



# MONTHLY UPDATE ON CHINA

January 2019



# Details of Mature Clusters

23/1/2019

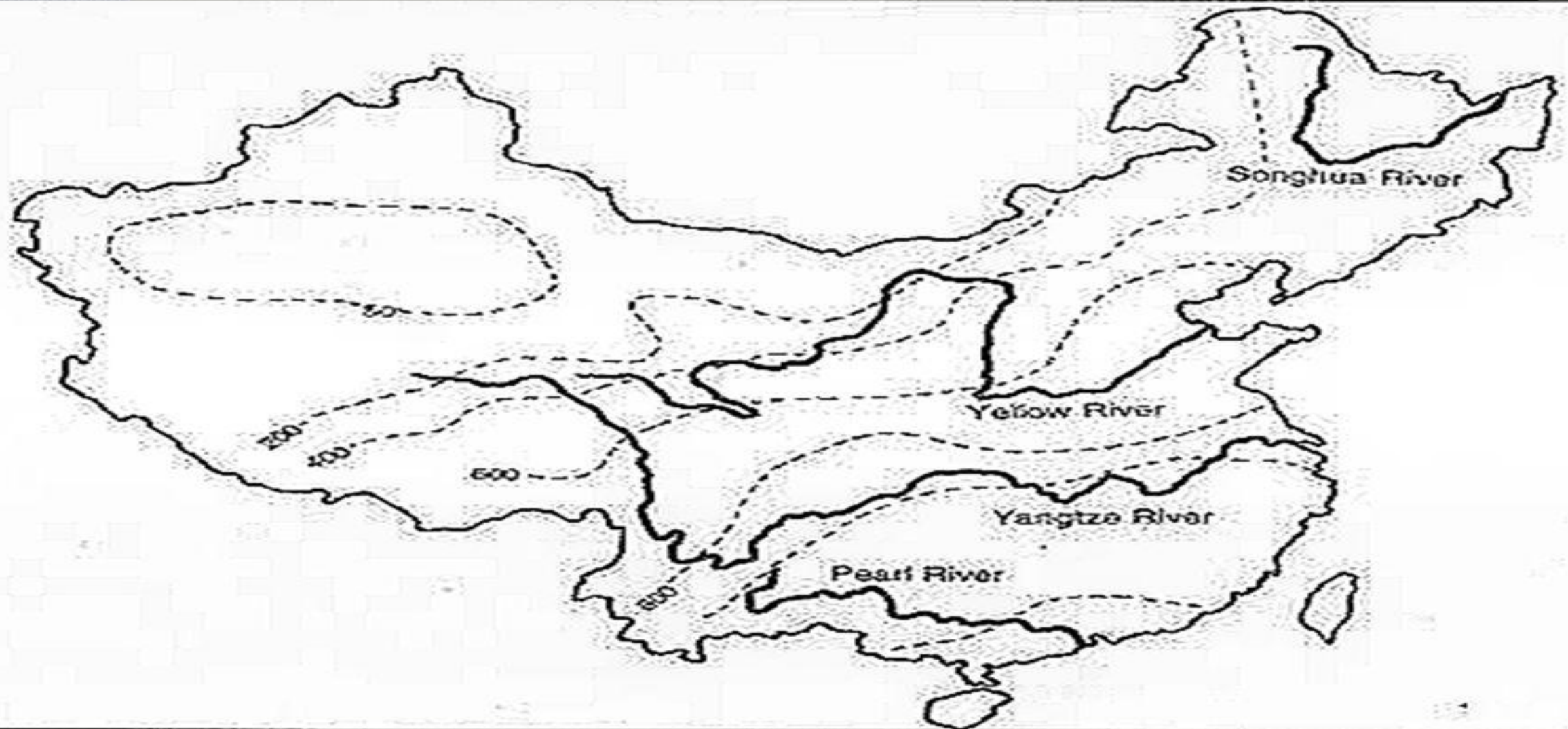
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# Three Mature Economic Clusters

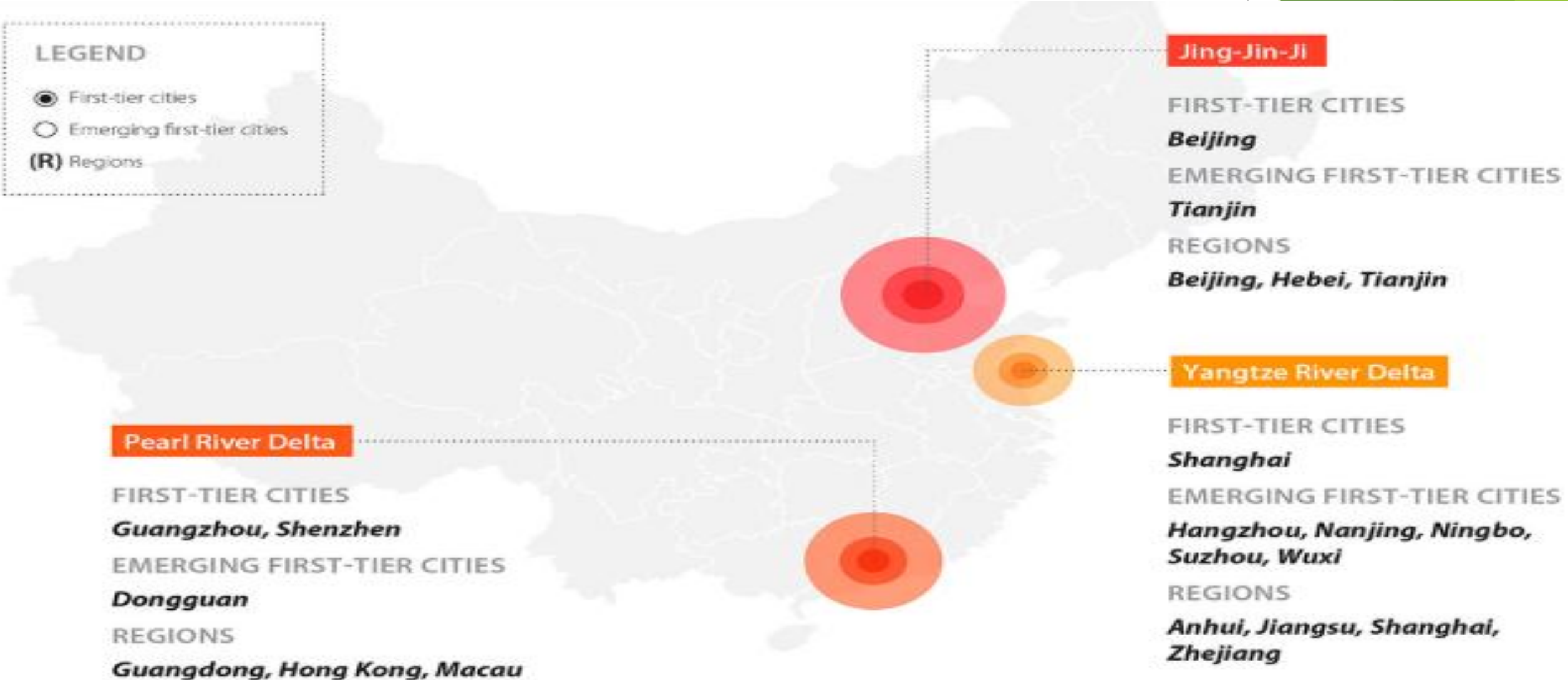
- ▶ The Beijing-Tianjin-Hebei region (Jing-Jin-Ji)
- ▶ The Yangtze River Delta (YRD)
- ▶ and the Pearl River Delta Greater Bay Area (PRD) will be developed by China as three world-class city clusters.



# Major Rivers of China



# Super Cluster and Tier Cities





# The Beijing-Tianjin-Hebei Region (Jing-Jin-Ji)

## Jing-Jin-Ji

### KEY CITIES

13

### LAND AREA

215,991 km<sup>2</sup>

### POPULATION

112 million

### 2016 GDP (RMB)

7,562.50 billion

### 2016 GDP PER CAPITA (RMB)

67,699



# The Yangtze River Delta (YRD)

## Yangtze River Delta

KEY CITIES

26

LAND AREA

351,318 km<sup>2</sup>

POPULATION

222 million

2016 GDP (RMB)

17,722.59 billion

2016 GDP PER CAPITA (RMB)

80,022



# Pearl River Delta (PRD)

## Pearl River Delta

KEY CITIES

11

LAND AREA

179,478 km<sup>2</sup>

POPULATION

118 million

2016 GDP (RMB)

10,515.03 billion\*

2016 GDP PER CAPITA (RMB)

89,738\*





# Chinese Clusters and other Global Clusters

- ▶ The Chinese government aims for these super-regions to compete against other world-class regions around the world, including the Tokyo Bay, the New York Tri-State Area, and the San Francisco Bay Area
- ▶ The average size of the five biggest clusters in China is 110 million people, which is almost triple the size of Tokyo, the biggest city cluster currently in the world, with a population of 40 million.

# Comparable to Other Countries

During 2016

1. The YRD GDP was equal to Germany
2. The PRD GDP was to Italy
3. and Jing-Jin-Ji to Mexico

The YRD is by far the biggest of the

► In 2016, the YRD contributed

1. **23 percent to China's GDP**
2. **Jing-Jin-Ji 10 percent**
3. **and the PRD (including all of Guangdong) 14 percent**

- At the city level, the YRD also has the most economically competitive cities.
- According to the Global Urban Competitiveness Report 2017-18 released by UN-Habitat and the Chinese Academy of Social Sciences,
- the YRD has 14 cities in the top 200 of the global Economic Competitive Index, while the PRD has eight and Jing-Jin-Ji two.

## Regional Economic Competitiveness

Cluster	Number of cities in top 200 rankings	Selected top cities	Economic Competitiveness Index	Rank in China	Rank in World
Yangtze River Delta	14	Shanghai	0.8367	3	14
		Suzhou	0.7648	7	28
		Nanjing	0.7261	8	44
Pearl River Delta	8	Shenzhen	0.9337	1	6
		Hong Kong	0.8873	2	12
		Guangzhou	0.8346	4	15
Jing-Jin-Ji	12	Beijing	0.8102	5	20
		Tianjin	0.7866	6	23

## Regional Innovation

Cluster	Number of cities in rankings	Selected top cities	Index and rank
Yangtze River Delta	6	Shanghai	89.00 (3)
		Hangzhou	73.00 (5)
		Suzhou	70.00 (9)
Pearl River Delta	2	Shenzhen	90.00 (2)
		Guangzhou	75.00 (4)
Jing-Jin-Ji	2	Beijing	100.00 (1)
		Tianjin	73.00 (6)

## Regional Business Appeal

Cluster	Number of cities in rankings	Selected cities	Index and Rank in YiCai 2018 China City Business Appeal Index
Yangtze River Delta	6	Shanghai	188.55 (1)
Pearl River Delta	3	Shenzhen	119.97 (3)
		Guangzhou	119.67 (4)
Jing-Jin-Ji	2	Beijing	186.62 (2)



## Regional Infrastructure

Cluster	International airports		Ports	
	Number of international airports	Passengers at international airports (2017)	Ports in the world top 20 (2016)	Cargo volume - goods throughput (1,000 tons)
Yangtze River Delta	9	210 million	Shanghai	647,446
			Ningbo	469,025
Pearl River Delta	4	191 million	Guangzhou	544,374
			Hong Kong	256,730
			Shenzhen	189,509
Jing-Jin-Ji	3	126 million	Tianjin	428,098

# Sources

- ▶ <http://blog.frontierstrategygroup.com/2014/08/trace-lights-ii-chinas-19-city-clusters-2020/>
- ▶ <https://www.china-briefing.com/news/chinas-mega-city-clusters-jing-jin-ji-yangzte-river-delta-pearl-river-delta/https://www.weforum.org/agenda/2014/09/urbanization-localization-product-innovation-china/>
- ▶ <https://www.china-briefing.com/news/chinas-city-clusters-plan-to-transform-into-19-super-regions/>
- ▶ <http://pubdocs.worldbank.org/en/343681455906838472/China-City-Clusters-Bertaud.pdf>
- ▶ [https://www.mckinsey.com/~media/McKinsey/Featured%20Insights/Urbanization/Preparing%20for%20urban%20billion%20in%20China/MGI\\_Preparing\\_for\\_Chinas\\_Urban\\_Billion\\_full\\_report.ashx](https://www.mckinsey.com/~media/McKinsey/Featured%20Insights/Urbanization/Preparing%20for%20urban%20billion%20in%20China/MGI_Preparing_for_Chinas_Urban_Billion_full_report.ashx)