



大珠江三角洲概覽

An overview of the Greater Pearl River Delta

大珠江三角洲的定義

大珠江三角洲(大珠三角)地區包括香港特別行政區、澳門特別行政區，以及廣東省的珠江三角洲(珠三角)經濟區。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，以及惠州和肇慶的市區(大珠三角的11個管轄區和所佔的土地面積見圖表1和地圖)。

Definition of the Greater Pearl River Delta

The GPRD includes the HKSAR, the Macao Special Administrative Region, and the PRD Economic Zone portion of Guangdong Province. The PRD Economic Zone, as specified by Guangdong Province, includes nine municipalities, namely Guangzhou, Shenzhen, Dongguan, Foshan, Jiangmen, Zhongshan, Zhuhai, and the urban areas of Huizhou and Zhaoqing (see Exhibit 1 and map below for the 11 jurisdictions of the Greater Pearl River Delta and their land area).

廣東省及珠江三角洲經濟區

Guangdong Province and the Pearl River Delta Economic Zone

資料來源：投資推廣署(www.investhk.gov.hk)
Source: Invest HK (www.investhk.gov.hk)



註：圖內橙色區域為珠江三角洲
Note: The area shaded orange denotes the Pearl River Delta

圖表1：大珠江三角洲管轄區和土地面積

Exhibit 1: Jurisdictions of the Greater Pearl River Delta and their land area

香港 Hong Kong	珠江三角洲經濟區 Pearl River Delta Economic Zone		澳門 Macao
	東莞 Dongguan	深圳 Shenzhen	
	佛山 Foshan	肇慶 Zhaoqing	
	廣州 Guangzhou	中山 Zhongshan	
	惠州 Huizhou	珠海 Zhuhai	
	江門 Jiangmen		
1,100平方公里 sq km	41,698平方公里 sq km		26平方公里 sq km

大珠江三角洲的主要管轄區

Main Jurisdictions in the Greater Pearl River Delta Region



資料來源：投資推廣署(www.investhk.gov.hk)
Source: Invest HK (www.investhk.gov.hk)

大珠三角的發展

二十多年前，廣東省珠三角大部分地區尚未發展。珠三角早期以務農為主，直到國家在七十年代末推行改革開放政策，才成為全球發展最快的地區之一。

八十年代初，鄰近港澳的深圳和珠海成為經濟特區，以特設的規定和稅制吸引外資，促使不少港商把工廠遷往鄰近的深圳特區以及珠三角其他地區，借助內地低廉的土地、工資和營運成本生產。勞工密集的工業北移至珠三角，而高增值的服務如管理、金融、物流、設計、科研、品質保證等行業則留港發展。

Development of the GPRD

Some twenty years ago, the PRD in Guangdong Province was largely undeveloped and largely engaged in agricultural activities. It was not until the introduction of the open-door policy and economic reforms in the late 1970s that the region has transformed into one of the fastest-growing areas in the world.

In the early 1980s, the areas next to Hong Kong and Macao became the Special Economic Zones (SEZs) of Shenzhen and Zhuhai respectively. These SEZs had special regulations and taxation to attract foreign investments. Hence, many Hong Kong manufacturers moved into the Shenzhen SEZ nearby as well as other parts of the PRD to take advantage of cheaper land, labour and operating costs. Whilst labour-intensive activities shifted to the PRD, higher value-added activities, such as management, finance, logistics, design, R&D, quality assurance etc. remained in Hong Kong.

珠三角的經濟結構近年出現了新一輪的轉變，由從前以製造業為主的，逐漸發展為知識型的經濟體系。廣東省一直積極拓展服務業，發展較高增值的服務。另一方面，又增加汽車製造、石油化工及設備製造等高增長和具有長增值鏈的高科技產業及重工業的比重。因此，珠三角正轉型為生產力高、科研發展力強的經濟重鎮。

香港在金融、管理、會計、法律服務、產品設計、品牌創造、分銷管理、市場推廣和公共關係上的優勢，結合珠三角在製造和科研發展方面的實力，使大珠三角成為實力雄厚的經濟地區。

珠三角的國內生產總值由1980年的稍低於120億元人民幣(14.5億美元)，上升至2003年的11,340多億元人民幣(1,370億美元)(見圖表2：珠江三角洲主要經濟指標)。期間，珠三角的國內生產總值每年平均增長21.9%，增幅遠較廣東省(13.6%)和全國(9.6%)為高。2003年，珠三角的人均國內生產總值為39,782元人民幣(4,806美元)，是廣東省的2.3倍，全國的4.36倍。在珠三角地區，以廣州、深圳、佛山和東莞這幾個城市的發展最為蓬勃；2003年，這些城市的人均國內生產總值都超過4萬元人民幣(4,833美元)(圖表3)。

珠三角是廣東省的經濟中心，雖然土地面積只佔全省的25%，但2003年的國內生產總值卻佔全省的83.2%。此外，珠三角已逐漸成為一個具有吸引力的消費市場。過去二十多年，珠三角消費品的零售額由1980年的70.7億元人民幣(8.5億美元)，激增至2003年的3,976.6億元人民幣(480.4億美元)。2003年的消費品零售額較一年前增加11.8%，佔全省總零售額的70%以上。

In recent years, a new wave of transformation of the PRD's economic structure - from one that has been predominantly manufacturing-based to one that is gradually becoming knowledge-based - has taken place. Guangdong Province has been keen in developing its service capabilities and diversifying into higher value-added services. Meanwhile, it has increased the proportion of high-tech and heavy industries such as automobiles, petrochemicals and equipment manufacturing industries, which feature high growth and long production industry value chains. Hence, the PRD is transforming into a dynamic place with high levels of productivity and considerable scientific R&D capabilities.

It is the combination of Hong Kong's strengths in financing, management, accounting, legal service, product design, branding, distribution management, marketing and public relations with the PRD's abilities in production and R&D research that has enabled the GPRD to emerge as an economic powerhouse.

The GDP of the PRD grew from just below 12 billion yuan (US\$1.45 billion) in 1980 to over 1,134 billion yuan (US\$ 137 billion) in 2003 (see Exhibit 2 for a summary of the major economic indicators of the PRD). During the period, the average annual growth rate of GDP in the PRD was 21.9%, well above that of Guangdong Province (13.6%) and the country as a whole (9.6%). The per capita GDP of the PRD amounted to 39,782 yuan (US\$ 4,806) in 2003, which is 2.3 times that of Guangdong Province and 4.36 times that of the whole country. Within the PRD region, Guangzhou, Shenzhen, Foshan and Dongguan are the most prosperous cities, and the per capita GDP of each of them was over 40,000 yuan (US\$4,833) in 2003 (Exhibit 3).

The PRD is the economic hub of Guangdong province. It accounted for 25% of Guangdong's land area but contributed to 83.2% of the province's GDP in 2003. Moreover, the PRD has increasingly become an attractive consumer marketplace. Over the past two decades, the retail sales of consumer goods in the PRD increased dramatically from 7.07 billion yuan (US\$ 0.85 billion) in 1980 to 397.66 billion yuan (US\$ 48.04 billion) in 2003. In 2003, the retail sales of consumer goods grew by 11.8% year-on-year, and accounted for over 70% of the provincial total.

圖表2：珠江三角洲的主要經濟指標(按當時價格計算)

Exhibit 2: Pearl River Delta Region Major Economic Indicators (at current prices)

指標 Indicator	1980	1985	1990	1995	2000	2001	2002	2003
登記人口(百萬人) (註) Registered population (million persons) (Note)	16.27	17.57	19.28	21.38	23.07	23.37	23.65	23.99
國內生產總值(億元人民幣) Gross domestic product (billion yuan)	119.2	303.9	872.2	3,899.7	7,378.6	8,363.9	9,418.8	11,341.1
第一產業(億元人民幣) Primary industry (billion yuan)	30.7	57.3	129.4	314.9	428.5	445.2	465.0	470.5
第二產業(億元人民幣) Secondary industry (billion yuan)	54.0	148.7	404.6	1,957.1	3,657.3	4,139.0	4,688.1	5,939.6
第三產業(億元人民幣) Tertiary industry (billion yuan)	34.5	97.9	338.2	1,627.7	3,292.9	3,779.8	4,265.6	4,930.0
固定資產投資總額(億元人民幣) Total amount of investment in fixed assets (billion yuan)	16.6	128.4	231.4	1,491.0	2,291.6	2,566.8	2,886.6	3,739.7
消費品零售總額(億元人民幣) Total amount of retail sales of consumer goods (billion yuan)	70.7	198.0	445.7	1,544.7	2,781.4	3,120.1	3,481.3	3,976.6
出口總額(億美元) Total amount of exports (US\$ billion)	6.2	16.3	81.4	461.1	847.4	908.3	126.1	1,450.6
實際利用的外資(億美元) Amount of foreign capital actually utilized (US\$ billion)	1.0	7.4	15.4	85.8	125.4	141.9	150.2	170.3
政府收入(億元人民幣) Government revenue (billion yuan)	23.4	49.9	95.9	315.3	599.1	745.7	768.7	878.0
政府支出(億元人民幣) Government expenditure (billion yuan)	8.2	26.1	76.4	316.6	685.4	822.7	963.6	1,075.0
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 (billion yuan)	21.0	112.0	552.7	2,810.4	6,641.0	7,670.6	9,240.2	11,068.9

資料來源：廣東省統計局和 2001 年、2002 年、2003 年及 2004 年的《廣東統計年鑑》。

Sources: Guangdong Provincial Statistics Bureau, and Guangdong Statistical Yearbook 2001, 2002, 2003, 2004.

註：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，與官方的登記人口數字有出入。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。

Note: 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.

圖表3：2003年珠三角主要城市居民的生活水平

Exhibit 3: Living standard of local residents in major cities of the PRD in 2003

主要城市 Major City	國內生產總值 GDP (百萬元人民幣) (million yuan) (逐年增長率) (yoy growth)	人均國內生產總值 Per capita GDP (百萬元人民幣) (million yuan) (逐年增長率) (yoy growth)	消費品零售總額 Total Retail Sales of Consumer Goods (百萬元人民幣) (million yuan) (逐年增長率) (yoy growth)
廣州 Guangzhou	349,687.87 (15.2%)	48,372 (14.2%)	149,427 (9.02%)
深圳 Shenzhen	289,540.70 (19.2%)	54,545 (9.3%)	80,177 (16.27%)
珠海 Zhuhai	47,327.42 (17.5%)	37,675 (16.3%)	15,918 (10.95%)
佛山 Foshan	138,159.51 (16.1%)	40,444 (14.7%)	47,319 (12.72%)
江門 Jiangmen	73,008.25 (11.1%)	19,131 (10.9%)	27,784 (11.86%)
東莞 Dongguan	94,796.54 (19.5%)	60,158 (17.6%)	33,800 (50.26%)
中山 Zhongshan	50,140.43 (18.6%)	28,645 (16.4%)	15,361 (14.35%)
惠州 Huizhou	59,097.72 (13.9%)	20,759 (12.7%)	18,167 (12.84%)
肇慶 Zhaoqing	46,639.14 (11.4%)	11,907 (10.9%)	17,120 (10.72%)

資料來源：《廣東統計年鑑—2004》

Source: Guangdong Statistical Yearbook 2004

大珠三角的競爭力

香港和珠三角在經濟上互動互補，帶動了大珠三角地區發展各式各樣具國際競爭力的工業和產業羣。大珠三角不僅是各種資源、物料和資本貨物的重要工業市場，也是運輸及貿易服務的主要市場。

(1) 製造業

大珠三角在國際輕工業和科技製造業的市場上甚具競爭力，也許可說已成為全球最重要的輕工業製品中心，以及全球高科技電子產品的主要裝配點之一。大珠三角在這些工業上具備的主要優勢包括：低廉的土地和工資、高效率的勞工、妥善的基礎設施、日益進步的技術，以及政府的政策支持。此外，這些產業亦借助本港的投資、管理、市場知識、科技和國際聯繫拓展業務。

Competitiveness of the GPRD

The economic interaction between Hong Kong and the PRD has fostered the development of a range of internationally competitive industries and clusters in the GPRD. The region is important as an industrial market for all sorts of inputs, materials, and capital goods. It is also a major market for transportation and trade-related services.

(1) Manufacturing industries

The GPRD has achieved a high level of international competitiveness in light manufacturing and technology-based manufacturing. The region has become perhaps the world's leading centre for a wide range of light-manufactured goods and one of the leading locations for assembling manufacturing of high-tech electronics products. The region's greatest strengths in these industries include low land and labour cost, productive workforce, reasonable infrastructure, improving technical skills, and a supportive policy regime. The industries also benefit from the investment, management, market knowledge, technology, and international connections obtained through Hong Kong.

(2) 運輸服務

大珠三角地區的運輸服務主要由國際貿易帶動。大珠三角是全球主要的製造業和出口基地之一，而且地位日益顯要，因而成為全球海空貨運服務的最大市場之一。一直以來，本港擁有全球最繁忙的貨櫃港和國際航空貨運機場。最近，珠三角（特別是深圳和廣州）的港口和機場發展非常迅速，為付運人提供更多的貨運容量和選擇，也為區內的運輸服務帶來發展動力。

(3) 貿易和商業服務

大珠三角的出口量在過去二十多年大幅增長，使區內的貿易、採購、貨運代理、物流、貿易融資、法律及其他相關服務的需求上升。香港是國際貿易和金融中心，具備發展完善的服務業，吸引大量跨國企業的採購部門，以及物流、資訊和其他貿易服務公司進駐香港。類似服務亦在珠三角發展，數量與日俱增。時至今日，大珠三角已經成為內地貿易服務的主要中心。

至於商業服務方面，香港資金自由流動、有效率的規管制度，又匯聚世界各地的技術專業人才，足以提供大量的專業和商業服務，供應大珠三角的龐大需求。

(4) 產業羣

大珠三角發展的一個明顯特徵是湧現了一大批各行各業的產業羣，如製衣和紡織、鞋履、塑膠製品、電器、電子、印刷、運輸、物流、金融服務等。這些產業羣大多分布在範圍較小的地方（圖表4顯示各行各業往往集中在珠三角的某些城市和鄉鎮）。

產業羣已經成為大珠三角的主要競爭優勢。在產業羣中，企業可共用相關的生產資源、具有專門技能的勞工、分銷和訊息渠道，以及聯繫網絡等，從而

(2) Transportation services

Transportation services in the GPRD region are driven largely by international trade. Given the growing prominence of the GPRD as one of the world's leading manufacturing and export bases, the region has become one of the largest markets for sea and air cargo services in the world. Hong Kong has long been the world's busiest container port and airport for international airfreight. Recently, the ports and airports in the PRD, particularly those in Shenzhen and Guangzhou are developing very fast. This provides shippers with additional capacity and additional choice, as well as impetus for development of transportation services in the region.

(3) Trade-related and business services

The massive export surge of the GPRD region over the last two decades has increased demand for trading, sourcing, freight-forwarding, logistics, trade finance, legal, and other related services in the region. Hong Kong being an international trade and finance centre, with a well-developed service industry, has become a magnet to the buying and sourcing offices of multinational enterprises, as well as to logistical, information, and other services related to trade. Increasingly, similar services are developing in the PRD. Hence, the GPRD has become a major centre for trade-related services in the Mainland.

As for business services, Hong Kong's free flows of capital, efficient regulatory system and skilled professionals from all over the world have greatly contributed to a good supply of professional and business services to meet the enormous demand for such services in the GPRD.

(4) Industrial clusters

A distinctive feature of the development of the GPRD is the emergence of a broad range of clusters in various industries such as garments and textiles, footwear, plastic products, electrical goods, electronics, printing, transportation, logistics, financial services, etc. Many of these clusters can be found in relatively small geographic areas. (Exhibit 4 shows a wide range of industries in which there is a strong geographic concentration in individual cities or towns in the PRD).

Industrial cluster has become a major source of the GPRD's competitiveness - enterprises within a cluster can enjoy economies of scale from sharing related production inputs, specialized labour pools, distribution and communication channels, and also networking. Moreover, such clustering can also spur competition, which encourages information, knowledge and technology transfer among related

受惠於規模經濟效益。此外，這些產業羣亦可推動競爭，促進相關企業互通資訊、知識和技術。這種知識與技術的轉移有助發展新的產業，從而帶動產業羣的整體發展。

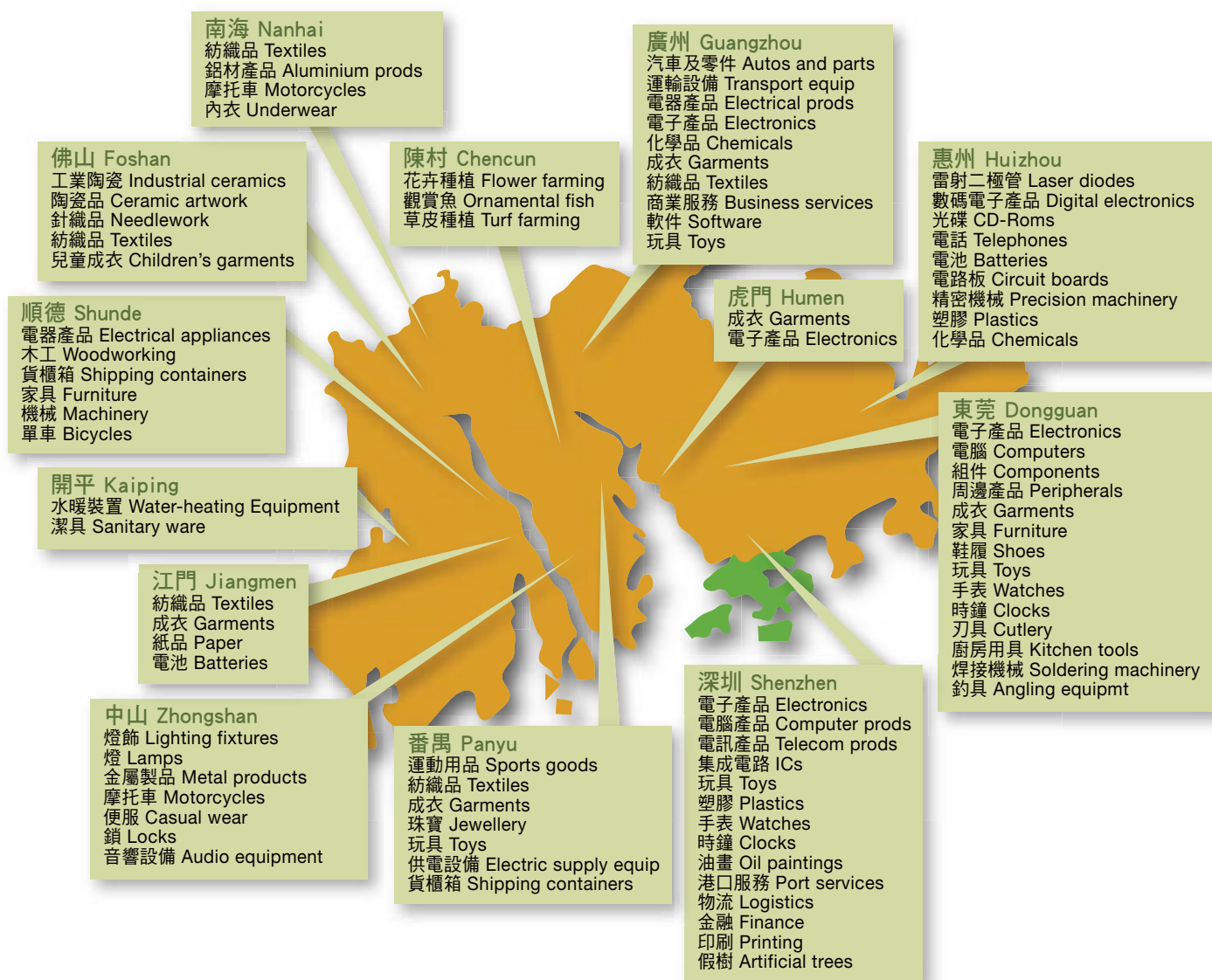
產業羣是地區經濟的重要一環，大珠江三角的經濟一直受惠於各地區產業羣的穩步發展。

enterprises within the cluster. Such type of knowledge and technology transfer may lead to new industry growth, thereby helping to drive the overall growth of the cluster.

Industrial cluster is an integral part of the regional economy. The GPRD economy has been benefiting from the steady growth of the local clusters.

圖表4：珠三角的地區工業

Exhibit 4: Localised Industries in the Pearl River Delta Region



資料來源：《香港與珠江三角洲：經濟互動》，恩萊特等著，2003年

Source: "Hong Kong and the Pearl River Delta: the Economic Interaction", M. Enright et al., 2003.

近期影響大珠三角發展的措施

(1) 世貿和CEPA

國家持續進行經濟自由化和改革開放，對大珠三角的經濟帶來重要影響。2001年國家加入世界貿易組織(世貿)，2003年簽署《內地與香港關於更緊密經貿關係的安排》(CEPA)，以及多項促進粵港經濟合作的政策措施，均有助增強大珠三角的經濟增長。

根據世貿協議，中國須逐步開放服務業市場。不少跨國企業將會把握這個機會，開拓龐大的中國市場。由於珠三角毗鄰以香港為基地的世界級服務機構，因此會大大受惠。

在CEPA框架下，預期大珠三角會通過貨物和服務貿易、投資便利化和旅遊業，加速融合。CEPA准許香港多個服務界別以先於內地對世貿訂下的開放時間表進入內地市場，使以香港為基地的企業可以早着先機，赴內地發展。

(2) 泛珠三角區域合作

2003年8月，廣東省政府提出泛珠三角區域合作的構思。泛珠三角包羅九個省份，再加上香港和澳門兩個特別行政區¹。整個地區的面積佔全國面積的五分之一，人口超過全國的三分之一，國內生產總值合計達到52,145億元人民幣(6,300億美元)。

今天，國際間的競爭已不再局限於一個城市，而是以區域為單位，同時，每個經濟區亦必須擁有獨特的優勢(“核心”)和腹地。泛珠三角區域合作成功，將可大大增強區內的經濟實力、地位和影響力，並有助達致區域協調發展的目標。香港和廣東是區內經濟最發達的兩個地方，當可攜手合作，戮力開拓和利用這個巨大經濟區域的潛力和機遇。

¹ 泛珠三角由廣東、福建、湖南、廣西、海南、四川、貴州、江西和雲南九個省份，再加上香港和澳門兩個特別行政區組成，又稱為“9+2”。

Recent initiatives shaping the development of the GPRD

(1) WTO and CEPA

China's continuing process of economic liberalisation and opening will have an important influence on the economies of the GPRD. China's accession to the WTO in 2001, the signing of CEPA between the Mainland and Hong Kong in 2003, and the various policy initiatives to enhance economic cooperation between Guangdong and Hong Kong have helped strengthen economic growth of the GPRD.

Under WTO's agreement, China has to gradually open up its service sector to the world. Many multinational enterprises will make use of this opportunity to tap the huge Chinese market. In this connection, the PRD, with its proximity to world-class service providers based in Hong Kong, shall be a strong beneficiary.

With CEPA, the GPRD is expected to integrate even faster through trade in goods and services, investment facilitation and tourism. In many service sectors, CEPA is lowering barriers of entry into the Mainland for Hong Kong service providers before China's WTO commitments take effect, allowing enterprises based in Hong Kong an early mover advantage.

(2) Pan-PRD cooperation

The concept of Pan-Pearl River Delta (Pan-PRD) regional cooperation was proposed by the Guangdong Government in August 2003. The Pan-PRD region comprises nine provinces and the Hong Kong and Macao Special Administrative Regions¹. The region makes up one-fifth of China's landmass, contains more than one-third of its population and a combined GDP of \$5,214.5 billion yuan (US\$630 billion).

Nowadays, international competition is no longer on a city basis, but rather on a regional basis, and that each economic region possesses unique strengths ('core') and a hinterland. A successful Pan-PRD regional collaboration will give a huge boost to the economic strength, status and influence of the region concerned and help realise the objective of coordinated regional development. Hence, Hong Kong and Guangdong, being the two most developed economies in the region, must together play a very critical role in exploring and utilising the potentials of and opportunities brought by this growing regional giant.

¹ The Pan-PRD region is made up of nine provinces including Guangdong, Fujian, Hunan, Guangxi, Hainan, Sichuan, Guizhou, Jiangxi and Yunnan as well as Hong Kong and Macao special administrative regions. The region is also known as "9+2".

(3) 改善運輸基建

為了促進大珠三角的合作，我們必需發展一系列運輸基建和相關設施，以配合隨着區內貿易投資大幅增長而激增的需求。最近，粵港兩地正不斷推動多項跨界基建的發展。舉例來說，港珠澳大橋的前期規劃工作進展良好，三方已就大橋的定線和落腳點達成共識。此外，兩地政府正進行廣深港高速鐵路的前期工作，並正全力興建深港西部通道，以期在2006年下半年前落成啟用。在泛珠三角區域進行類似的合作，對進一步促進區內的融合至為重要。

大珠三角面對的挑戰

大珠三角地區誠然擁有龐大的潛力，具備實力成為全球最有活力的地區之一，但前路並非毫無障礙，仍有不少問題和挑戰足以左右未來的發展。事實上，很多挑戰都是區內急速發展所致。發展迅速對珠三角的基建、環境、能源和其他公共服務造成壓力，其中環境惡化等問題已在粵港兩地引起很大的關注。

此外，大珠三角正面對內地其他地區的激烈競爭。十多年前，長江三角洲（長三角）的經濟發展落後於珠三角，但現已急起直追，成為推動內地經濟發展的另一個重要動力源頭。長三角近年的出口增長更超越珠三角。另一方面，華北的環渤海地區亦正在冒起，將在內地的經濟發展方面擔當重要的角色。

事實上，大珠三角面對種種挑戰和問題，將會促使區內各地更加緊密合作。總而言之，大珠三角端賴區內各政府和私人機構緊密合作，才能持續興旺發展。

(3) Improvement in transport infrastructure

To facilitate GPRD cooperation, it is important to develop a range of transport infrastructure and related facilities to keep pace with the surging needs resulting from substantial growth of trade and investment in the region. Recently, the Hong Kong and Guangdong authorities have been making progresses concerning cross-boundary infrastructure developments. For example, the advanced planning work of the proposed bridge linking Hong Kong, Zhuhai and Macao has been progressing well, with consensus reached on the alignment and landing sites. They are also taking forward the preparatory work of the Guangzhou-Shenzhen-HK Express Rail Link and working at full steam on the construction of HK-Shenzhen Western Corridor with the objective of ensuring its opening by the second half of 2006. Similar cooperation in the Pan-PRD region would be important to facilitate better regional integration.

Challenges faced by the GPRD

There is no doubt that there is enormous potential for the GPRD region to extend its position as one of the most dynamic regions in the world. Yet the region is not growing without challenge – the region is facing a number of issues and challenges that can influence its future development. In fact, many of these challenges stem from the rapid growth of the region. The rapid pace of development has placed great strains on the infrastructure, environment, energy and other public services in the PRD. Some issues, for instance, the problem of environmental degradation, have become a major concern for both Hong Kong and Guangdong.

Besides, the GPRD is facing strong competition from other regions in China. The Yangtze River Delta (YRD), whose economy lagged behind the PRD some ten years ago, is surging as another major economic engine of China. The YRD's export growth recently overtook that of the PRD. The Bohai Rim in Northern China is also going to play a key role in economic development.

Indeed, the challenges and issues that the GPRD faces would provide incentive for different parts of the region to work together even more closely. All in all, it is through close cooperation between governments and private sector in the region that the GPRD can continue to prosper in the future.