone unturned in optimising use of our existing land and creating new land for development. However, it is clear that first, there is no magic bullet that can increase land supply with no cost or no impact; and second, we need to fire on all cylinders and there is no question of taking one measure in lieu of another as no single measure could provide sufficient land for housing and other socio-economic development purposes for our community. In terms of priority we would certainly continue to strike a balance among the environment, development and social needs, but to believe that any one single solution could solve our land supply problem is unrealistic.

Development Bureau
January 2017