

Executive Summary of Assessment of Typhoon Shelter Space Requirements 2015 – 2030

Demand and Supply of Sheltered Space for Classes I to III and Mainland Visiting Vessels

1. The demand of sheltered space from Classes I to III and Mainland visiting vessels¹ is projected to increase from 319.5 hectares in 2014 to 323.3 hectares in 2030, or at an average increase of 0.2 hectare (simple average basis) or 0.1% (compound rate basis) per year.
2. The supply of sheltered space for Classes I to III and Mainland visiting vessels including gazetted typhoon shelters² and five sheltered anchorages³ in 2014 is 402.4 hectares. Due to reinstatement of sheltered space from some development projects, the supply would increase to 405.5 hectares in 2025 and remain at this level up to 2030.
3. The matching of demand and supply of sheltered space for Classes I to III and Mainland visiting vessels indicates that the supply of sheltered space could adequately meet the projected demand on a territory-wide basis with a surplus of over 80 hectares throughout the period from 2014 to 2030. The results are shown in Table 1 below:

**Table 1: Balance of Demand and Supply of Sheltered Space for
Classes I to III and Mainland Visiting Vessels**

Hectares				
	Actual	Projection		
	2014	2020	2025	2030
Supply	402.4	405.4	405.5	405.5
Demand	319.5	318.4	319.6	323.3
Variance	+82.9	+87.0	+85.9	+82.2

Note: Figures refer to year-end positions.

¹ They include river trade vessels and coastal vessels registered in the Mainland.

² The typhoon shelters do not include Aberdeen South Typhoon Shelter and part of Causeway Bay Typhoon Shelter, which are commonly used by Class IV vessels.

³ The sheltered anchorages include Chai Wan Cargo Basin, Kat O, Sha Tau Kok, Tai O, Tsuen Wan, and Wan Chai Cargo Basin when it is not affected by development project.

Demand and Supply of Sheltered Space for Class IV Vessels

4. The demand of sheltered space from Class IV vessels (or pleasure vessels) is projected to increase from 195.5 hectares in 2014 to 306.4 hectares in 2030, or at an average increase of 6.9 hectares (simple average basis) or 2.8% (compound rate basis) per year.
5. The supply of sheltered space for Class IV vessels includes sheltered anchorages⁴, marinas, as well as typhoon shelters⁵. The supply would increase from 186.9 hectares in 2014 to 230.9 hectares in 2030, mainly attributable to the inclusion of sheltered space available in Shuen Wan Hoi, Cheung Sha Lan and Nim Shue Wan, and a proposed marina facility in Tung Chung.
6. The matching of demand and supply of sheltered space for Class IV vessels indicates that there would be shortfall of sheltered space for Class IV vessels up to 2030. The shortfall would increase significantly from 8.6 hectares in 2014 to 75.5 hectares in 2030. The results are shown in Table 2 below.

Table 2: Balance of Demand and Supply of Sheltered Space for Class IV Vessels

	Hectares			
	Actual	Projection		
	2014	2020	2025	2030
Supply	186.9	224.1	227.6	230.9
Demand	195.5	250.3	282.7	306.4
Variance	-8.6	-26.2	-55.1	-75.5

Note: Figures refer to year-end positions.

⁴ The sheltered anchorages include Cheung Sha Lan, Middle Island, Nim Shue Wan, Pak Sha Wan, Sai Kung, Shuen Wan Hoi, St. Stephen's Bay, Tai Mei Tuk, Tai Tam Harbour, Ting Kau and Tsam Chuk Wan. Sheltered anchorages in Cheung Sha Lan, Nim Shue Wan and Shuen Wan Hoi are included in the supply of sheltered space in this assessment, taking into account these water space have been extensively used by local vessels during inclement weather for many years.

⁵ Aberdeen South Typhoon Shelter and part of Causeway Bay Typhoon Shelter.

Overall Balance of Demand and Supply of Sheltered Space for Local Vessels

7. Although there would be shortfall in sheltered space for Class IV vessels up to 2030, the shortfall could be absorbed by the surplus with respect to Classes I to III and Mainland visiting vessels throughout the period up to 2030. On a territory-wide basis, the supply of sheltered space for local vessels can adequately meet the demand throughout the period up to 2030. As shown in Table 3 below, the surplus in sheltered space for local vessels would reduce significantly from 74.4 hectares in 2014 to 6.7 hectares in 2030.

Table 3: Overall Balance of Demand and Supply of Sheltered Space for Local Vessels

	Actual	Projection		
		2014	2020	2025
Classes I to III and Mainland visiting vessels	+82.9	+87.0	+85.9	+82.2
Class IV vessels	-8.6	-26.2	-55.1	-75.5
Total	+74.4	+60.8	+30.7	+6.7

Hectares

Note: Figures refer to year-end positions.

Conclusions

8. The surge in demand from local vessels for sheltered space at an average of 7.2 hectares (simple average basis) per year during 2014 to 2030 is largely attributable to the large increase in demand from Class IV vessels, which is projected to increase at an average of 6.9 hectares (simple average basis) per year.
9. As both typhoon shelters and sheltered anchorages are open to all classes of local vessels on a first-come-first-served basis, the shortfall of sheltered space for Class IV vessels could be absorbed by the surplus with respect to Classes I to III and Mainland visiting vessels throughout the period up to 2030. Hence, the supply of sheltered space for local vessels could adequately meet the demand throughout the period up to 2030.

Way Forward

10. To cope with the surge in demand of sheltered space from Class IV vessels, Marine Department will continue to identify suitable sheltered anchorage(s) and suitable water space for laying private moorings for use by Class IV vessels. Marine Department will consider practicable measures to enhance the utilisation of the existing sheltered space, and to consult the trade of the measures prior to implementation.
11. Marine Department will maintain the adopted practice of periodically carrying out assessment of sheltered space for local vessels.