

STUDY ON EXISTING PROFILE AND OPERATIONS OF BROWNFIELD SITES IN THE NEW TERRITORIES

新界棕地使用及作業現況研究

Panel on Development Meeting

發展事務委員會 會議

Contents

主要內容

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- ❖ Study Methodology 研究方法
- ❖ Brownfield Sites under the Study 研究包括的棕地
- ❖ Study Findings 研究結果
- ❖ Follow-up actions 跟進工作

- Commissioned a consultant in April 2017 to undertake the Brownfield Study
於2017年4月委聘顧問開展棕地研究
- Captured a snapshot of comprehensive profile (including overall distribution, size, characteristics, economic uses, etc.) across brownfield sites in the New Territories
全面掌握研究期間新界各處棕地的整體情況 (包括整體分布、面積、特徵及經濟用途等)
- Useful for facilitating land use planning
有助於日後土地用途規劃工作



Desktop Research 資料搜集

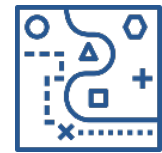


Brownfield sites were identified with reference to helicopter aerial photos, satellite images, unmanned aerial vehicle photos and LandsD's aerial photographs and maps
透過參考拍攝的直升機航拍照片、衛星圖像、無人機航拍照片、地政總署的航空相片及地圖，識別出可能被視作棕地的場地



Observations and Questionnaire Survey 場地觀察及問卷調查

Recorded site information (including uses, operational characteristics and site boundaries)
記錄場地的資料 (包括場地用途、營運特徵及場地邊界)



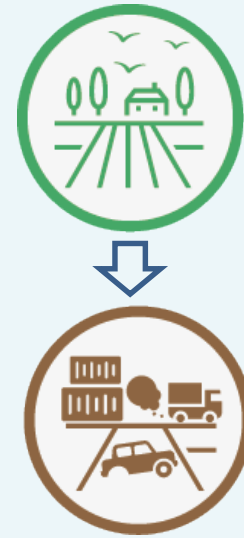
Interviews 訪問

With stakeholder groups to understand the nexus of their industries with Hong Kong's economy
訪問持份者以了解這些行業與香港經濟的關連



Primarily agricultural land in the New Territories
which has been formed and occupied by
industrial, storage, logistics and parking uses

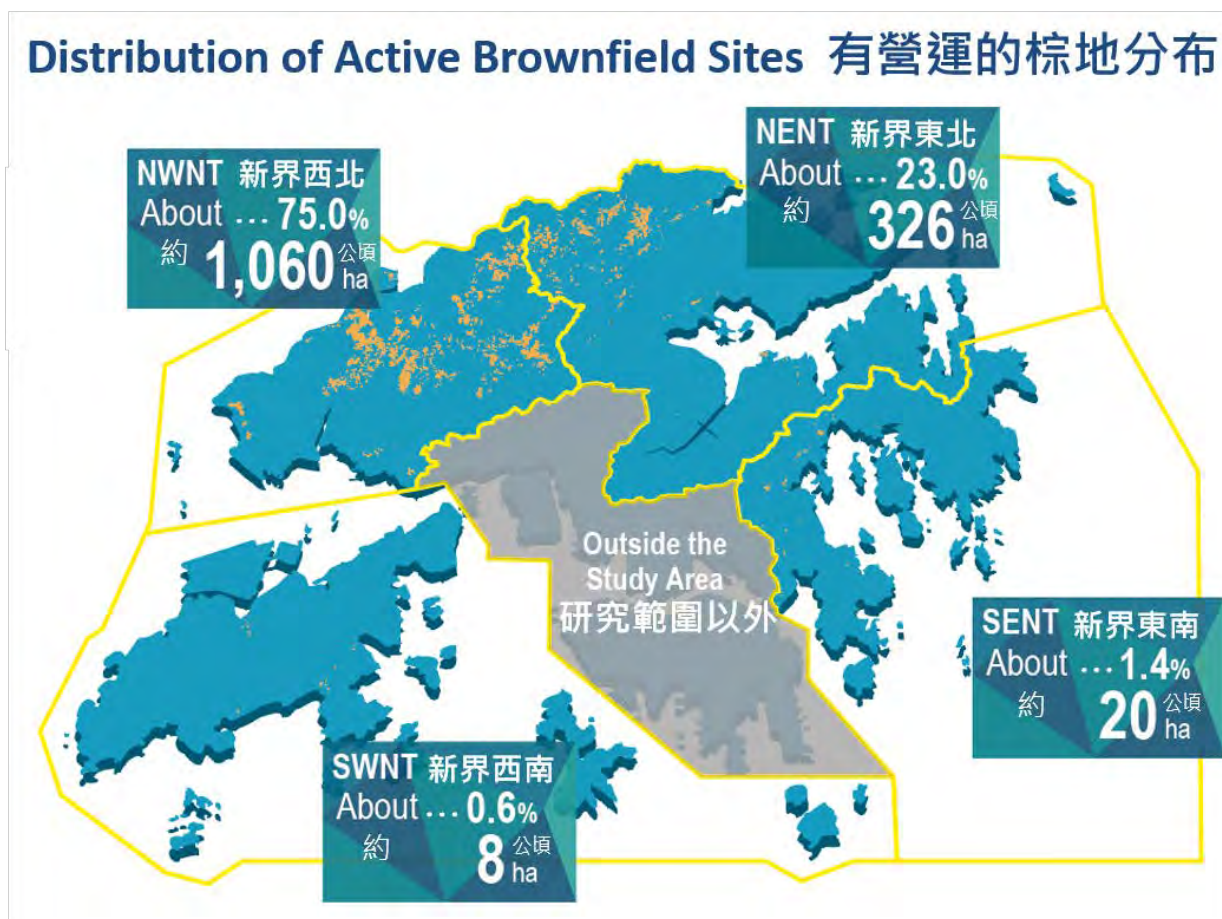
泛指新界一些遭平整的農耕土地，
用作工業、貯物、物流及泊車用途



Study Findings – Spatial Distribution

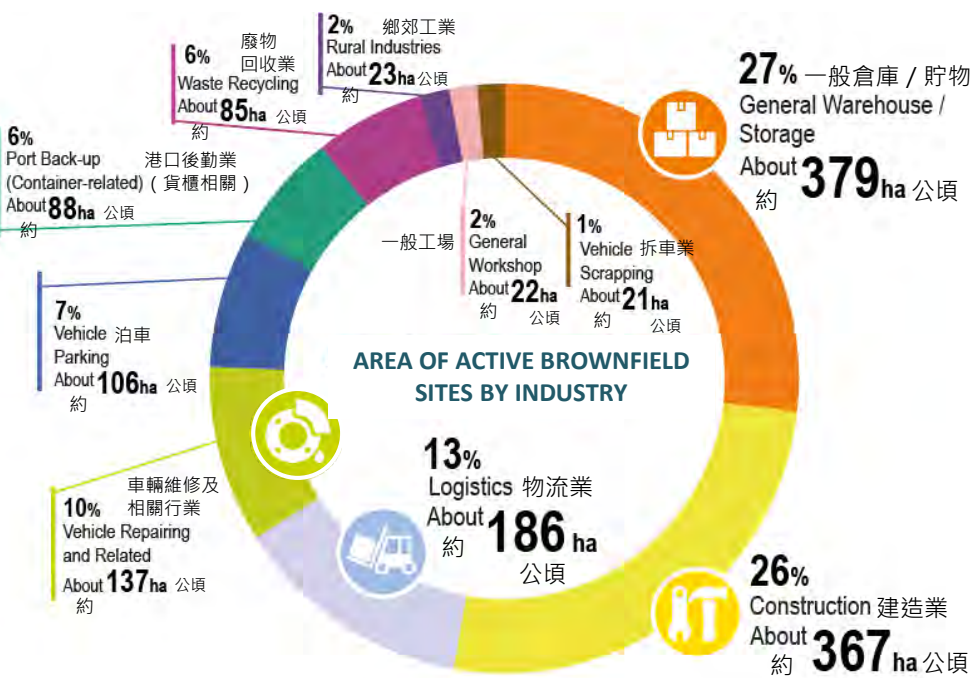
研究結果 – 空間分佈

- The survey located 7,373 active brownfield sites (about 1,414 ha), predominantly in NWNT and NENT (excluding 996 inactive brownfield sites (about 165 ha) in the NT 調查確認在新界共有7,373個有營運的棕地（面積約為1,414公頃），主要位於新界西北及新界東北（並不包括996個當時沒有營運的棕地（面積約為165公頃））



Study Findings – Distribution of Active Brownfield Site(s) by Industry

研究結果 – 有營運的棕地行業種類分布



Type of Industries 行業種類	No. of Sites 場地數目	Area of Sites (sq.m.) 場地面積 (平方米)
General Warehouse / Storage 一般倉庫 / 貯物	2,718	379
Construction 建造業	1,558	367
Logistics 物流業	560	186
Vehicle Repairing and Related 車輛維修及相關行業	1,102	137
Vehicle Parking 泊車	435	106
Port Back-up (Container-related) 港口後勤業 (貨櫃相關)	152	88
Waste Recycling 廢物回收業	441	85
Rural Industries 鄉郊工業	104	23
General Workshop 一般工場	176	22
Vehicle Scrapping 拆車業	127	21
Total Active Brownfield Sites 有營運的棕地總數	7,373	1,414
Inactive Brownfield Sites 沒有營運的棕地	996	165

- Many brownfield operations play a part in our economy’s production chain serving some industries
許多棕地作業正服務着一些行業，在我們的產業鏈發揮作用
- The ecosystems of these industries are expected to undergo changes when existing brownfield sites are cleared for development or alternative land uses.
清拆現有棕地作發展或其他土地用途時，這些行業的生態將會出現變化

Study Findings – Distribution of Active Brownfield Site(s) by Industry

研究結果 – 有營運的棕地行業種類分布



Construction 建造業
(367 ha 公頃)



General Warehouse/Storage 一般倉庫 / 貯物
(379 ha 公頃)



**Vehicle Repairing and Related
車輛維修及相關行業**
(137 ha 公頃)



Logistics 物流業
(186 ha 公頃)

Study Findings – Distribution of Active Brownfield Site(s) by Industry

研究結果 – 有營運的棕地行業種類分布



Vehicle Parking 泊車
(106 ha 公頃)



Port Back-up (Container-related)
港口後勤業 (貨櫃相關)
(88 ha 公頃)



Waste Recycling 廢物回收業
(85 ha 公頃)



Rural Industries 鄉郊工業
(23 ha 公頃)



General Workshop 一般工場
(22 ha 公頃)



Vehicle Scrapping 拆車業
(21 ha 公頃)

	Median 中位數 (Range 幅度) \$/ft ² 每平方呎	Average 平均數 \$/ft ² 每平方呎
All Brownfield 所有棕地	3.0 (0.9 – 22.2)	3.9
Logistics 物流業	3.5 (2.0 – 22.2)	4.7
Construction 建造業	2.8 (0.9 – 12.7)	3.5
Rural Industries 鄉郊工業	2.5 (0.9 – 3.7)	2.3

According to the survey findings, the levels of rent (recorded from August 2017 to October 2018) are for reference only. In fact, the rents of individual sites may vary 根據問卷調查結果，上述租金數字(在2017年8月至2018年10月間記錄)僅供參考。事實上不同棕地的租金會各有差異

- Brownfield sites are filling a gap in land supply for industrial operations unable to find or afford accommodation in urban areas
棕地為無法在市區覓得可負擔營運場地的一些工業作業填補了土地供應缺口
- In addition to operational requirements, rent affordability is a key concern of most brownfield operators
除營運需求外，承租能力是大部分棕地營運者主要的營運考慮因素

Estimated Employment in Brownfield Sites 推算的棕地就業

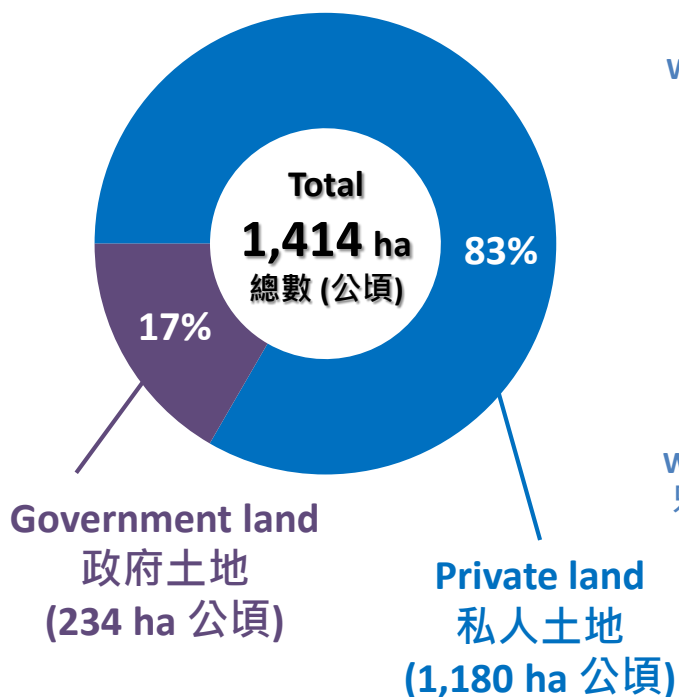
52,110 Jobs 職位

(Projected by extrapolation 根據推算)

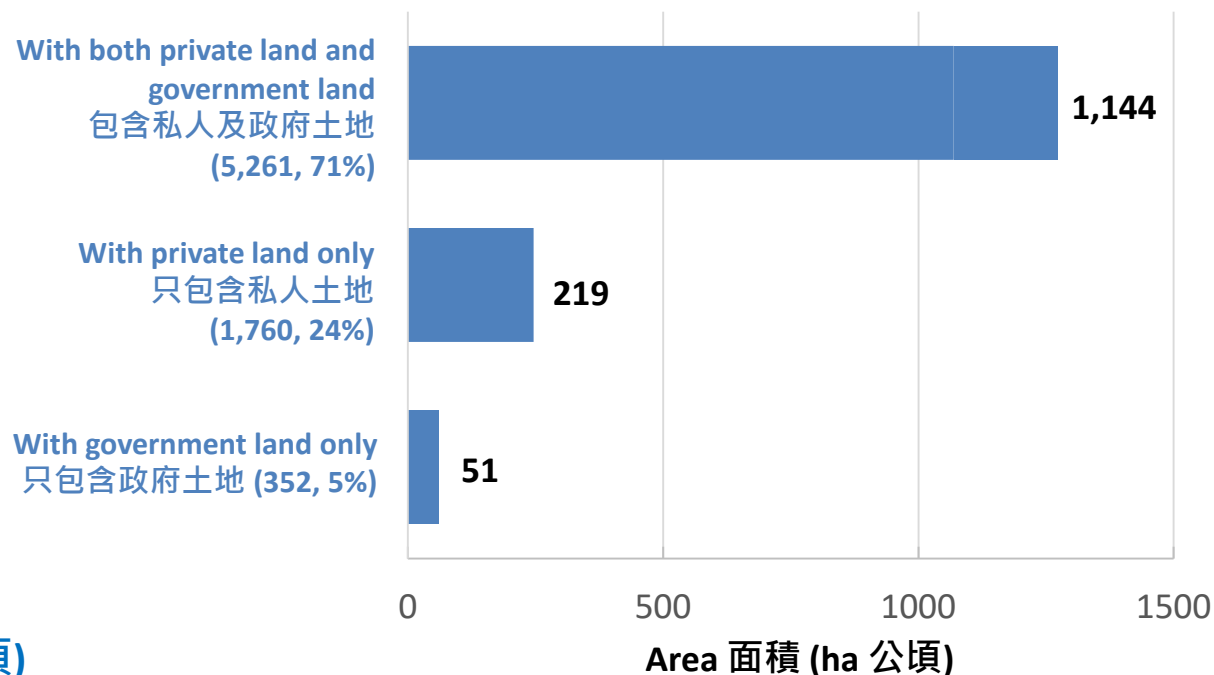


- Mostly full-time jobs
大部分為全職職位

Breakdown by Area 按面積分類



Breakdown by Number of Sites 按棕地場地數目分類



- Majority of brownfield sites is under private ownership
絕大部分棕地由私人擁有
- Land resumption in accordance with the law is an important tool of our community in developing brownfield sites on private land for which public purposes have been identified through due planning processes
在經審慎的規劃過程確立了公共用途後，再按照法例收回私人土地，一直都是發展棕地的主要做法

Study Findings – Brownfield Sites within New Development Areas/Other Development Projects

研究結果 – 新發展區/其他發展項目內的棕地

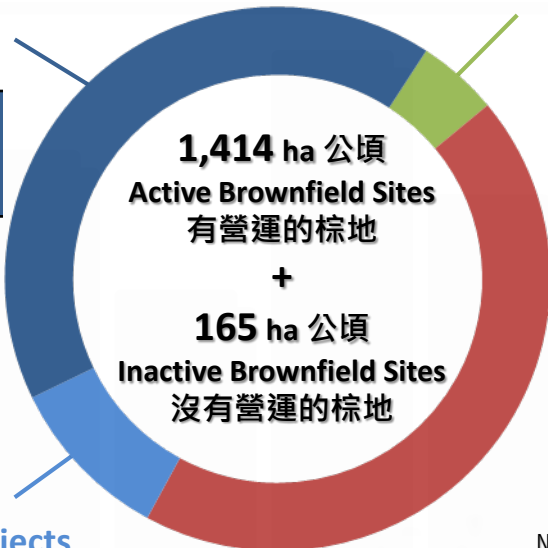
Within New Development Areas
位於新發展區內

653 ha 公頃 (41%)

NDA/PDAs 新發展區 / 具發展潛力地區	Area of Brownfield Sites 棕地面積 (ha) (公頃)
Hung Shui Kiu/Ha Tsuen 洪水橋/廈村	246
New Territories North 新界北	243
Yuen Long South 元朗南發展	94
Kwu Tong North and Fanling North 古洞北及粉嶺北	70

Within Conservation-Related Zones
位於保育及相關地帶內

76 ha 公頃 (5%)



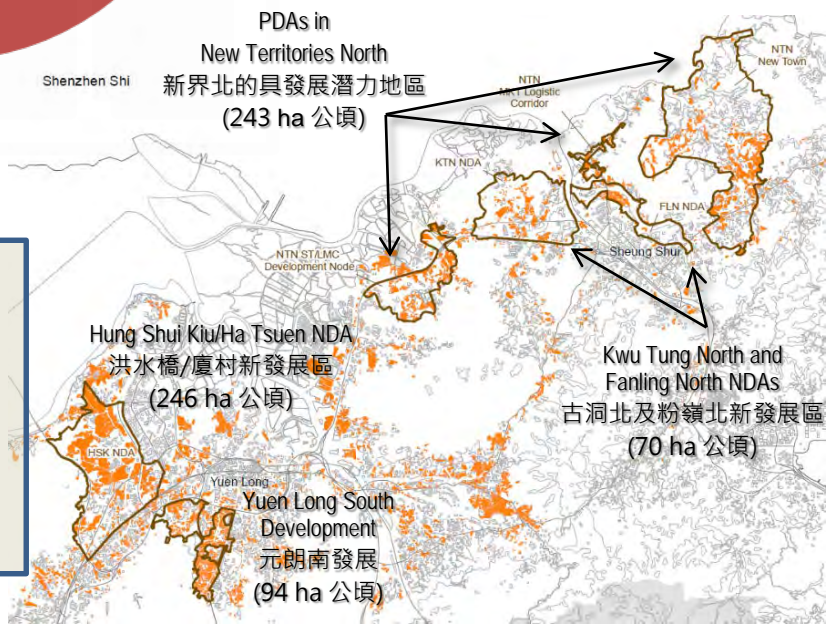
Remaining Brownfield Sites
餘下棕地

700 ha 公頃 (44%)

Within Other Development Projects
位於其他發展項目內

150 ha 公頃 (10%)

- More than 50% of brownfield sites have been covered in different development projects
多個發展項目已涵蓋超過一半的棕地
- Developing brownfield sites has always been an important component of Government's multi-pronged land supply strategy
發展棕地是政府多管齊下土地供應策略中的重要一環



Study Findings – Consultant’s Classification of Possible Development Potential

研究結果 – 顧問進行的棕地可能發展潛力分類

Factors relevant to possible development potential of brownfield sites:




- Distance from existing new towns
- Distance from highways
- Size of brownfield clusters

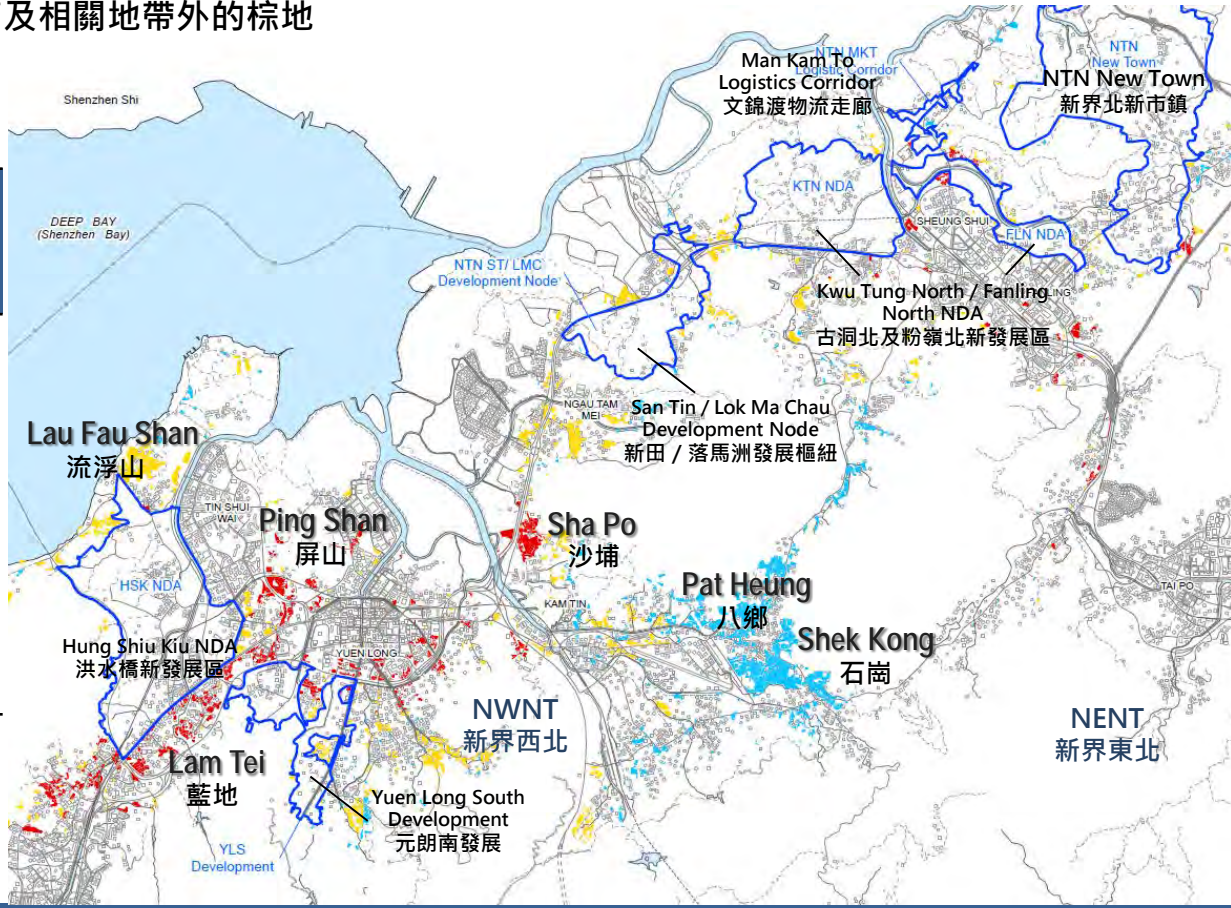
棕地可能發展潛力的相關因素:

- 與現有新市鎮的距離
- 與主要公路的距離
- 棕地群的面積

Remaining Brownfield Sites located outside NDAs/other Planned Projects and Conservation-related zones

餘下位於新發展區 / 其他已規劃項目 / 保育及相關地帶外的棕地

Possible Development Potential 可能發展潛力	Main locations 主要位置	Area of Brownfield Sites 棕地面積
 High 高	Sha Po Tsuen, Shap Pat Heung, Ping Shan, Tai Hang, Lam Tei, etc. 沙埔村、十八鄉、屏山、泰亨、藍地等	160 ha 公頃
 Medium 中	Ngau Tam Mei, Lau Fau Shan, etc. 牛潭尾、流浮山等	290 ha 公頃
 Low 低	Shek Kong, Pat Heung, etc. 石崗、八鄉等	250 ha 公頃



1. **Taking into account the Study findings, we will spearhead our efforts in land use planning involving brownfield sites in the NT based on the following main directions -**
考慮到棕地研究的結果，我們將根據以下主要方向推動涉及新界棕地的土地用途規劃工作 -
 - a) **Redeveloping brownfield sites with potential for housing or other uses to unlock their development potential for the wider public good**
重新發展具潛力作房屋及其他用途的棕地，從而釋放其發展潛力以帶來更廣泛的公共利益
 - b) **Providing land or space to support sustainable development of industrial operations with due regard to the benefits of cluster development, need for greater land efficiency and operational requirements for some businesses to operate outdoor**
在充分考慮發展棕地羣的效益、提高土地使用效率，以及部分作業需要在戶外營運的基礎上，提供土地或空間以支持相關工業作業的可持續發展
 - a) **combating unauthorised development, as well as encouraging phasing out and preventing proliferation of brownfield operations with priority given to operations at or near ecologically sensitive areas**
打擊違例發展，並根據規劃用途鼓勵棕地作業逐步離場及防止其擴散（特別是位於生態敏感地區或附近的作業）

- a) Redeveloping brownfield sites with potential for housing or other uses to unlock their development potential for the wider public good**
重新發展具潛力作房屋及其他用途的棕地，從而釋放其發展潛力以帶來更廣泛的公共利益
- PlanD aims to assess, by the end of this year, how many of the 160 ha of brownfield sites with relatively higher potential for development would be suitable for public housing, having regard to land use compatibility and site constraints
規劃署計劃在今年內以土地使用兼容性和場地限制等因素，檢視160公頃具較高可能發展潛力的棕地，以評估當中有多少可適合作公營房屋發展
 - CEDD will then commence technical studies to ascertain the scope for public housing development and the extent of infrastructure works required
土木工程拓展署會開展技術研究，以確定公營房屋開發及所需基礎設施工程的範圍
 - PlanD will then examine the remaining 290 ha of brownfield sites in the next stage of review to be completed by end 2020
規劃署下一階段會檢視餘下290公頃的棕地，目標是在2020年年底前完成分析

b) Identify opportunities for consolidating brownfield operations through land use planning to channel brownfield sites to suitable locations
透過土地用途規劃，整合棕地作業至合適地點

- We will identify large land parcels with good accessibility and infrastructure in major development projects to provide concentrated, orderly and more land efficient accommodation for brownfield operations
我們會從大型發展項目中，選取面積較大而交通相對可達並設有基建設施的土地，以為棕地作業提供集中、有序及具土地使用效益的場地
- Studies commissioned by CEDD have initially confirmed the architectural and technical feasibility of purpose-built industry-specific multi-storey buildings (MSBs) but indicated the need for considerable capital investment owing to the special access, headroom and loading requirements
土木工程拓展署委託顧問從事的研究初步顯示，為特定行業而建的多層工業樓宇在建築要求及技術上是可行的；但由於特建的通道、樓底及負荷量的要求，需要龐大的資本投資
- A market sounding exercise will be launched shortly to ascertain the market interest towards developing and running MSBs for key brownfield businesses under different scenarios
政府準備即將展開市場意向調查，以探測在不同情況下，市場就棕地作業興建及營運多層樓宇的發展及投資意向

(c) combating unauthorised development, as well as encouraging phasing out and preventing proliferation of brownfield operations

打擊違例發展，並根據規劃用途鼓勵棕地作業逐步離場及防止其擴散

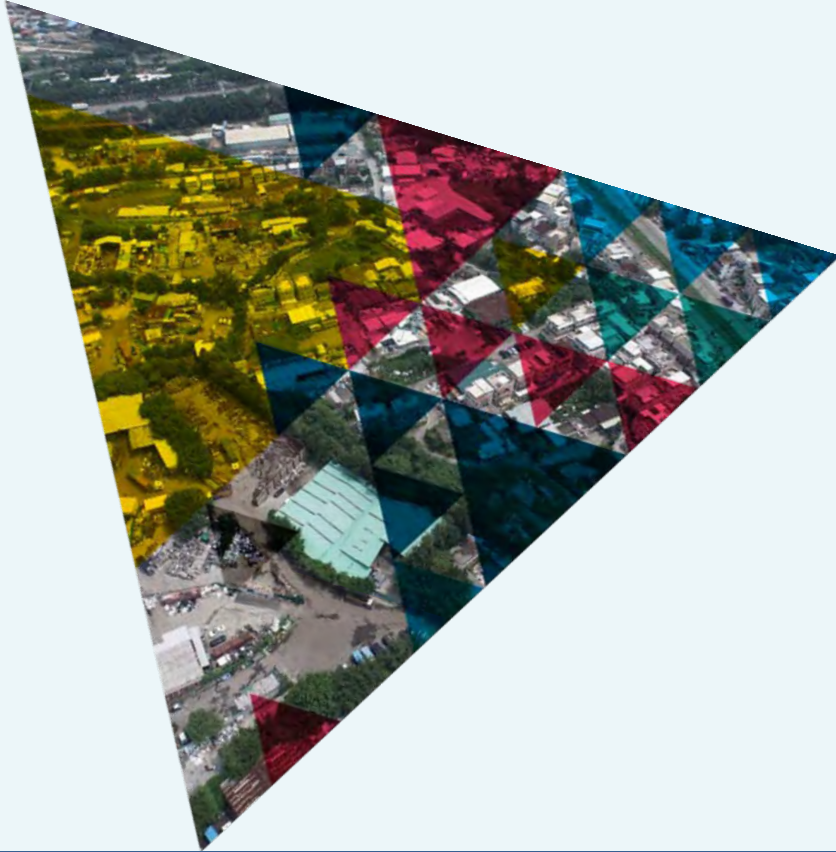
- We will continue to strengthen enforcement actions in respect of brownfield sites involving non-compliances under the planning and land regimes, including giving priority to combating unauthorised developments near or at environmentally sensitive areas.
我們會繼續加強就涉及違反規劃及土地制度的棕地展開執管行動，包括優先打擊鄰近或位於環境敏感地區的違例發展
- PlanD is also reviewing relevant Town Planning Board Planning Guidelines to facilitate consolidation of such uses at the more appropriate locations
規劃署正檢視有關的城市規劃委員會規劃指引，以協助整合上述土地用途至更合適的地點。

Final report, Executive Summary and statistical tables/maps available on PlanD's website

最終報告、行政摘要及統計數據表/地圖已上載到規
劃署網頁

網址: https://www.pland.gov.hk/pland_en/p_study/comp_s/Brownfield/Home_t.html

URL : https://www.pland.gov.hk/pland_en/p_study/comp_s/Brownfield/Home_e.html



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