



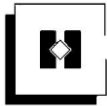
## **Demand and Supply Assessment Report**

**For**

**Section 16 Application for Proposed Temporary Shop and Services  
Use and Associated Filling of Land for a Period of 3 Years at the  
Remaining Portion of Section A of Lot No. 610 in Demarcation District  
90, Man Kam To**

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Report : Version 1.0



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## 1 INTRODUCTION

This assessment aims to estimate the demand and supply of retail shops in the vicinity of the Proposed Development, to support the subject planning application.

## 2 METHODOLOGY

A site reconnaissance survey was undertaken in April 2025 to assess the latest demand and supply of retail shops in the vicinity of the Proposed Development. The field observations were subsequently validated through geospatial verification, utilizing Google Street View imagery and orthophoto mapping for temporal comparison.

Reference has been made to the Government's latest territorial development strategy of "Hong Kong 2030+: Towards a Planning Vision and Strategy Transcending 2030" ("Hong Kong 2030+"). The conceptual framework of accessibility was recommended to promote easy access to public transport, public amenities, neighbourhood facilities, jobs, recreational opportunities, nature, etc.. A 400-metre pedestrian catchment threshold for retail facilities was established under the Hong Kong 2030+.

The 400-metre pedestrian catchment echoes with the concept of a "15-minute neighborhood" in the New Development Areas (NDA) as recommended by the "Traffic and Transport Strategy Study" commenced by the Transport Department.

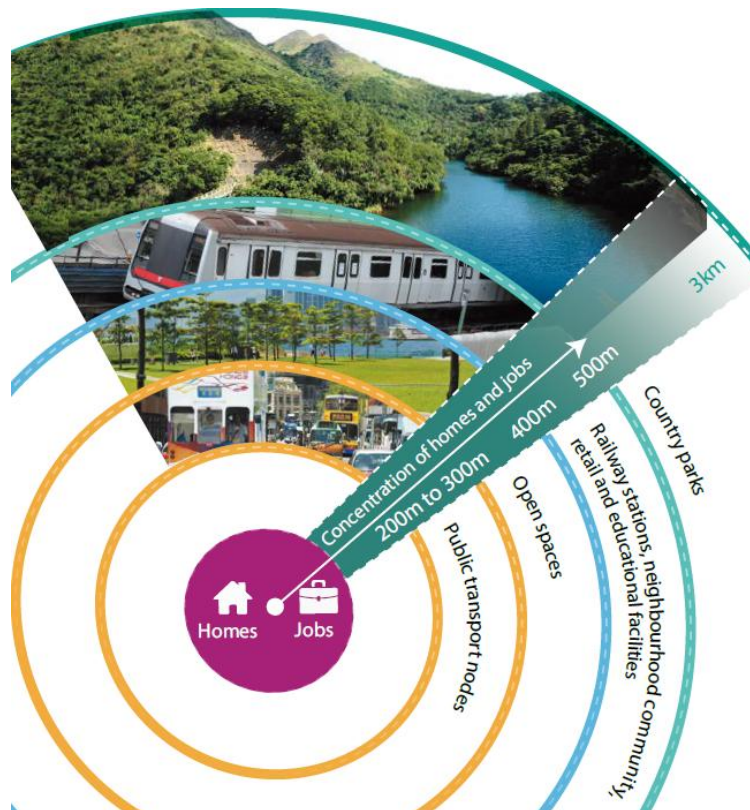


Diagram 1: The Conceptual Framework of Accessibility  
(Source: Hong Kong 2030+: Towards a Planning Vision and Strategy Transcending 2030, Development Bureau and Planning Department)



The concept of a “15-minute neighborhood” has been widely adopted in the recent NDA developments, including the Northern Metropolis as well as the Kau Yi Chau Artificial Island. While the concept is to cluster residential areas, major activity nodes and public facilities within the 500-metre catchment of a railway station/public transport interchange at the town centre<sup>1</sup>, it is considered to adopt 400-metre pedestrian catchment for rural area with less-developed pedestrian connections. Having said that, the section of Lin Ma Hang Road is also considered as within walkable distance from the Proposed Development.



Diagram 2: Concept of “15-minute neighborhood”  
(Source: Land Use proposal of San Tin Technopole, Civil Engineering and Development Department and Planning Department)

In sum, the catchment area encompasses the Lin Ma Hang Road between San Uk Ling in the east and River Ganges Pumping Station in the west.

<sup>1</sup> Smart, Green and Resilient Strategies for the Northern Metropolis under LC Paper No. CB (1) 345/2024 (03)





### 3 RESIDENT'S DEMAND

There are three primary village clusters in the vicinity, namely Muk Wu Village, Muk Wu Nga Yiu, and San Uk Ling, mainly interspersed with low-density village houses. A contextual overview of these settlements is provided below:

#### 3.1 Muk Wu Village

Muk Wu Village is a historic Punti walled village located in the jurisdiction of Ta Kwu Ling Rural Committee Area in the New Territories North, proximate to the Man Kam To boundary control point ("BCP") in Hong Kong's northern periphery. Adjacent to the village lies the Muk Wu Pumping Station, a critical freshwater distribution infrastructure node supplying over 70% of the territory's portable water.

In addition, Muk Wu occupies a unique cross-boundary adjacency, with its residents experiencing overlapping telecommunication service catchments (i.e. mobile phone, radio and television signals) from both Hong Kong and mainland China. Seasonal intergenerational clan gathering, particularly during the Ching Ming and Double Ninth Festival, underscoring its role as a cultural anchor for the various family clans. There are also external visitors during weekdays, when the movement patterns along Lin Ma Hang Road become considerable.

The village is only 10-minute walk from the Proposed Development.



Diagrams 3-6: Site Photos of Muk Wu Village



### 3.2 Muk Wu Nga Yiu

Muk Wu Nga Yiu is a village settlement within the jurisdiction of Ta Kwu Ling District Rural Committee, located to the northeast of Muk Wu and to the west of Ta Kwu Ling. The village retains a vestigial kiln structure, representing the last surviving archaeo-industrial heritage asset from a once-thriving network of tile and blue brick kilns that supplied vernacular building materials for regional construction. This kiln complex, adjacent to the previously referenced critical freshwater infrastructure node, is formally recognized as the Site of Archaeological Interest (“SAI”) in the Antiquities and Monuments Office registry, with documented material culture assemblages affirming its role in Hong Kong’s pre-industrial land use legacy.

The village is only a 10-minute walk from the Proposed Development.



Diagrams 7-10: Site Photo of Muk Wu Nga Yiu





### 3.3 San Uk Ling

San Uk Ling village is a statutorily recognized village situated within the Man Kam To administrative boundary of Hong Kong's North District, falling under the Ta Kwu Ling District Rural Committee's jurisdiction. The area sustains moderate residential density, with the existing built environment demonstrating immediate adjacent to the Proposed Development through a 3-minute pedestrian catchment radius.



Diagrams 10-14: Site Photos of San Uk Ling

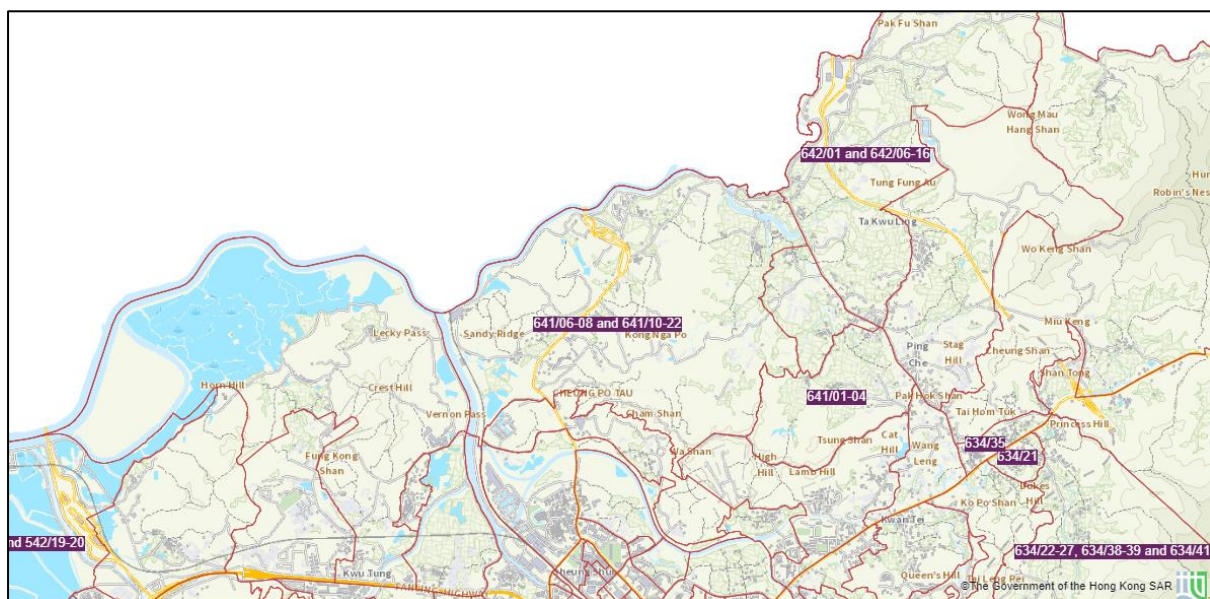
According to the latest population census conducted in 2021 by the Census and Statistics Department (C&SD), there were approximately 1,980 residents in TPU Subunits 641/06-08 and 641/10-22, which are mainly distributed in the three primary village clusters.

<u>TPUs 620, 622 &amp; 641</u>	Year 2021	Year 2022	Year 2023	Year 2024	Year 2025	Year 2026	Year 2027
Population projection	5,300	5,400	5,500	5,700	5,600	5,600	5,600

(Source: Table 15 Projected Population by Tertiary Planning Unit, 2023-2027, Projections of Population Distribution 2023-2031, Planning Department)

<u>Subunits 641/06-08 and 641/10-22</u>	<u>Number of Persons (2021)</u>		<u>Increment</u>	<u>Total Projected Number of Persons (2025)</u>
Gender	Male	Female		
Population	902	1,078	5.7%	2,093

(Source: 2021 Population Census, Census and Statistic Department)



(Source: 2021 Population Census, Census and Statistic Department)





## 4 VISITOR'S POPULATION

There are various sites of interest that would attract visitors, which are listed as below and refer to Figure 1 :

### 4.1 Hong Kong Seeing Eye Dog Training School

The organization (Registration #91/12149) incorporated on 11 January 2012, operates as a community-facing social infrastructure entity specializing in accessibility service provision. Its core mandate focuses on advancing guide dog programming as an integral component of inclusive mobility infrastructure, including localized breeding protocols and assistive animal training aligned with universal design principles.

Through its service delivery framework, the organization seeks to strengthen social capital by fostering pro-social behavioral norms around animal welfare stewardship and interspecies cohabitation paradigms. Concurrently, it functions as a public education platform to advance equitable access awareness, particularly regarding neurodiverse populations and persons with sensory or mobility impairments, thereby operationalizing Hong Kong's commitments under the Convention on the Rights of Persons with Disabilities within localized community planning contexts.

The Hong Kong Seeing Eye Dog Training School occupies a repurposed community infrastructure asset – the decommissioned Sam Wo Public School – spanning a site area of about 24,500 sq ft (about 2,276 sqm). The facility operates as a specialized accessibility services hub, with an operational capacity for 20 guide dogs in concurrent training, yielding an anticipated daily visitor throughput of approximately 10 users (including handlers, trainers, and public education participants).



Diagrams 16-17: Events of Hong Kong Seeing Eye Dog Training School

### 4.2 MacIntosh Fort and Lo Shue Ling

Lo Shue Ling, situated within the North District's Ta Kwu Ling, occupies a low-relief upland zone (about 75mPD) functioning as a strategic cross-boundary vantage point, offering panoramic sightlines to Robin's Nest Country Park and Wutong Mountain Scenic Area. To the immediate north of the Application Site is an existing grade 3 historic building 'MacIntosh Fort' as a colonial-era defensive infrastructure during British administration.



The area forms a critical node within the North District's interconnected trail networks and hiking routes, covering the MacIntosh Fort and Lo Shue Ling, to further extend to the Robin's Nest Country Park along the Wutong Mountain-Robin's Nest ecological corridor. In addition, the Proposed Development is covered by the Blue and Green Recreation, Tourism and Conservation Circle as proposed in the Northern Metropolis Action Agenda announced in 2023. With its strategic location, it is expected to bring opportunities for recreational and tourism development during weekdays and weekends/public holidays.

#### 4.3 Sheung Ying Brick Works Ruins

The Sheung Ying Brick Works Ruins, at the southeast of the Proposed Development, comprise a heritage-industrial site within San Uk Ling's adaptive re-use context. This decommissioned terracotta brick kiln, integral to Hong Kong's pre-modern construction material supply chain, serves as a historical attraction along the Lo Shue Ling recreational corridor. Visitors going along the Lo Shue Ling may also stop by the Sheung Ying Brick Works Ruins. It takes about 10-minute to walk from the Proposed Development.

#### 4.4 Muk Wu Nga Yiu Ancient Kiln

Muk Wu Nga Yiu Ancient Kiln constitutes a heritage-industrial asset within the Ta Kwu Ling cultural landscape, representing one of Hong Kong's last surviving pre-colonial ceramic production sites. According to Section 3.2 above, Muk Wu Nga Yiu Ancient Kiln has been recognized as the SAI in the Antiquities and Monuments Office registry, which were used for brick and tile production with a history of approximately 100 years.






Diagrams 17-18: Site Photos of Muk Wu Nga Yiu Ancient Kiln





## 5 EMPLOYMENT POPULATION

Based on the on-site site survey, some brownfield operation were observed along the Lin Ma Hang Road as shown in Figure 2. Table 3 below shows the number of estimated employment on active brownfield sites by industry, referring to the findings from the Study on Existing Profile and Operation of Brownfield Sites in the New Territories - Feasibility Study ("Brownfield Study")<sup>2</sup>.

Employment Location	Site Photo(s)	Estimated Employment
Site 1: Site area of about 2,963sqm		2,963 x 0.003687 = 11 persons
Site 2: Under Application No. A/NE-MKT/35 approved on 19.7.2024 with site area of about 20,563sqm		20,563 x 0.003687 = 76 persons
Site 3: Site area of about 5,928sqm		5,928 x 0.003687 = 22 persons





<sup>2</sup> According to Table 4.5.1 of the Brownfield Study, the total estimated employment is about 52,110 for about 1413.84 ha of site. Thus, the number of employment is 0.003687 per sqm/ 36.857 per ha.





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Site 4: Site area of about 797sqm		797 x 0.003687 = 3 persons
Site 5: Site area of about 6,330sqm		6,330 x 0.003687 = 24 persons
Site 6: Hong Kong Seeing Eye Dog Training School with site area of about 2,276sqm		2,276 x 0.003687 = 9 persons
Site 7: Under Application No. A/NE-MKT/34 approved on 20.9.2024 with site area of about 1,360sqm		1,360 x 0.003687 = 6 persons



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Site 8: Site area of about 2,867sqm		2,867 x 0.003687 = 11 persons
Site 9: Site area of about 7,202sqm		7,202 x 0.003687 = 27 persons
Site 10: Under Application No. A/NE-MKT/37 approved on 10.1.2025 with site area of about 2,950sqm		2,950 x 0.003687 = 11 persons
Site 11: Under Application No. A/NE-MKT/39 approved on 24.1.2025 with site area of about 1,500sqm		1,500 x 0.003687 = 6 persons





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Site 12: Site area of about 4,733sqm		4,733 x 0.003687 = 18 persons
Site 13 Site area of about 3,368sqm		3,368 x 0.003687 = 13 persons
Site 14: Site area of about 3,853sqm		3,853 x 0.003687 = 15 persons
Site 15: Site area of about 3,489sqm		3,489 x 0.003687 = 13 persons
<b>Total</b>		<b>265 persons</b>

Table 3: Number of Estimated Employment around the Application Site  
(Source: Photos from on-site site survey)





## 6 THE SUPPLY OF SHOP AND SERVICES

The Application Site falls within an area of “Agriculture” zone on the Draft Man Kam To Outline Zoning Plan No. S/NE-MKT/5. The Application Site can be directly accessible via the Lin Ma Hang Road. Several village clusters under “Village Type Development” (“V”) zone are situated in the north and the southwest of the Application Site, namely Muk Wu and Muk Wu Nga Yiu respectively.

As mentioned in Section 3.4, there is no shops/ convenience stores are currently available in the vicinity. Despite “V” zone is intended to concentrate village type provision of infrastructures and services. However, the “V” zones are located further away from main road as well as the employment belt along the Lin Ma Hang Road. This creates accessibility constraints, resulting in absent retail amenities across Muk Wu and Ngau Yiu. In addition, the existing village houses in San Uk Ling are occupied for residential use, with no commercial tenancy vacancies available. It is expected there will be demand of commercial use serving the residents nearby.

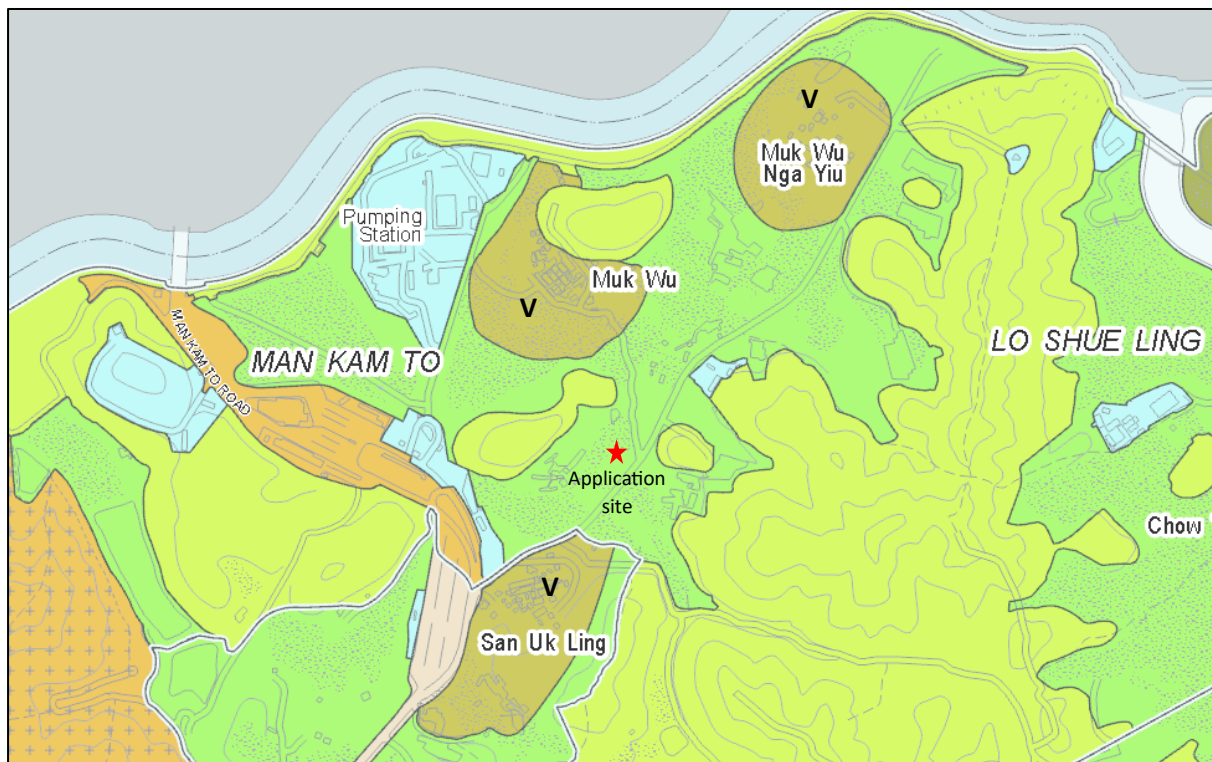


Diagram 19: Application Site Under Draft Man Kam To OZP No. S/NE-MKT/5  
(Source: Town Planning Board, HKSAR Government)



## 7 SUMMARY TABLE

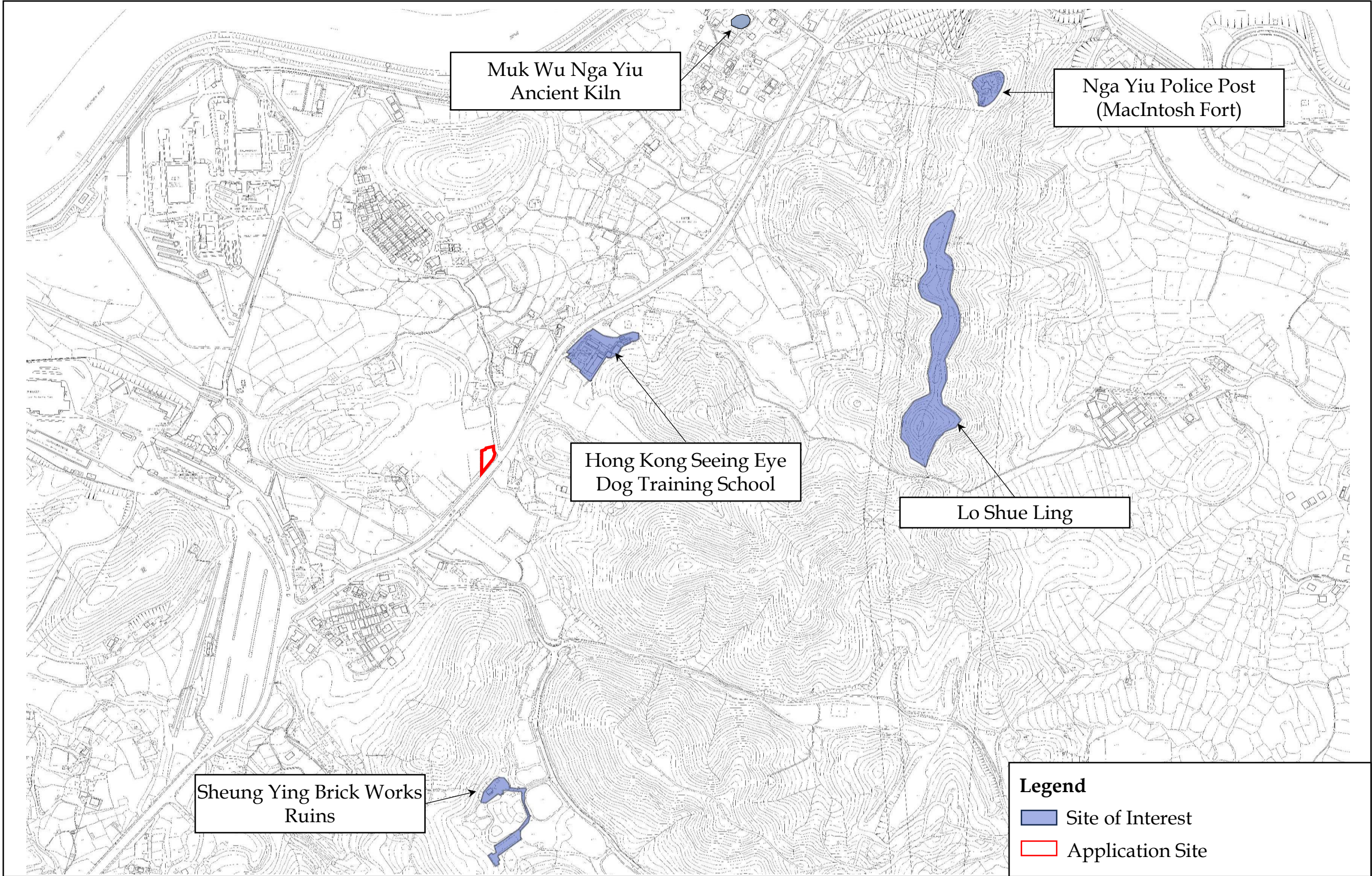
Demand Type	Population	Estimation/ Source
A. <u>Residents (on daily visiting basis)</u>		
Muk Wu Village	2,093 persons	Results of 2021 <i>Population Census</i> in Subunits 641/06-08 and 641/10-22 and projection from <i>Projections of Population Distribution 2023-2031</i>
Muk Wu Nga Yiu		
San Uk Ling		
B. <u>Visitors</u>		
HK Seeing Eye Dog Training School	10 Daily Visitors	Estimation
MacIntosh Fort and Lo Shue Ling	50 Visitors on weekend	Estimation
Sheung Ying Brick Works Ruins		
C. <u>Employment (on daily visiting basis)</u>		
Site 1	11 persons	From site visit and estimated in accordance with the <i>Brownfield Study</i>
Site 2 under Application No. A/NE-MKT/35	76 persons	
Site 3	22 persons	
Site 4	3 persons	
Site 5	24 persons	
Site 6 Hong Kong Seeing Eye Dog Training School	9 persons	
Site 7 under Application No. A/NE-MKT/34	6 persons	
Site 8	11 persons	
Site 9	27 persons	
Site 10 under Application No. A/NE-MKT/37	11 persons	
Site 11 under Application No. A/NE-MKT/39	6 persons	
Site 12	18 persons	
Site 13	13 persons	
Site 14	15 persons	
Site 15	13 persons	
<b>Total</b>	2,418 persons where 2,093 Residents, 265 Workers and 60 Visitors	
	= 2,418 x 3% = <b>about 73 daily customers</b>	Assuming 3% for daily demand only



## 8 CONCLUSION

As revealed from our survey, there is currently no supply of retail services in the study area. The demand of retail shops in the vicinity of the Proposed Development is estimated. The Application Site is situated within walking distance from nearby villages and is surrounded by a number of village clusters. Various sites of interest are also found in the vicinity of the Proposed Development that would attract visitors, including Hong Kong Seeing Eye Dog Training School, MacIntosh Fort and Lo Shue Ling, Sheung Ying Brick Works Ruins, and Muk Wu Nga Yiu Ancient Kiln. It is expected there is a great demand for retail amenities in the vicinity of the Proposed Development.





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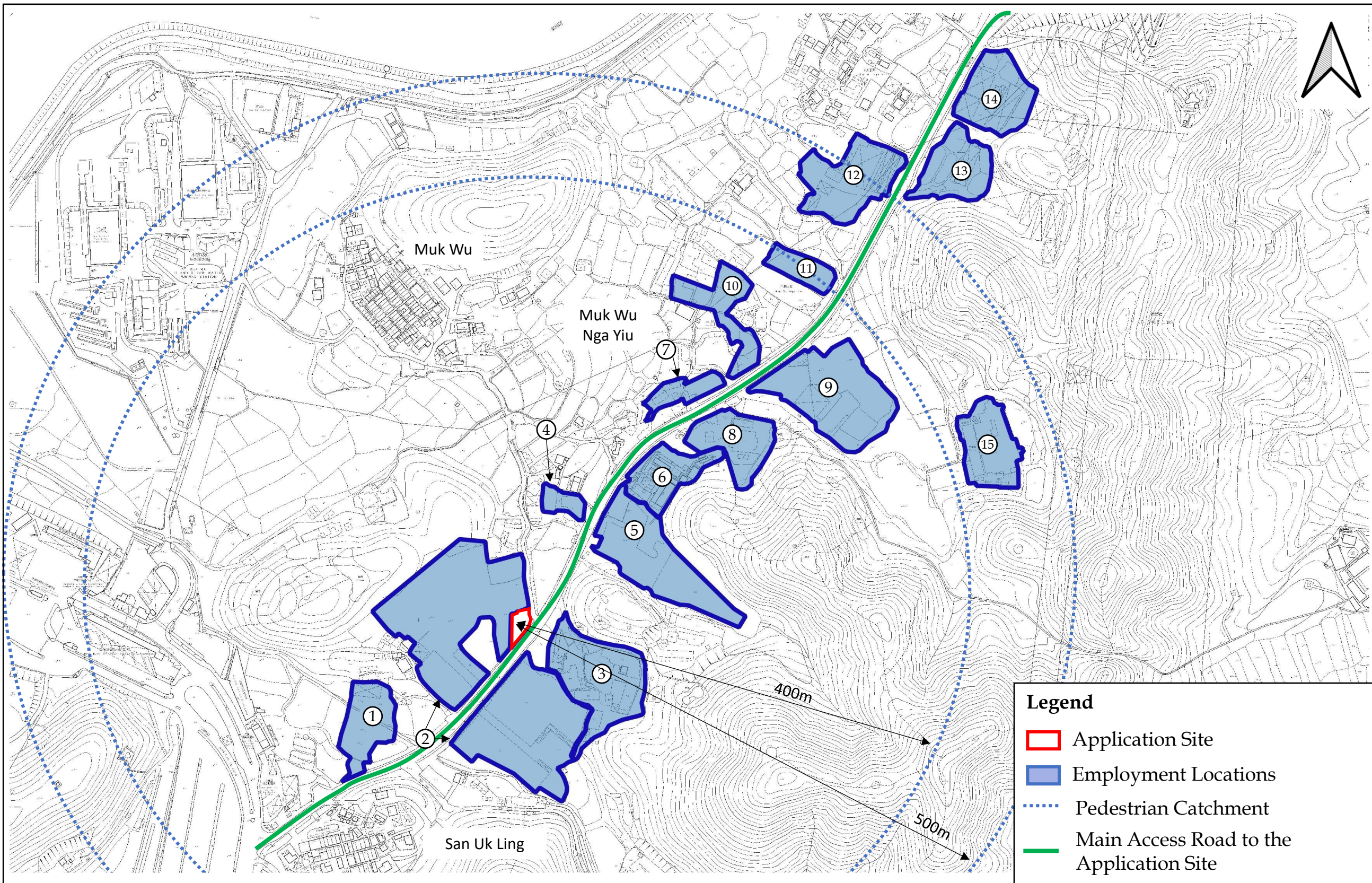
Figure 1 : Sites of Interest

(For reference only. Not to scale.)

Demand and Supply Assessment  
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(Source: HK GEODATA STORE, HKSAR Government)





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Figure 2 : Employment Locations

(For reference only. Not to scale.)

Demand and Supply Assessment  
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Associated Filling of Land for a Period of 3 Years at the Remaining Portion of Section A  
of Lot No. 610 in Demarcation District 90, Man Kam To

(Source: HK GEODATA STORE, HKSAR Government)