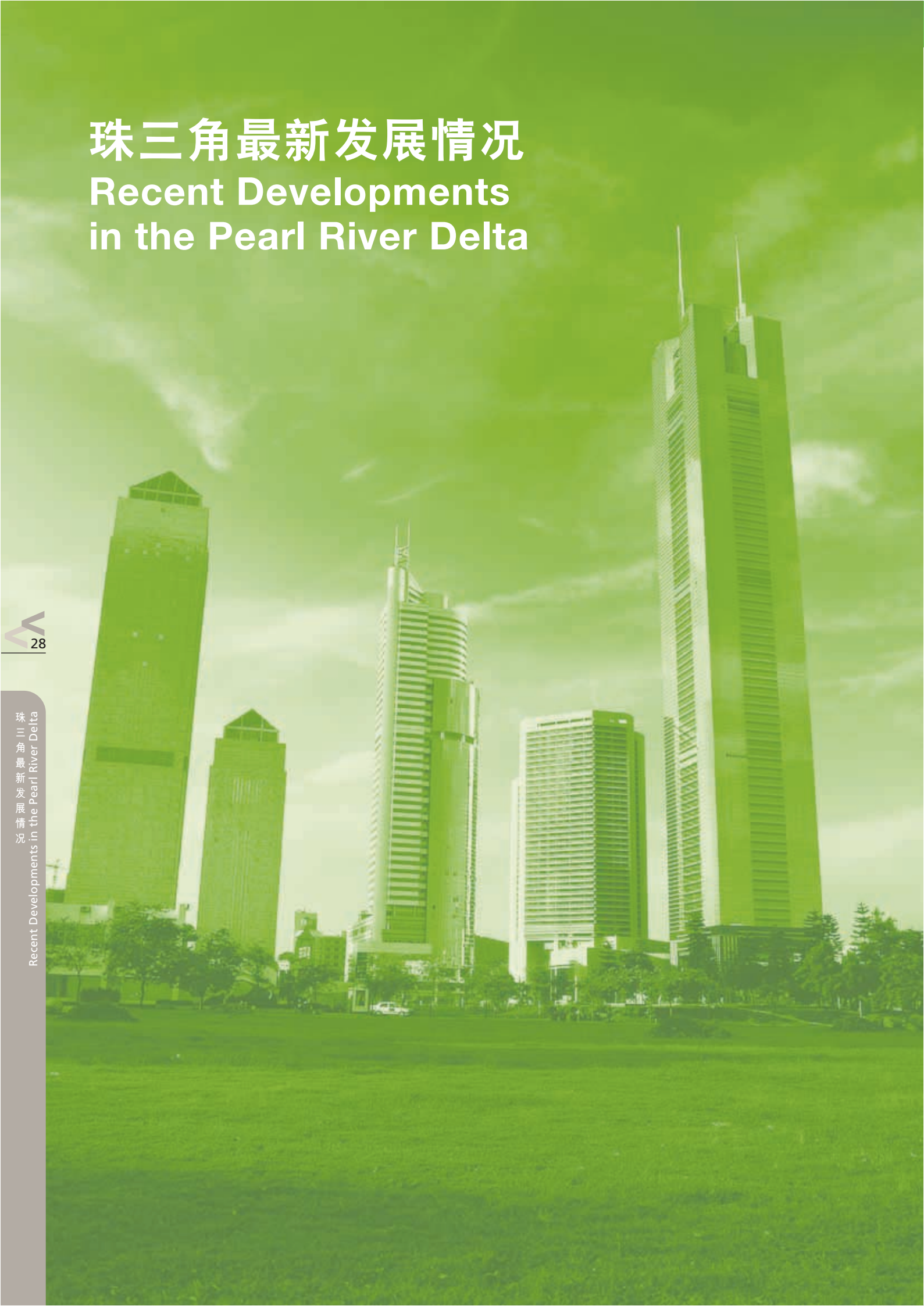


珠三角最新发展情况

Recent Developments in the Pearl River Delta



珠三角最新发展情况

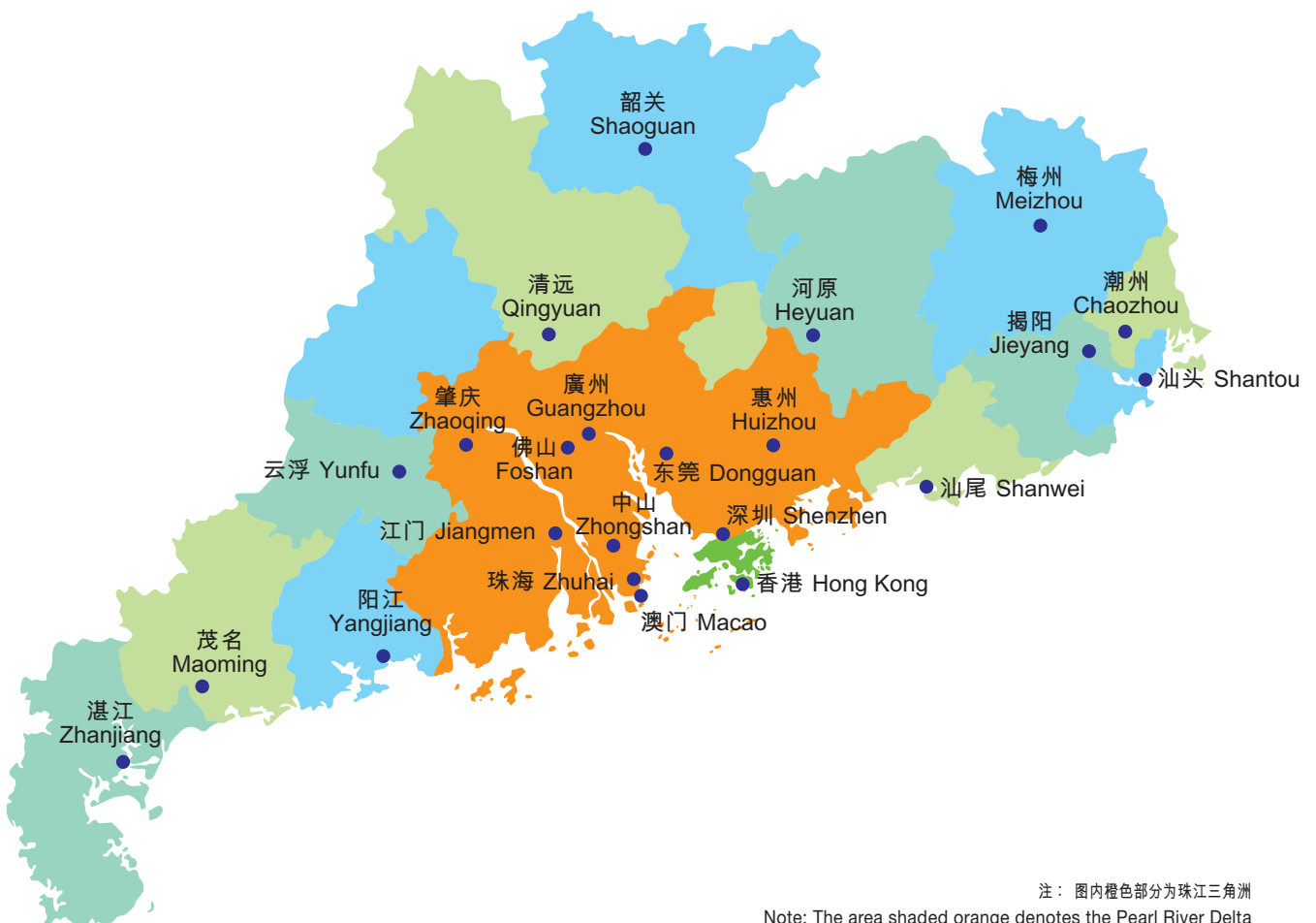
Recent Developments in the Pearl River Delta

背景

珠三角是推动中国经济发展的其中一个最重要地区，亦是广东省的经济枢纽。根据广东省的界定，珠三角经济区包括九个城市，分别是广州、深圳、东莞、佛山、江门、中山、珠海，以及惠州(其中的惠州市区、惠东县和博罗县)和肇庆(其中的肇庆市区、高要市和四会市)。

地图

广东省及珠江三角洲经济区



注：图内橙色部分为珠江三角洲
Note: The area shaded orange denotes the Pearl River Delta

General Background

The PRD is one of the most important regions in driving China's economic development. The region is the economic hub of Guangdong. The PRD Economic Zone, as specified by Guangdong, includes nine municipalities, namely Guangzhou, Shenzhen, Dongguan, Foshan, Jiangmen, Zhongshan, Zhuhai, and the urban areas of Huizhou (Huizhou urban district, Huidong County and Boluo County) and Zhaoqing (Zhaoqing urban district, Gaoyao County-level City and Sihui County-level City).

Map

Guangdong Province and the Pearl River Delta Economic Zone

大珠江三角洲(即珠三角加上香港及澳门)的主要管辖区

Main jurisdictions in the Greater Pearl River Delta Region (i.e. PRD region plus Hong Kong and Macao)



资料来源：投资推广署
Source: Invest HK

珠三角地区的经济发展迅速，2004年的生产总值已达到13,394亿元人民币(1,618.2亿美元)。珠三角的主要经济指标见图表1及2。

The PRD region enjoys robust economic development. The GDP in 2004 amounts to RMB 1,339.4 billion (US\$ 161.8 billion). Major economic indicators of the PRD region are shown in exhibits 1 & 2.

图表1 珠江三角洲的主要经济指标（当年价格）
Exhibit 1 Major economic indicators of PRD region (at current prices)

| 指标 Indicator | 1980 | 1985 | 1990 | 1995 | 2000 | 2001 | 2002 | 2003 | 2004 |
|---|-------|-------|-------|---------|---------|---------|---------|----------|---------------|
| 户籍人口(百万人) ⁽¹⁾ Registered population (million persons) ⁽¹⁾ | 16.27 | 17.57 | 19.28 | 21.38 | 23.07 | 23.37 | 23.65 | 23.99 | 24.51 |
| 生产总值 (亿元人民币) ⁽²⁾ Gross domestic product (0.1billion yuan) ⁽²⁾ | 119.2 | 303.9 | 872.2 | 3,899.7 | 7,378.6 | 8,363.9 | 9,418.8 | 11,341.1 | 13,394.0 |
| 第一产业 (亿元人民币) Primary industry (0.1billion yuan) | 30.7 | 57.3 | 129.4 | 314.9 | 428.5 | 445.2 | 465.0 | 470.5 | 506.3 |
| 第二产业 (亿元人民币) Secondary industry (0.1billion yuan) | 54.0 | 148.7 | 404.6 | 1,957.1 | 3,657.3 | 4,139.0 | 4,688.1 | 5,939.6 | 7,206.4 |
| 第三产业 (亿元人民币) Tertiary industry (0.1billion yuan) | 34.5 | 97.9 | 338.2 | 1,627.7 | 3,292.9 | 3,779.8 | 4,265.6 | 4,930.0 | 5,681.3 |
| 固定资产投资总额 (亿元人民币) Total amount of investment in fixed assets (0.1billion yuan) | 16.6 | 128.4 | 231.4 | 1,491.0 | 2,291.6 | 2,566.8 | 2,886.6 | 3,739.7 | 4,487.0 |
| 消费品零售总额 (亿元人民币) Total amount of retail sales of consumer goods (0.1billion yuan) | 70.7 | 198.0 | 445.7 | 1,544.7 | 2,792.4 | 2,749.6 | 3,481.3 | 3,976.6 | 4,498.5 |
| 出口总额 (亿美元) Total amount of exports (US\$ 0.1billion) | 6.2 | 16.3 | 81.4 | 461.1 | 847.4 | 908.3 | 1,126.1 | 1,450.6 | 1,818.5 |
| 实际利用外资总额 (亿美元) Amount of foreign capital actually utilised (US\$ 0.1billion) | 1.0 | 7.4 | 15.4 | 85.8 | 125.4 | 141.9 | 150.2 | 170.3 | 注3 Notes 3 |
| 地方财政收入 (亿元人民币) Local government revenue (0.1billion yuan) | 23.4 | 49.9 | 95.9 | 315.3 | 595.6 | 745.7 | 768.7 | 848.0 | 932.0 |
| 地方财政支出 (亿元人民币) Local government expenditure (0.1billion yuan) | 8.2 | 26.1 | 76.4 | 316.6 | 682.1 | 822.7 | 963.6 | 1075.0 | 1,210.0 |
| 城乡居民年终储蓄存款(亿元人民币) Savings deposits by urban and rural residents at year-end (0.1billion yuan) | 21.0 | 112.0 | 552.7 | 2,810.4 | 6,641.0 | 7,670.6 | 9,240.2 | 11,068.9 | 12,680.0 |

注： (1) 根据2000年进行的全国人口普查，珠三角经济区共有人口4 080万，与官方的户籍人口数字有出入。两者出现差异的主要原因，是前者计算了外来人口和流动人口，而后者则没有把这两类人口计算在内。由于前往珠三角就业者人数众多，但却没有正式的“登记”户籍，所以珠三角在这方面的人口差异较中国其他地区为大。

(2) 内地出版的刊物已于2004年开始改称地区的GDP为“地区生产总值”（例如广东省生产总值）。中国内地整体的GDP仍称为“国内生产总值”。

(3) N.A. 暂时没有数字

Notes:(1) According to the 2000 National Census, the PRD Economic Zone had a population of 40.8 million people. This contrasts with the official registered population. The main reason for the difference between the Census and registered populations is that the former figure includes the migrant and floating populations and the latter does not. Given the large number of people that come to the PRD for employment, but do not have official 'registered' status, this discrepancy is larger in the PRD than elsewhere in China.

(2) The Chinese term for Gross Domestic Product (GDP) of a region in the Mainland has been renamed as “地区生产总值” in Mainland's publications starting from 2004 (e.g. 廣東省生產總值). That of the Mainland as a whole remains as “国内生产总值”.

(3) N.A. Data not yet available

资料来源：广东省统计局和2002年、2003年、2004年及2005年的《广东统计年鉴》。

Sources: Guangdong Provincial Statistics Bureau, and Guangdong Statistical Yearbook 2002, 2003, 2004 and 2005.

图表2 2004年珠三角主要城市居民的生活水平

Exhibit 2 Living standard of local residents in major cities of the PRD in 2004

| 主要城市 Major City | 生产总值 ^(注1, 3) (百万元人民币) GDP ^(Notes 1, 3) (million yuan) (按可比价格计算的逐年增长率) (yoy growth at comparable prices) | 人均生产总值 ^(注2, 3) (人民币) (按可比价格计算的逐年增长率) Per capita GDP ^(Notes 2, 3) (yuan) (yoy growth at comparable prices) | 消费品零售总额 (百万元人民币)(逐年增长率) Total Retail Sales of Consumer Goods (million yuan) (yoy growth) |
|--------------------|--|--|---|
| 广州 Guangzhou | 445,055 (8.1%) | 56,271 (13.7%) | 167,777 (12.3%) |
| 深圳 Shenzhen | 428,214 (17.3%) | 59,271 (7.8%) | 125,064 (56.0%) |
| 珠海 Zhuhai | 55,168 (13.8%) | 41,848 (9.5%) | 18,922 (18.9%) |
| 佛山 Foshan | 191,804 (18.3%) | 47,658 (14.3%) | 55,575 (17.4%) |
| 江门 Jiangmen | 69,564 (12.2%) | 21,647 (11.0%) | 27,583 (-0.7%) |
| 东莞 Dongguan | 180,603 (19.6%) | 71,995 (17.4%) | 42,647 (26.2%) |
| 中山 Zhongshan | 70,430 (15.4%) | 44,006 (17.3%) | 23,461 (54.6%) |
| 惠州 Huizhou | 68,645 (15.1%) | 23,643 (13.1%) | 21,316 (17.3%) |
| 肇庆 Zhaoqing | 39,056 (13.2%) | 13,945 (12.7%) | 12,086 (-29.4%) |

注：(1) 内地出版的刊物已于2004年开始改称地区的GDP为"地区生产总值" (例如广东省生产总值)。中国内地整体的GDP仍称为"国内生产总值"。
 (2) 内地出版的刊物已于2004年开始改称地区的Per capita GDP为"人均地区生产总值" (例如人均广东省生产总值)。中国内地整体的Per capita GDP仍称为"人均国内生产总值"。
 (3) 生产总值数字为初步核算数字，稍后会根据2004年的经济普查结果作出调整。为适应经济和社会发展需要，并与国家编制的五年规划作好衔接，推进国民经济核算与统计调查体系综合配套改革，国务院于2003年7月决定，将原有的工业普查、第三产业普查和基本单位普查合并，并将建筑业纳入普查范围，在2004年开展第一次全国经济普查。普查的标准时点是2004年12月31日，时期资料为2004年度。

Notes:(1) The Chinese term for Gross Domestic Product (GDP) of a region in the Mainland has been renamed as "地区生产总值" in Mainland's publications starting from 2004 (e.g. 广东省生产总值). That of the Mainland as a whole remains as "国内生产总值".
 (2) The Chinese term for Per capita GDP of a region in the Mainland has been renamed as "人均地区生产总值" in Mainland's publications starting from 2004 (e.g. 人均广东省生产总值). That of the Mainland as a whole remains as "人均国内生产总值".
 (3) The figures for GDP are preliminary estimates and subject to revision later according to results of Economic Census conducted in 2004. In July 2003, the State Council decided to conduct the first national economic census in 2004 by combining the former industrial census, the tertiary industry census and establishment census, and including the construction sector in the census. Its main purpose is to meet the needs of economic and social development, to better link up with the National Five-Year program and to push forward the comprehensive reform of national economic accounting system and statistical survey system. The reference time for the census was 31st December 2004, and the flow data covered the whole year of 2004.

资料来源：《广东统计年鉴—2005》，2005年各市的统计公报及《广东统计概要2006》

Sources: Guangdong Statistical Yearbook 2005, statistical communiques of individual cities 2005 and 广东统计概要2006.

虽然珠三角经济区只占全国土地面积的0.4%及普查人口的3.2%，但在2004年却占国内生产总值的9.8%、总出口的30.6%及在2003年占全国实际利用外来直接投资的26.1%(图表3)。

Although the PRD economic zone encompassed only 0.4% of China's land mass and only 3.2% of the census population, they accounted for 9.8% of the nation's GDP, 30.6% of total exports in 2004 and 26.1% of foreign direct investment actually used in 2003 (Exhibit 3).

图表3 珠三角经济区对广东和内地的重要性
Exhibit 3 The importance of PRD Economic Zone in Guangdong and the Mainland

| | 2004 | |
|---|--|--------------|
| | 珠三角经济区所占百分比 % share of PRD Economic Zone in | |
| | 广东 Guangdong | 内地 Mainland |
| 土地面积 Land area | 23.2% | 0.4% |
| 户籍登记人口 Population of Household Registration | 31.4% | 1.9% |
| 普查人口 Census population | 47.8% | 3.2% |
| 生产总值 GDP | 83.5% | 9.8% |
| 出口 Exports | 94.9% | 30.6% |
| 实际利用外来直接投资 Foreign Direct Investment actually used | 89.7% (2003) | 26.1% (2003) |

资料来源：《中国统计年鉴—2005》、《广东统计年鉴—2005》

Sources : China Statistical Yearbook 2005, Guangdong Statistical Yearbook 2005

图表4 2005年珠三角个别城市的经济指标
Exhibit 4 Economic indicators of individual cities in the PRD

| 主要城市 | 生产总值 ⁽¹⁾ (亿元人民币) GDP ⁽¹⁾ (0.1billion yuan) | 生产总值的组合成分 ⁽¹⁾ Composition of GDP ⁽¹⁾ | | |
|--------------|--|--|------------------------------------|-----------------------------------|
| | | 第一产业 (%) Primary industry (%) | 第二产业 (%) Secondary industry (%) | 第三产业 (%) Tertiary industry (%) |
| 广州 Guangzhou | 5,115.8 | 2.5 | 40.7 | 56.9 |
| 深圳 Shenzhen | 4,926.9 | 0.2 | 52.4 | 47.4 |
| 珠海 Zhuhai | 634.6 | 3.2 | 51.9 | 44.9 |
| 佛山 Foshan | 2,379.8 | 3.5 | 60.4 | 36.1 |
| 惠州 Huizhou | 803.9 | 10.3 | 57.2 | 32.5 |
| 东莞 Dongguan | 2,182.4 | 1.0 | 56.5 | 42.5 |
| 中山 Zhongshan | 817.6 | 3.8 | 61.4 | 34.8 |
| 江门 Jiangmen | 802.2 | 9.9 | 49.6 | 40.5 |
| 肇庆 Zhaoqing | 453.6 | 31.2 | 25.6 | 43.2 |

- 注：(1) 此乃初步核算数字，实际数字有待修订。为适应经济和社会发展需要，并与国家编制的五年规划作好衔接，推进国民经济核算与统计调查体系综合配套改革，国务院于2003年7月决定，将原有的工业普查、第三产业普查和基本单位普查合并，并将建筑业纳入普查范围，在2004年开展第一次全国经济普查。普查的标准时点是2004年12月31日，时期资料为2004年度。
- (2) 数字指规模以上的工业企业(全部国有工业企业和年产品销售收入500万元人民币以上的非国有工业企业)。
- (3) N.A. 暂时没有数字

- Notes : (1) The figures are preliminary estimates and subject to revision. In July 2003, the State Council decided to conduct the first national economic census in 2004 by combining the former industrial census, the tertiary industry census and establishment census, and included the construction sector in the census. Its main purpose is to meet the needs of economic and social development, to better link up with the National Five-Year program and to push forward the comprehensive reform of national economic accounting system and statistical survey system. The reference time for the census was 31st December 2004, and the flow data covered the whole year of 2004.
- (2) Figures refer to industrial enterprises above designated size (all state-owned industrial enterprises and non-state-owned industrial enterprises with an annual sales revenue over 5 million yuan).
- (3) N.A. Data not yet available

资料来源：有关城市的统计公报和《广东统计概要2006》

Sources : Statistical communiques of relevant cities and 广东统计概要2006.

| | 工业总产值 ⁽²⁾ (亿元人民币) Gross Industrial Output ⁽²⁾ (0.1billion yuan) | 进出口 总额 (亿美元) Imports and Exports (0.1billion USD) | 实际利用外来 直接投资 (百万美元) FDI actually used (million USD) | 城市居民人均 可支配收入(人民币) Per capita disposable income of urban residents (yuan) | 人均生产 总值 ⁽¹⁾ (人民币) Per capita GDP ⁽¹⁾ (yuan) | 消费品零售总额 (亿元人民币) Retail sales of consumer goods (0.1billion yuan) |
|--|---|---|--|--|---|--|
| | 6,032.1 | 534.9 | 2,649 | 18,287 | N.A. ⁽³⁾ | 189.9 |
| | 9,567.7 | 1,828.2 | 2,969 | 21,494 | 60,507 | 143.8 |
| | 1,562.0 | 257.3 | 666 | 18,908 | 45,258 | 22.0 |
| | 4,739.8 | 257.1 | 929 | 17,424 | 41,031 | 63.4 |
| | 1,411.9 | 190.2 | 1,042 | 14,884 | 21,911 | 25.2 |
| | 3,812.8 | 743.7 | 1,468 | 22,882 | N.A. ⁽³⁾ | 50.0 |
| | 2,216.9 | 186.9 | 654 | 17,255 | 33,631 | 27.7 |
| | 1,443.3 | 90.6 | 606 | 12,903 | 19,600 | 31.0 |
| | 319.9 | 21.8 | 603 | 10,097 | N.A. ⁽³⁾ | 14.2 |

珠三角成为制造及采购基地

经过二十多年的发展，珠三角不但成为国内实力雄厚的制造业基地，亦是世界工厂，在纺织及服装、鞋履、塑胶制品、电脑、电子资讯、电子及电器产品、玩具等多个产业的发展上，均举足轻重。珠三角地区在制造原料和半制品方面占有独特的优势，亦是全球多种产品的主要采购基地。

产业群及专业镇

一如其他的地区经济体系，珠三角内有多发展蓬勃的产业群，而珠三角产业群的一个明显特征就是发展出一批专业镇。这些专业镇专门生产一种或多种特色产品，一般从事传统的制造业、农业及电子资讯业。广东目前有159个专业镇¹。虽然珠三角区内不少专业镇均位于珠三角西部城市，特别是佛山、江门和中山，但珠三角东部的部分城市亦有大量专业镇，最典型的例子是东莞，广东省有10个专业镇均位于东莞市。图表5载列珠三角部分专业镇的资料。

PRD as a manufacturing and sourcing base

Over the past two decades, the PRD has become the manufacturing powerhouse of China. As a manufacturing base of the world, the region is playing a leading role in various industries, including textile and apparel, footwear, plastic products, computers, electronic information, electronic and electrical goods, toys, etc. The region has a distinct edge in manufacturing of raw materials and intermediate products. It has become one of the world's leading sourcing bases for a wide variety of products.

Industrial clusters and specialised towns

Like other regional economies, the PRD has developed a number of vibrant industrial clusters. A distinctive feature of the PRD industrial clusters is the development of specialised towns. These specialised towns specialise in the production of one or more distinctive products. Generally, they are in traditional manufacturing, agricultural or electronic information sectors. At present there are 159 specialised towns in Guangdong¹. Within the PRD, many of these specialised towns are located in the cities in western PRD - particularly in Foshan, Jiangmen and Zhongshan; yet, some cities in the eastern PRD also account for a large number of specialised towns - a typical example is Dongguan, which accounts for 10 specialised towns in Guangdong. Exhibit 5 shows the selected specialised towns in the PRD.

1 资料来源：广东省人民政府工作报告(2006年2月22日)

1 Source: Work Report of Guangdong Province People's Government (22 February, 2006)

图表5 广东省部分专业镇
Exhibit 5 Selected specialised towns in Guangdong

| 市 Cities | 镇 Towns | 产业群 Industrial clusters | 市 Cities | 镇 Towns | 产业群 Industrial clusters | |
|-------------|---------------------|----------------------------|--------------|----------------|--------------------------------------|----------------------------|
| 佛山 Foshan | Lanshi (澜石) | Stainless steel 不锈钢 | 东莞 Dongguan | Shilong (石龙) | Electronics 电子产品 | |
| | Zhangcha (张槎) | Knit wear 针织品 | | Zhangan (长安) | Electronics 电子产品 | |
| | Datang (大塘) | Vegetable 蔬菜 | | Dongfeng (东风) | Household electrical appliances 家庭电器 | |
| | Shiwan (石湾) | Construction ceramic 建筑陶瓷 | | Minzhong (民众) | bananas 香蕉 | |
| | Yanbu (盐步) | Underwear 内衣 | | Humen (虎门) | Garment 成衣 | |
| | Chencun (陈村) | Flower 花卉 | | Dalong (大朗) | Knitted wear (wool) 毛织品 | |
| | Guangao (官窑) | Toy 玩具 | | Changping (常平) | Logistics 物流 | |
| | Nanzhuang (南庄) | Porcelain 瓷器 | | Shijie (石碣) | Electronics 电子产品 | |
| | Pingzhou (平洲) | Shoes 鞋履 | | Houjie (厚街) | Furniture 家俬 | |
| | Lecong (乐从) | Furniture 家俬 | | Qingxi (清溪) | Electronics 电子产品 | |
| | Lunjiao (伦教) | Wood Machinery 木工机械 | | 中山 Zhongshan | Shaxi (沙溪) | Garment 成衣 |
| | Genglou (更楼) | Cultivation 农产品 | | | Xiaolan (小榄) | Metal 金属 |
| | Xiqiao (西樵) | Textiles 纺织品 | | | Guzhen (古镇) | Lights 灯饰 |
| | Jinsha (金沙) | Metal 金属 | | | Huangpu (黄圃) | Food 食品 |
| | Dali (大沥) | Aluminium material 铝材 | | | Nantou (南头) | Electrical appliances 电器用品 |
| 江门 Jiangmen | Jianghai (江海) | Electronic material 电子物料 | Guangzhou 广州 | Dayong (大涌) | Furniture 家俬 | |
| | Pengjiang (蓬江) | Motorcycle 电单车 | | Shiling (狮岭) | Leather product 皮革产品 | |
| | Shuikou (水口) | Heater 加热器 | | Zhuhai 珠海 | Xintang (新塘) | Jeans, garment 牛仔裤及成衣 |
| | Encheng (恩城) | Microphone 扬声器 | | | Huizhou 惠州 | Huangfu (黄埠) |
| | Shaping (沙坪) | Garment (manufacturing) 制衣 | | Zhaoqing 肇庆 | Jinli (金利) | Metal products 金属产品 |
| | Shagang (沙冈) | Textiles 纺织品 | | | | |
| | Shangxiachuan (上下川) | Ocean tourism 海洋旅游业 | | | | |
| | Siqian (司前) | Stainless steel 不锈钢 | | | | |
| Daoo (大鳌) | Container 货柜 | | | | | |

资料来源：王珺：《珠江三角洲西岸地区产业集群生成机制研究》，《城市经济、区域经济》2006。

Source: Wang jun, "Study on the Industrial clusters in the western Pearl River Delta", Urban and Regional Economy 2006.

产业结构转型

多年来，劳工密集的轻工业在推动广东省工业发展方面一直占主要地位。不过，这情况正出现转变，广东省的产业结构近年已逐渐转型。

首先，珠三角正迅速转向重工业发展，轻工与重工业比例已由1978年的56.6:44.4变为2004年的44.4:55.6。同年，重工业的总产值为12,867亿元人民币(1,554.5亿美元)，较前一年上升28.8%。相比之下，轻工业较为逊色，总产值只有10,286亿元人民币(1,242.8亿美元)，升幅为19%。在各类重工业中，重化工和器材制造业均录得强劲增长，而石化、钢材和汽车制造业亦发展迅速。举例来说，汽车制造业在2004年的总产值为783亿元人民币(94.6亿美元)，较前一年上升43%。

此外，珠三角的经济结构亦出现重大转变，第三产业所占的经济比重日渐增加。在1978至2004年间，以地区生产总值计算，珠三角三类产业的比例由25.8:45.3:28.9发展为3.8:53.8:42.4，第三产业所占的比例增加了46.7%。

珠三角市场

今天，珠三角是内地最大、最成熟的消费市场之一。2004年，该区的人均生产总值为46,304元人民币(5,594美元)，是全国平均的12,336元人民币(1,490.4美元)的3.8倍。城市居民的人均可支配收入达17,290元人民币(2,088.9美元)，是全国平均的9,422元人民币(1,138.3美元)的1.84倍。

珠三角居民日益富裕，对各种服务(如教育、康乐文化、交通、邮递通讯、金融等)的需求亦随之增加。同时，商业服务近年亦随着第二产业的持续增长而迅速发展。

2004年，珠三角的消费品零售总额达4,499亿元人民币(543.5亿美元)，占该区生产总值三分之一以上。主要的消费市场位于广州及深圳，其零售额分别占珠三角零售总额的37%及28%。

广东消费者的消费模式与内地其他地区一样，出现了重大变化。居民的可动用收入增加，提升了消费结构。

零售业不断迅速发展。自2005年起，国家按照加入世贸的承诺进一步开放分销业，全面取消在零售地点、拥有权架构及店铺数目方面对外资零售商的限制。此举彻底改变了珠三角零售业的面貌，各类现代化零售经营模式，如超级市场、特大超级市场、便利店、专业服务店、专门店、购物商场/中心，以及网上订购等，纷纷应运而生。

Industrial Restructuring

For years, labour-intensive light industries have played a key role in powering the industrial development of Guangdong. However, changes are taking place. The industrial structure has gradually transformed in recent years.

First, the PRD is moving swiftly towards heavy industries. The proportion of its light industries to its heavy industries changed from 56.6:44.4 in 1978 to 44.4:55.6 in 2004. In 2004, the total industrial output yielded by heavy industries was RMB 1,286.7 billion (US\$155 billion), representing a year-on-year (yoy) increase of 28.8%, which compared favourably with the RMB 1,028.6 billion (US\$124.3 billion) and a yoy increase of 19% yielded by the light industries. Among the various heavy industries, heavy chemical and equipment manufacturing have enjoyed robust growth while the petrochemical, steel, as well as automobile manufacturing are also growing rapidly. For instance, the automobile manufacturing industry achieved an output valued at RMB 78.3 billion (US\$9.46 billion) in 2004, up by 43% yoy.

Furthermore, the composition of economy has experienced a profound change with tertiary industry taking up an increasing share of the economy. Between 1978 and 2004, the ratio of the three sectors in PRD's GDP changed from 25.8: 45.3: 28.9 to 3.8: 53.8: 42.4, with the proportion of the tertiary industry increased by 46.7%.

PRD as a Market

Today, PRD is one of the largest and most sophisticated consumer markets in the Mainland. In 2004, the region enjoyed a Per capita GDP of RMB 46,304 (US\$5,594), which was 3.8 times as large as the national average of RMB 12,336 (US\$1,490.4). Per capital disposable income of urban residents reached RMB 17,290 (US\$2,088.9), 1.84 times as large as the national average of RMB 9,422 (US\$1,138.3).

Increased affluence of PRD residents has boosted the demand for services like education, cultural and recreation services, transport, post and communication services, and financial services, etc. Meanwhile, business services have also been developing rapidly in recent years, along with the constant growth of the secondary industry.

Total retail sales of consumer goods in the PRD reached RMB 449.9 billion (US\$54.35 billion) in 2004, accounting for over one-third of the region's GDP. Major consumer markets are in Guangzhou and Shenzhen, accounting for 37% and 28% of the region's retail sales respectively.

In Guangdong, as in other parts of China, consumers' consumption pattern has undergone significant changes. The rising disposable income of people has led to the upgrading of consumption structure.

The retail sector has been evolving rapidly. Starting from 2005, China further liberalised its distribution sector in accordance with its WTO commitments. The restrictions on locations, ownership structure and number of stores imposed on all foreign retailers have been eliminated. These have altered the PRD's retail landscape and led to the emergence of modern retail formats such as supermarkets, hypermarkets, convenience stores, professional stores, specialty stores, shopping malls/centres and on-line ordering, etc.

加速基建发展

广东省政府一直致力加强珠三角区内各地的交通连系。现时广东省所有大城市之间均有公路和铁路连接。

铁路

《珠江三角洲地区城际轨道交通网规划(2005至2020年)》获得通过,标志着珠三角铁路发展进入一个新里程。这些城际高速铁路和地铁建成后,会在珠三角城际之间形成“一小时经济生活圈”。这个“A”字型的主要网络包括广深²和广珠两条主干线,另有两条副线(广州至肇庆;中山小榄至江门;东莞至惠州)和两条连接珠三角两岸城市(顺德至番禺至东莞;中山至虎门)的支线。铁路全长570公里,主干线将于2010年建成。

其他正在兴建的主要铁路包括广珠铁路,连接广州和位于珠三角西部的珠海。另一项工程是连接华中湖北省省会武汉及广州的武广高速铁路。这条铁路将会连接广深港高速铁路,届时武汉至香港的车程将由现时的12小时缩短至5小时。第三项工程是由深圳至杭州的杭福深客运专线。按照内地现时的铁路发展计划,上述工程将于2010年完成。

高速公路/公路

根据《广东省高速公路网规划(2004至2030年)》文件,一个全长6 500公里的高速公路网将于2004至2030年间建成,其中2 140公里预计位于珠三角内。

现时,正在规划或兴建的主要高速公路/公路包括广深沿江高速及深港西部通道、港珠澳大桥、京珠高速、广珠西线及西部沿海高速公路。工程完成后,将会大大增强香港与内地的经济联系及合作关系。

Accelerating Infrastructure Construction

The Guangdong Provincial Government has been making vigorous efforts to strengthen the transport link within the PRD. Today, all cities in Guangdong are interconnected by highways and railways.

Railways

The approval of the "Plan of the Pearl River Delta Intercity-city High Speed Rail (2005-2020)" signified a new regime for the railway development in the PRD. Upon completion of the construction of these inter-city high speed rail links and city metro trains, it is expected to create an "one hour economic and living sphere" in the PRD. The main frame of the network is formed like an "A shape" by two principal axis (Guangzhou-Shenzhen²; Guangzhou-Zhuhai), two subordinate lines (Guangzhou-Zhaoqing; Xiaolan in Zhongshan-Jiangmen; Dongguan-Huizhou) and two minor lines connecting cities on the two banks of the PRD (Shunde-Panyu-Dongguan; Zhongshan-Humen). The total mileage of the railways is 570 km. The principal axis will be completed in 2010.

Other major railways under construction include the Guangzhou-Zhuhai Railway linking Guangzhou with Zhuhai on the west side of the PRD. Another project is the Wuhan-Guangzhou Express Railway connecting Wuhan, capital of central China's Hubei province to Guangzhou. This Express Railway connects with Guangzhou-Shenzhen-Hong Kong Express Rail Link and travelling time between Wuhan and Hong Kong will be shortened to 5 hours from currently 12 hours. A third project is the Hangzhou-Fuzhou-Shenzhen Passenger Line which goes from Shenzhen to Hangzhou. According to the Mainland's current railway development plan, these railway projects would be completed before 2010.

Expressways/Highways

As stipulated in the "Guangdong Province Expressway Network Plan (2004-2030)", a traffic network with 6 500 km of expressway will be built during 2004-2030, of which 2 140 km is expected to be located in the PRD.

At present, the major expressways/highways under planning or construction include the Guangzhou-Shenzhen Expressway and the Hong Kong-Shenzhen Western Corridor, the Hong Kong-Zhuhai-Macao Bridge, the Beijing-Zhuhai Expressway, the Guangzhou-Zhuhai West Line, and the Western Coastal Expressway. Upon their completion, these projects will considerably help strengthen the economic west ties and cooperation between Hong Kong and the Mainland.

2 广深主干线延伸至香港,亦即广深港高速铁路。

2 The Guangzhou-Shenzhen axis is extended to Hong Kong and is known as the Guangzhou-Shenzhen-Hong Kong Express Rail Link.

港口

珠三角港口对工业制品出口至为重要。珠三角的主要港口位于深圳(盐田、大铲湾、赤湾、妈湾及蛇口)、广州(南沙、黄埔、新沙、洪圣沙及西基)、珠海(高栏、洪湾、九洲、湾仔及斗门)和中山(神湾、小榄及中山),当中以位于深圳的港口最为重要。2005年,深圳港的货柜吞吐量位列全球第四及全国第二位,达1 619.7万标准货柜单位(较去年上升18.6%)。

根据《珠江三角洲地区港口建设规划(2004至2010年)》文件³,截至2003年末,珠江三角洲地区港口吞吐能力是2.52亿吨。因应珠三角地区将会进一步发展外向型加工业、船舶与汽车制造业、石油化工等重化工业,在集装箱运输及能源、原材料运输等方面将有更大的需求,码头建设的重点亦会围绕集装箱和进口汽油泊位进行。预计到2010年,珠江三角洲地区的港口吞吐能力可达到6.5亿吨。

机场

至于航空方面,大珠三角共有五个机场,分别为香港国际机场、澳门国际机场、深圳宝安国际机场、广州新白云国际机场及珠海机场。预期大珠三角对航空服务的需求将会大增,为大珠三角各个机场带来大量商机。

Ports

Ports in the PRD play a crucial role in the export of manufactured goods abroad. Shenzhen (Yantian, Dachanwan, Chiwan, Mawan and Shekou), Guangzhou (Nansha, Huangpu, Xinsha, Hongshengsha and Siji), Zhuhai (Gaolan, Hongwan, Jiuzhou, Wanzai and Doumen) and Zhongshan (Shenwan, Xiaolan and Zhongshan) are some major ports in the PRD. Among these, Shenzhen is the most prominent one. In 2005, it ranked fourth in the world and second in Mainland China in terms of container throughput, amounting to 16.197 million TEU (up by 18.6% year-on-year).

According to the "Port Development Plan for the Pearl River Delta Region (2004-2010)"³, as at end of 2003, the throughput capacity of PRD ports stood at 252 million tonnes. It is envisaged that further developments in the direction of outward processing industry as well as heavy and chemical industries like shipbuilding, automobile manufacturing and petrochemical in the region will generate greater demands for transport of container, fuel and raw materials. Port development in PRD will also centre around the construction of container and oil berth facilities. By 2010, the throughput capacity of PRD ports is expected to reach 650 million tonnes.

Airports

There are 5 airports in the Greater PRD, namely Hong Kong International Airport, Macao International Airport, Shenzhen Baoan International Airport, New Baiyun Airport in Guangzhou and Zhuhai Airport. The demand for air services within the GPRD is expected to grow significantly, thereby providing tremendous business opportunities for these airports.

珠江三角洲城市群协调发展规划 (2004至2020年)

过去数年，广东省政府推出一连串措施，加强协调珠三角的工业发展。广东省人大常委会先后于2005年1月和同年8月通过及颁布《珠江三角洲城市群协调发展规划(2004至2020年)》。规划中表明广东省会锐意加快提升珠三角的整体竞争力，维持珠三角作为主要生产基地的地位，以及将珠三角发展为全球最具经济活力的地区之一。

该协调发展规划亦勾划出珠三角的初步工业布局。未来数年，珠三角将重点发展下列经济群：农业生产、加工制造、临港重工业、大型器材制造、高新技术产业、国际物流枢纽和旅游业。此外，珠三角亦会加速专业镇和工业园区的发展，最终目的是创建实力和竞争力兼备的工业，巩固珠三角作为全球生产基地的地位。

另一方面，粤港合作联席会议辖下的粤港城市规划及发展专责小组已展开大珠江三角洲城市群协调发展规划研究，从前瞻性的角度考虑和分析大珠三角的发展方向，藉此制定城市和区域发展策略。有关策略旨在解决基建发展、环境保护和协调发展的架构机制等重大区域发展问题，从而加强大珠三角地区的整体竞争优势，同时确保该区得以持续发展。研究已于2006年3月展开，预计在24个月内完成。

"Coordination and Development Plan of the Pearl River Delta City Cluster, 2004-2020"

In the past few years, the Guangdong Provincial Government launched a series of measures to better coordinate the industrial development of the PRD. In January 2005, the Standing Committee of Guangdong Provincial People's Congress approved the "Coordination and Development Plan of the Pearl River Delta City Cluster, 2004-2020" which was promulgated in August 2005. The Plan stipulated the province's intention to expedite the overall competitiveness of the PRD, maintain the region as one of the top-manufacturing powerhouses and transform the region into one of the most vibrant regions in the world.

The Plan also mapped out the tentative industrial setting of the PRD. In the years ahead, the PRD would put more emphasis on the development of the following economic clusters: agriculture production, processing manufacturing, heavy industry near the port, large-scale equipment manufacturing, high-tech industries, international logistics hub and tourism. Besides, the region would also expedite the development of specialised towns and industrial parks. The ultimate goal was to create a strong and highly competitive industrial sector so as to consolidate its status as the world's manufacturing powerhouse.

Meanwhile, the Expert Group on HK/GD Town Planning and Development under the HK/GD Co-operation Joint Conference had commenced a joint planning study on the Coordinated Development of the Greater PRD Township. This study seeks to formulate a city and regional development strategy by taking a forward-looking perspective to consider and to analyse the development direction of the Greater PRD. By addressing major regional development issues related to infrastructure development, environmental protection and institutional mechanisms for coordinated development, the strategy to be formulated will seek to enhance the competitive edge of the Greater PRD Region as a whole whilst securing sustainable development. The study commenced in March 2006 and is expected to be completed in 24 months.

广东“十一五”规划

广东“十一五”规划为广东省定下2006至2010年的发展蓝图。在该五年内，随着国家加入世贸的过渡期于2005年完结，广东在国际贸易上将面临激烈竞争。

根据“十一五”规划，广东将会集中力量改善经济、文化与法律制度，并建设和谐社会。广东将争取生产总值在未来五年年增长率不少于9%，并且在2010年生产总值达33,500亿元人民币(4,088亿美元)。预期到了2010年，广东的人均生产总值会较2000年的翻一番，达到34,824.5元人民币(4,250美元)。该省三类经济产业的比例，预计会由2005年的6.3:49.5:44.2变为2010年的5:50:45；而2010年的单位生产总值能源消耗会较2005年的最少降低13%。

此外，为响应中央政府号召以“科学发展观”指导建设，广东将致力推动可持续发展及和谐区域发展。在“十一五”期间，该省将鼓励和支持自主创新的措施。广东将会提升珠三角的发展水平，巩固广州及深圳作为广东省领导城市的地位，又会大力推动落实CEPA，制订加强粤港澳合作的措施。此外，广东亦会积极推进泛珠三角区域合作。

事实上，正如在《广东省人民政府工作报告》(于2006年2月22日发表)所述，广东将会通过上述措施，与香港及澳门特区更紧密合作。三地合作的主要范畴包括基建、跨境人流物流、贸易、旅游、环境保护、科学与科技、教育、流行病防控，以及食物安全等。

Guangdong's 11th Five Year Plan

Guangdong's 11th Five Year Plan provides a blueprint for Guangdong's development in 2006-2010 during which Guangdong will face keen competition in international trading as the transitional period of China's accession to the WTO ended in 2005.

According to the 11th Five Year Plan, Guangdong would focus its efforts on improving its economy, culture, legal system and building a harmonious society. The Province would seek to achieve an annual GDP growth rate of no less than 9 percent for the next five years and GDP is expected to hit RMB 3,350 billion (US\$408.8 billion) in 2010. The Per capita GDP in 2010 is expected to double that of 2000 and reach RMB 34,824.5 (US\$ 4,250). The ratio of the three sectors of economy is anticipated to change from 6.3:49.5:44.2 in 2005 to 5:50:45 in 2010. The energy consumption per GDP unit in 2010 should fall by at least 13 percent as compared to that of 2005.

Moreover, guided by the Central government's promotion of 'scientific development', Guangdong would dedicate efforts to sustainable development and harmonious regional development. In the period, the Province would encourage and support self-innovation initiatives. It would enhance the development level of the PRD and strengthen the role of Guangzhou and Shenzhen as the leading cities in Guangdong. In addition, it would better facilitate the implementation of CEPA and map out measures to strengthen cooperation with Hong Kong and Macao. Besides, the Province would actively push forward Pan-PRD regional cooperation.

In fact, as stated in the "Work Report of Guangdong Province People's Government" (issued on 22 February, 2006), the Province would use the initiative to work even more closely with Hong Kong and Macao SARs. Infrastructure projects, cross-boundary flow of people and cargo, trade, tourism, environmental protection, science and technology, education, epidemic disease prevention and food safety would be among the major cooperation areas of the three sides.