

珠三角最新發展情況

Recent Developments in the Pearl River Delta



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背景

珠三角是推動中國經濟發展的其中一個最重要地區，亦是廣東省的經濟樞紐。根據廣東省的界定，珠三角經濟區包括九個市，分別是廣州、深圳、東莞、佛山、江門、中山、珠海，以及惠州(其中的惠州市區、惠東縣和博羅縣)和肇慶(其中的肇慶市區、高要市和四會市)。

地圖

廣東省及珠江三角洲經濟區



註：圖內橙色部分為珠江三角洲

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門)的主要管轄區

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



珠三角地區的經濟發展迅速，2004年的生產總值已達到13,394億元人民幣(1,618.2億美元)。珠三角的主要經濟指標見圖表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.

圖表1 珠江三角洲的主要經濟指標（當年價格）
Exhibit 1 Major economic indicators of PRD region (at current prices)

指標 Indicator	1980	1985	1990	1995	2000	2001	2002	2003	2004
戶籍人口(百萬人) ⁽¹⁾ Registered population (million persons) ⁽¹⁾	16.27	17.57	19.28	21.38	23.07	23.37	23.65	23.99	24.51
生產總值(億元人民幣) ⁽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
第一產業(億元人民幣) Primary industry (0.1billion yuan)	30.7	57.3	129.4	314.9	428.5	445.2	465.0	470.5	506.3
第二產業(億元人民幣) 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
第三產業(億元人民幣) 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
固定資產投資總額(億元人民幣) 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
消費品零售總額(億元人民幣) 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
出口總額(億美元) 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
實際利用外資總額(億美元) 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	註3 Notes 3
地方財政收入(億元人民幣) Local government revenue (0.1billion yuan)	23.4	49.9	95.9	315.3	595.6	745.7	768.7	848.0	932.0
地方財政支出(億元人民幣) 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
城鄉居民年終儲蓄存款(億元人民幣) 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

- 註： (1) 根據2000年進行的全國人口普查，珠三角經濟區共有人口4 080萬，與官方的戶籍人口數字有出入。兩者出現差異的主要原因，是前者計算了外來人口和流動人口，而後者則沒有把這兩類人口計算在內。由於前往珠三角就業者人數眾多，但卻沒有正式的“登記”戶籍，所以珠三角在這方面的人口差異較中國其他地區為大。
- (2) 內地出版的刊物已於2004年開始改稱地區的GDP為“地區生產總值”（例如廣東省生產總值）。中國內地整體的GDP仍稱為“國內生產總值”。
- (3) N.A. 暫時沒有數字

- 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 “地區生產總值” 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 “國內生產總值”.
- (3) N.A. Data not yet available

資料來源：廣東省統計局和 2002年、2003年、2004年及2005年的《廣東統計年鑑》。

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

圖表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	生產總值 ^(註 1, 3) (百萬元人民幣) GDP ^(Notes 1, 3) (million yuan) (按可比價格計算的逐年增長率) (yoy growth at comparable prices)	人均生產總值 ^(註 2, 3) (人民幣) (按可比價格計算的逐年增長率) Per capita GDP ^(Notes 2, 3) (yuan) (yoy growth at comparable prices)	消費品零售總額 (百萬元人民幣)(逐年增長率) Total Retail Sales of Consumer Goods (million yuan) (yoy growth)
廣州 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%)
江門 Jiangmen	69,564 (12.2%)	21,647 (11.0%)	27,583 (-0.7%)
東莞 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%)
肇慶 Zhaoqing	39,056 (13.2%)	13,945 (12.7%)	12,086 (-29.4%)

- 註： (1) 內地出版的刊物已於2004年開始改稱地區的GDP為"地區生產總值" (例如廣東省生產總值)。中國內地整體的GDP仍稱為"國內生產總值"。
- (2) 內地出版的刊物已於2004年開始改稱地區的Per capita GDP為"人均地區生產總值" (例如人均廣東省生產總值)。中國內地整體的Per capita GDP仍稱為"人均國內生產總值"。
- (3) 生產總值數字為初步核算數字，稍後會根據2004年的經濟普查結果作出調整。為適應經濟和社會發展需要，並與國家編製的五年規劃作好銜接，推進國民經濟核算與統計調查體系綜合配套改革，國務院於2003年7月決定，將原有的工業普查、第三產業普查和基本單位普查合併，並將建築業納入普查範圍，在2004年開展第一次全國經濟普查。普查的標準時點是2004年12月31日，時期資料為2004年度。

- Notes:(1) The Chinese term for Gross Domestic Product (GDP) of a region in the Mainland has been renamed as "地區生產總值" 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 "國內生產總值".
- (2) The Chinese term for Per capita GDP of a region in the Mainland has been renamed as "人均地區生產總值" in Mainland's publications starting from 2004 (e.g. 人均廣東省生產總值). That of the Mainland as a whole remains as "人均國內生產總值".
- (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.

資料來源：《廣東統計年鑑—2005》，2005年各市的統計公報及《廣東統計概要2006》

Sources: *Guangdong Statistical Yearbook 2005, statistical communiques of individual cities 2005 and 廣東統計概要2006.*

雖然珠三角經濟區只佔全國土地面積的0.4%及普查人口的3.2%，但在2004年卻佔國內生產總值的9.8%、總出口的30.6%及在2003年佔全國實際利用外來直接投資的26.1%(圖表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).

圖表3 珠三角經濟區對廣東和內地的重要性
Exhibit 3 The importance of PRD Economic Zone in Guangdong and the Mainland

	2004	
	珠三角經濟區所佔百分比 % share of PRD Economic Zone in	
	廣東 Guangdong	內地 Mainland
土地面積 Land area	23.2%	0.4%
戶籍登記人口 Population of Household Registration	31.4%	1.9%
普查人口 Census population	47.8%	3.2%
生產總值 GDP	83.5%	9.8%
出口 Exports	94.9%	30.6%
實際利用外來直接投資 Foreign Direct Investment actually used	89.7% (2003)	26.1% (2003)

資料來源：《中國統計年鑑—2005》、《廣東統計年鑑—2005》

Sources : China Statistical Yearbook 2005, Guangdong Statistical Yearbook 2005

圖表4 2005年珠三角個別城市的經濟指標
Exhibit 4 Economic indicators of individual cities in the PRD

主要城市	生產總值 ⁽¹⁾ (億元人民幣) GDP ⁽¹⁾ (0.1billion yuan)	生產總值的組合成分 ⁽¹⁾ Composition of GDP ⁽¹⁾		
		第一產業 (%) Primary industry (%)	第二產業 (%) Secondary industry (%)	第三產業 (%) Tertiary industry (%)
廣州 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
東莞 Dongguan	2,182.4	1.0	56.5	42.5
中山 Zhongshan	817.6	3.8	61.4	34.8
江門 Jiangmen	802.2	9.9	49.6	40.5
肇慶 Zhaoqing	453.6	31.2	25.6	43.2

- 註： (1) 此乃初步核算數字，實際數字有待修訂。為適應經濟和社會發展需要，並與國家編製的五年規劃作好銜接，推進國民經濟核算與統計調查體系綜合配套改革，國務院於2003年7月決定，將原有的工業普查、第三產業普查和基本單位普查合併，並將建築業納入普查範圍，在2004年開展第一次全國經濟普查。普查的標準時點是2004年12月31日，時期資料為2004年度。
- (2) 數字指規模以上的工業企業(全部國有工業企業和年產品銷售收入500萬元人民幣以上的非國有工業企業)。
- (3) N.A. 暫時沒有數字

- 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

資料來源：有關城市的統計公報和《廣東統計概要2006》

Sources : Statistical communiques of relevant cities and 廣東統計概要2006.

	工業總產值 ⁽²⁾ (億元人民幣) Gross Industrial Output ⁽²⁾ (0.1billion yuan)	進出口總額 (億美元) Imports and Exports (0.1billion USD)	實際利用外來 直接投資 (百萬美元) FDI actually used (million USD)	城市居民人均 可支配收入(人民幣) Per capita disposable income of urban residents (yuan)	人均生產 總值 ⁽¹⁾ (人民幣) Per capita GDP ⁽¹⁾ (yuan)	消費品零售總額 (億元人民幣) 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

珠三角成為製造及採購基地

經過二十多年的發展，珠三角不但成為國內實力雄厚的製造業基地，亦是世界工廠，在紡織及服裝、鞋履、塑膠製品、電腦、電子資訊、電子及電器產品、玩具等多個產業的發展上，均舉足輕重。珠三角地區在製造原料和半製成品方面佔有獨特的優勢，亦是全球多種產品的主要採購基地。

產業群及專業鎮

一如其他的地區經濟體系，珠三角內有多個發展蓬勃的產業群，而珠三角產業群的一個明顯特徵就是發展出一批專業鎮。這些專業鎮專門生產一種或多種特色產品，一般從事傳統的製造業、農業及電子資訊業。廣東目前有159個專業鎮¹。雖然珠三角區內不少專業鎮均位於珠三角西部城市，特別是佛山、江門和中山，但珠三角東部的部分城市亦有大量專業鎮，最典型的例子是東莞，廣東省有10個專業鎮均位於東莞市。圖表5載列珠三角部分專業鎮的資料。

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 資料來源：廣東省人民政府工作報告(2006年2月22日)

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

圖表5 廣東省部分專業鎮
Exhibit 5 Selected specialised towns in Guangdong

市 Cities	鎮 Towns	產業群 Industrial clusters	市 Cities	鎮 Towns	產業群 Industrial clusters
佛山 Foshan	Lanshi (瀾石)	Stainless steel 不銹鋼	東莞 Dongguan	Shilong (石龍)	Electronics 電子產品
	Zhangcha (張槎)	Knit wear 針織品		Zhangan (長安)	Electronics 電子產品
	Datang (大塘)	Vegetable 蔬菜		Dongfeng (東鳳)	Household electrical appliances 家庭電器
	Shiwan (石灣)	Construction ceramic 建築陶瓷		Minzhong (民眾)	bananas 香蕉
	Yanbu (鹽步)	Underwear 內衣		Humen (虎門)	Garment 成衣
	Chencun (陳村)	Flower 花卉		Dalong (大朗)	Knitted wear (wool) 毛織品
	Guangao (官窑)	Toy 玩具		Changping (常平)	Logistics 物流
	Nanzhuang (南庄)	Porcelain 瓷器		Shijie (石碣)	Electronics 電子產品
	Pingzhou (平洲)	Shoes 鞋履		Houjie (厚街)	Furniture 傢俬
	Lecong (樂從)	Furniture 傢俬		Qingxi (清溪)	Electronics 電子產品
	Lunjiao (倫敦)	Wood Machinery 木工機械	中山 Zhongshan	Shaxi (沙溪)	Garment 成衣
	Genglou (更樓)	Cultivation 農產品		Xiaolan (小欖)	Metal 金屬
	Xiqiao (西樵)	Textiles 紡織品		Guzhen (古鎮)	Lights 燈飾
	Jinsha (金沙)	Metal 金屬		Huangpu (黃圃)	Food 食品
	Dali (大滘)	Aluminium material 鋁材		Nantou (南頭)	Electrical appliances 電器用品
江門 Jiangmen	Jianghai (江海)	Electronic material 電子物料	Dayong (大涌)	Furniture 傢俬	
	Pengjiang (蓬江)	Motorcycle 電單車	Guangzhou 廣州	Shiling (獅嶺)	Leather product 皮革產品
	Shuikou (水口)	Heater 加熱器	Zhuhai 珠海	Xintang (新塘)	Jeans, garment 牛仔褲及成衣
	Encheng (恩城)	Microphone 揚聲器	Huizhou 惠州	Huangfu (黃埠)	Shoes 鞋履
	Shaping (沙坪)	Garment (manufacturing) 製衣		Zhaoqing 肇慶	Jinli (金利)
	Shagang (沙岡)	Textiles 紡織品			
	Shangxiachuan (上下川)	Ocean tourism 海洋旅遊業			
	Siqian (司前)	Stainless steel 不銹鋼			
Dao (大鰲)	Container 貨櫃				

資料來源：王珺：《珠江三角洲西岸地區產業集群生成機制研究》，《城市經濟、區域經濟》2006。

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

產業結構轉型

多年來，勞工密集的輕工業在推動廣東省工業發展方面一直佔主要地位。不過，這情況正出現轉變，廣東省的產業結構近年已逐漸轉型。

首先，珠三角正迅速轉向重工業發展，輕工與重工業比例已由1978年的56.6:44.4變為2004年的44.4:55.6。同年，重工業的總產值為12,867億元人民幣(1,554.5億美元)，較前一年上升28.8%。相比之下，輕工業較為遜色，總產值只有10,286億元人民幣(1,242.8億美元)，升幅為19%。在各類重工業中，重化工和器材製造業均錄得強勁增長，而石化、鋼材和汽車製造業亦發展迅速。舉例來說，汽車製造業在2004年的總產值為783億元人民幣(94.6億美元)，較前一年上升43%。

此外，珠三角的經濟結構亦出現重大轉變，第三產業所佔的經濟比重日漸增加。在1978至2004年間，以地區生產總值計算，珠三角三類產業的比例由25.8:45.3:28.9發展為3.8:53.8:42.4，第三產業所佔的比例增加了46.7%。

珠三角市場

今天，珠三角是內地最大、最成熟的消費市場之一。2004年，該區的人均生產總值為46,304元人民幣(5,594美元)，是全國平均的12,336元人民幣(1,490.4美元)的3.8倍。城市居民的人均可支配收入達17,290元人民幣(2,088.9美元)，是全國平均的9,422元人民幣(1,138.3美元)的1.84倍。

珠三角居民日益富裕，對各種服務(如教育、康樂文化、交通、郵遞通訊、金融等)的需求亦隨之增加。同時，商業服務近年亦隨着第二產業的持續增長而迅速發展。

2004年，珠三角的消費品零售總額達4,499億元人民幣(543.5億美元)，佔該區生產總值三分之一以上。主要的消費市場位於廣州及深圳，其零售額分別佔珠三角零售總額的37%及28%。

廣東消費者的消費模式與內地其他地區一樣，出現了重大變化。居民的可動用收入增加，提升了消費結構。

零售業不斷迅速發展。自2005年起，國家按照加入世貿的承諾進一步開放分銷業，全面取消在零售地點、擁有權架構及店舖數目方面對外資零售商的限制。此舉徹底改變了珠三角零售業的面貌，各類現代化零售經營模式，如超級市場、特大超級市場、便利店、專業服務店、專門店、購物商場／中心，以及網上訂購等，紛紛應運而生。

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.

加速基建發展

廣東省政府一直致力加強珠三角區內各地的交通連繫。現時廣東省所有大城市之間均有公路和鐵路連接。

鐵路

《珠江三角洲地區城際軌道交通網規劃(2005至2020年)》獲得通過，標誌着珠三角鐵路發展進入一個新里程。這些城際高速鐵路和內地鐵建成後，會在珠三角城際之間形成“一小時經濟生活圈”。這個“A”字型的主要網絡包括廣深²和廣珠兩條主幹線，另有兩條副線(廣州至肇慶；中山小欖至江門；東莞至惠州)和兩條連接珠三角兩岸城市(順德至番禺至東莞；中山至虎門)的支線。鐵路全長570公里，主幹線將於2010年建成。

其他正在興建的主要鐵路包括廣珠鐵路，連接廣州和位於珠三角西部的珠海。另一項工程是連接華中湖北省省會武漢及廣州的武廣高速鐵路。這條鐵路將會連接廣深港高速鐵路，屆時武漢至香港的車程將由現時的12小時縮短至5小時。第三項工程是由深圳至杭州的杭福深客運專線。按照內地現時的鐵路發展計劃，上述工程將於2010年完成。

高速公路／公路

根據《廣東省高速公路網規劃(2004至2030年)》文件，一個全長6 500公里的高速公路網將於2004至2030年間建成，其中2 140公里預計位於珠三角內。

現時，正在規劃或興建的主要高速公路／公路包括廣深沿江高速及深港西部通道、港珠澳大橋、京珠高速、廣珠西線及西部沿海高速公路。工程完成後，將會大大增強香港與內地的經濟聯繫及合作關係。

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 廣深主幹線延伸至香港，亦即廣深港高速鐵路。

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

港口

珠三角港口對工業製品出口至為重要。珠三角的主要港口位於深圳(鹽田、大鵬灣、赤灣、媽灣及蛇口)、廣州(南沙、黃埔、新沙、洪聖沙及西基)、珠海(高欄、洪灣、九洲、灣仔及斗門)和中山(神灣、小欖及中山)，當中以位於深圳的港口最為重要。2005年，深圳港的貨櫃吞吐量位列全球第四及全國第二位，達1 619.7萬標準貨櫃單位(較去年上升18.6%)。

根據《珠江三角洲地區港口建設規劃(2004至2010年)》文件³，截至2003年末，珠江三角洲地區港口吞吐能力是2.52億噸。因應珠三角地區將會進一步發展外向型加工業、船舶與汽車製造業、石油化工等重化工業，在集裝箱運輸及能源、原材料運輸等方面將有更大的需求，碼頭建設的重點亦會圍繞集裝箱和進口汽油泊位進行。預計到2010年，珠江三角洲地區的港口吞吐能力可達到6.5億噸。

機場

至於航空方面，大珠三角共有五個機場，分別為香港國際機場、澳門國際機場、深圳寶安國際機場、廣州新白雲國際機場及珠海機場。預期大珠三角對航空服務的需求將會大增，為大珠三角各個機場帶來大量商機。

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.

珠江三角洲城鎮群協調發展規劃 (2004至2020年)

過去數年，廣東省政府推出一連串措施，加強協調珠三角的工業發展。廣東省人大常委會先後於2005年1月和同年8月通過及頒布《珠江三角洲城鎮群協調發展規劃(2004至2020年)》。規劃中表明廣東省會銳意加快提升珠三角的整體競爭力，維持珠三角作為主要生產基地的地位，以及將珠三角發展為全球最具經濟活力的地區之一。

該協調發展規劃亦勾劃出珠三角的初步工業布局。未來數年，珠三角將重點發展下列經濟群：農業生產、加工製造、臨港重工業、大型器材製造、高新技術產業、國際物流樞紐和旅遊業。此外，珠三角亦會加速專業鎮和工業園區的發展，最終目的是創建實力和競爭力兼備的工業，鞏固珠三角作為全球生產基地的地位。

另一方面，粵港合作聯席會議轄下的粵港城市規劃及發展專責小組已展開大珠江三角洲城鎮群協調發展規劃研究，從前瞻性的角度考慮和分析大珠三角的發展方向，藉此制定城市和區域發展策略。有關策略旨在解決基建發展、環境保護和協調發展的架構機制等重大區域發展問題，從而加強大珠三角地區的整體競爭優勢，同時確保該區得以持續發展。研究已於2006年3月展開，預計在24個月內完成。

"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.

廣東“十一五”規劃

廣東“十一五”規劃為廣東省定下2006至2010年的發展藍圖。在該五年內，隨着國家加入世貿的過渡期於2005年完結，廣東在國際貿易上將面臨激烈競爭。

根據“十一五”規劃，廣東將會集中力量改善經濟、文化與法律制度，並建設和諧社會。廣東將爭取生產總值在未來五年年增長率不少於9%，並且在2010年生產總值達33,500億元人民幣(4,088億美元)。預期到了2010年，廣東的人均生產總值會較2000年的翻一翻，達到34,824.5元人民幣(4,250美元)。該省三類經濟產業的比例，預計會由2005年的6.3:49.5:44.2變為2010年的5:50:45；而2010年的單位生產總值能源消耗會較2005年的最少降低13%。

此外，為響應中央政府號召以“科學發展觀”指導建設，廣東將致力推動可持續發展及和諧區域發展。在“十一五”期間，該省將鼓勵和支持自主創新的措施。廣東將會提升珠三角的發展水平，鞏固廣州及深圳作為廣東省領導城市的地位，又會大力推動落實CEPA，制訂加強粵港澳合作的措施。此外，廣東亦會積極推進泛珠三角區域合作。

事實上，正如在《廣東省人民政府工作報告》(於2006年2月22日發表)所述，廣東將會通過上述措施，與香港及澳門特區更緊密合作。三地合作的主要範疇包括基建、跨境人流物流、貿易、旅遊、環境保護、科學與科技、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.