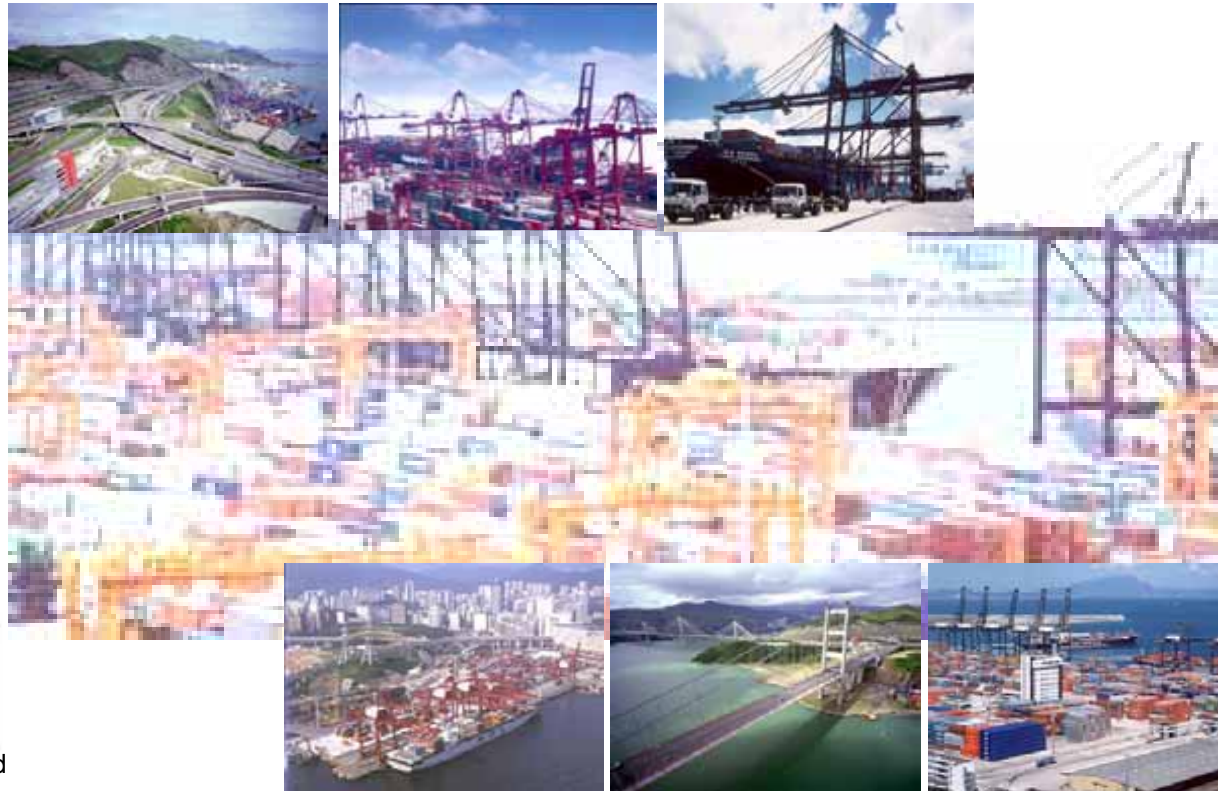


Study on Hong Kong Port - Master Plan 2020 Presentation to LegCo ES Panel 立法會經濟事務委員會 香港港口規劃總綱2020研究簡報

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GHK (香港) 有限公司

In Association with Scott Wilson Limited
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G | H | K

Objectives

目的



- To formulate a competitive and sustainable strategy and master plan for port development over a 20-year planning frame.

規劃香港未來20年可持續實行的港口發展競爭策略和總綱計劃

- **Critical priority is enhancing the competitiveness of existing port assets.**
This will enable Hong Kong to:

首要的工作，是增強現有港口資產的競爭力，使香港得以：

- retain a leading position in the provision of port services in South China;
在港口服務方面，保持在華南地區的領先地位；
- provide a sound basis for further port expansion; and
為進一步擴建港口奠下穩固基礎；以及
- secure sustainable economic benefits for the HKSAR community.
確保港口能為香港特區帶來可持續的經濟利益。

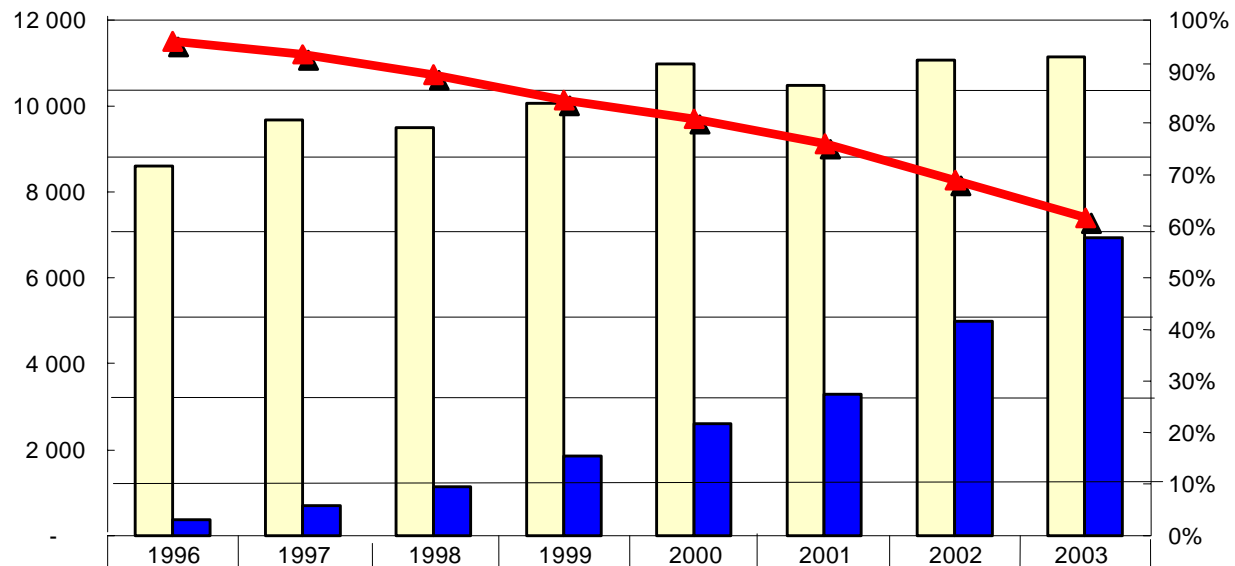


South China Import/Export Cargo Market - A Competitive Sea Change

華南進出口貨運(直接遠洋貨物)

轉變中的港口競爭局面

'000TEUs 千個標準貨櫃 HK Share / 香港的佔有率



HK Direct Ocean Cargo 香港直接遠洋貨運	8 603	9 662	9 498	10 071	10 964	10 478	11 062	11 149
Other S China Direct Ocean Cargo 華南其他地區的直接遠洋貨運	367	698	1 132	1 846	2 607	3 298	4 983	6 936
HK Share in S China Direct Ocean Cargo 香港在華南地區直接遠洋貨運中的佔有率	96%	93%	89%	85%	81%	76%	69%	62%



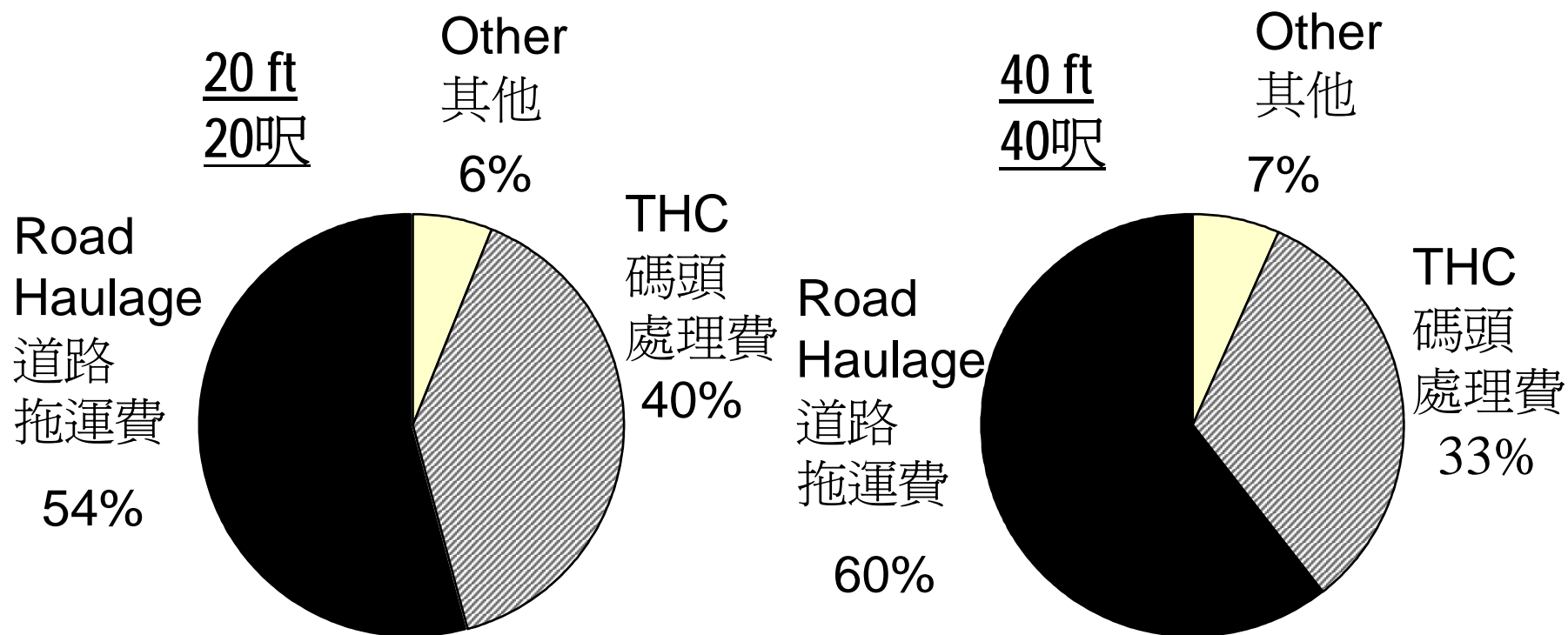
Total Through Costs - Hong Kong versus Shenzhen Ports

整體運輸成本 - 香港和深圳港口比較

	Industry data as at mid 2004, US\$ (From Dongguan to the US west coast) 截至2004年年中的業界數據(美元) (從東莞到美國西岸)	Via Hong Kong 經 香港		Via Yantian 經 鹽田		Via Shekou/Chiwan 經 蛇口/赤灣	
		20ft 20呎	40ft 40呎	20ft 20呎	40ft 40呎	20ft 20呎	40ft 40呎
1	Ocean Freight Rate (Basic); +/- \$50 航運費(基本) : +/- \$50	2,000	2,700	2,000	2,700	2,000	2,700
2	Fees / 雜費	599	1,014	579	994	579	994
3	Truck to Port Terminal / 至碼頭拖車費	308	333	128	154	141	167
4	Terminal Handling Charge (THC) 碼頭處理費	274	366	141	269	141	269
	Total / 總計	3,181	4,413	2,848	4,117	2,861	4,130
	Differential: HK Relative to Shenzhen 經香港或深圳費用差別	+\$333	+\$296				

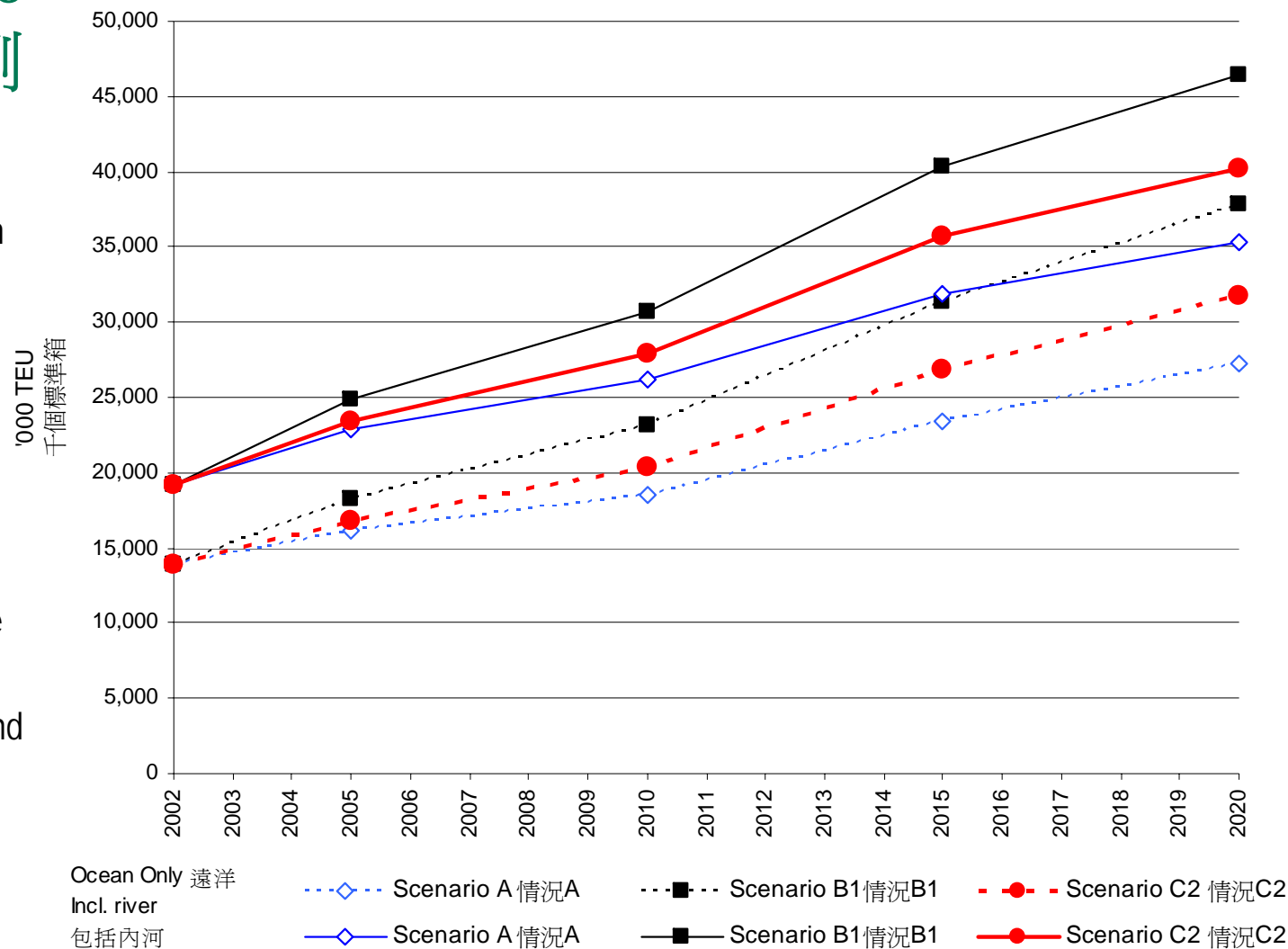
Port Choice Determinants - Components of Hong Kong's Cost Disadvantage

選擇港口要素 - 對香港不利的成本項目



Port Cargo Forecasts 貨運量預測

- favourable growth prospects of cargo base but increased competition for Hong Kong
貨運量增長前景良好但香港面對的競爭日趨劇烈
- Challenge is to capture market share of import/export cargo in the first instance and transshipment in the second
香港面對的挑戰，首先是爭取華南地區直接貨運的市場佔有率，其次是爭取國際轉運的市場佔有率



The Masterplan - Setting Priorities

總綱計劃 - 制訂優先次序

Strategic Initiative 策略性措施	Immediate 立刻	Medium Term 中期	Long Term 長期
Super – connectivity (SCI) 強化連繫措施	“Mission Critical” “首要目標”	Monitor total through cost 監察整體運輸成本	Monitor total through costs 監察整體運輸成本
Hong Kong First (HKFI) 香港為先計劃	Agree communication channels & priorities 在傳達途徑及優先次序上取得共識	On –going dialogue 維持溝通及對話	
Power Port Initiative (PPI) 港口提升計劃	Agree productivity support requirements 支援生產力方面提升取得共識		Support productivity enhancement 支援提升生產力
Port Rationalisation Initiative (PRI) 重整碼頭分佈	Initial review 初步檢討	Discuss and develop options – 探討及發展各項選擇	
Port Expansion 港口擴建	Initiate planning process 啟動規劃程序	Review options 檢討選址	





Port Expansion

擴建港口



- Based on the C2 forecasts, the indicative Master Plan provides for 3 new berths by first half of next decade, 3 more to follow

根據港口貨運量預測情況C2,指向性總綱計劃預計在2015年前增設3個泊位，其後數年再增設3個

- Possible additional 22,500 jobs ('direct') and Value Added of \$11.14billion by 2020

將可能為香港在2020年創造22 500個職位和111.4億元的額外附加價值

- Long lead time - initiate next phase of planning as soon as practical

規畫時間頗長 – 應立即展開規畫程序

- Potential expansion areas: Northwest Lantau & Southwest Tsing Yi

有可能擴建碼頭的地點：大嶼山西北部及青衣西南部

Under current circumstances, NWL has better potential (1)

目前的條件下，以大嶼山西北部潛力較佳

	Southwest Tsing Yi 青衣西南部	Northwest Lantau 大嶼山西北部
Pros 優點	<ol style="list-style-type: none"> Potential to be financially and economically viable with FIRR at 12% and NPV of HK\$12.8 billion. 財務及經濟方面原則上可行，財務內部回報率為 12%，淨現值為 128 億港元 Offers synergy with existing port facilities and road infrastructure. 與現有的港口設施和道路基建可發揮協同效應。 	<ol style="list-style-type: none"> Potential to be financially and economically viable: financial internal rate of return (FIRR) at 18% and economic net present value (NPV) of HK\$15.7 billion. 財務及經濟方面原則上可行，財務內部回報率為 18%，淨現值為 157 億港元。 Offers capacity to 2030 and a better terminal layout than SWTY. 該地點的發展潛力足以應付到二零三零年的需求，而且碼頭布局較青衣西南部地點為佳。 Advantageously positioned for west PRD development. 位置有利珠三角西部發展。



Under current circumstances, NWL has better potential (2)

目前的條件下，以大嶼山西北部潛力較佳

	Southwest Tsing Yi 青衣西南部	Northwest Lantau 大嶼山西北部
Cons 缺點	<ol style="list-style-type: none"> 1 High land resumption costs & reprovisioning of existing uses would have impacts on development costs and programme. 收地和重置現有土地用途設施成本高昂，對發展成本和時間表會有影響。 2 Limited expansion opportunity beyond 2020. 二零二零年以後再擴建的空間有限。 3 Possible impacts on Harbour Area Treatment Scheme. 對淨化海港計劃可能造成影響。 4 Impacts and cost on the reprovisioning of oil depots installations and other land use. 重置儲油設施及其他土地用途的影響及成本。 	<ol style="list-style-type: none"> 1 Ecological impacts - Chinese White Dolphin habitat - and visual impact on an undeveloped area. 將對生態環境有影響，特別是中華白海豚棲息地，亦會影響未開發地區的景觀。 2 Creates a split port. 與葵涌貨櫃港分開運作。 3 Dependent on new strategic infrastructure, e.g. Hong Kong-Zhuhai-Macao Bridge. 須依賴新的策略性基建，如港珠澳大橋。





Next Steps

下一步的工作



- Implement Super Connectivity Initiative (SCI)

即時實行強化連繫措施

- build on current initiatives and implement complementary measures to improve boundary crossing, raise the efficiency of trucking movements and review licensing & registration

以現行措施為基礎，實施相輔相成的措施，以改善跨境通道，提高貨車運輸效率；並檢討發牌及登記費

- Update the port cargo forecasts and continue to review the demand & supply of facilities in South China and competitiveness of HK port

更新港口貨運量預測，繼續檢討華南地區設施供求情況和香港港口的競爭力

- Port Expansion - Ecology Study for NWL as soon as practicable

擴建港口 - 盡快就大嶼山西北部可供興建十號貨櫃碼頭的地點進行生態研究



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Thank you
多謝

