

Executive Summary of Assessment of Typhoon Shelter Space Requirements 2022–2035

Demand and Supply of Sheltered Space for Working Vessels

1. The demand for sheltered space for working vessels (Classes I to III vessels and Mainland visiting vessels¹) is projected to increase from 328.5 hectares in 2021 to 345.9 hectares in 2035.
2. The supply of sheltered space for working vessels including statutory typhoon shelters² and five sheltered anchorages³ in 2021 is 376.7 hectares. Due to some development projects which may involve small reclamation and installation of floating barriers, the supply will be slightly decreased to 375.3 hectares in 2035.
3. The matching of demand and supply of sheltered space for working vessels indicates that the supply of sheltered space can adequately meet the projected demand on a territory-wide basis with a surplus of 29.4 hectares in 2035. The results are shown in Table 1 below.

Table 1: Balance of Demand and Supply of Sheltered Space for Working Vessels

	Hectares			
	Actual	Projection		
	2021	2025	2030	2035
Supply	376.7	376.8	375.3	375.3
Demand	328.5	349.8	351.4	345.9
Balance	+48.2	+27.0	+23.9	+29.4

Note: Figures refer to year-end position.

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

² The typhoon shelters for working vessels include Aberdeen West Typhoon Shelter, Cheung Chau Typhoon Shelter, New Yau Ma Tei Typhoon Shelter, Rambler Channel Typhoon Shelter, Sam Ka Tsuen Typhoon Shelter, Shau Kei Wan Typhoon Shelter, Shuen Wan Typhoon Shelter, To Kwa Wan Typhoon Shelter, Tuen Mun Typhoon Shelter, and part of the typhoon shelters including Causeway Bay Typhoon Shelter, Hei Ling Chau Typhoon Shelter, Kwun Tong Typhoon Shelter and Yim Tin Tsai Typhoon Shelter.

³ The sheltered anchorages for working vessels include Chai Wan Cargo Basin, Kat O, Sha Tau Kok, Tai O and Tsuen Wan.

Demand and Supply of Sheltered Space for Pleasure Vessels

4. The demand for sheltered space for pleasure vessels (Class IV vessels and visiting pleasure vessels) is projected to increase from 240.3 hectares in 2021 to 311.1 hectares in 2035.
5. The supply of sheltered space for pleasure vessels includes statutory typhoon shelters⁴, sheltered anchorages⁵, as well as marinas. The supply will increase from 248.2 hectares in 2021 to 284.8 hectares in 2035, mainly attributable to the expansion of Aberdeen South Typhoon Shelter.
6. The matching of demand and supply of sheltered space for pleasure vessels indicates that there will be a shortfall of sheltered space for pleasure vessels up to 2035. The balance of sheltered space will change from a surplus of 7.9 hectares in 2021 to a shortfall of 26.3 hectares in 2035. The results are shown in Table 2 below.

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

	Hectares			
	Actual	Projection		
	2021	2025	2030	2035
Supply	248.2	254.1	284.8	284.8
Demand	240.3	253.9	282.5	311.1
Balance	+7.9	+0.2	+2.3	-26.3

Note: Figures refer to year-end position.

⁴ The typhoon shelters for pleasure vessels include Aberdeen South Typhoon Shelter, and part of the typhoon shelters including Causeway Bay Typhoon Shelter, Hei Hing Chau Typhoon Shelter, Kwun Tong Typhoon Shelter and Yim Tin Tsai Typhoon Shelter.

⁵ The sheltered anchorages for pleasure vessels include Cheung Sha Lan, Middle Island, Nim Shue Wan, Pak Sha Wan (Hebe Haven), Sai Kung, Shuen Wan Hoi, St. Stephen's Bay, Tai Mei Tuk, Tai Tam Harbour, Ting Kau, Tsam Chuk Wan (Jade Bay) and Tseung Kwan O.

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

7. Although there will be a shortfall in sheltered space for pleasure vessels up to 2035, the shortfall can be absorbed by the surplus with respect to working vessels throughout the period up to 2035 since both statutory typhoon shelters and sheltered anchorages are open to all classes of local vessels on a first-come-first-served basis. On a territory-wide basis, the supply of sheltered space for local vessels can adequately meet the demand throughout the period up to 2035. As shown in Table 3 below, the surplus of sheltered space for local vessels will reduce from 56.1 hectares in 2021 to 3.1 hectares in 2035.

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

	Hectares			
	Actual	Projection		
	2021	2025	2030	2035
Supply	624.9	630.9	660.1	660.1
Demand	568.8	603.7	633.9	657.0
Balance	+56.1	+27.2	+26.2	+3.1

Note: Figures refer to year-end position.

Conclusions

8. The surge in demand for sheltered space for local vessels from 2021 to 2035 is largely attributable to the significant increase in demand for Class IV vessels.
9. On a territory-wide basis, the supply of sheltered space for local vessels can adequately meet the demand throughout the period up to 2035.
10. It is observed that the trends of the number of fish carriers (Class III a), fishing vessels (Class III c) and open cruisers (Class IV c) have been significantly affected by the COVID-19 pandemic during recent years. It is thus proposed that the projection on demand for sheltered space for local vessels, particularly fish carriers, fishing vessels and open cruisers, should be closely monitored and reviewed, alongside with the development of the COVID-19 pandemic and economy in the coming few years.