

Transport & Logistics Development in HK & GD

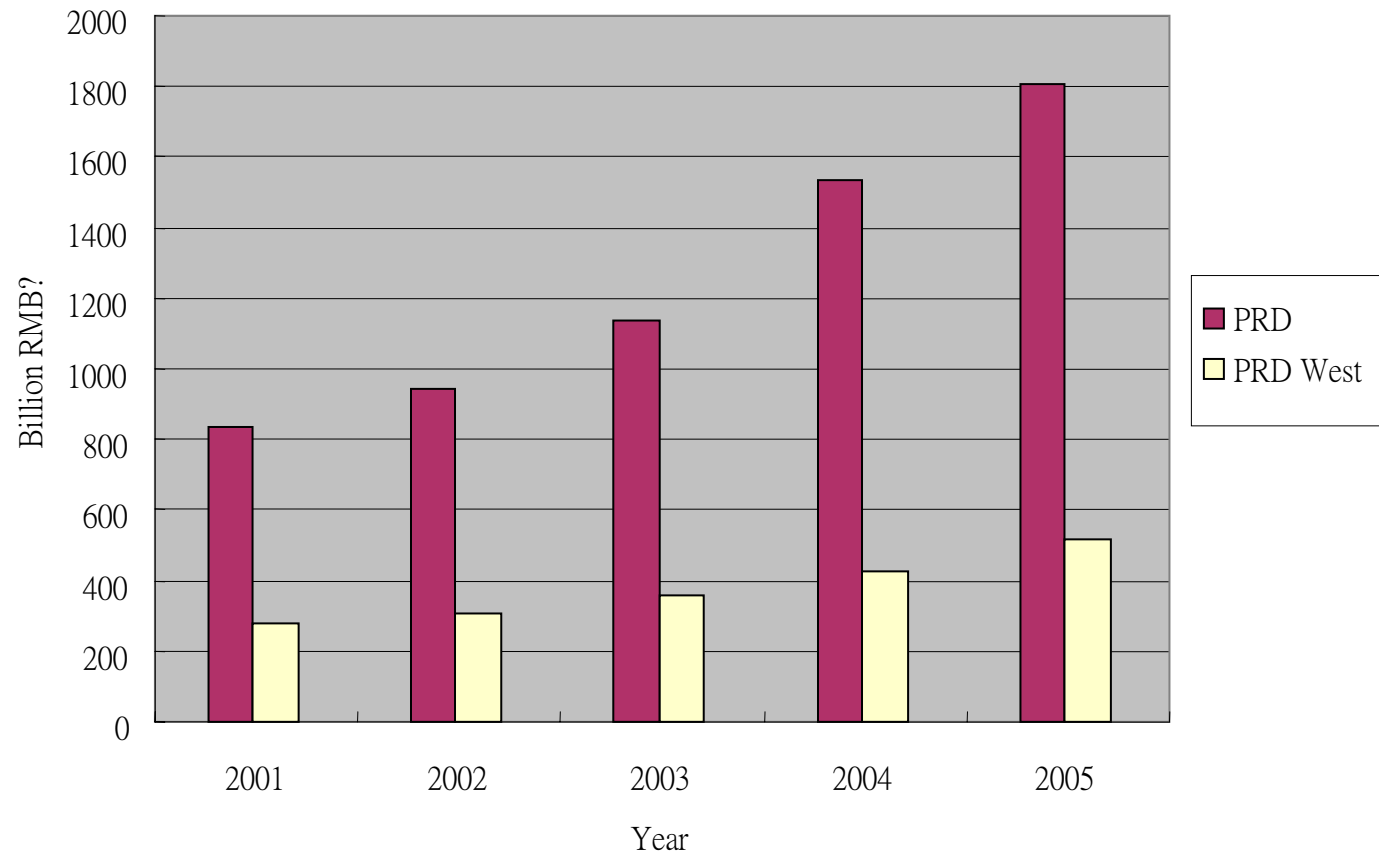
Waiman Cheung
Cyber Logistics Center
Li & Fung Institute of SCM & Logistics



Sources of Cargos

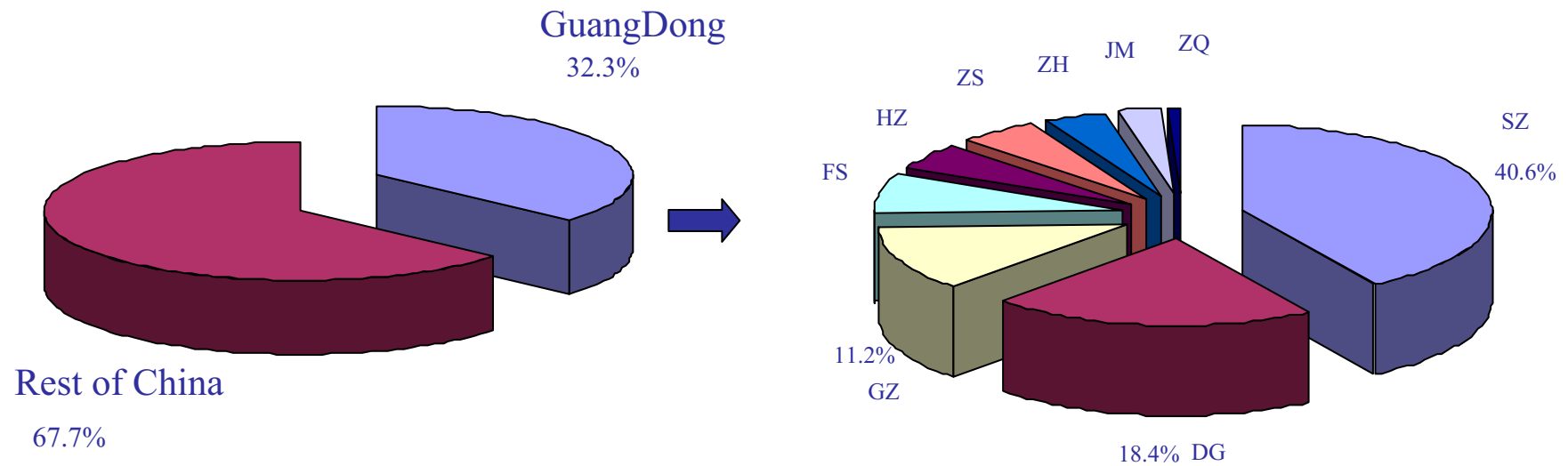


GDP of the PRD Regions



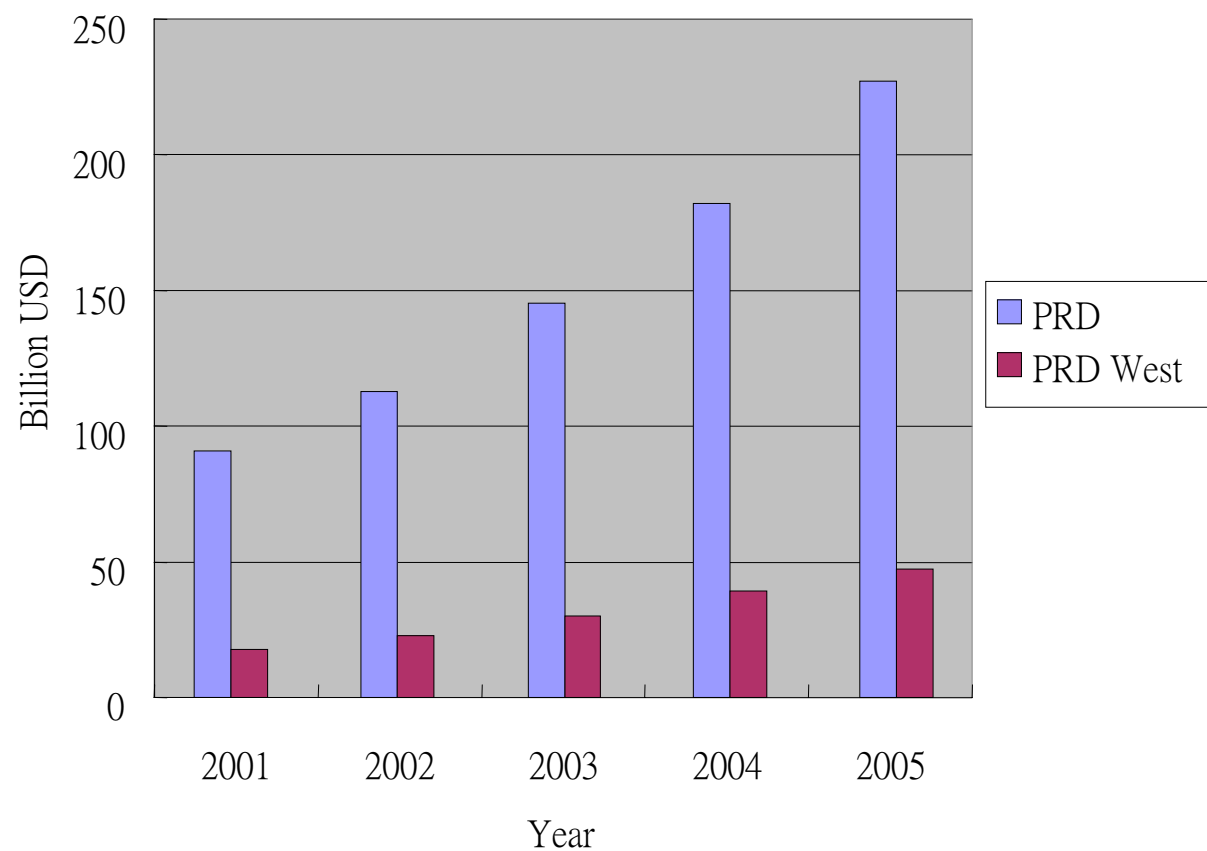
注：珠三角西部包括中山、江门、佛山、珠海和绍兴部分地区。
资料来源：广东统计年鉴。

PRD Export Values Ratios



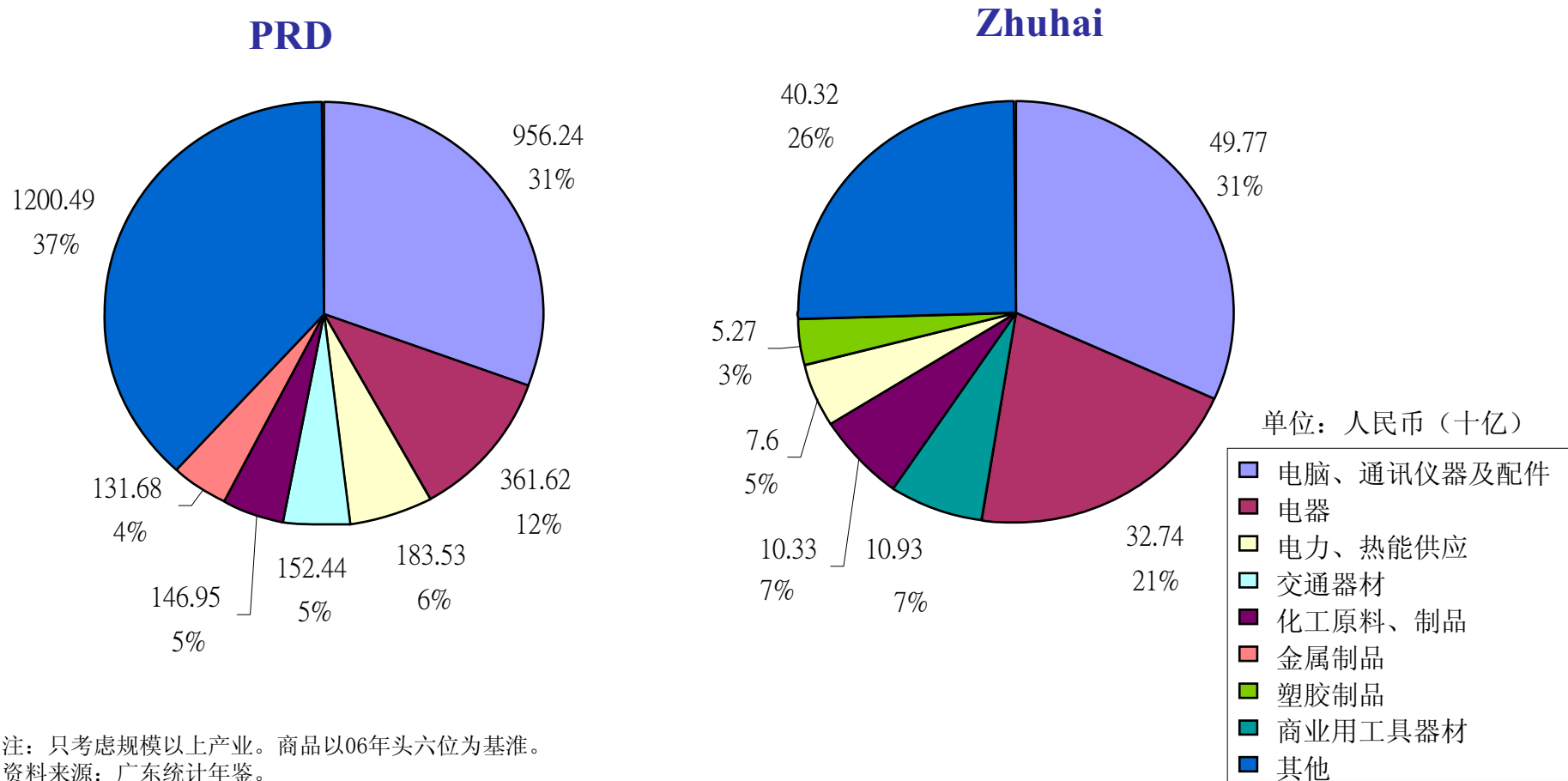
资料来源：中国统计年鉴2005，广东统计年鉴2005。

PRD Region Export Values



注：珠三角西部包括中山、江门、佛山、珠海和绍兴部分地区。
资料来源：广东统计年鉴。

Industrial Output: PRD & Zhuhai (2005)



注：只考虑规模以上产业。商品以06年头六位为基准。
资料来源：广东统计年鉴。

HK & SZ Economic Data



Hong Kong Economic Data

- Area: 1,104 km²
- Population: 6.90 million
- Import/Export: USD 648.82 billion
- Foreign direct investment: USD 41 billion
- GDP: USD 188.76 billion, a 6.48% increase from last year

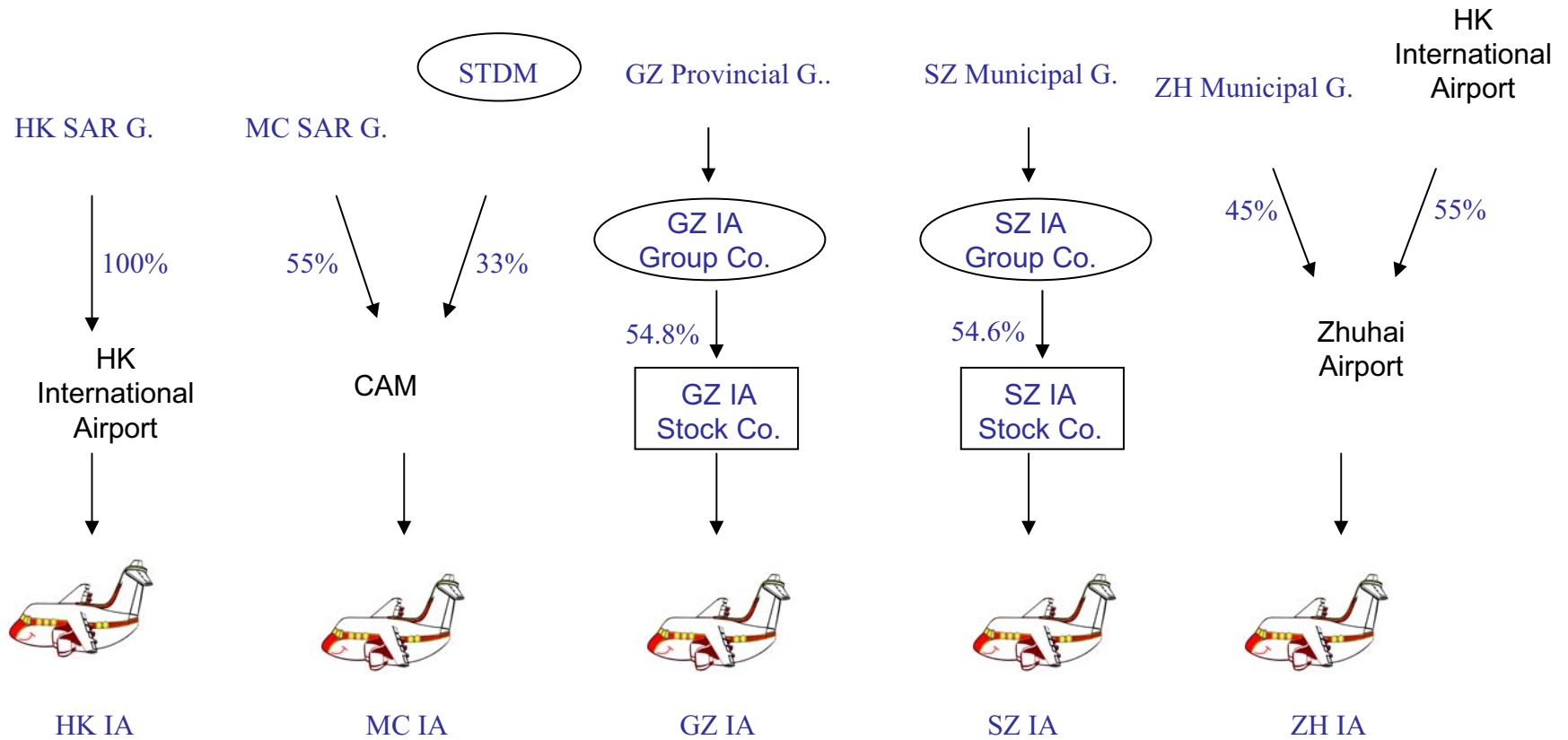
Shenzhen Economic Data

- Area: 1,949 km²
- Population: 11 million (local residents 8 m)
- Import/Export: USD 182.86 billion
- The largest export city in China for the past 13 years
- 141 of the world's top 500 enterprises have invested in Shenzhen
- GDP: USD 60.15 billion, a 15% increase yearly
- Foreign direct investment: USD 3,269 million, a 10.1% increase to last year

Air Cargo Industry in PRD



Ownerships of the Airports



Basic Facts of the Airports

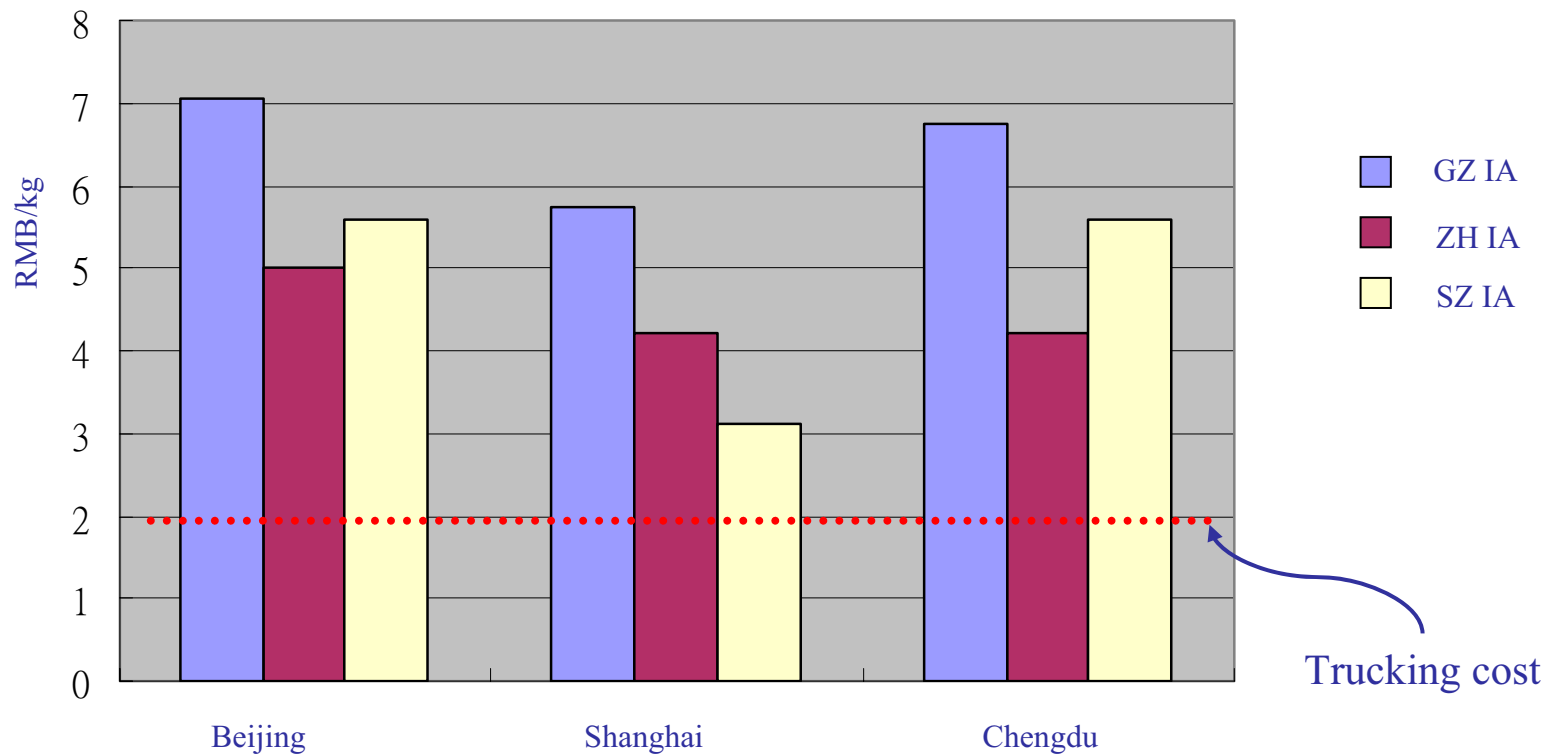
	HK	Macau	Guangzhou	Shenzhen	Zhuhai
No. of runway	2	1	2	1	1
Passenger Capacity	45 m.	6 m.	25 m.	16 m.	12 m.
Cargo Capacity	3m. tons	0.16m. tons	1m. tons	0.7m. tons	0.6m. tons

Cost of Ground Transportation

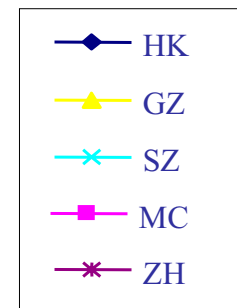
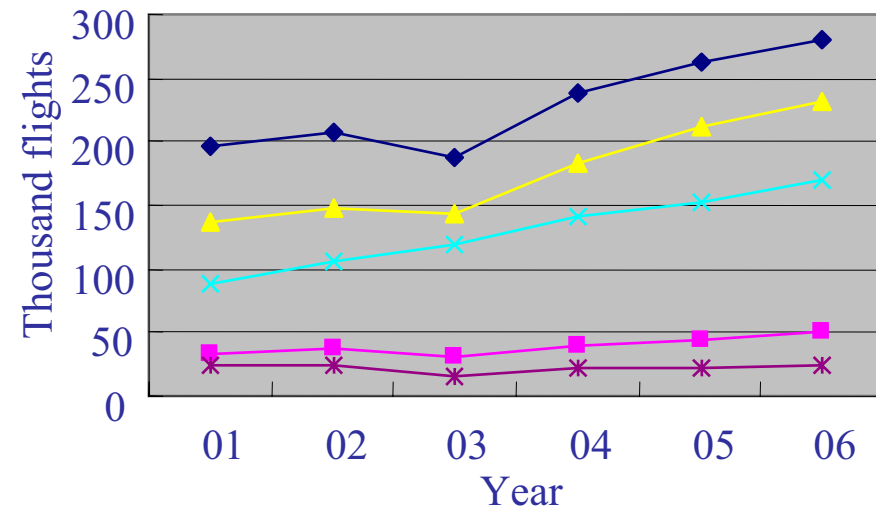
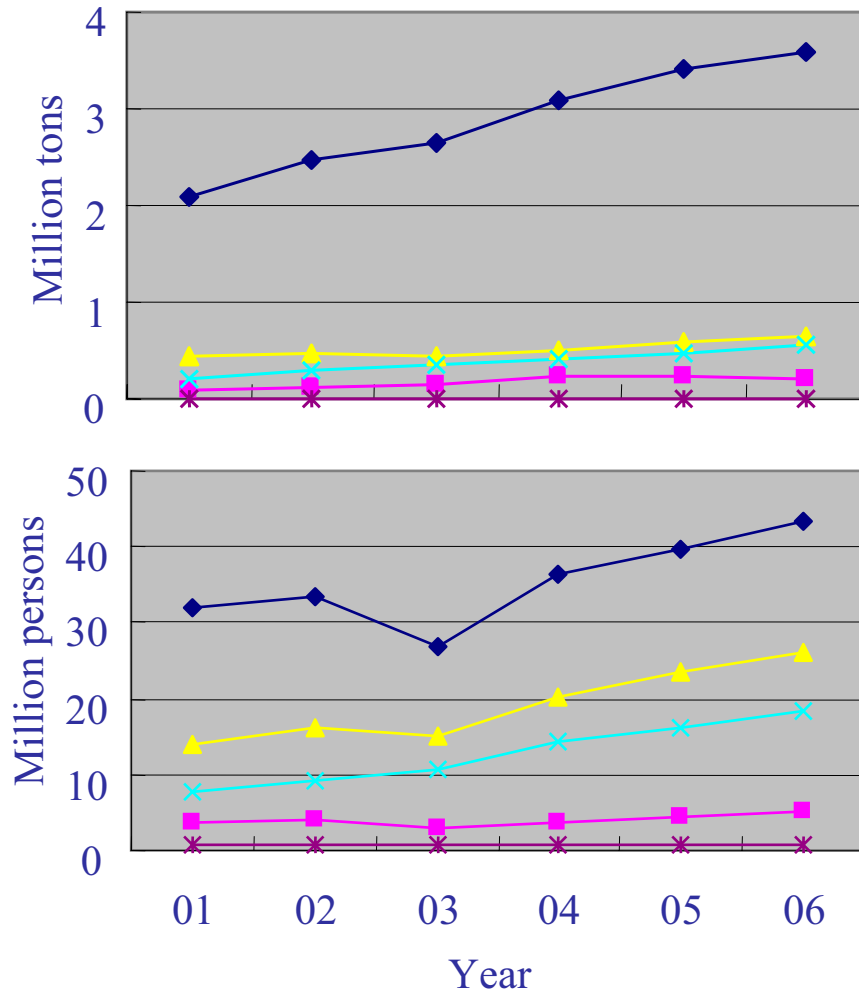
Unit : RMB/KG

	ZH	ZS	FS	SZ	JM	DG	GZ
ZH IA	<u>0.3</u>	0.5	0.5	0.5	0.5	0.5	0.5
SZ IA	0.5	0.5	0.5	<u>0.3</u>	0.5	0.5	0.5
GZ IA	0.5	0.5	0.5	0.5	0.5	0.5	<u>0.3</u>

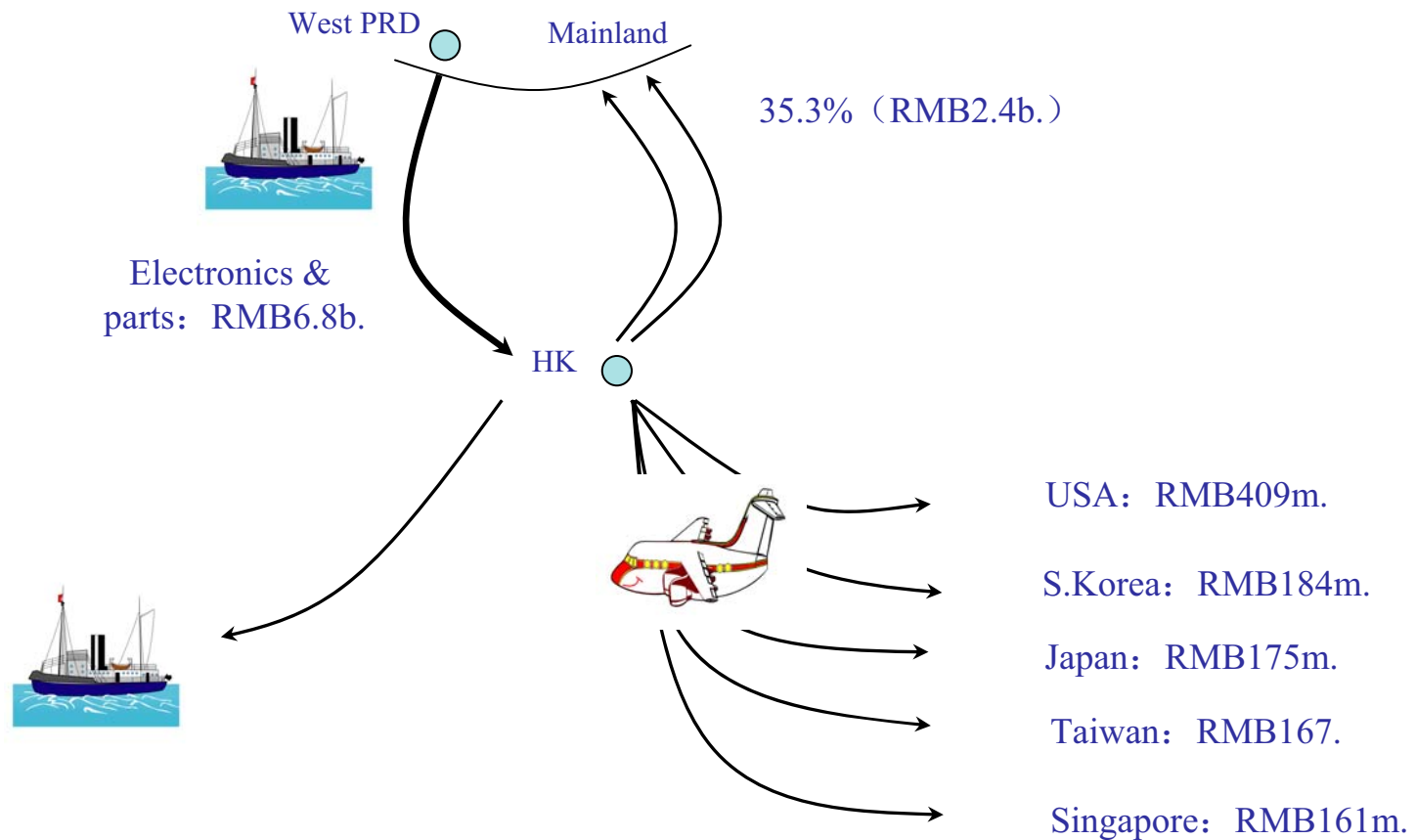
Air vs. Trucking Costs



Current Level of Activities



An Example of Air Cargo Flow



Expansion Plans for the Airports

	HK	Macau	Guangzhou	Shenzhen	Zhuhai
No. of runway After Expansion	2 ?	1 -	2 3	1 2	1 -
Passenger Capacity After Expansion	45 m. 50 m.	6 m. 25m.	25 m. 40m.	16 m. 30m.	12 m. -
Cargo Capacity After Expansion	3m. tons 4.3m. tons	0.16m. tons -	1m. tons 2m. tons	0.7m. tons 1.5m. tons	0.6m. tons -
Expansion Investment	\$4.5b.	\$6.0 b.	\$13.2b.	\$11b.	-

Ocean Cargo Industry in PRD



The Container Shipping Industry

HONG KONG

- 80% of container handling involve shipments to and from the Mainland
- 13 out of 100 HK people work in shipping or related fields
- shipping provides 250,000 jobs
- generates HKD \$200 billion each year

Operators in Kwai Tsing

Terminal	Operator	Depth (m)	Berths
Terminal 1 (CT1)	MTL	14	1
Terminal 2 (CT2)	MTL	14	1
Terminal 3 (CT3)	DPI	14	1
Terminal 4 (CT4)	HIT	12.5	3
Terminal 5 (CT5)	MTL	14	1
Terminal 6 (CT6)	HIT	12.5-15.5	3
Terminal 7 (CT7)	HIT	15.5	4
Terminal 8 East (CT8E)	HIT/COSCO	15.5	2
Terminal 8 West (CT8W)	ACT	15.5	2
Terminal 9 North (CT9N)	HIT	15.5	2
Terminal 9 South (CT9S)	MTL	15.5	4

MTL: Modern Terminals Ltd.

HIT: Hongkong International Terminals Ltd.

COSCO: COSCO Information & Technology (HK) Ltd.

DPI: Dubai Port International Terminals Ltd.

ACT: Asia Container Terminals Ltd.

網際物流研究中心

<http://ccl.baf.cuhk.edu.hk>

Share Holders



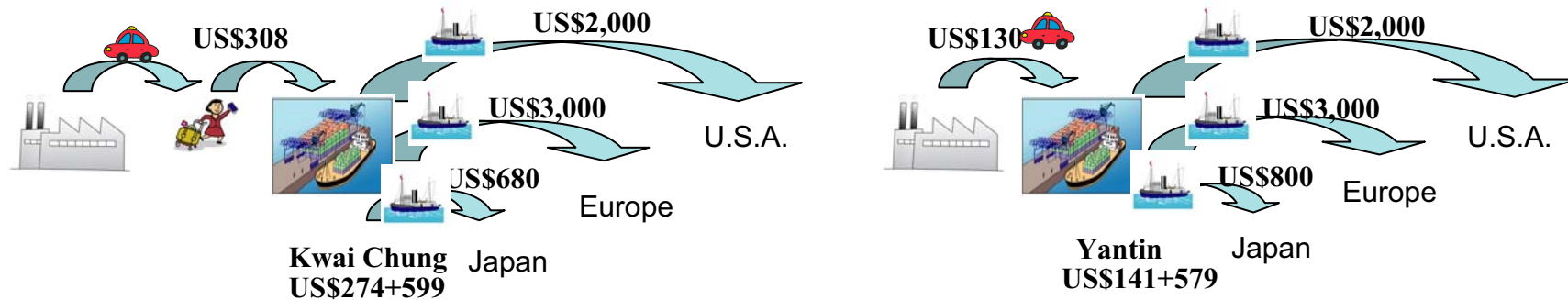
Kwai Tsing Existing Facilities

Facilities	Quantity
Total Area (hectares)	285 (= 407 football fields)
Container Berths	24
Total Berth Length (meters)	8,500
Water Depth Alongside (meters)	12.5-15.5
Quay Cranes	92
Yard Gantry Cranes	86

Kwai Tsing Weekly Shipping Schedule

Destinations	Services
New York	213
Los Angeles	83
Tokyo	239
Seoul	25
Hamburg	198
Rotterdam	200
Cape Town	31
Dubai	93
Yangon	26

Shipping Cost Comparison



	Data collected in 2004	Through Hong Kong		Through Yantian		Through Shekou / Chiwan	
	USD						
	From Donguan to West USA						
		20 ft	40 ft	20 ft	40 ft	20 ft	40 ft
1	Shipping fee	2,000	2,700	2,000	2,700	2,000	2,700
2	Customs & others	599	1,014	579	994	579	994
3	Trucking	308	333	128	154	141	167
4	Terminal Charges	274	366	141	269	141	269
	Total	3,181	4,413	2,848	4,117	2,861	4,130
	Fee Difference		+\$333		+\$296		

Source: HK Port – Master Plan 2020, <http://www.pdc.gov.hk/eng/plan2020/pdf/annex.pdf>

Cross Border Trucking Restrictions

四上四落

兩上兩落

中港司機

跨境牌照

Share Holders

Yantian International
Container Terminals

HPH

鹽田港集團

China Merchants Holdings
(International) Company
Limited

大鏟灣碼頭

Modern
Terminals

Shekou
Container
Terminals

Modern Terminals

Swire

Kerry Logistics

DP World

Chiwan
Container
Terminal

China Merchants Holdings
(International) Company
Limited

Modern Terminals

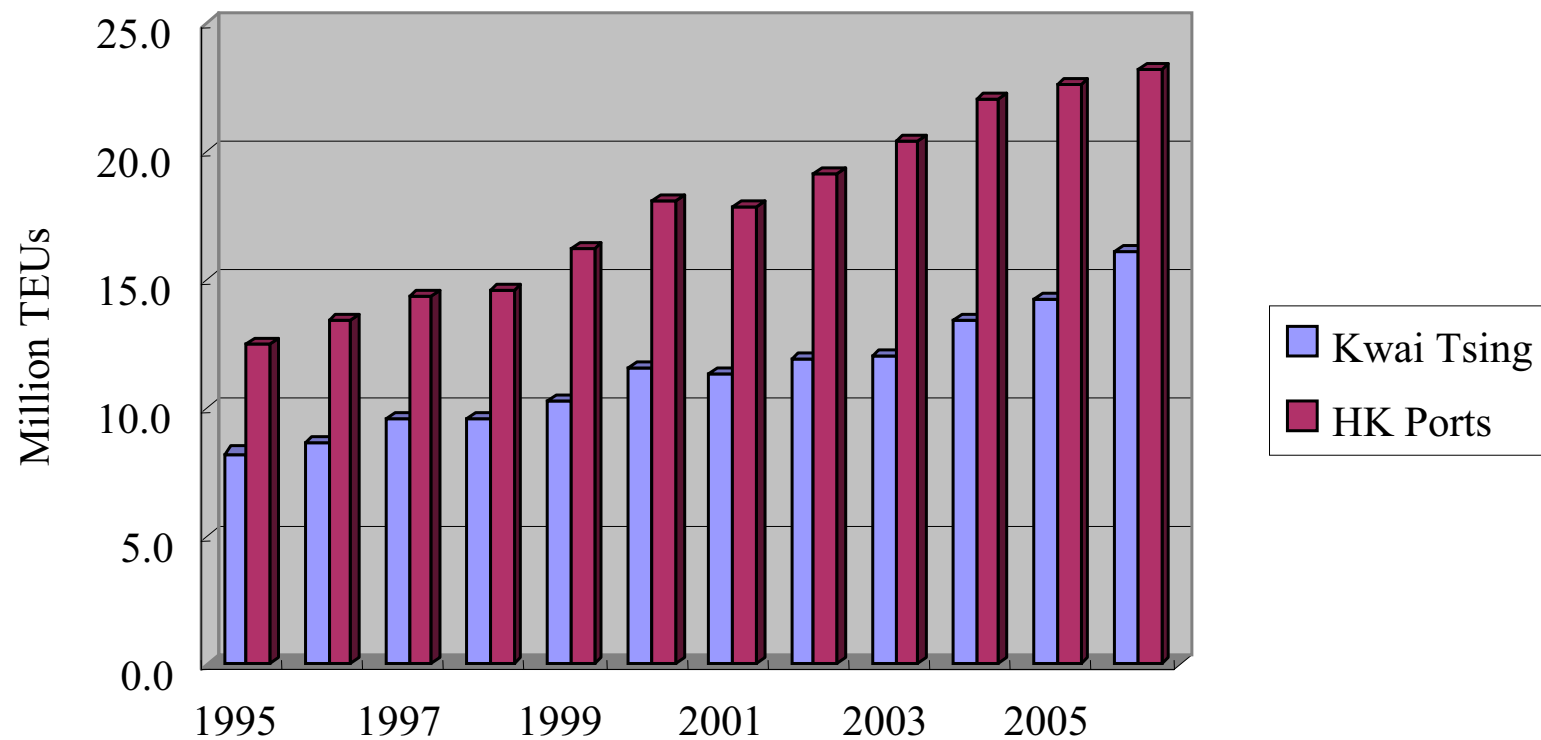
Yantian Existing Facilities

Facilities	Quantity
Total Area (hectares)	222 (= 317 football fields)
Container Berths	11
Total Berth Length (meters)	4,418
Water Depth Alongside (meters)	14-16
Quay Cranes	55
Yard Gantry Cranes	196
Entrance Gatehouse Lanes	27
Exit Gatehouse Lanes	24

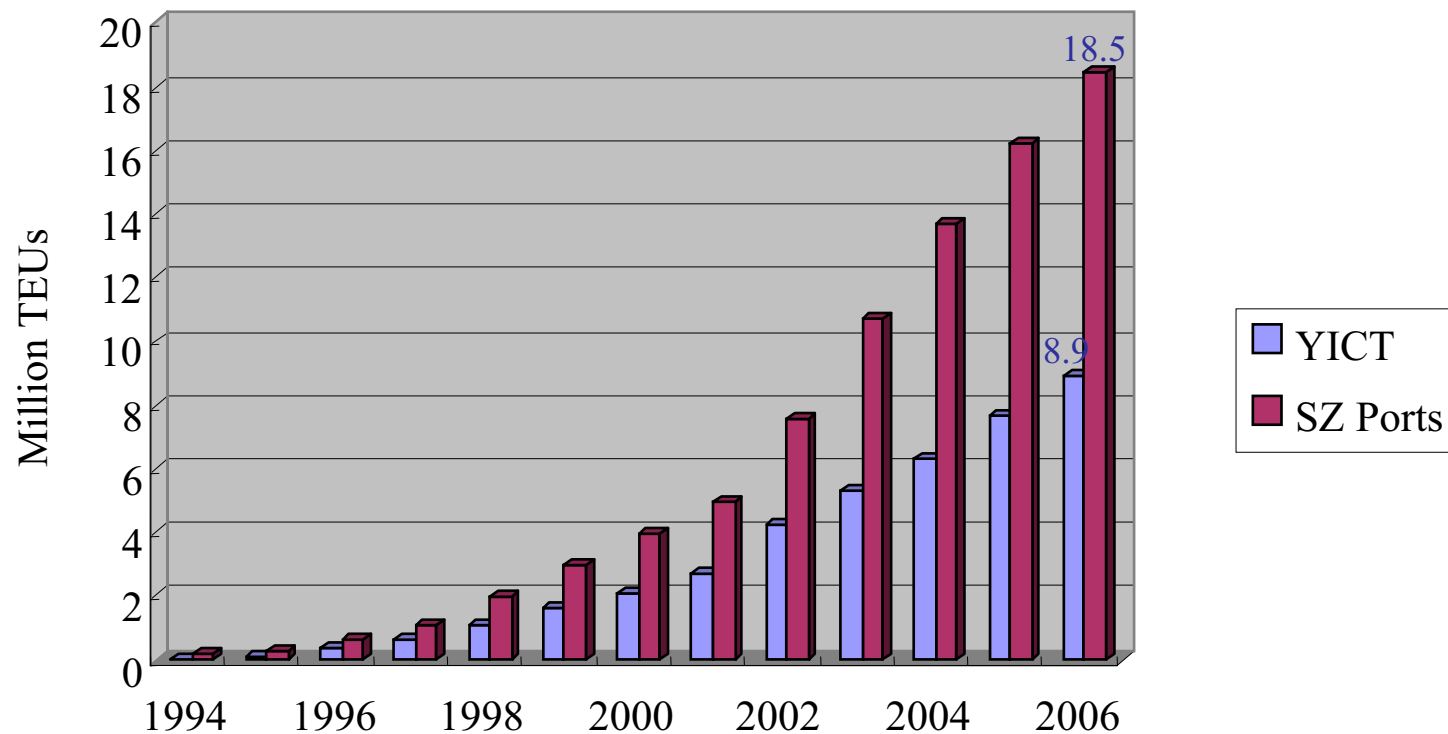
Weekly Shipping Schedule Comparison

Destinations	From HK	From YT
New York	213	134
Los Angeles	83	51
Tokyo	239	30
Seoul	25	5
Hamburg	198	96
Rotterdam	200	92
Cape Town	31	10
Dubai	93	25
Yangon	26	2

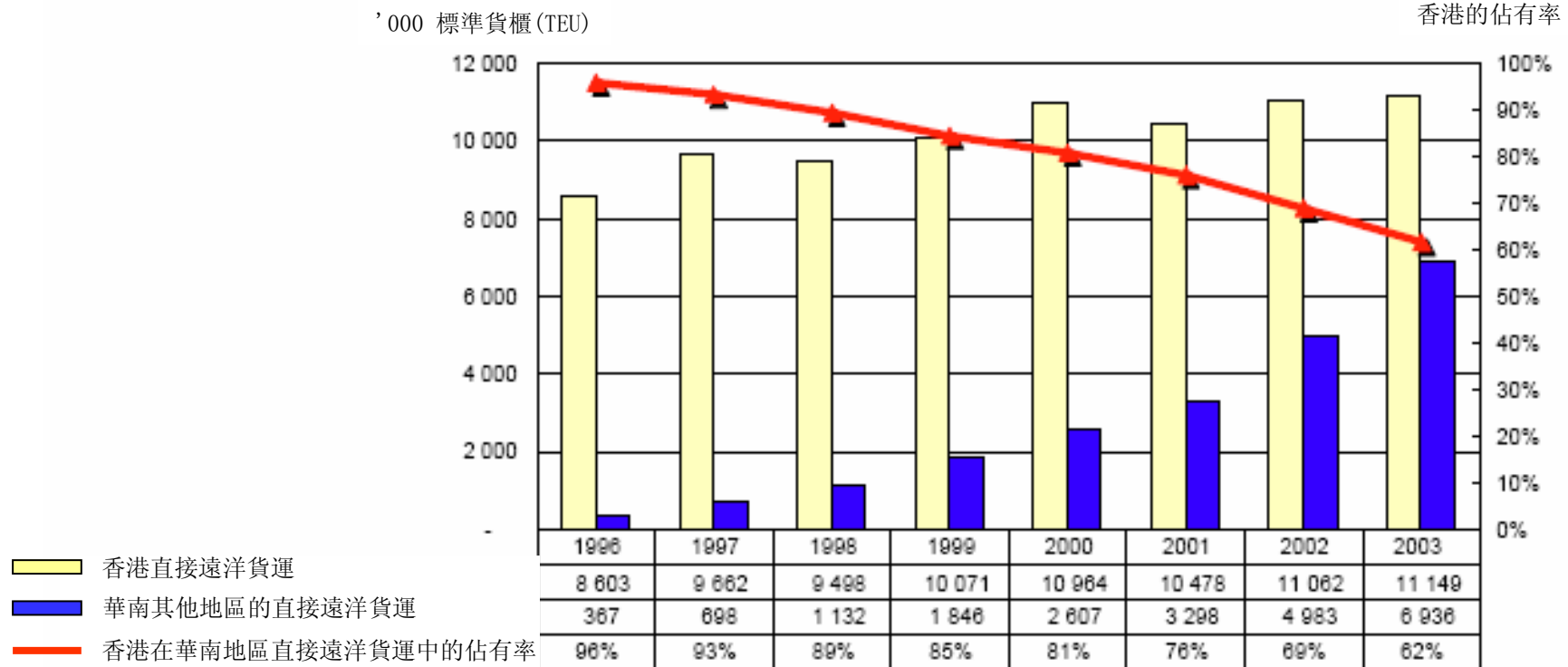
Kwai Tsing & HK Ports Throughout



Yantain & SZ Ports Throughput



Dropping Market Share



Source: Study on Hong Kong Port – Master Plan 2020, 2004

香港及深圳十一五規劃



香港十一五行動綱領

- M1. 致力提高跨界貨運成本效益
 - 1.1 檢討現時陸路跨界貨運工作主要由香港貨車司機擔當的做法
 - 1.2 降低跨界貨運車輛的牌照費
 - 1.3 加強發展內河運輸網絡，包括珠江西岸銜接遠洋船
 - 1.4 加強資訊科技在物流業的應用
- M2. 從宏觀角度規劃港口及相關設施
 - 2.1 研究港口貨運量預測
 - 2.2 研究充分利用香港的土地和海岸線，發展物流有關後勤用地
- M3. 着力發展香港的航運業
 - 3.1 完善香港船舶註冊的服務
 - 3.2 培訓本地相關人才
 - 3.3 考慮以船舶噸位稅 (Tonnage Tax)，徵收船隻稅項的另一選擇

香港十一五行動綱領

- M4. 鞏固香港作為國際及地區航空樞紐的地位
 - 4.1 香港國際機場增設新貨運站及研究是否需要增建跑道
 - 4.2 透過協商及適當協調，開拓往來內地的新民用航道
 - 4.3 提升航空交通管理的能力，以增加飛機班次升降量
- M5. 磋商有關航運與空航入息寬免雙重課稅協議
- M6. 發揮長處及完善供應鏈運作，以穩妥可靠且優質的高增值服務競爭
- M7. 研究成立高層次跨部門統籌協調機制
- M8. 促進區域發展的思維來構建跨界交通運輸網絡
- M9. 優化跨界交通網絡
 - 9.1 加強與內地溝通和合作
 - 9.2 以交通運輸網絡促進空運發展
 - 9.3 擴大及提升直通鐵路客運服務範圍和水平
 - 9.4 以「專用通道」方式接駁國家高速鐵路網絡
 - 9.5 探討香港在鐵路貨運方面的機遇及限制

Relevant 11th 5-year Plan

- Guangdong will focus on improving 10 key aspects by launching 233 key projects, with a total investment of 1.5 trillion RMB
- Transportation: 62 projects related to highway, railway, ports and airport, with a total budget of 537 billion RMB, among which 418 billion will be input in the next five years

第三十二節加強基礎設施建設

建設以兩港為支撐的物流樞紐中心。繼續實施“以港強市”和“兩港帶動”的發展策略，強化深圳港在國內沿海港口中的主樞紐地位。

- 盐田港扩建（05—09）：110亿元，5个10万吨及1个3万吨泊位，吞吐能力370万箱
- 蛇口三期（05—07）：36亿元，3个10万吨泊位，吞吐180万箱
- 大铲湾一期（05—08）：70亿元，5个7~10万吨泊位，吞吐250万箱
- 盐田西扩建（06—09）：20亿元，4个2~5万吨泊位，吞吐125万箱
- 大铲湾二期（08—10）：55亿元，4个10万吨级泊位，吞吐240万箱
- 盐田东一期（07—15）：90亿元，6个10万吨泊位，吞吐445万箱
- 铜鼓航道（06—07）：16亿元，10万吨航道20.2公里
- 西部公用航道（06—07）：10亿元，10万吨级9.3公里

第四十節加強深港戰略合作

- 建設深圳灣口岸、福田口岸、蓮塘口岸、大鏟灣海港口岸、沙魚湧海港口岸、南澳海港口岸和龍華鐵路口岸。
- 推進大通關，加快電子口岸建設，實現口岸管理資訊化、網路化。加強港口、口岸的疏運系統建設
- 積極推進口岸通關制度改革，推進深港兩地的航空和港口合作，
- 加快陸路“一地兩檢”建設，發揮深圳對香港發展的延伸服務作用。

Facility Comparison

Facilities	Hong Kong	Shenzhen After Expansion
Total Area (hectares)	285 (= 407 football fields)	344 (= 491 football fields)
Container Berths	24	15
Total Berth Length (meters)	8,500	7,047
Water Depth Alongside (meters)	12.5-15.5	14-16
Quay Cranes	92	71
Yard Gantry Cranes	86	286
Entrance Gatehouse Lanes	-	41
Exit Gatehouse Lanes	-	35

Summary

- Hong Kong, Gaungzhou (GZ), Shenzhen (SZ) are sharing the same logistics catchment area
- Logistics infrastructures in GZ and SZ are catching up
- Optimistic and aggressive development/expansion plans in both GZ & SZ
- Hong Kong, Macau, Zhuhai bridge, terminal No. 10, and logistics park are forever planning
- Hong Kong air cargo industry will experience similar challenges as the ocean terminals

香港應如何自處？

