



MONTHLY UPDATE ON CHINA

January 2019



Pearl River Delta (PRD)

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LEGEND

● First-tier cities

○ Emerging first-tier cities

(R) Regions

Jing-Jin-Ji

FIRST-TIER CITIES

Beijing

EMERGING FIRST-TIER CITIES

Tianjin

REGIONS

Beijing, Hebei, Tianjin

Yangtze River Delta

FIRST-TIER CITIES

Shanghai

EMERGING FIRST-TIER CITIES

*Hangzhou, Nanjing, Ningbo,
Suzhou, Wuxi*

REGIONS

*Anhui, Jiangsu, Shanghai,
Zhejiang*

Pearl River Delta

FIRST-TIER CITIES

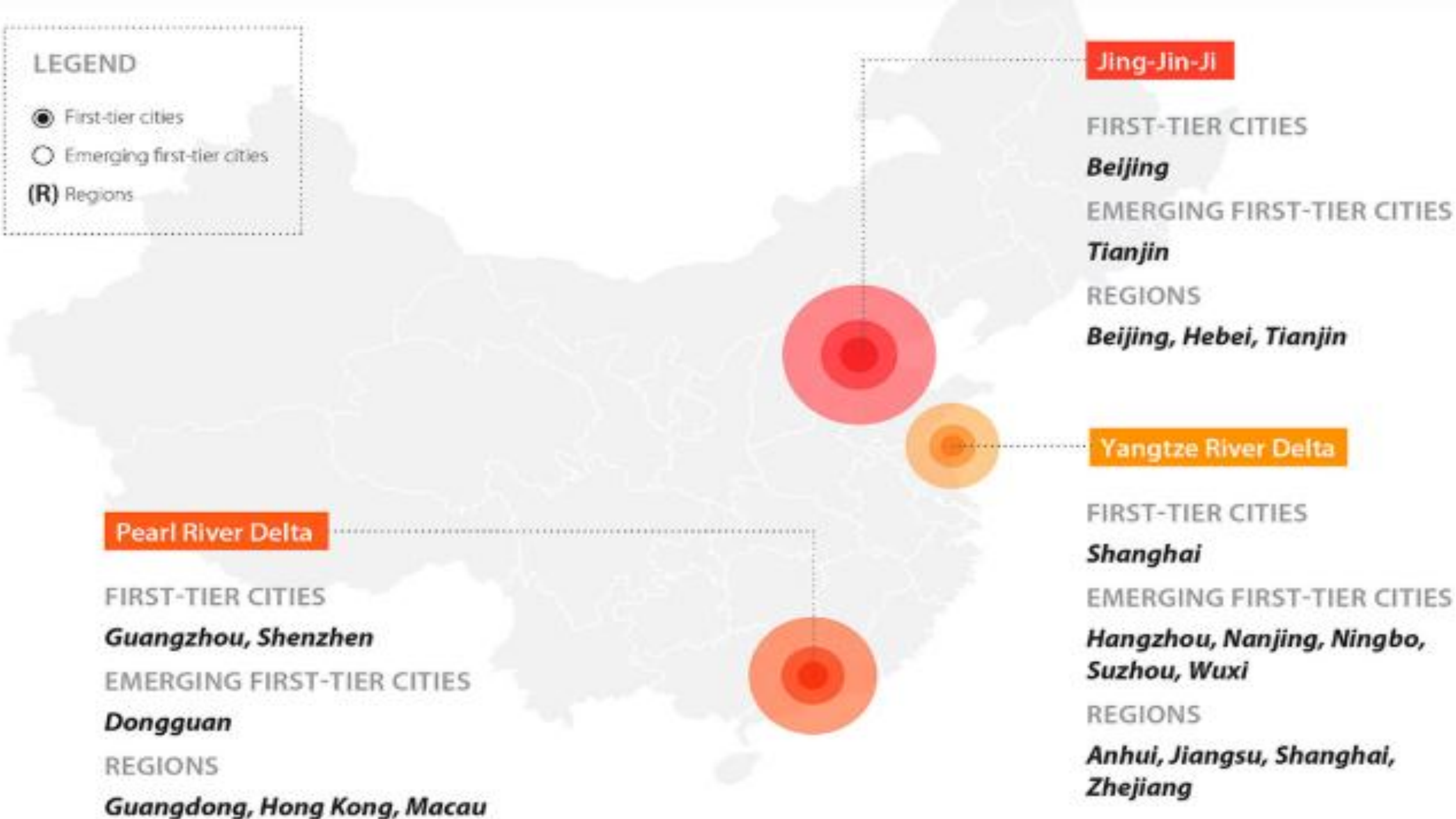
Guangzhou, Shenzhen

EMERGING FIRST-TIER CITIES

Dongguan

REGIONS

Guangdong, Hong Kong, Macau

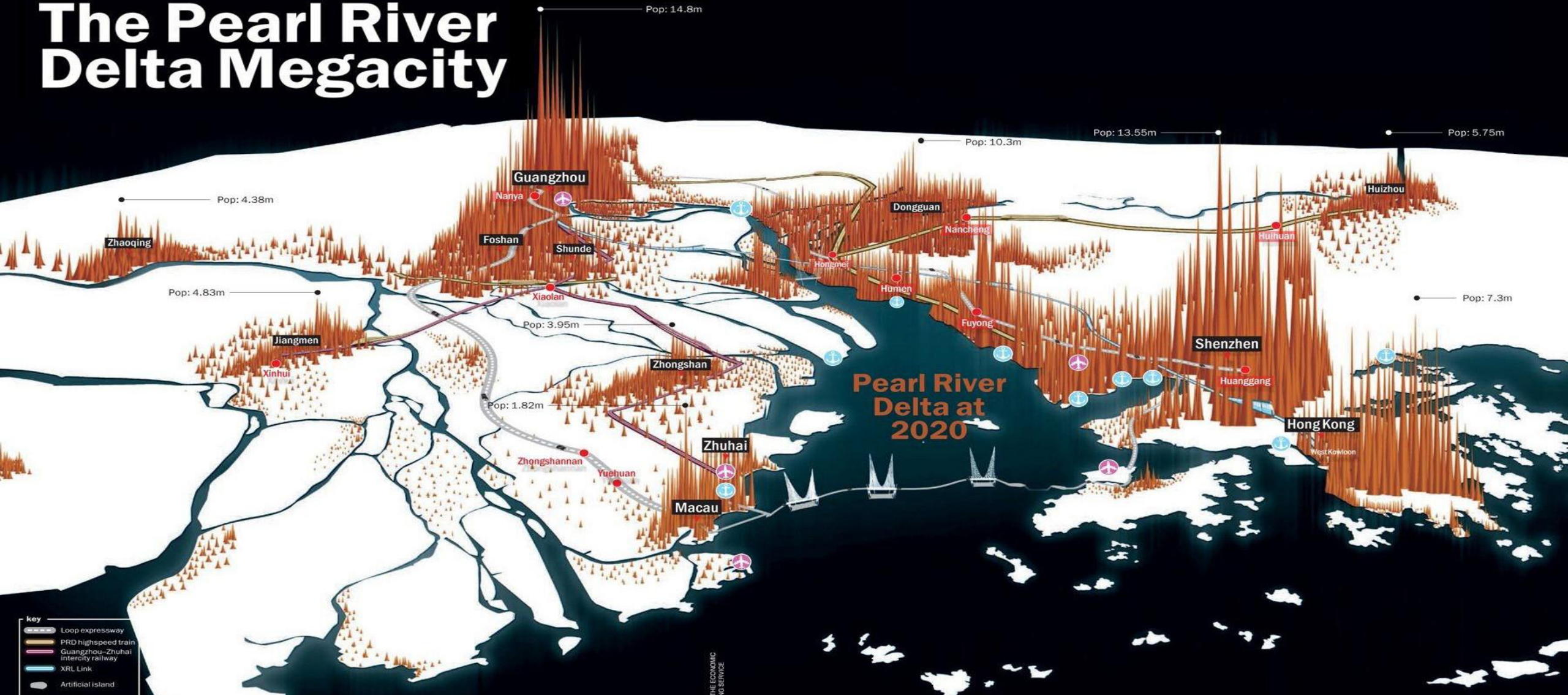


Pearl River Delta

- ▶ The Pearl River Delta is dubbed as the "factory floor" of the world .
- ▶ This is also known as the "Silicon Delta" .



The Pearl River Delta Megacity



Key

- Loop expressway
- PRD high-speed train
- Guangzhou-Zhuhai intercity railway
- XRL Link
- Artificial island
- Bridge link
- Tunnel
- Hong Kong-Zhuhai-Macau Bridge
- Humen bridge
- City
- Town
- Port
- Airport

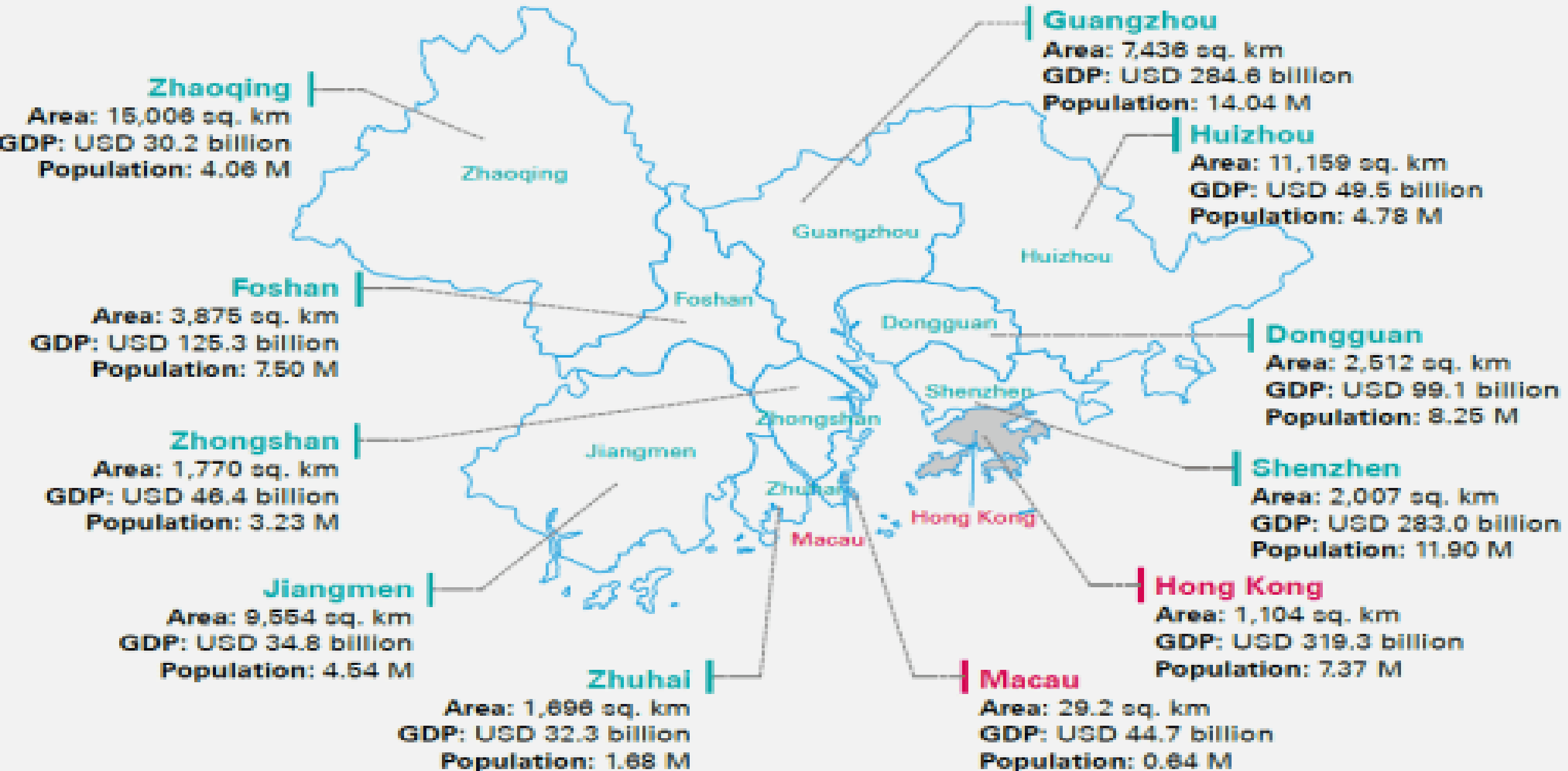
ALL PROJECTED FIGURES PROVIDED BY THE ECONOMIC INTELLIGENCE UNITS CHINA FORECASTING SERVICE

Pearl River Delta GDP (RMB): 135,000million Life expectancy: 80 years

Guangzhou GDP (RMB): 230,276m Birth Rate: 0.62% Industry: Services, finance	Dongguan GDP: 98,794m Birth Rate: 0.20% Industry: Manufacturing	Zhuhai GDP: 179,698m Birth Rate: 0.84% Industry: Transport hub	Zhongshan GDP: 152,291m Birth Rate: 0.38% Industry: Healthcare, fine chemicals	Jiangmen GDP: 76,057m Birth Rate: 0.65% Industry: Advanced manufacturing
Huizhou GDP: 105,948m Birth Rate: 0.61%	Shenzhen GDP: 221,883m Birth Rate: 0.42% Industry: Hi-tech,	Foshan GDP: 146,918m Birth Rate: 0.32% Industry: Machinery,	Hong Kong GDP: 269,279m Birth Rate: 1.1%	Zhouqing GDP: 78,851m Birth Rate: 1.71%

ILLUSTRATION BY GERGEN BRULEZ
 RESEARCH BY ISABELLE CHEUNG

PRD with Cities, Area, Population and GDP



Cities	Land area (sq km)	Population (mn)	GDP (RMB bn)	GDP growth (%)	Per Capita GDP (RMB)
Guangzhou	7,249	14.04	1,954.7	8.2	141,933
Shenzhen	1,997	11.91	1,949.3	9.0	167,411
Zhuhai	1,732	1.68	222.6	8.5	134,548
Foshan	3,798	7.46	863.0	8.3	115,891
Huizhou	11,347	4.78	341.2	8.2	71,605
Dongguan	2,460	8.26	682.8	8.1	82,682
Zhongshan	1,784	3.23	320.3	7.8	99,471
Jiangmen	9,505	4.54	241.9	7.4	53,374
Zhaoqing	14,891	4.08	208.4	5.0	51,178

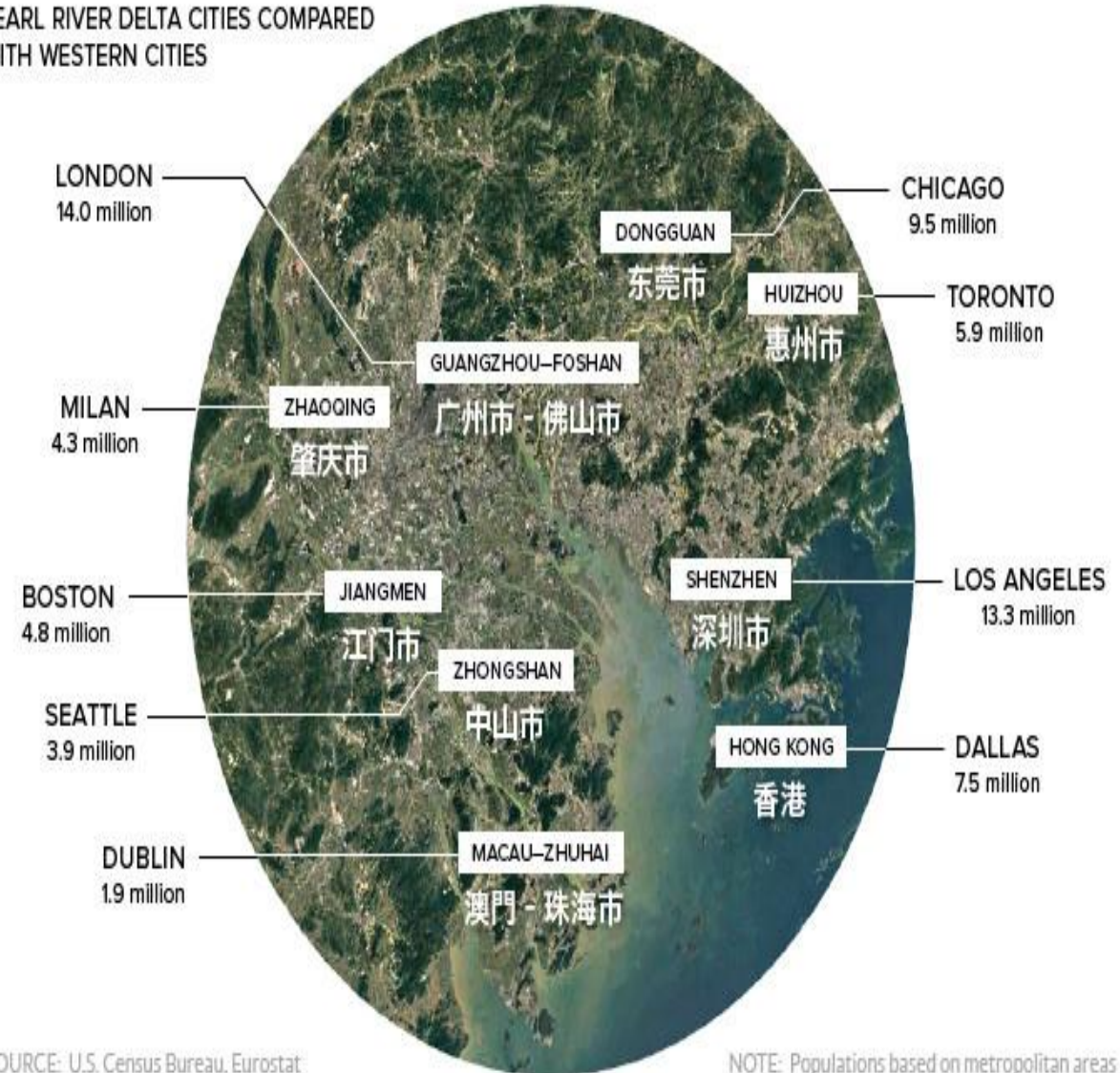
Pearl River Delta

- ▶ PRD is one of the most vibrant economic regions.
- ▶ In 2016, Real GDP of the PRD grew by an average of 8.3%
- ▶ The PRD accounted for 54.5% of Guangdong's population or 4.3% of China's total population
- ▶ The PRD accounted for 79.3% of Guangdong's GDP or 9.1% of China's GDP
- ▶ The PRD accounted for 94.4% of Guangdong's exports or 26.9% of China's total export
- ▶ The PRD accounted for 72.1% of Guangdong's retail sales or 7.5% of China's total retail sales of consumer goods

Pearl River Delta comparison with Western Cities

	Pearl River Delta	Greater New York	San Francisco Bay	Tokyo Bay
Population	66.7	23.4	7.2	43.5
Economic output (million USD)	1,334	1,614.6	712.8	1,783.5
Per capita economic output	20,000	69,000	99,000	41,000
Land area thousand sq. km	56.0	17.4	17.9	36.8

PEARL RIVER DELTA CITIES COMPARED WITH WESTERN CITIES



SOURCE: U.S. Census Bureau, Eurostat

NOTE: Populations based on metropolitan areas

PRD Composition of GDP (%)

	1980	2008	2016
Primary Industry (%)	25.8	2.4	1.8
Secondary Industry (%)	45.3	49.9	42.1
Tertiary Industry (%)	28.9	47.7	56.1

Source: Guangdong Statistical Yearbook 2016

Guangdong-Hong Kong-Macao Greater Bay Area

- ▶ The 55-km bridge, situated in the waters of Pearl River Estuary, connects the Hong Kong Special Administrative Region (SAR), Zhuhai and the Macao SAR
- ▶ The bridge is the first of its kind for Guangdong, Hong Kong, and Macao to jointly build a supergiant sea-crossing traffic project under the principle of "one country, two systems."

HONG KONG – ZHUHAI – MACAO CROSSING



PRD in 2000 to 2008



Guangdong's growing clusters

100km

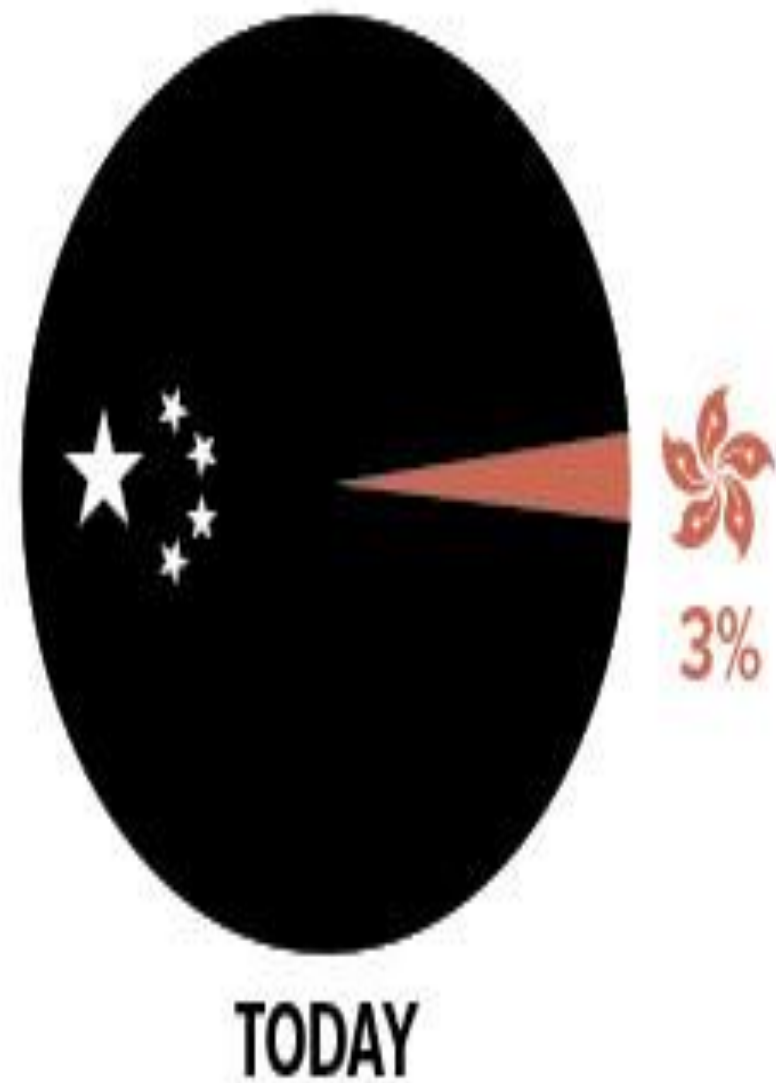
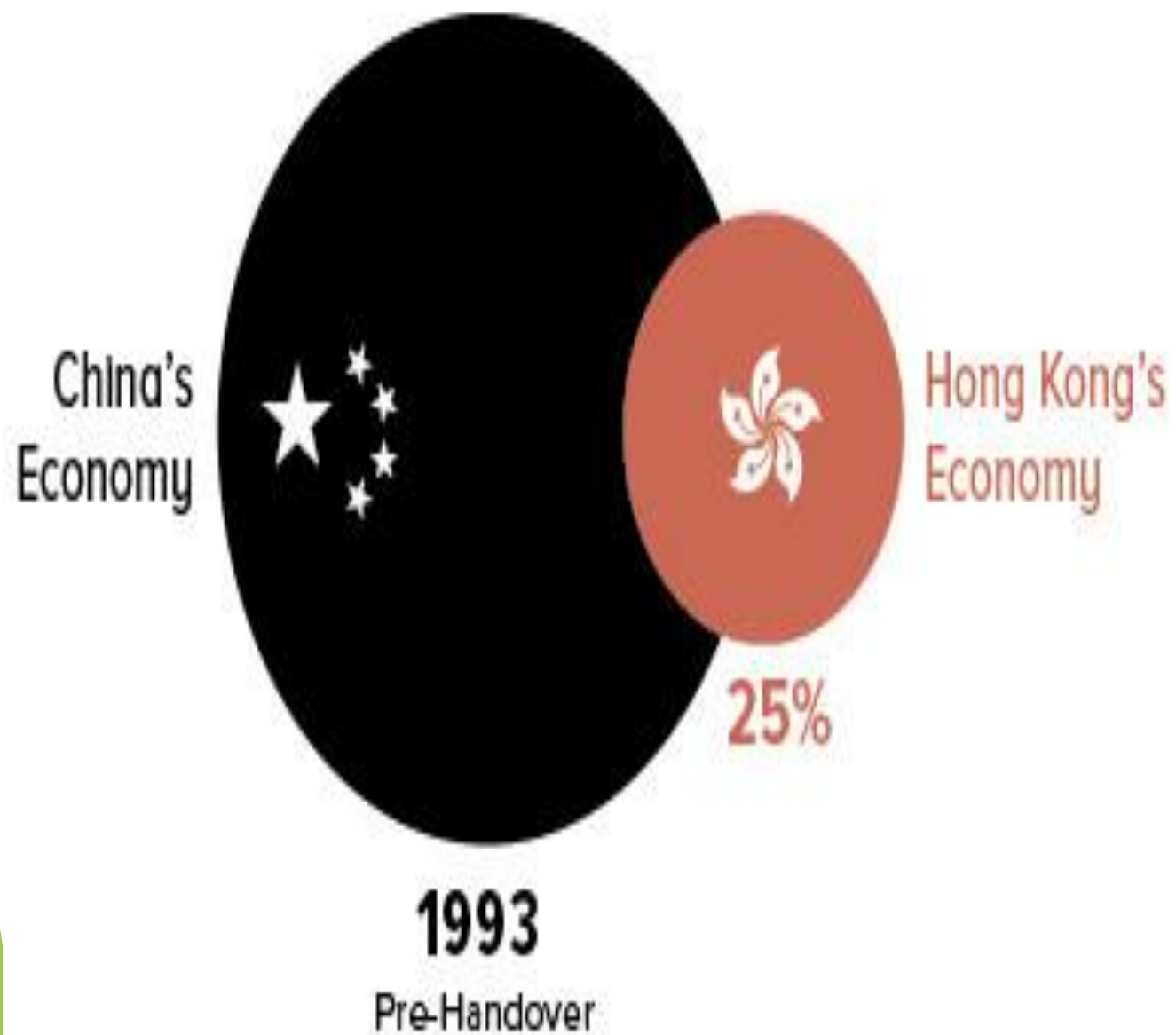


- Guangzhou-Foshan-Zhaoqing+Qingyuan+Yunfu
- Shenzhen-Dongguan-Huizhou+Heyuan+Shanwei
- Zhuhai-Zhongshan-Jiangmen+Yangjiang
- Other growth areas



Source: Guangdong government

HONG KONG'S ECONOMY IN RELATION TO CHINA



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.weforum.org/agenda/2018/08/megacity-2020-the-pearl-river-delta-s-astonishing-growth>