



# SOUTH CHINA BUSINESS JOURNAL

THE AMERICAN CHAMBER OF COMMERCE IN SOUTH CHINA

SPECIAL REPORT

## 2009 SPECIAL REPORT ON THE STATE OF BUSINESS IN SOUTH CHINA

## 2009 年华南地区 经济情况特别报告

Last updated: March 2, 2009

This *Special Report*, compiled by the American Chamber of Commerce in South China with the support of Hewitt Associates (Shanghai) Co., Ltd. and Dezan Shira & Associates Ltd., is an annual publication intended to provide an overview of the economy of Southern China, its progress and development, and the successes and challenges of the individual companies operating in it. This *Special Report* is distributed to the members of the American Chamber of Commerce in South China and other chambers of commerce, diplomatic missions and government institutions of the United States, the People's Republic of China and foreign nations throughout Asia Pacific, and all other interested parties throughout the world.

华南美国商会组织编译、并与翰威特咨询（上海）有限公司和协力商业顾问有限公司共同合作完成的这份“特别报告”，是商会的年度出版物。它旨在概述华南地区经济发展进程的状况和各企业在该地区经营商业活动时获得的成功和面临的挑战。“特别报告”将派送至华南美国商会及其他商会会员；美国中国、及其他国家亚太地区商会、外交组织、政府机构；美国国会议员、中国政府领导人和其他美国政府领导人，以及所有对此感兴趣的国际商业团体成员。

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THE AMERICAN CHAMBER OF COMMERCE IN SOUTH CHINA

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华南美国商会

# 2009年华南地区经济情况特别报告



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## Hewitt

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# Contents 目录

President's Report 会长报告	6 7
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## Study Results 调查结果

Demographics 受访企业统计	12 13
Revenue and profitability 收入和利润	18 19
South China 华南地区	22 23
Investment trends 投资趋势	24 25
The business environment in South China 华南地区的营商环境	30 31

## Economic Overview 经济概况

Overview: Greater South China 华南地区经济概况	40 41
Guangdong Province 广东省	44 45
Fujian Province 福建省	50 51
Guangxi Zhuang Autonomous Region 广西壮族自治区	54 55
Hainan Province 海南省	60 61
Hong Kong Special Administrative Region 香港特别行政区	66 67
Macau Special Administrative Region 澳门特别行政区	68 69



## President's Report

**I**N MY MIND, the results of this year's State of Business in South China study indicate two things: first, that the ongoing economic slowdown in China and abroad is having a tangible effect on the business operations of participating companies, but second, that it does not appear to be the "end of the economic world," at least in South China.

In support of the first observation, I offer reports of substantially lower investment budgets—a decrease of some 50% and 40% from last year's 1- and 3-year budgets, respectively—in addition to the fact that more than 50% of participants indicated a somewhat or significant negative perceived effect of the economic slowdown in China and abroad on their operations. Furthermore, although profitability rates for participants remained consistent with prior years, the percentage of companies who were profitable but not meeting budget expectations has increased by nearly 20% since 2007. While last year we observed the beginning of this trend and speculated that it might have been a case of strong performance leading to increasingly lofty profitability expectations, in the context of this year's results I would suggest that that may not, in fact, be the case and that this precipitous decrease may be better explained by the onset of the economic slowdown's first symptoms.

In support of the second observation, however, I would revisit the profitability rate of participants from a different angle. Surely, the fact that just over 70% of companies reported already being profitable, with nearly 100% expecting profitability within three to five years is a positive thing. While profitability is not the only indicator of success, and while we have seen profitable businesses suffer greatly and declare bankruptcy in the past year, this suggests to me that the business environment remains, as a whole, at least sufficiently competitive for the time being. I would further point out that while investment budgets are reported to have shrunk considerably, they have not disappeared entirely. We estimate that the participants of this study have budgeted a total of nearly \$6.5 billion for investments in the coming year, and just under \$11 billion over the next three years. While last year those same budgets were reported as \$11 billion and \$16 billion respectively, companies simply do not invest billions of dollars into a market devoid of promise.

This tension between cautious optimism for the future and a present mindset seemingly occupied by survival is, in my opin-

ion, the most interesting and the most illustrative idea that we can draw from this report.

**I**FEEL CONFIDENT in drawing these concepts from the data that follows because of the demonstrable consistency of the trends over the past several years that this study has been executed. We first began this effort in its present form in 2006, and have continued since then making only minor changes to the questions involved and adding a few questions to address contemporary issues.

Perhaps the largest change to our methodology since this study commenced has been the sample size. In 2006 we had 161 participants. That number grew in 2007 to 364 and again in 2008 to 419. This year 551 companies participated. Nevertheless, we have found that the demographic breakdowns have remained remarkably constant—roughly the same number of companies have reported being profitable each year, the distribution of company size, both in terms of revenue and employees, has remained fairly stable, as has nearly every other demographic metric.

It is generally considered that the larger a sample size, the more clearly resolved indicators will be. The fact that this year's results in terms of demographic metrics are not suspiciously divergent from previous years, and that strong, meaningful trends in investment and business focus have developed, gives us confidence that these results correlate to and are consistent with what is actually happening "on the ground" in South China.

One of the more positive trends that we have observed has been that of the shift of focus onto China, rather than the export market. In 2006, roughly 46% of study participants indicated that their main objective was to providing goods or services to the local market. In 2007, this number reached 50.1%, growing again to 57.5% in 2008. This year, fully 72.5%—very nearly three out of every four companies—have indicated that their top priority is providing goods or services to Chinese consumers. While this has obvious benefits in an economic climate in which export industries are particularly hard-hit, given the historical development of this trend it appears to be primarily a product of strategic insight, rather than a response to the current slowdown. This shift, coincidentally or not, is furthermore in line with the Chinese government's own efforts to move the domestic econo-

## 会长报告

根据今年“华南地区经济情况调查”的结果，我认为有两点需要指出：首先，中国及海外持续的经济放缓对于受访企业的经营状况产生了实质的影响；但其次，放缓并不代表“经济世界的尽头”，至少在华南地区并没有。

为了说明第一点，我在此提出报告中显示投资预算明显下降的数据——受访企业去年所做的1至3年内投资预算分别有40%和50%的下降。——同时，超过50%的受访企业表示感觉到中国或海外的经济放缓对于他们的运营产生了一定程度或是很大程度上的负面影响。此外，对受访企业来说虽然收益率与前些年维持一致，但从2007年开始，赢利但未达预期目标的企业比例增加了将近20%。去年开始我们注意到上述趋势，并估计这也许是由于整体经营状况佳造成企业对盈利的高预期造成的。但从今年的调查结果来看事实可能并非如此，我认为企业实现盈利目标数字的骤减，或许更好的解释了经济放缓开始的最初征兆。

然而，为了支持我的第二个观点，我将从不同的角度对受访企业的收益率进行审视。非常明确，超过70%的企业表示已经实现赢利，而预期在三到五年内赢利的受访者接近100%，这是非常积极的情况。但收益率不是衡量运营成功的唯一标准，当去年我们看到原本盈利的企业遭受严重打击甚至宣告破产的时候，就营商环境整体来说，至少在当时竞争是非常激烈的。我想进一步指出的是，虽然投资预算出现相当程度的萎缩，但投资预算并没有完全消失。我们估计参与受访企业的下一年投资预算总额达到近65亿美元，对未来三年的预算也达到约110亿美元。而去年同等时间内的预算分别达到110亿美元和160亿美元，企业不会简单盲目地承诺将数十亿美元投向市场。

在我看来，对未来谨慎乐观的态度和现在苦于生存的心态两者之间的紧张关系是最有意思的，也是这份报告中最说明问题的之处。

我对从数据中得出这些结论感到有信心，因为在过去的几年间，当报告面世之后，报告中提出的趋势都被逐一证实。从2006年开始，我们第一次使用现行模式进行调查工作，从那之后只对涉及的调查问题进行过少许修改并增加了一些其他题目来补充当前存在的问题。

从开始到现在，在调查中最大的改变可能是样本数量。2006年有161家企业参与调查。这个数字在2007年增加到364家，又被2008年的419家再次刷新。今年，有551家企业参与了调查。尽管如此，我们发现调查结果的统计分析仍然保持一致——粗略估计，每年有相同数量的企业表明实现赢利，从盈利情况与雇佣员工数量显示的公司规模的分布都相对稳定，接近其他统计数据。

通常情况下，样本数量越多，得出的结论会更清晰。根据统计标准，今年的结果与往年的并没有分歧。那些投资与经营重点趋势稳固的、有意义的不断发展，让我们对调查结果信心十足，这些结果与中国“实际”正在发生的一切紧密相联。

据我们观察，其中更为积极的趋势之一就是：相对于之前对出口市场的重视，现在企业开始向中国市场转移。2006年，约46%的受访企业表示他们的主要目标是向当地市场提供产品或服务。在2007年，这个数字达到50.1%，到2008年又再次增长到57.5%。今年，整整72.5%——差不多是四分之三的企业——的受访企业表示他们最主要的经营目标是向中国消费者提供产品或服务。这在当前经济的大环境下有明显的好处，尤其在当前出口行业遭遇沉重打击的形势下，与其说是针对现时经济放缓的对应，不如说这种趋势的历史性发展是战略性眼光的主要产物之一。不管是否巧合，这种转型仍然与中国政府致力于提升国内经济的价值链、限制一定类型的贸易（这类型贸易活动通常是拥有高附加值出口地获益，中国从中获得大量的贸易顺差）的目标相一致。我相信，这是在经济环境中一种根本性的机制转变，有理由看到，这将促进中国经济增长进入下一个阶段。

在我们的研究结果中显现出的生存与发展的相互作用也同样被其他报告所证实。一月初，商务部表示，在2008年前十个月的外商直接投资超出2007年同期水平35%，但若将11月份计算在内，相应的增长则跌至26.3%。对于整个2008年，年度增长仅有23.6%，表明在2008年最后一季度投资量的实质放缓。<sup>1</sup>

在这里我提及外商直接投资量并不仅因为它是该调查的重要衡量标准之一（仅14%的受访企业是来自中国内地），也由于其在中国经济发展史上所扮演的重要角色。在2005年第九届中国国际投资贸易洽谈会（投洽

my up the value chain and limit a certain type of transaction in which China receives a large trade surplus in exchange for export destinations benefiting from the majority of added value. This is, I believe, a fundamentally organic shift in the business environment, and one that will arguably allow China's economic growth to enter its next phase.

**T**HIS INTERPLAY BETWEEN survival and growth that can be seen in our study results is corroborated by other reports. In early January, the Ministry of Commerce reported that growth in FDI in the first 10 months of 2008 was 35% over the same period in 2007, while the figure dropped to only 26.3% when including November. For the entirety of 2008, year-on-year growth was merely 23.6%, indicating a substantial slowing of inflow in the last quarter of 2008.<sup>1</sup>

I reference FDI inflow here not only because that is essentially what this study measures (only 14% of participants were from the Chinese mainland), but also because of the role FDI has played in China's historic economic development. At the 9th China International Fair for Investment and Trade (CIFIT) in 2005, then-Vice Premier Zeng Peiyan noted that:

Today, the industrial added-value of foreign invested enterprises accounts for 1/4 of China's total industrial added-value; they contribute 1/5 of China's total tax revenues, directly employ 1/10 of China's urban work force, and account for 1/2 of China's total exports.<sup>2</sup>

In light of this, I believe it is justifiable to suggest that the fate of foreign invested enterprises (FIEs) in China is intimately related to the health of the overall economy. We, as a community of foreign investors in China, employ millions of Chinese workers, contribute billions of yuan in tax revenue, and play an important role in the cross-pollination of ideas, practices and values that is, for the most part, an extremely positive side-effect of globalization.

It is in this context that I view more and more companies not meeting budget expectations for profitability, and in which I see a slow, but steady decrease in confidence in the business environment from extremely high (91.5% in 2007) to merely high (85.2% in 2009). It is in this context that I see "regulatory changes in China" as being the primary reported concern and potential setback for companies both at present and in the future, for the past four consecutive years.

<sup>1</sup> "China's FDI up 23.6% in 2008." *Xinhua*. January 15, 2009. [http://news.xinhuanet.com/english/2009-01/15/content\\_10662757.htm](http://news.xinhuanet.com/english/2009-01/15/content_10662757.htm). Retrieved February 4, 2009.

<sup>2</sup> Zeng Peiyan. "Maintaining Mutual Benefits and Win-Win Situation & Realizing Common Development." The 9th China International Fair for Investment and Trade. Xiamen, People's Republic of China. September 8, 2005.

I have confidence that FIEs can continue to play the role they have in China's development, and I personally hope that they—we—will do just that going forward. As the success of FIEs directly results in tangible benefits to the Chinese economy as a whole and to individuals at every level, I would encourage the leaders of this nation to join me in this confidence and this hope and to consider what it was that encouraged these contributions in the past. I would suggest that what had led to past successes can again lead to future successes, be it in its historical incarnation or as part of a new articulation or new agenda.

Specifically, I would refer to the overall incentives that were leveraged so successfully in the past to promote and facilitate foreign investment. In recent years, we have seen a gradual erosion of these policies, from tax equalization to adjustments to the foreign investment catalogue to the Anti-Monopoly Law, which in a country with major, State-owned monopolies is at least sentimentally viewed as exclusively targeting foreign companies.

Precisely because it is FIEs that are best positioned to help China achieve its economic goals of moving up the value chain, focusing more on high-technology industries, increasing "home grown" innovation and accumulating the institutional expertise necessary to "go global," I would say that it is of strategic importance to ensure that these enterprises, in addition to Chinese companies, survive and succeed in this uncertain environment.

Thus far, barring a few notable exceptions such as the ability of foreign firms to participate in the "Appliances to the Countryside" program, the majority of China's stimulus efforts have not accounted for a segment of the economy that represents 10% of urban employment and 20% of tax revenue.

A reinstatement of taxation schemes that have been proven effective, such as 3 tax-free years and two years paying 50% of normal taxes after investment, will not only increase China's competitiveness for an increasingly small pool of international funding, but will also relieve burdens on companies that are already here and thus allowing them to expand, invest and employ more. It will allow them to play their role in sustaining and developing China's economy, a role that we have been playing for the past 30 years and a role that we are prepared to continue moving forward.



Harley Seyedin  
President

The American Chamber of Commerce in South China

会)上, 国务院副总理曾培炎曾经表示:

今天, 外商投资企业的产业附加值已经占到中国产业总增值的1/4; 他们创造了中国税收的1/5, 直接雇佣了中国城市劳动力的1/10, 占中国出口总额的1/2。<sup>2</sup>

据此, 我有理由相信, 中国外商投资企业的命运与整个经济的健康发展息息相关。华南美国商会, 作为一个在华外国投资者团体, 雇佣数百万的中国工人, 创造数十亿元人民币的税收, 并在思想、实践和价值沟通中扮演着重要角色, 对全球化进程起到非常积极的影响。

在这份报告中, 我看到越来越多的企业未达到预期盈利目标, 在预期下降的同时, 企业对营商环境的信心从非常高(2007年91.5%)下降到比较高(2009年85.2%)。在报告中我还看到, "中国政府法规变化"连续四年来是受访企业主要关注的问题, 并成为当前和未来存在的潜在挑战。

对于外商投资企业将继续在中国扮演重要角色, 我很有信心。同时, 我个人也希望他们——我们所有商业人士——将能继续前行。外商投资企业的成功给中国经济整体及各阶层带来了直接切实的利益。我想鼓励中国的领导者和我们一起胸怀信心和期望, 并共同探索在过去是什么促使和鼓励大家做出出色的成绩。我想说的是, 过去令我们成功的力量能引导我们走向未来的成功, 并成为一种历史典型或一个新的转折点。

我要特别指出的是过去成功促进和推动了外商投资的总体刺激措施。近年来, 我们能看到那些刺激优惠政策有所削弱, 从两税合一到调整外商投资类型再到《反垄断法》, 重大国有专营行业至少在一定程度上将外国企业排除在外。

中国的经济发展目标包括提升价值链、更多关注高新产业、提升自主创新能力的"本土成长"、以及"走出去"积累必要的机制上的专家意见等, 而外商投资企业在协助中国达成这一系列目标方面处于最佳定位。我想说的是, 让中国企业和外国投资企业在当前不确定的环境中生存并获得成功是非常具有战略重要性的。

迄今为止, 越来越多外资企业加入了"家电下乡"计划的行列, 在中国雇佣了10%城市劳动力、贡献了20%税收的外资企业希望更多的支持中国的经济刺激计划工作, 促进双赢的发展。

新的税收方案的有效性已经得到证实, 例如投资后首三年免税期和随后两年按正常税率50%征收等, 这将不仅增加中国在持续增长的小额国际资金方面的竞争

力, 而且还将减轻现有投资的企业负担, 给他们提供了继续扩大、投资并雇佣更多劳动力的空间。这些措施将能够令外商投资企业在中国经济的可持续发展中扮演好自己的角色, 这个角色外资企业已经扮演了30年, 并将在以后尽心竭力、继续努力做到更好!



哈利·赛亚丁  
华南美国商会 会长

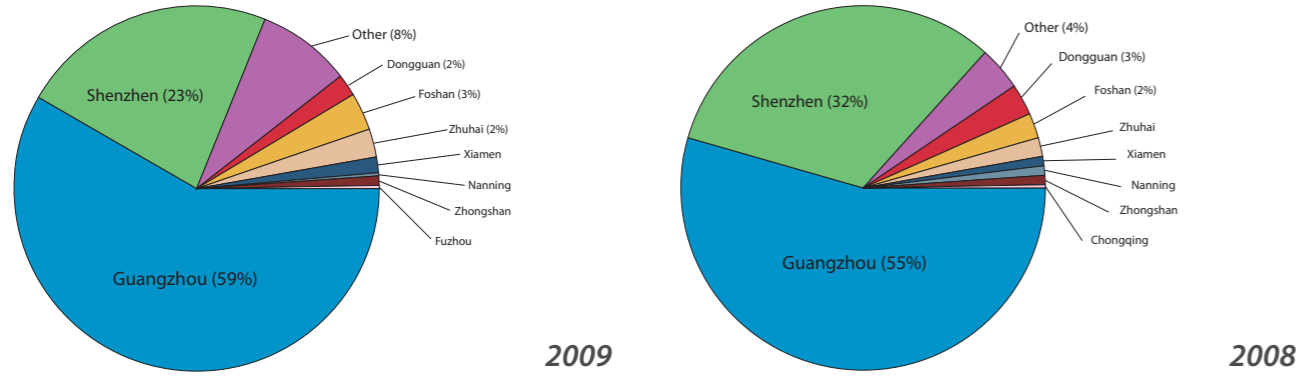
# *STUDY RESULTS*

# 调查 结果



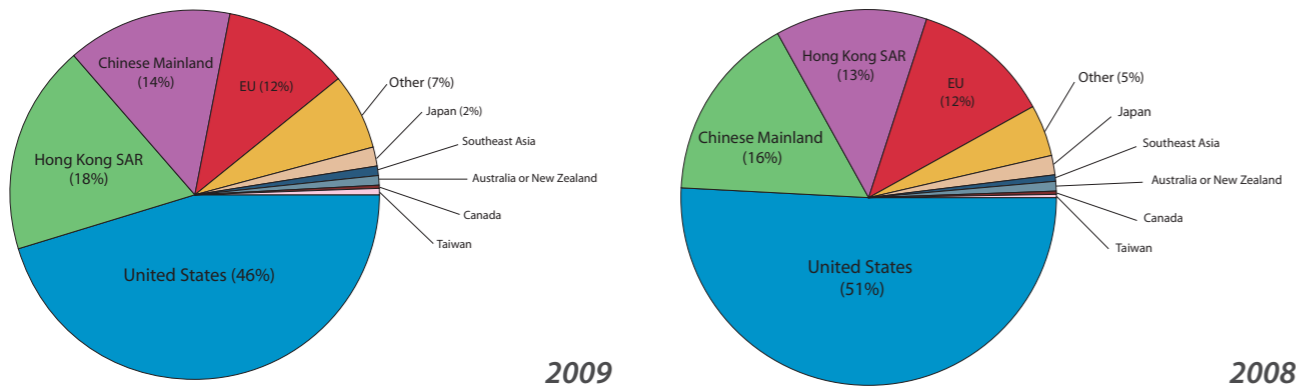
# Demographics

**Q: Where is your company's headquarters or main office located in South China?**



Consistent with past results, approximately 80% of respondents are headquartered in Guangzhou and Shenzhen. The "other" category once again represented the third-most selected option, with Hong Kong most represented, followed by Shanghai.

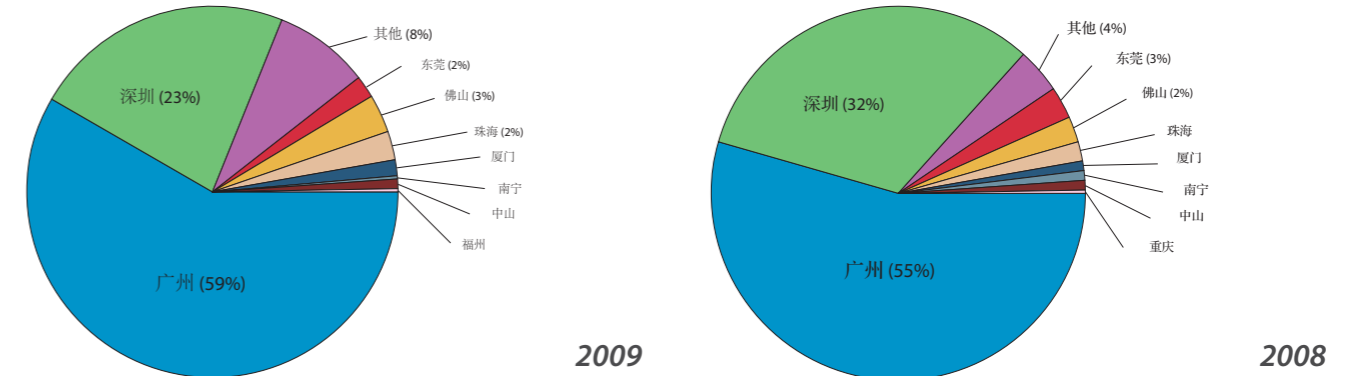
**Q: Where is your parent or holding company located?**



This year, only about 46% of respondents reported parent or holding companies in the United States, compared to the approximately 51% reported in 2008. The second-most reported location of parent companies was Hong Kong SAR (with approximately 18%), followed by mainland China (accounting for approximately 14% of respondents)—a reverse of 2008's results, which ranked mainland China second with 16% and Hong Kong SAR third with 13%. The European Union was once again represented by about 12% of respondents (compared to the 12% reported last year). Finally, the "other" category was chosen by nearly 7% of participants, although the majority of these write-in responses were, in fact, members of the European Union.

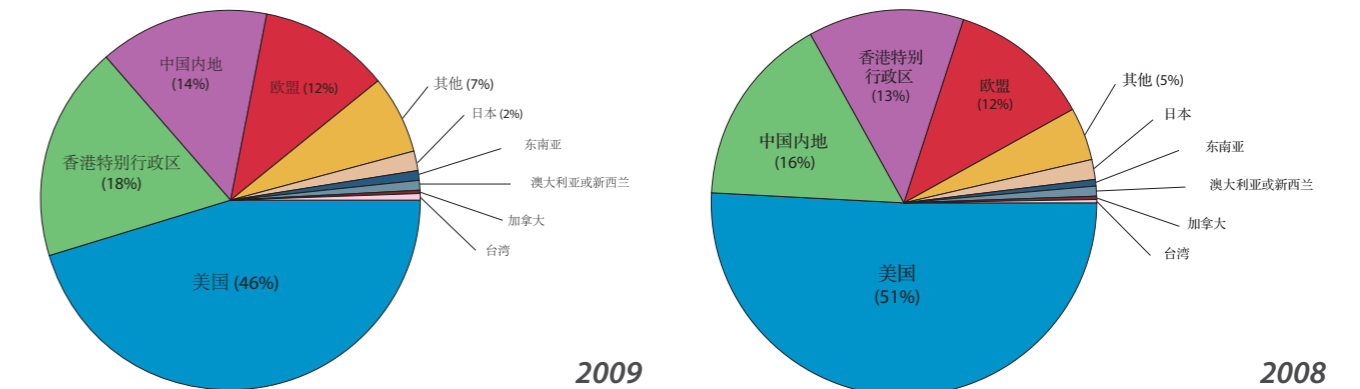
# 受访企业统计

**问题：贵企业运营总部或办事处在华南地区的地点位于哪里？**



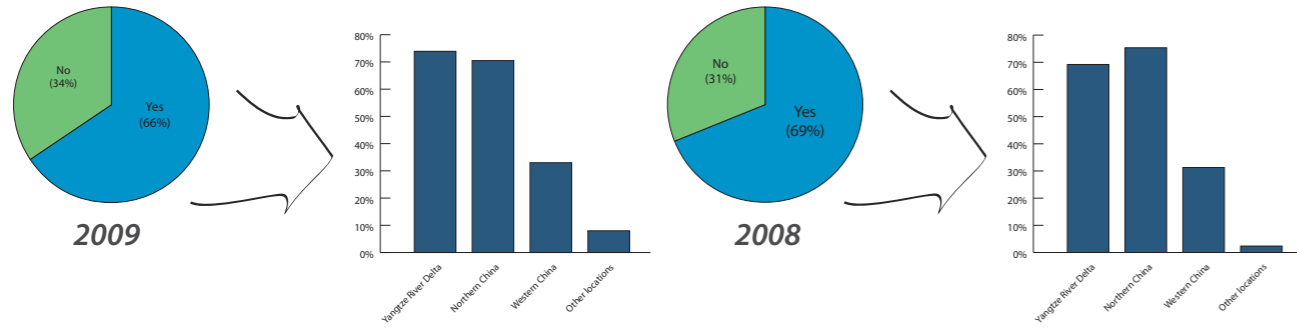
和过去的调查结果一样，接近八成的受访企业运营总部都设在广州和深圳。在“其他地区”选项当中，香港位列第一，而上海则位居第二。

**问题：贵企业母公司或控股公司的地点在哪里？**



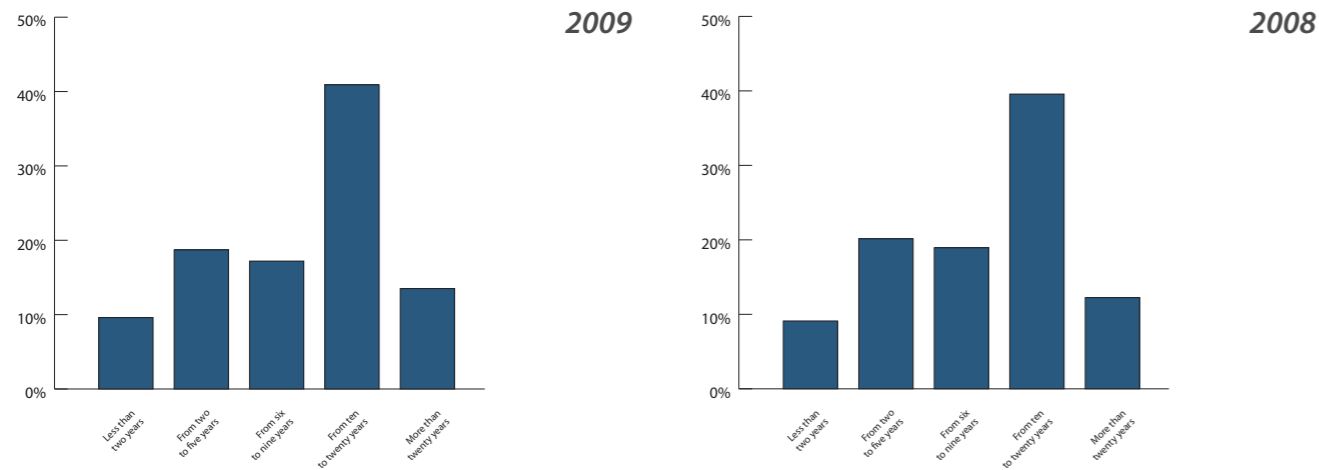
与上年接近50%的数据相比，今年仅有约46%受访者其母公司或者控股公司设在美国。紧随其后的是香港（接近18%），中国大陆排第三（占受访者当中的14%）。与2008年中国大陆占16%排行第二，而香港以13%的比例排行第三的调查结果刚好相反。欧盟则以11%的比例排行第四（去年数据为12%）。最后，有接近7%的受访者表示其公司总部设在“其他地区”，但他们当中的大部分母公司分布的地区仍然是欧盟地区。

**Q: Does your company or group have offices in other parts of China? If so, where?**



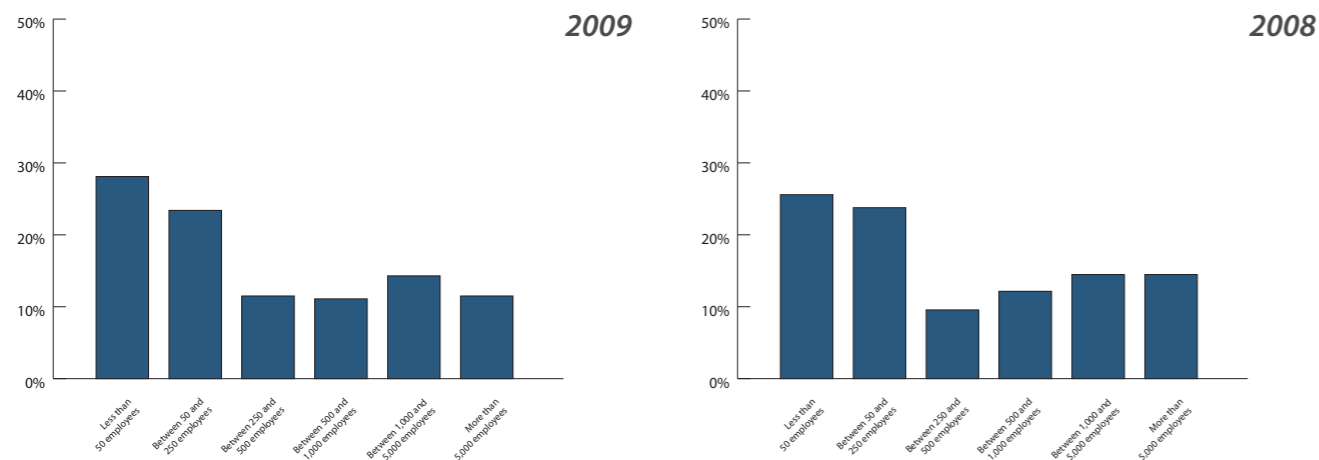
As in previous years, approximately two-thirds of companies have operations outside of South China, with approximately 70% of those having a presence in the Yangtze River Delta or Northern China, and about 33% with a presence in western China.

**Q: How long has your company been engaged in business in China?**



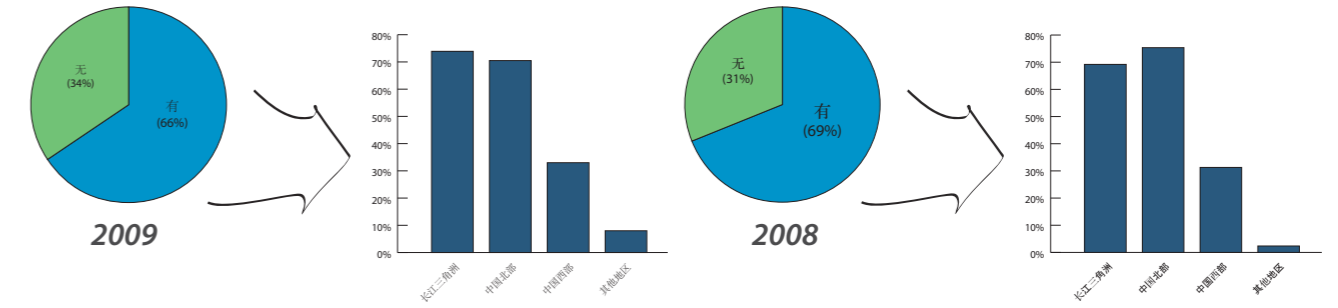
Results for this question were nearly identical to those of previous years, with slightly more than 50% of companies having been operational in China for more than 10 years, and again with approximately 13% of companies having been in China for more than 20 years.

**Q: How many people does your company currently employ in China?**



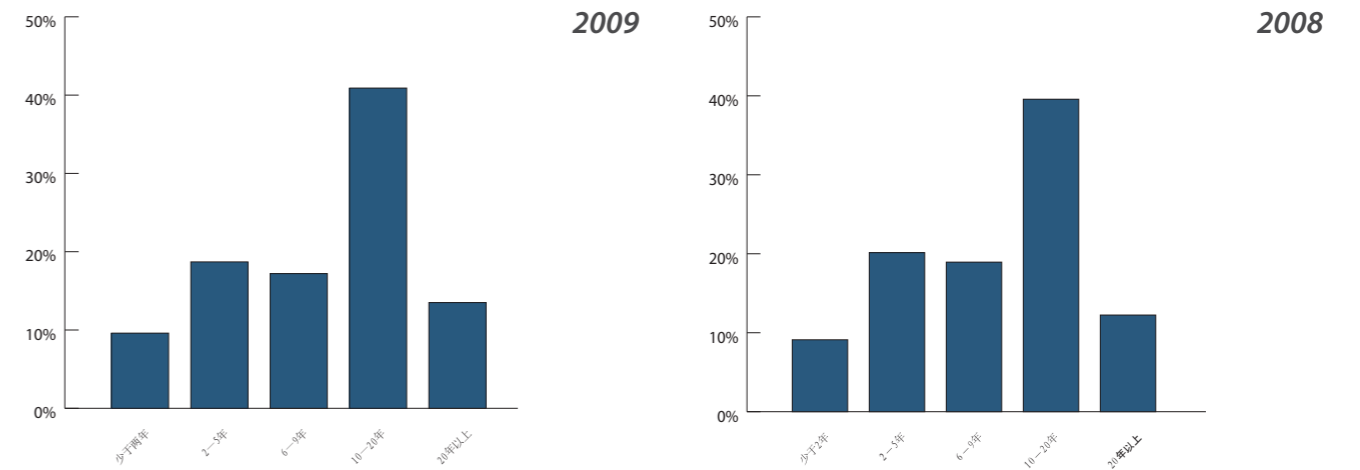
As in past years, nearly 50% of companies reported employing 250 or fewer individuals, with the remaining categories accounting for between about 10% and 15% of respondents each.

**问题：贵企业或集团在中国其它地区是否设有办事处？如果是，位于哪里？**



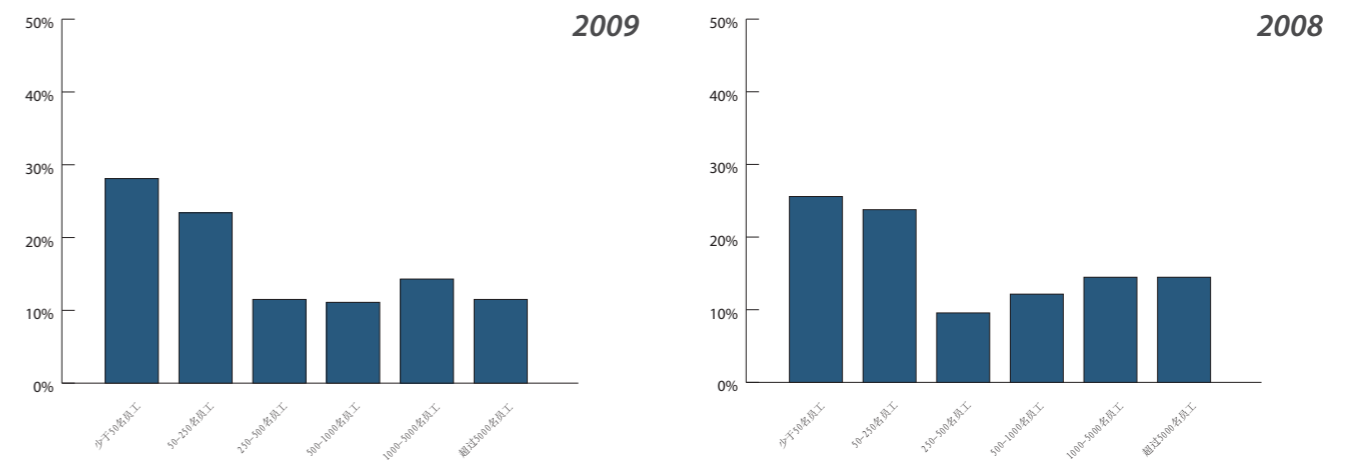
与过去几年的调查结果相近，约三分之二的受访企业在中国其它地区设有办事处，近70%分布在长江三角洲和中国北部地区，其余约有33%的企业在西部地区设有办事处。

**问题：贵企业来华开展业务已有多少年？**



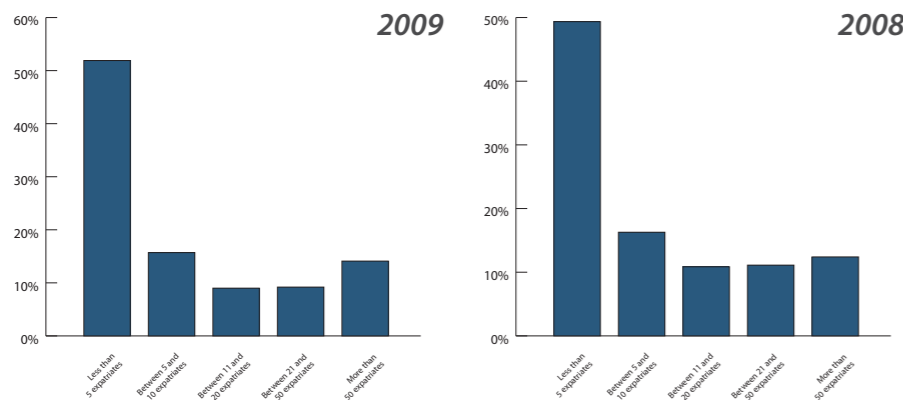
与过去几年的调查结果几乎一致，过半数的企业表示在华经营的时间超过10年，其中约13%更达20年以上。

**问题：贵企业目前在中国的员工数量为多少？**



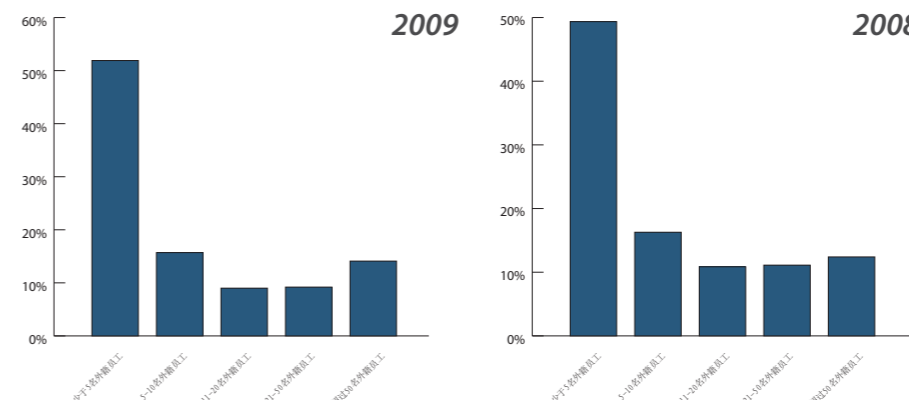
在过去几年中，近50%的受访企业表示雇用250名或更少的员工，其余类别之间的各占10% - 15%左右。

**Q: Out of those, how many employees are expatriates or foreign passport holders?**



Again consistent with past years, approximately 50% of companies reported employing 5 or fewer foreign passport holders, with 15% reporting employing between 5 and 10, and an additional 15% reporting employing more than 50 (presumably roughly mapping onto the approximately 25% of companies employing 1,000 or more total employees).

**问题：全体员工中，有多少是外籍人士或持有外国护照？**



调查结果与之前保持一致，大约有50%的受访企业表示雇员中持有外国护照者为5个或更少，雇用5至10个的为15%，另有15%的受访企业雇用人数超过50个（其中选择该项的企业中，25%左右的雇员总数达到1000人以上）。

**Q: Which category best describes the primary focus of your business activities in China?**



**问题：以下哪种行业描述与贵企业在华南地区的主要业务范围最相符？**



This question has been slightly amended for 2009 to better clarify results; while in past years the question has distinguished between “goods” and “services,” this year saw the additional distinction made between “providing goods or services to the Chinese market” and “manufacturing primarily for export.”

The results are telling; whereas in previous years we have observed a continuing growth trend for companies reporting involvement in “services” rising nearly 11% from 46% in 2006 to reach 57.5% last year, this year’s results indicate that fully 72.5% of respondents consider providing goods or services to the Chinese market as their primary focus. We interpret this consistent with the established trend, as the “manufactured goods” category did not specify the intended destination for the same—because of this, we suspect that the “goods” category, interpreted as a focus on manufacture for export, has been artificially inflated in previous years’ results. As such, this year’s results reinforce both the trend observed across the past three years and also our anecdotal experience of a predominant focus on serving the Chinese market.

Finally, in examining individual categories reported for both “goods” and “services,” the “other” category continues to be often selected by respondents, indicating a breadth of specialization among companies and a diversity of markets being served.

In the “goods” category, “electronic equipment and household appliances” remains one of the three most-often reported industries, with “semiconductors and electronic components” this year being replaced by “textiles, apparel and leather goods”—perhaps as a result of the year-long relaxing of VAT and processing trade regulations which were initiated in late 2007 adding significant burdens to producers in this category.

The “services” category remains unchanged from 2008’s results, with “business services,” “professional services” and the abovementioned “other” again the top three most-reported categories.

在过去几年的调查报告中，提问的形式仅体现了“制造业”和“服务业”的两者区别，2009年的调查将行业描述进一步细分，答案选项则将其具体化为“向中国市场提供产品或服务”和“以出口为主的制造业”。

结果表明：通过几年来的观察我们发现企业投身“服务业”的比率越来越高，从2006年的同比增长近11%，到上年度增长到57.5%。今年的结果更是显示出，72.5%的受访企业的业务重点是向中国市场提供产品或服务。我们认为这和既定的趋势是一致的，因为“制成品”类别没有详细指出产品出售地，所以，我们猜测该“产品”种类被理解成主要以出口为主，因此相关数据结果在以前的报告中被人为夸大了。

由此，今年的调查报告结果更加凸显了企业的业务重点是向中国市场提供服务。

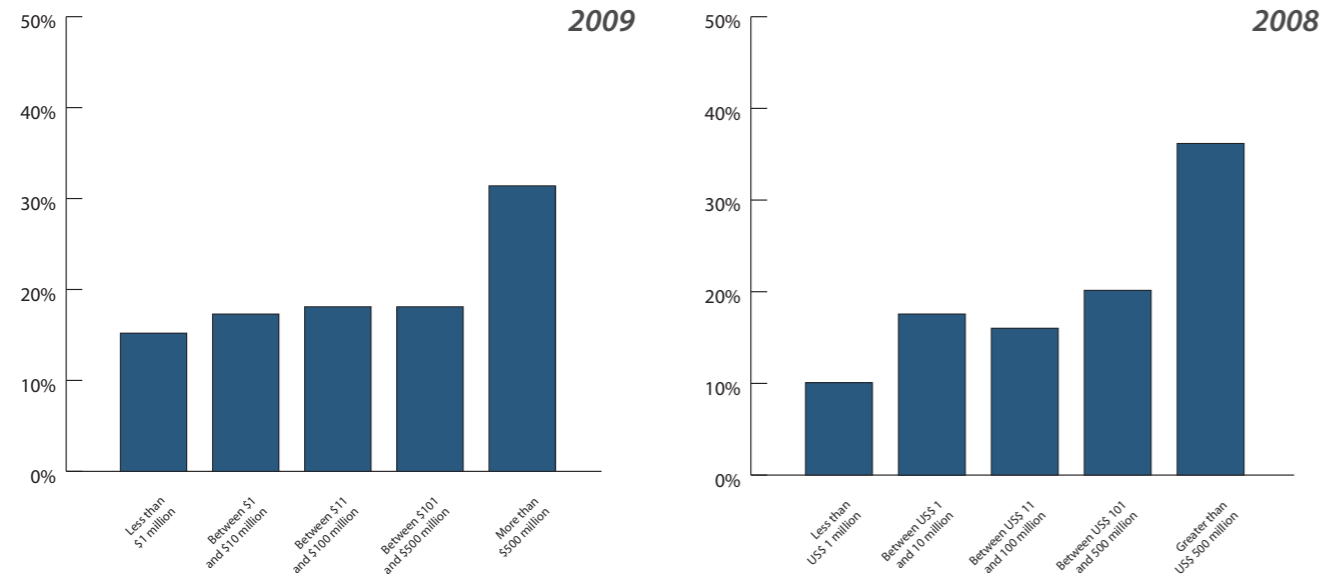
此外，在“产品”和“服务”两大类细分出来的选项结果中，“其他”这一选项的选择率也很高，表明了企业间专业化程度的扩大和市场提供服务的多元性。

在“产品”类别中，电子设备和家用电器仍是报告中三个最普遍的行业之一，而半导体和电子元件则今年被纺织品，服装和皮革制品取代——2007年国家改变出口增值税和加工贸易的有关规定，生产企业的压力上升。随着2008年相关政策的放松，对相关企业也有了影响。

“服务”类别与2008年的结果基本一致，商业服务、专业服务和上述“其他”几个选项再次排在报告的前三列。

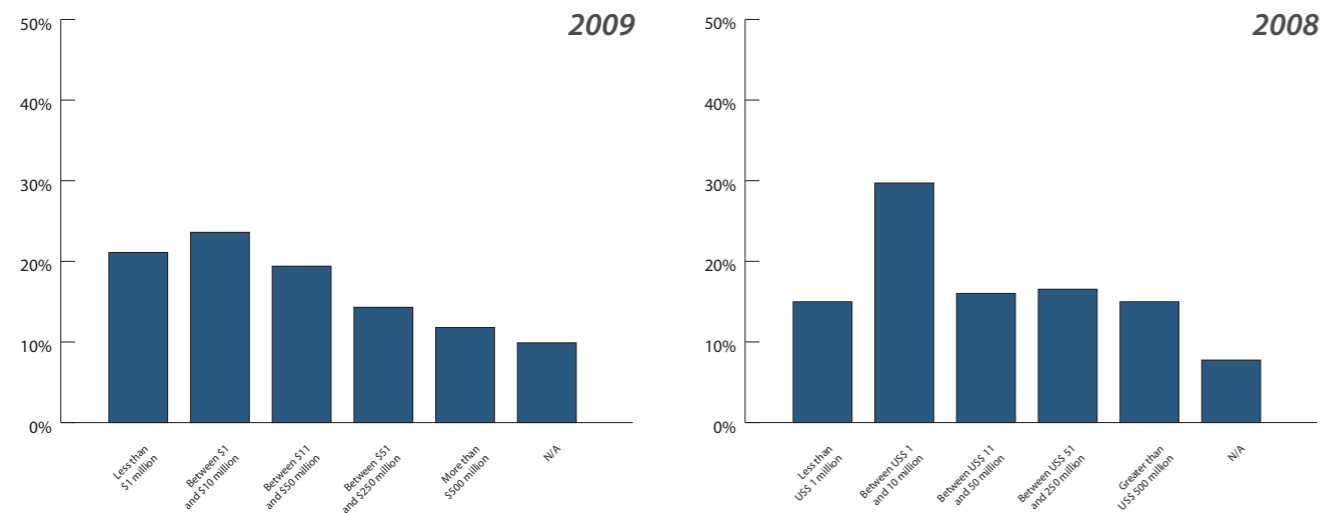
# Revenue and profitability

**Q: What is your company/group's approximate annual worldwide revenue?**



As in 2006, 2007 and 2008, companies reporting global annual revenue of more than \$500 million are most represented, this year accounting for 31% of the total compared to 36% last year. A further 18% reported global annual revenues between \$101 and \$500 million. Companies with global annual revenue of less than \$1 million were once again least represented.

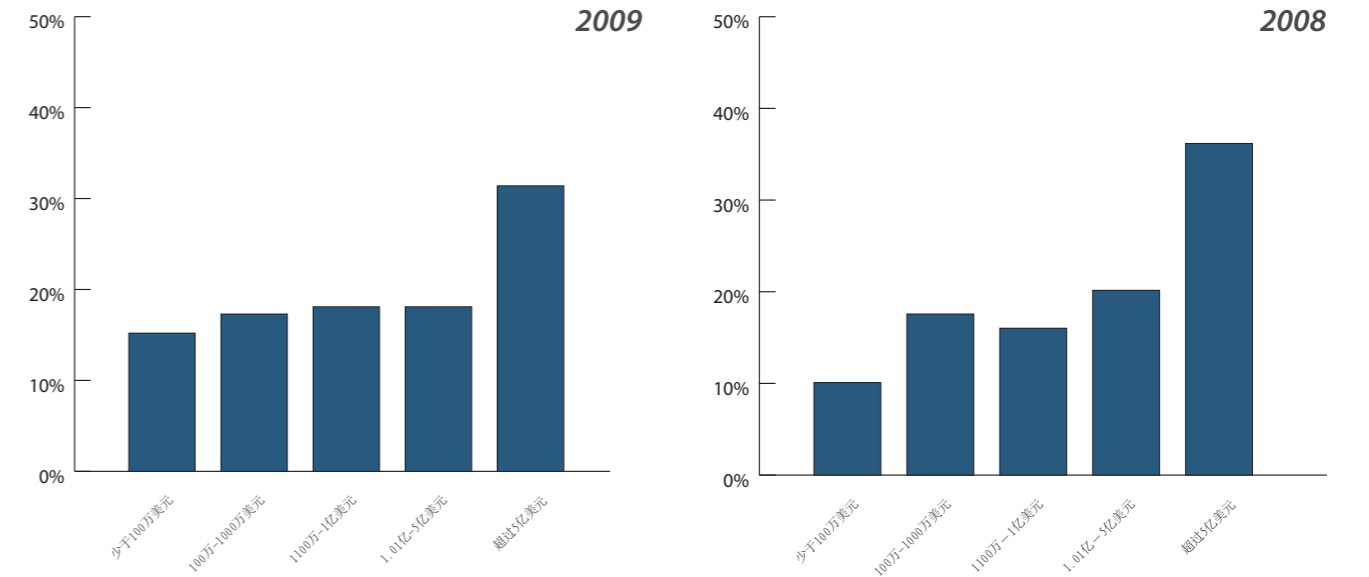
**Q: What is your company's approximate annual China revenue?**



Interestingly, results for annual revenue in China saw greater changes than those for the annual worldwide revenue; this year, slightly more than 20% of companies reported revenue in China of less than \$1 million, an increase of 5%. The "between \$11 and 50 million" category similarly saw an increase of 3% and the "not applicable" category—generally representing representative offices—grew to nearly 10%. These increases were offset by decreases of between 3 and 6% in the remaining categories.

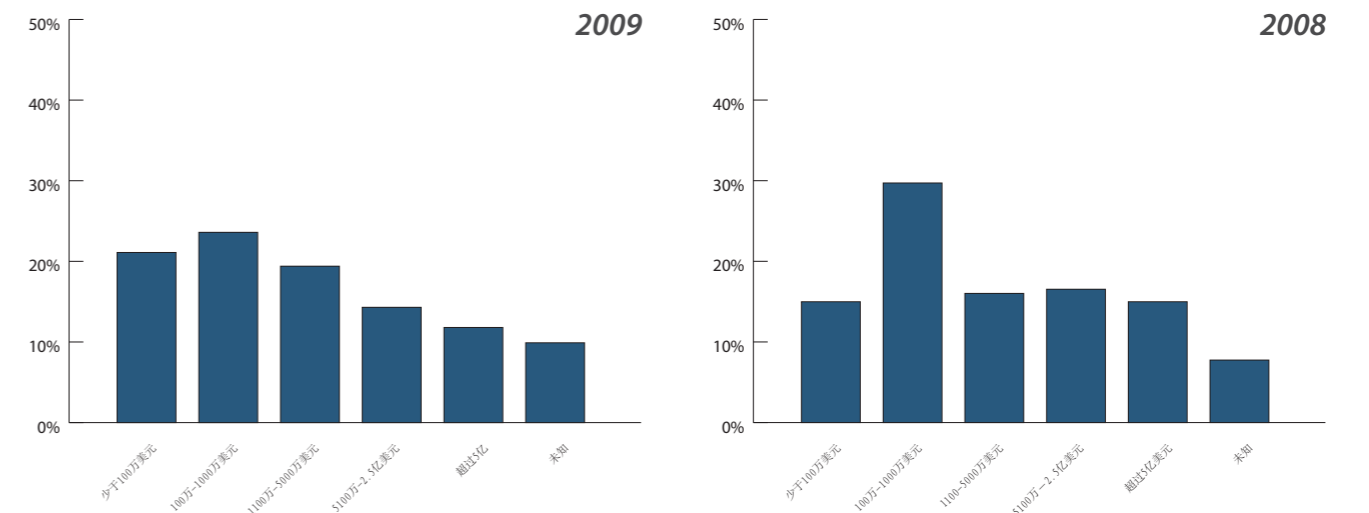
# 收入和利润

**问题：贵企业/集团在全球范围的年收入大约是多少？**



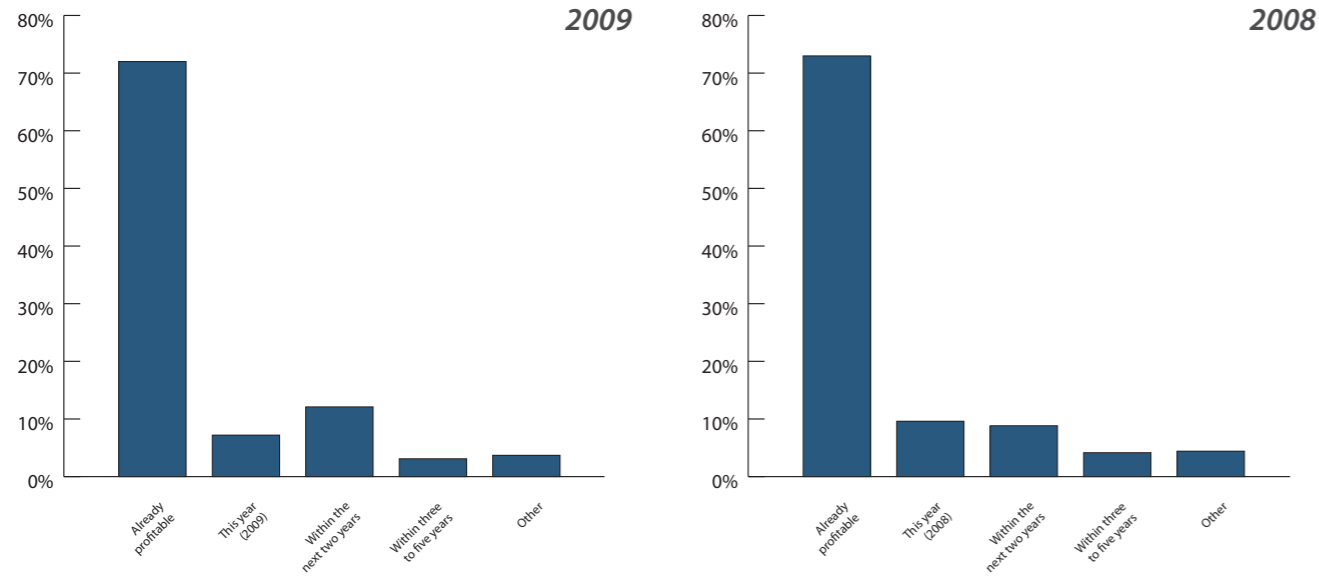
2006、2007和2008三个年度的调查中，全球年收入超过5亿美元的企业占多数。与去年36%相比，今年选择此类别的企业只占到31%。而有18%的企业表示其全球年收入介于1.01-5亿美元。企业全球年收入不到100万美元的比例仍然占少数。

**问题：贵企业在中国的年收入大约是多少？**



有趣的是，受访企业在中国的年收入与全球范围内年收入的变化更加显著。今年的报告显示，略超过两成的企业在中国年收入少于100万美元，同比增长5%。年收入“介于1100万至5000万美元之间”的企业也同比增长了3%。对于“未知”这一选项，一般为代表处，增长了近10%。这些增长被余下其他类别3%至6%的下降所抵消。

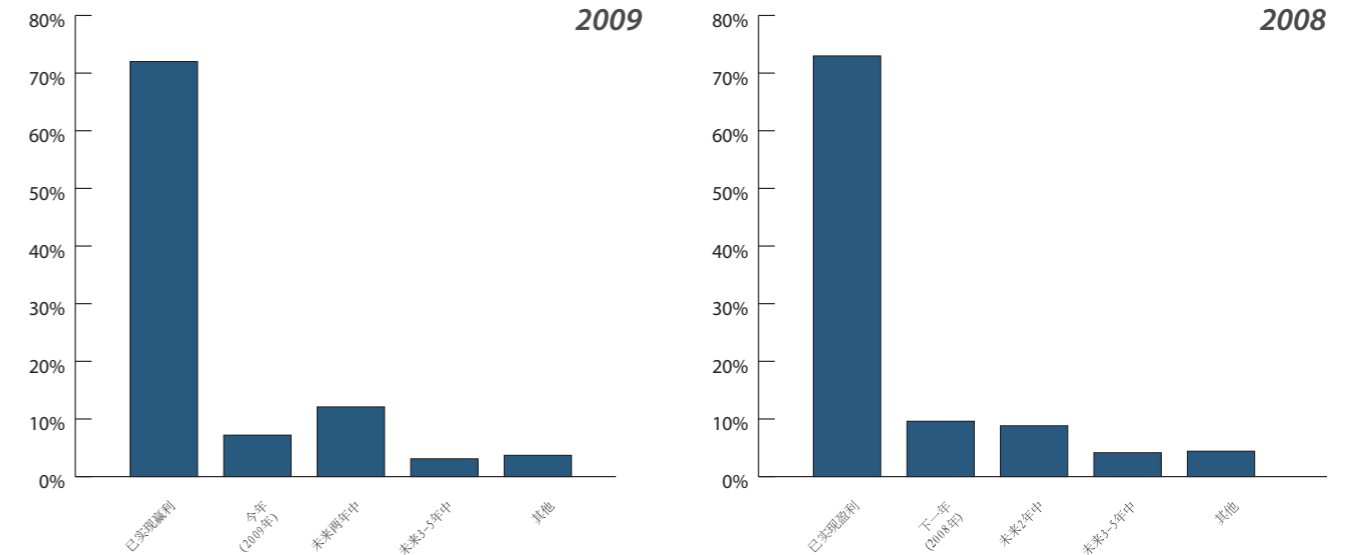
**Q: When does your company expect to be profitable in China?**



Consistent with findings in prior years, 72% of companies reported being profitable at the time the study was executed, with an additional 7% estimating that they would achieve profitability this year and 12% more expecting to be profitable within the coming two years. In total, nearly 92% of participants are already profitable or will be by 2011.

Additionally, nearly 5% of companies reported profitability timelines of “other,” predominately indicating representative office status and thus, by definition, not profitable. Adjusting for this, nearly 96% of reporting (for-profit) companies report being profitable already or expecting to achieve profitability within the next 2 years.

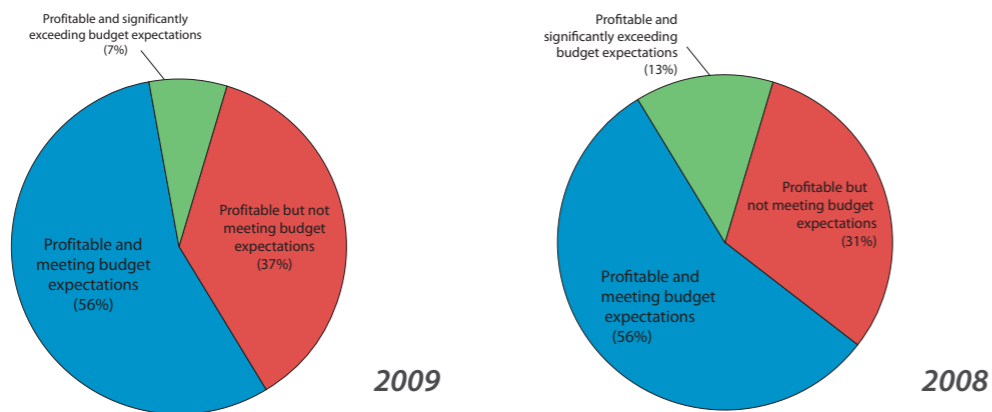
**问题：贵企业在中国预期什么时候实现盈利？**



整体调查结果与上年度基本一致，约超过70%的企业表示在调查进行之时正处于赢利当中；另有7%的受访企业预估今年将实现赢利，接近12%的企业预计在未来两年内实现赢利，因此共计约有92%的企业则预计在未来两年内实现赢利。

除此之外，受访企业中大约5%选择赢利时间为“其他”，主要原因是受访者来自企业代表处，不存在赢利的需求。但约96%的受访企业表示已经正在赢利或者期望在未来两年内实现赢利。

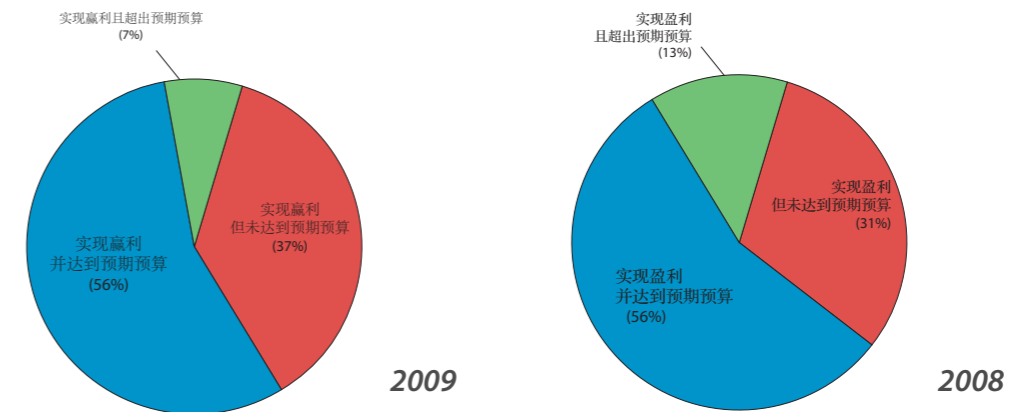
**Q: If your company is already profitable, to what extent?**



Of those companies reporting profitability at the time of the study, the extent of the same meeting or exceeding budget expectations has for the past three years decreased, from 76% in 2007 to 63% in 2009. That this trend has been observed since the beginning of 2007 suggests that the ongoing economic slowdown is not the only contributor to this decline, but that some other factor may also be involved.

One candidate is “increasing local competition,” which for several years has been cited as a major concern for companies at the time of response and looking to the future; similarly, the perpetual spectre of “regulatory changes” in the business environment, which have raised the cost of business across the board. While these changes are generally more positive than sentiment would suggest, their effects on the bottom-line are seldom unambiguously positive.

**问题：如果您的公司已经盈利，将会有多大盈利的幅度？**



从企业的盈利报告中可以看出，盈利幅度达到或超出预期的比例与过去三年相比有所下降，从2007年的76%下降2009年的63%。也许是由于前些年整体经营状况的出色表现，企业对盈利预期的期待值抱有非常乐观的态度。这一趋势在2007年开始显现，同时说明了当前的经济放缓并非盈利缩减的唯一因素，其他原因也会影响企业盈利。

在影响企业盈利的原因中，“不断增强的本地竞争”已经连续几年成为企业在受访时及未来主要关注的问题之一。同样地，经营环境中的“法规变化”，也令企业的经营成本全面提高。虽然这些变化总体来说是具有其积极的意义，但其最根本的积极性却较少凸显出来。

## South China

### Q: What are your company's goals in South China?

1. Produce goods or services in South China for the China market
2. Establish or expand a regional base
3. Produce goods or services in South China for the U.S. market
4. Produce goods or services in South China for markets other than the U.S. and China
5. Export from China to the U.S.

For the fourth year in a row, “production of goods or services for the China market” remains the top-reported business goal for the majority of participants. Also consistent with results from previous years, “establishing or expanding a regional base,” “production of goods or services for the U.S. market” and “production of goods or services for markets other than China or the U.S.” ranked as top goals, with “export from China to the U.S.” supplanting “benefit from lower labor costs,” which had been reported for the past three consecutive years as the fifth top-ranking goal for participants.

### Q: What are the major reasons for your company to set up operations in South China instead of other China locations?

1. Opportunities in South China's domestic market
2. Greater openness than other parts of China
3. Proximity to Hong Kong
4. Better infrastructure than other parts of China
5. Availability of qualifiable managers and specialists

“Opportunities in South China's domestic market” remains a top consideration for companies setting up operations in South China, as do “greater openness than other parts of China,” “proximity to Hong Kong” and “better infrastructure than other parts of China.”

Significantly, however, the fifth-most reported category has shifted since the establishment of this question in 2006's study. That year, “lower overall production costs” was reported as the fifth top reason for establishing a presence in South China, but was replaced in 2007 by “transportation and logistical advantages,” which was in turn replaced in 2009 by “availability of qualifiable managers and specialists.” This is promising, as studies in previous years have consistently identified the same (“availability of qualifiable managers and specialists”) as one of the five primary challenges for companies moving forward.

### Q: How do you expect your company's operations to change in the following areas over the coming 3 years?

1. Services provided in China
2. Overall China business activities
3. China market share
4. Profits
5. Competition from PRC firms

For the first time in four years, the top five most-reported expected changes to operations in China included an element that is not unilaterally beneficial—“competition from PRC firms”—although the remaining four most-reported changes (“services provided in China,” “overall China business activities,” “profits” and “China market share”) remained in place.

This perhaps speaks more of the increasing competitiveness of Chinese firms than of any growing deficit in foreign companies' operations or strategies, and in this respect can certainly be considered a net improvement for the overall business environment, if not for the operations of individual companies operating within it.

## 华南地区

### 问题：贵企业在华南地区的发展目标是什么？

1. 在华南地区向中国市场生产产品或服务
2. 建立或扩大区域基地
3. 在华南地区向美国市场生产产品或服务
4. 在华南地区向中国和美国以外的市场生产产品或服务
5. 从中国向美国出口

“在华南地区向中国市场生产产品或服务”连续四年位居受访企业发展目标的首位。而且，结合以往的调查结果可以看出，“建立或扩大区域基地”、“在华南地区向美国市场生产产品或服务”以及“在华南地区向中国和美国以外的市场生产产品或服务”也是受访企业发展目标的重点。过往连续三年处于被选第五位的“从中国的廉价劳动力成本中获利”则被“从中国向美国出口”取代，从而挤出了首选五大发展目标的行列。

### 问题：贵企业选择在华南地区（而非中国其他地方）设立运营机构的主要原因是什么？

1. 华南地区国内市场的机遇
2. 比中国其他地方更加开放
3. 临近香港
4. 华南地区更好的基础设施
5. 拥有高素质管理和专业人才

“华南地区国内市场的机遇”、“比中国其他地方更加开放”、“临近香港”以及“华南地区更好的基础设施”依次成为受访企业在此设立运营机构的主要原因。

值得关注的是，自2006年的调查报告提出这个问题以来，排名第五位的选项一直在变化。2006年的调查结果显示，“较低的总体生产成本”是企业选择在华南地区设立运营机构的第五个最重要的原因，而2007年的调查结果则被“运输和物流优势”取代，2009年最新的调查结果显示“拥有高素质管理和专业人才”是第五个重要原因。连续几年的调查结果都表明“拥有高素质管理和专业人才”是企业选择在华南地区设立运营机构的五个最重要的影响因素之一，且地位越来越重要。

### 问题：未来三年，贵企业的运营将在以下哪些领域有所改变？

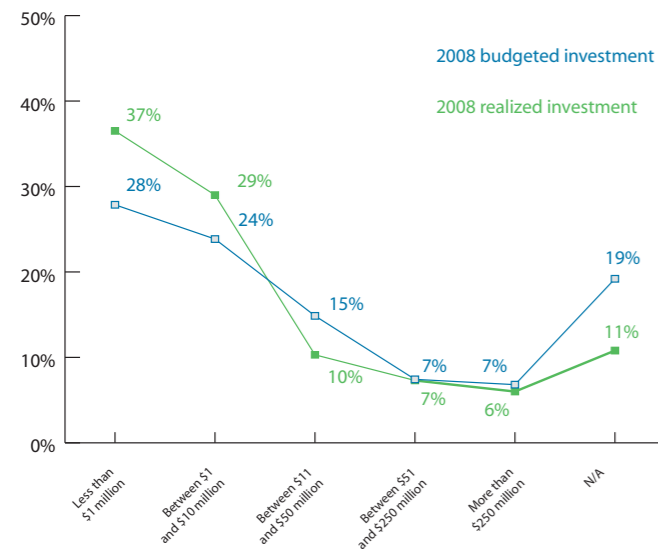
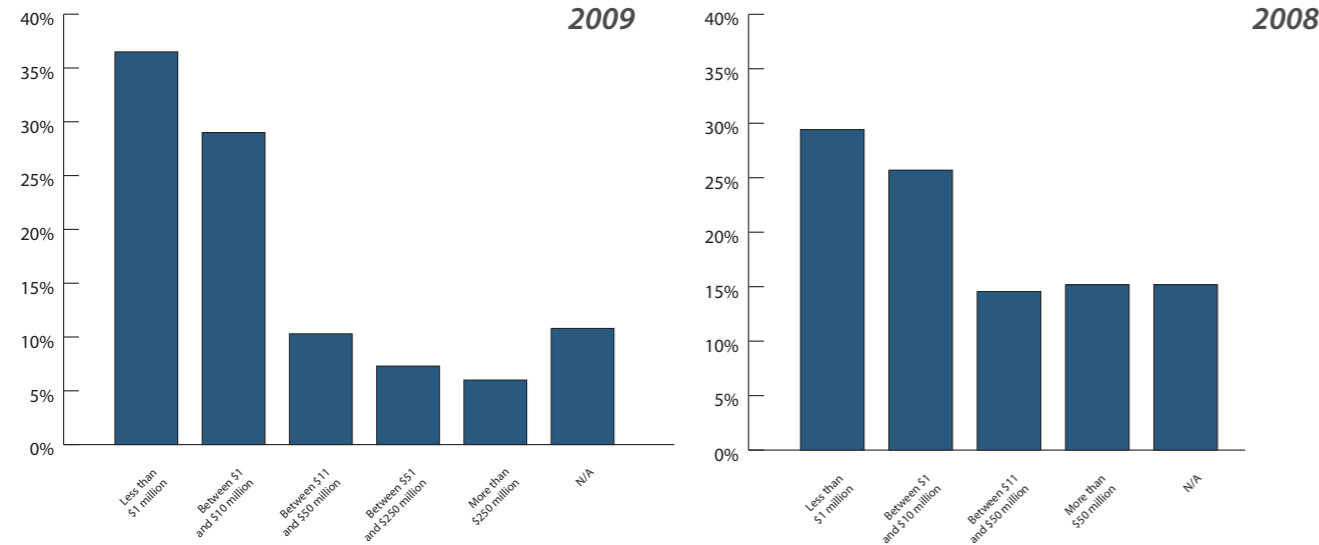
1. 中国提供的服务
2. 全中国的经营活动
3. 在中国的市场份额
4. 利润
5. 来自中国企业的竞争

四年来的调查结果中，“来自中国企业的竞争”第一次成为企业在经营中期望改变的五大领域之一，这其中包括了创造双赢环境的因素。其他期望改变的四大领域包括“中国提供的服务”，“全中国的经营活动”，“利润”和“在中国的市场份额”。

相较于外国企业在经营和战略中赤字的增长，中国企业竞争力的增长速度更快，当然这要归功于总体经济的增长而不是单一企业的经营。

# Investment trends

**Q: For 2008, what was your company's realized investment volume in China?**



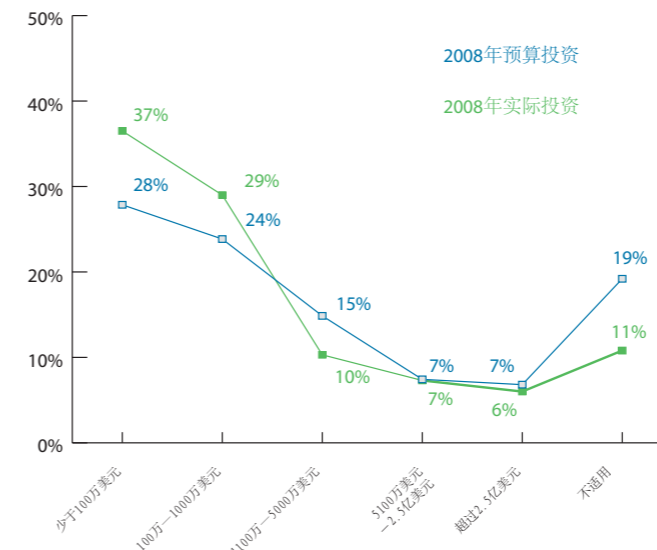
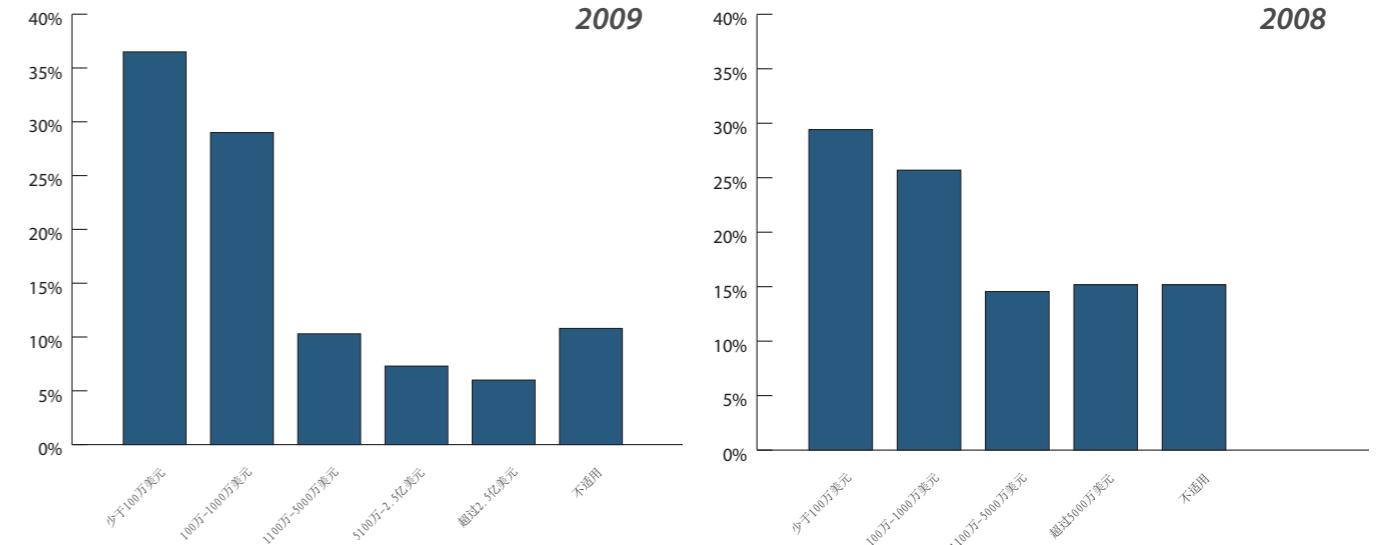
This year, nearly 90% of companies reported investing some amount into their China operations in 2008, with approximately 37% reporting investments of \$1 million or less, 29% reporting investments between \$1 and \$10 million, slightly more than 10% reporting investments of between \$10 and \$50 million and approximately 14% reporting investments of \$51 million or more. These numbers are generally consistent with projected reinvestment numbers from last year's study, with the largest deviations being in the "less than \$1 million" (9% more) and "no investment" (8% fewer—approaching half of the projected number) categories. The rest of the distribution of projected v.s. actualized investments tended toward understandably lower amounts, except for actualized investments of \$50 million or more, which remained more or less consistent with the projected values from last year.

An analysis of reported 2008 investment budgets (from March of that year) against realized investment volumes reported this year for the same period indicate a cautious approach to expansion. While nearly half of the number of participants that had not budgeted for any investment eventually invested some amount, only the categories of "less than \$1 million" and "between \$1 and \$10 million" exceeded the amounts indicated in budgets for 2008. The number of companies reporting realized investment of between \$11 and \$50 million decreased by a full third, offsetting the presumptively unplanned investments of less than \$10 million reported retrospectively.

Also interesting is the fact that the realized investments of more than \$51 million appear to have closely followed the budgets reported in the first quarter of 2008. This is perhaps indicative of larger, strategic investments being less effected by contemporary circumstances than the smaller investments of less than \$10 million being made.

# 投资趋势

**问题：2008年，您所属企业在中国的实际投资总额是多少？**

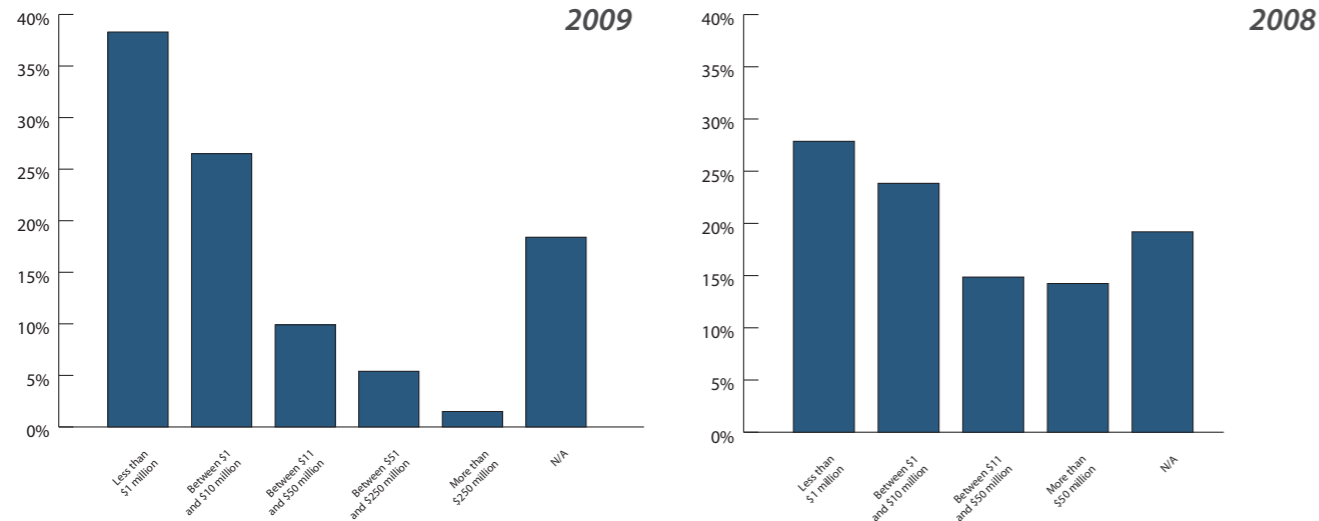


2008年，近90%的受访企业表示该年度在中国进行了一定数量的再投资。其中，约37%的受访企业再投资金额在100万美元以内；29%的企业再投资金额为100万到1000万美元；超过10%的企业再投资金额为1000万到5000万美元；而近14%的受访企业表示其再投资金额为5000万美元以上。以上数据与2008年经济调查结果基本保持一致，最大的差别是“再投资额少于100万美元”（比2008年情况相比高出9%）和“没有投资”（比2008年减少9%，占预计数字的近一半）两类选项。在图表中可以看出，实际投资比计划投资的趋势分布要低，但可以理解。然而，实际投资在5000万美元或以上的部分，企业的实际投资额与上一年的计划投资额保持一致。

对比2008年3月的预计投资额，受访企业在上年的实际投资方面采取了谨慎的发展战略。近半数在2008年无投资计划的企业最终进行了一定数量投资，仅“投资额少于100万美元”和“投资额为100万到1000万美元”两类受访企业实际投资超过预计投资额。调查指出，原预计“投资金额为1100万到5000万美元”的企业，有三分之一没能完全实现再投资计划，此比例被预计再投资金额少于1000万美元的企业超额实现。

同时，超过5100万的实际投资额的情况也非常接近年初预算报告的预测，这也许意味着当前的经济形势对企业长期战略部署的影响比1000万美元以下的小型投资要弱。

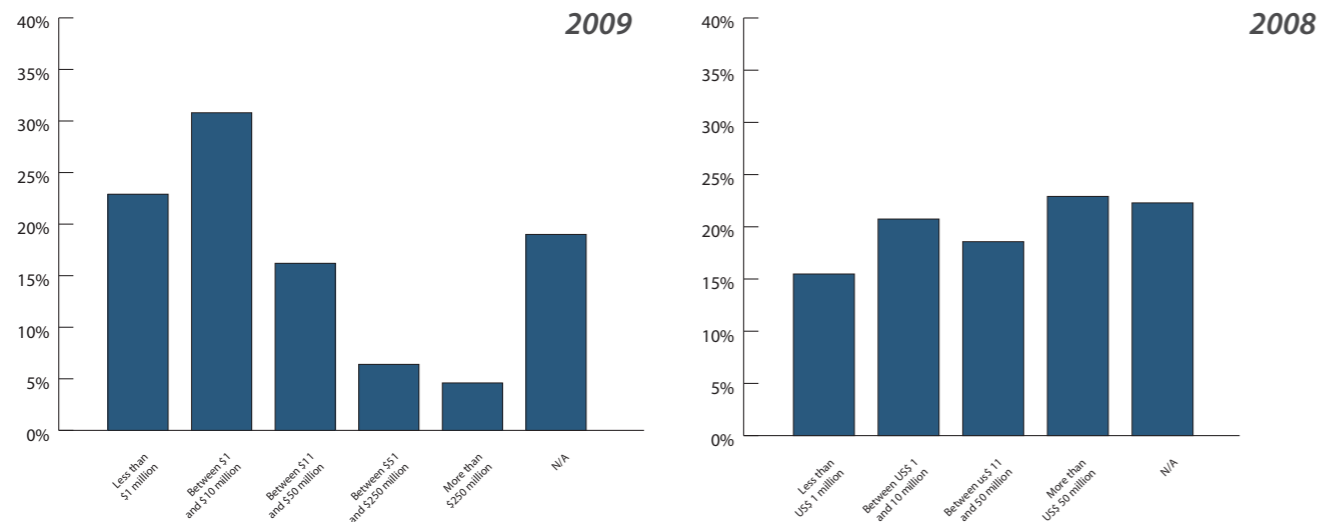
**Q: For 2009, what is your company's budgeted investment in China?**



Budgeted reinvestment for the coming year is, again understandably, conservative compared to prior years. Consistent with last year's reported investment budgets, nearly 20% of companies do not plan to reinvest in 2009. More than 65% plan to invest \$10 million or less, and approximately 6% plan to invest \$50 million or more.

As the number of companies reporting no investment plans over the coming year has remained relatively stable at approximately 20%, however, we can note that although the overall investment volume has appeared to decrease, the number of companies has not; rather, a strong preference for making smaller investments than were planned is evident, with slightly greater than 10% more companies reporting less than \$1 million budgeted than in 2008.

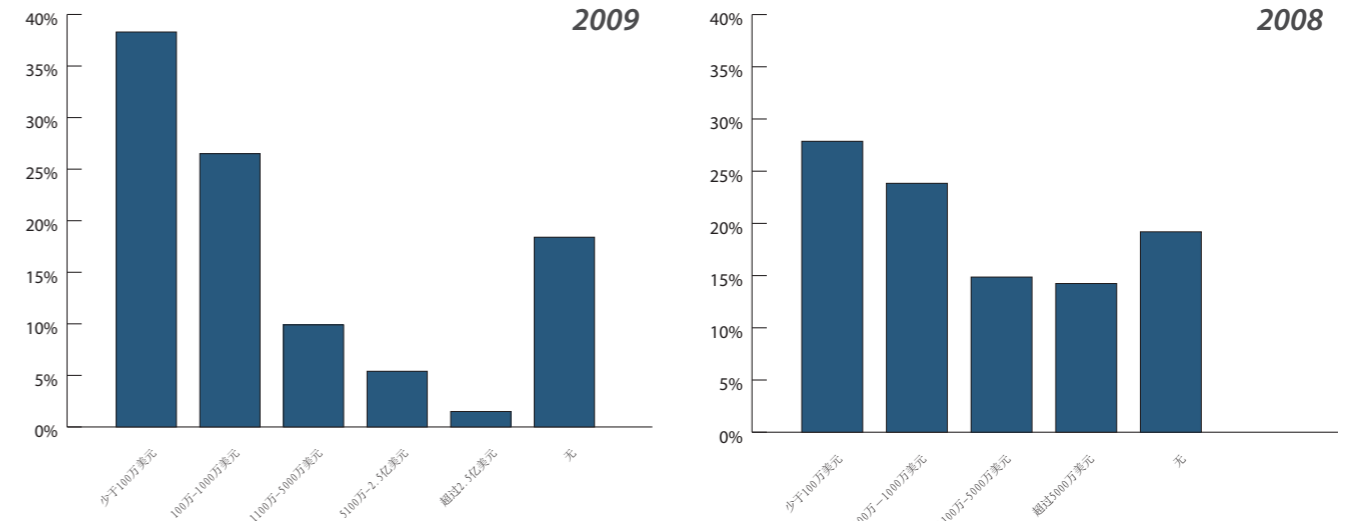
**Q: For the coming 3 years, what is your company's expected investment volume in China?**



Unsurprisingly, the distribution of budgeted reinvestment over the coming three years tends higher than for the current year. Again, approximately 80% of respondents indicated some degree of planned investment in this time frame, although approximately 11% plan to invest in excess of \$50 million, compared to only 6% in 2009 alone, and nearly 60% of companies report plans to invest more than \$10 million.

Still, the distribution of budgeted investment volume over three years is significantly lower than 2008's results. Presumably, this is a result of increased difficulty securing financing, in addition to more conservative approaches to managing cash flow as the economy continues to suffer systemic issues in the continuing slowdown.

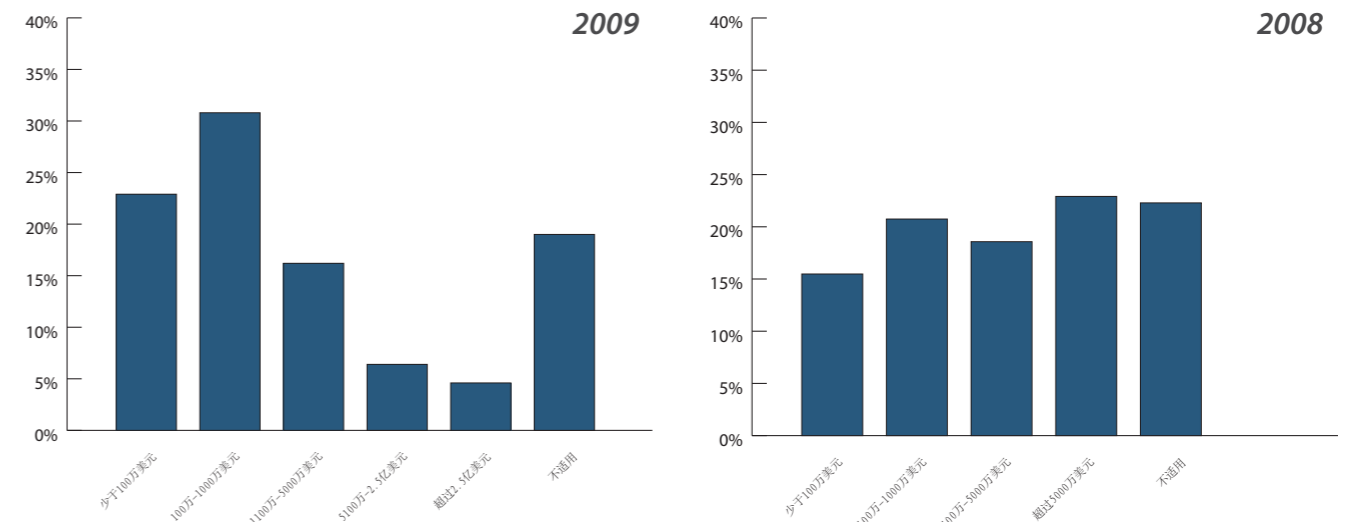
**问题：贵企业2009年度在中国的预算投资额是多少？**



调查显示，今年的预算再投资会比之前几年保守。与去年的投资预算相一致的是，近20%的企业在2009年度没有再投资计划，而超过65%的企业的计划投资在1000万美元以内，还有约6%的企业计划投资5000万美元或以上。

虽然没有增资计划的企业数量稳定地保持在20%左右，但我们能够注意到尽管投资总额出现下滑，但是在今年计划投资的企业数量并没有减少；并且，计划小额投资（100万美元以内）的企业数量增加是非常明显的，比2008年增加了约10%以上。

**问题：在未来三年内，贵企业在中国的预算投资额是多少？**



不出所料，未来三年的预算投资额高于本年度预算；约80%的受访企业表示在该时间段会进行一定程度的计划投资，而约11%的受访企业计划投资超过5000万美元，相比在2009年有此计划的企业份额只有6%，而近60%的企业将计划投资超过1000万美元。

尽管如此，此次统计出的未来三年预算投资额大大低于2008年的结果。据推测，引发这一结果的原因是由于融资保障困难加大，此外，持续的经济放缓造成了经济系统性的问题，从而使企业采取保守态度进行现金流的管理。

### Real and Standardized Investment Volumes

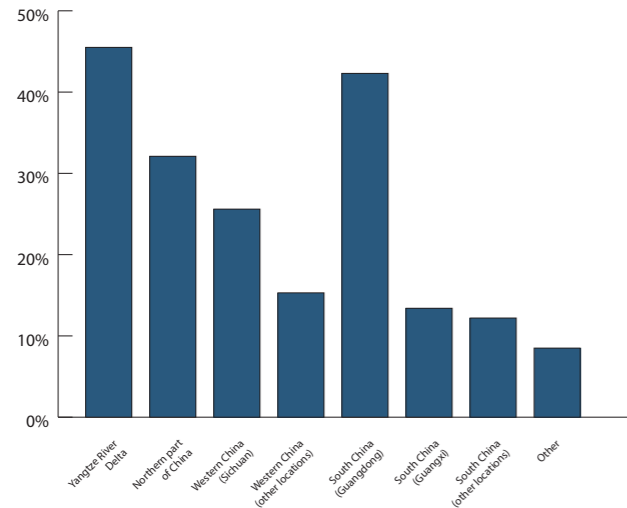
In an effort to better describe long-term investment volume trends observed over the consecutive years that this study has been conducted, we have this year included a standardized measure of investment volume in addition to a composite of actual reported investment budgets.

In previous years this composite has been calculated as the product of the mean of the investment range for each category (except for the "Greater than" category, for which the minimum value has been used) and the number of participants indicating that category. In 2008, for example, we reported that study participants confirmed a minimum of \$16 billion in reinvestment between 2008 and 2011.

While this is strictly supported by the data, it is no longer a meaningful comparative measure over the long-term due to significant increases in the number of study participants over the past two years. Instead, beginning this year we will be supplementing this calculation with a comparison of reported investment budgets standardized to 100 companies but reflecting the same breakdowns in categories. Because results prior to 2008 did not include the "Greater than \$250 million" category, however, they have been omitted from this presentation.

In looking at the results, we can observe that while total standardized projected investment volume has lowered across the board, the general relationship between 1- and 3-year projections remains intact. As noted above, difficulty obtaining financing as a result of the "credit crunch," in addition to more conservative investment programs as companies are more tightly managing cash flow, are likely contributors to this decline.

### Q: For future investments, in which areas of China will you likely expand in the next three years?



This year, an additional question was added to the study in order to measure interest in expansion in various regions over the coming three years. Approximately 42% of companies indicated that they would continue to expand in South China, with just over 40% of companies indicating that they would additionally expand their operations in the Yangtze River Delta. 25% of companies furthermore indicated that they would expand into the earthquake-damaged Sichuan province, consistent with AmCham South China's ongoing "3-year plan to aid earthquake reconstruction," which includes a program of investment promotion for Sichuan province and nearby effected areas.

**\$6,486,000,000**

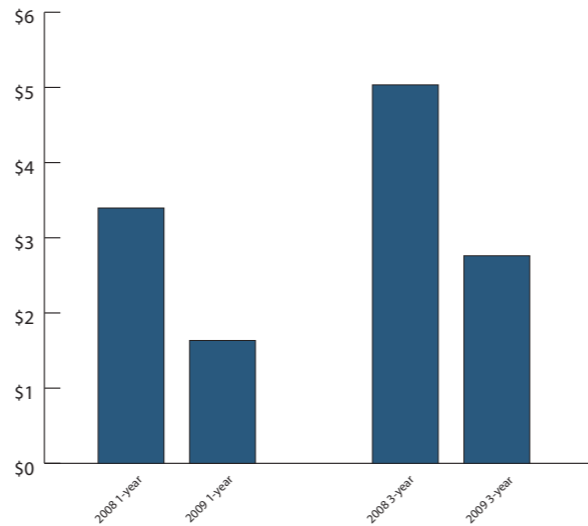
MINIMUM REPORTED TOTAL INVESTMENT VOLUME IN 2009

**\$10,963,000,000**

MINIMUM REPORTED TOTAL INVESTMENT VOLUME IN 2009 - 2011

	(Over 1 year)	(Over 3 years)
2008	\$11,009,000,000	\$16,294,000,000
2009	\$6,486,000,000	\$10,963,000,000

MINIMUM REPORTED TOTAL INVESTMENTS OVER 1 AND 3 YEARS FROM 2008 AND 2009



STANDARDIZED INVESTMENT VOLUME PROJECTIONS FOR 1- AND 3-YEAR PERIODS (IN BILLIONS OF DOLLARS)

### 实际和标准化的投资量

为了更好地描述这份连续几年发布的研究报告中的长期投资量趋势，在列出实际投资预算总额之外，研究人员今年引入了标准化投资额，旨在更明晰的进行说明。

实际投资预算总额是各类别投资额范围值与选择相应类别的企业所占百分比的乘积（“大于...”类别则选取最小值）。例如，2008年度的调查结果显示，受访企业在2008年到2011年间的预算投资总额至少为160亿美元。

虽然这是一个非常可信的数据，但由于在这两年参加调查人数的显著上升，它不再是针对长期的有意义的衡量方法。从本年度开始，调查人员在推算时在选择相同选项的受访企业中选择100家公司做为一个标准化组来比较投资预算。由于2008年以前的统计结果并不包括“高于2.5亿美元”的类别，因此在本报告中略去。

从结果来看，我们可以观察到，虽然标准化的预计投资量有整体减少，但是1年和3年预测的总体关系保持不变。如上所述，融资的主要难度来源于“信用危机”，除此之外，由于企业在市场上困难而采取更保守的投资计划，也是引起投资下降的原因。

**\$6,486,000,000**

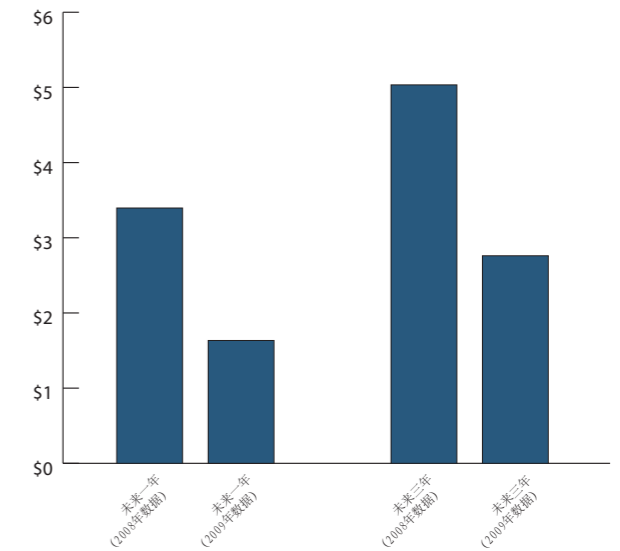
2009年度最低限度投资额

**\$10,963,000,000**

2009—2011年度最低限度投资额

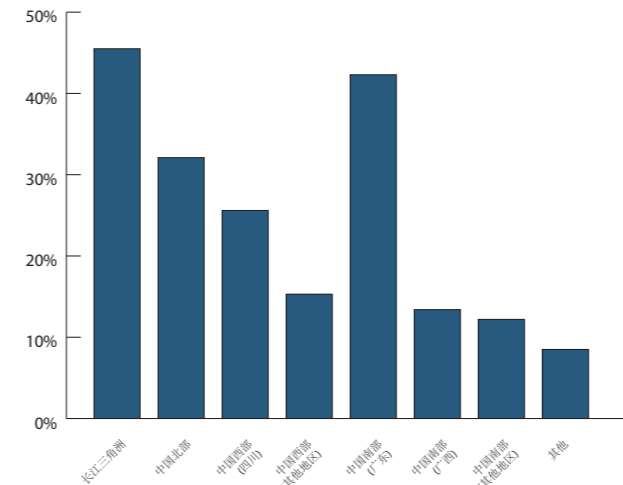
	未来一年	未来三年
2008	\$11,009,000,000	\$16,294,000,000
2009	\$6,486,000,000	\$10,963,000,000

未来一年和未来三年最低限度投资额 (2008年 Vs 2009年)



未来一年和未来三年标准化投资额对比 (以十亿美元为单位)

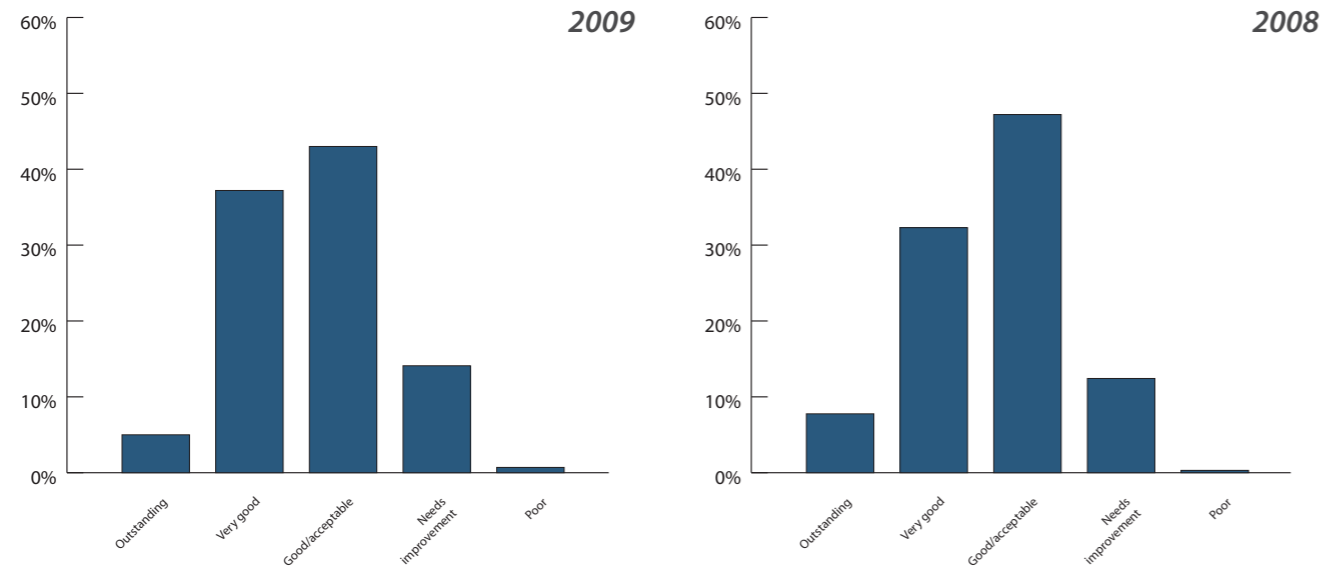
### 问题：未来的三年内您将会在中国哪个地区进行投资？



这是今年为了在本次调查中估计出未来三年内在不同区域的投资发展愿景而新添加的问题。约42%的企业表明他们将继续选择华南地区投资，只有多于40%的企业指出他们将在长三角地区增加运营。此外有25%的企业表明他们将会到四川省地震灾区发展，与华南美国商会正在推行的“帮助地震灾区重建的三年计划”一致，这一计划包括了对四川省和其邻近受影响地区投资推广方案。

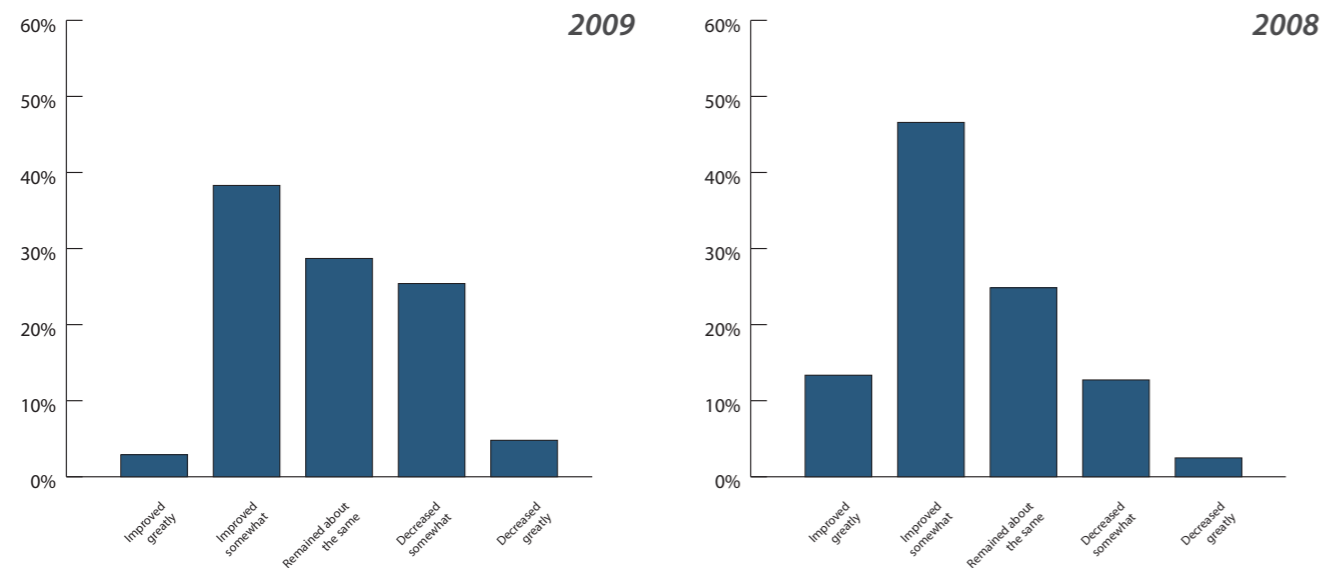
# The business environment in South China

**Q: How would you rate the overall business environment in South China?**



This year, as in years past, the vast majority of participants report that the business environment in South China remains “good/acceptable,” “very good” or “outstanding,” although the percentage of these responses has shifted slightly from 91.5% in 2007 to 87.2% in 2008 and again to 85.2% in 2009.

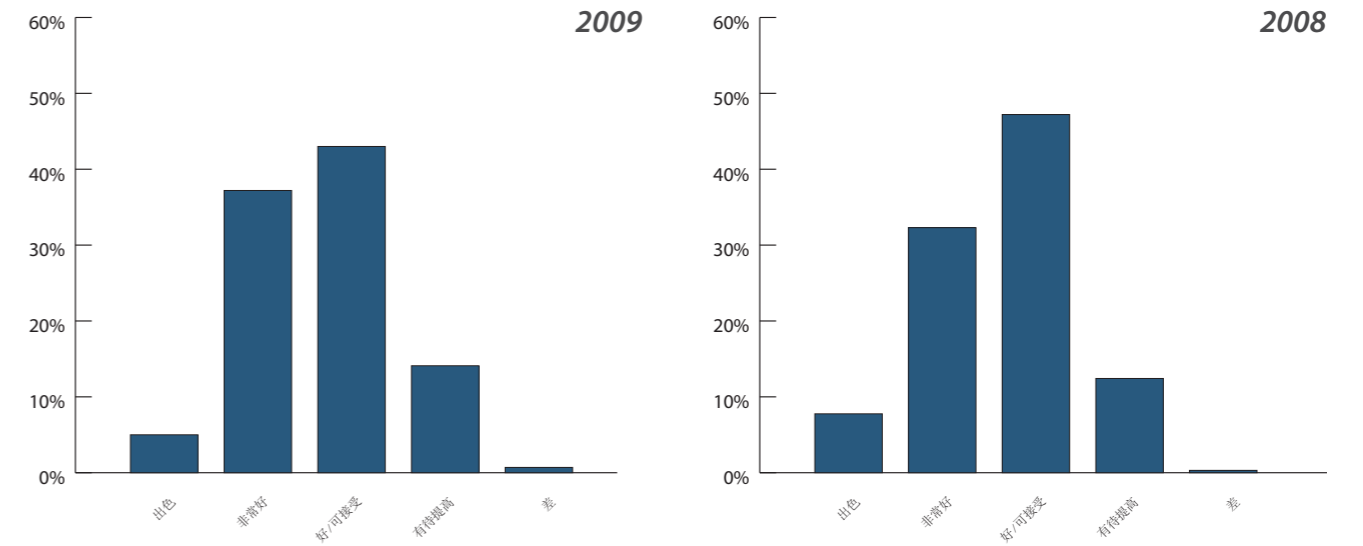
**Q: Compared to 12 months ago, in your opinion the overall business environment in South China has...**



These results are further illustrated by the follow-up question regarding changes to the business environment over the previous 12 months. Whereas in 2007 95% of respondents indicated that the overall business environment had remained the same or positively changed, in 2008 this number decreased to 85%, and this year only 70% of respondents indicated a neutral or positive change to the business environment.

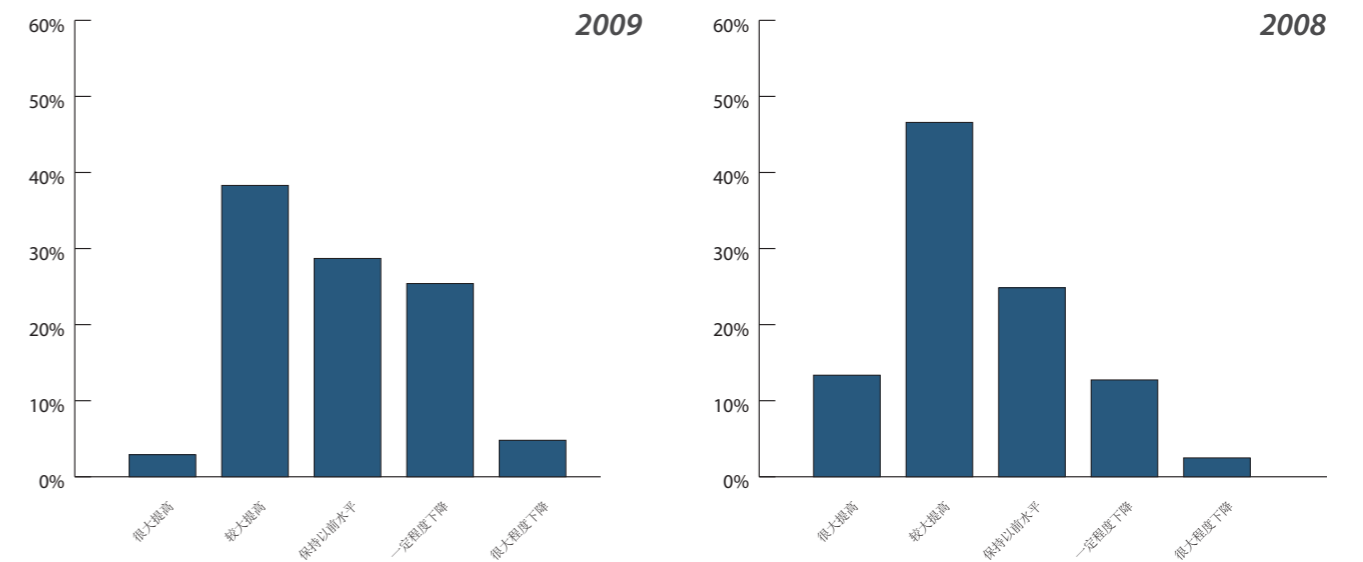
# 华南地区的营商环境

**问题：您如何评价华南地区的整体营商环境？**



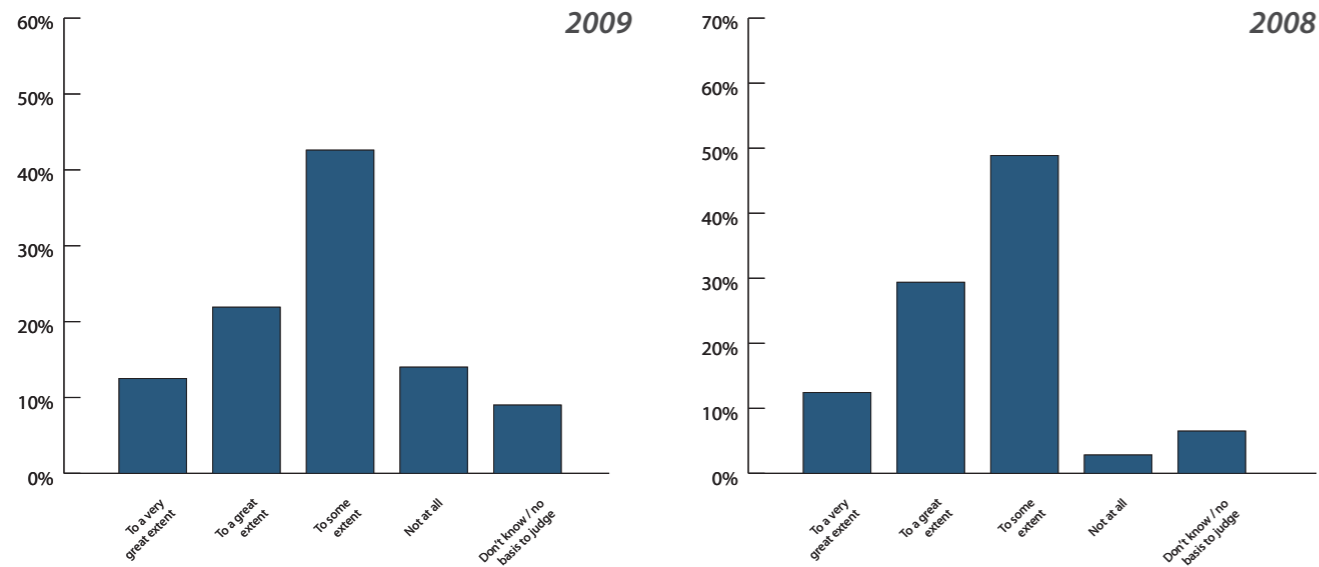
今年与过往的几年一样，大多数的受访企业都认为华南地区的营商环境仍然是“好/可以接受”、“非常好”或者“出色”，当相关百分比从2007的91.5%微降到2008年的87.27%，再到2009年的85.2%。

**问题：与过往12个月相比，您认为华南地区的整体营商环境……**



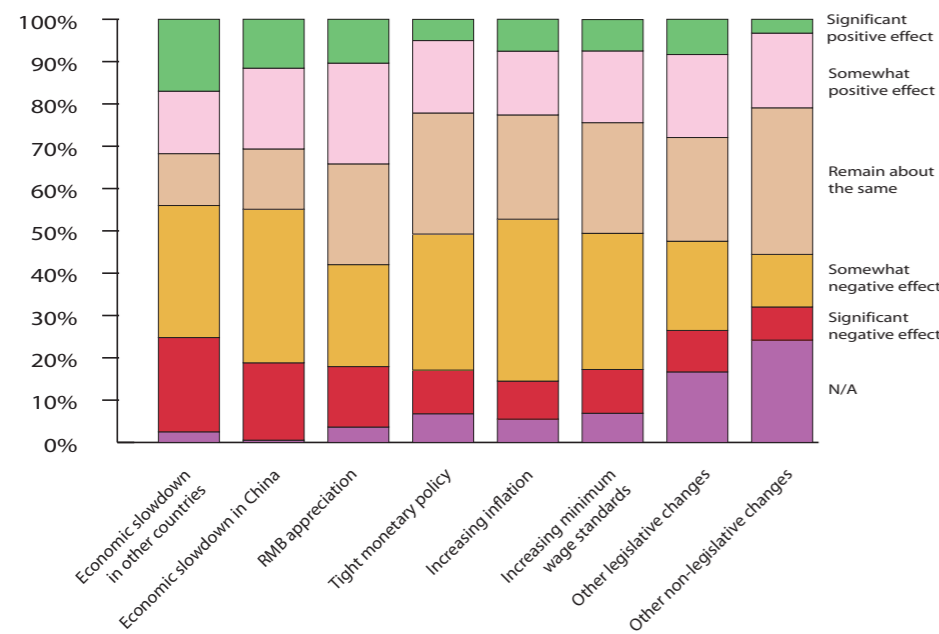
本问题的结果将在下面有关过去12个月营商环境改变的问题的分析中有更进一步的阐述。2007年95%的受访企业认为营商环境没有变化或者有积极的变化，而2008年这个数字跌至85%，今年只有70%的受访企业认为营商环境有着积极的变化。

**Q: In your opinion, to what extent have China's economic reforms in 2008 effected your business operations in South China?**



As in past years, participants report that China's economic reforms have, in general had positive effects on their business operations. Although the number of companies reporting no positive impact of reform has increased slightly, the number reporting at least some positive effect remains at nearly 80%.

**Q: In your opinion, how have, and how do you expect, the following developments to effect your business operations in South China?**

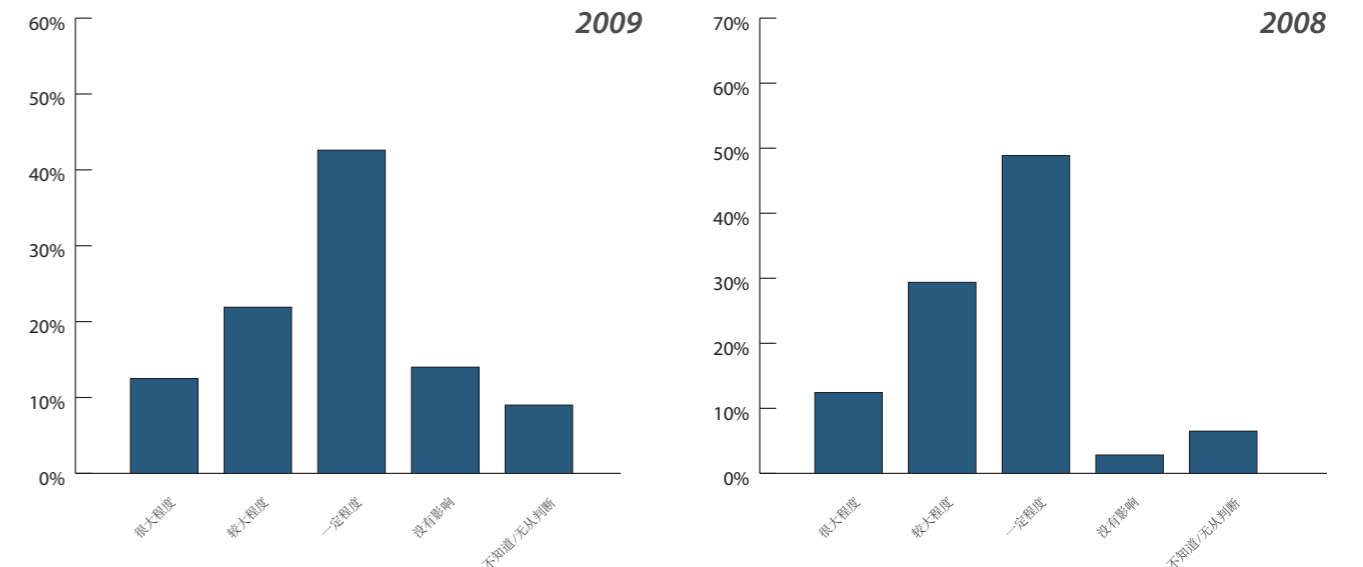


In order to address the fact that the preceding three questions do not specify whether responses are due to local (or even specific) changes to the overall environment or are rather indicative of more global trends, the "current events" question specifying six potential temporal issues was added in 2008 and updated in this year's study.

Of these responses, "economic slowdown in China," "economic slowdown in other countries," "increasing inflation" and "tight monetary policy" were the issues reported as having the greatest

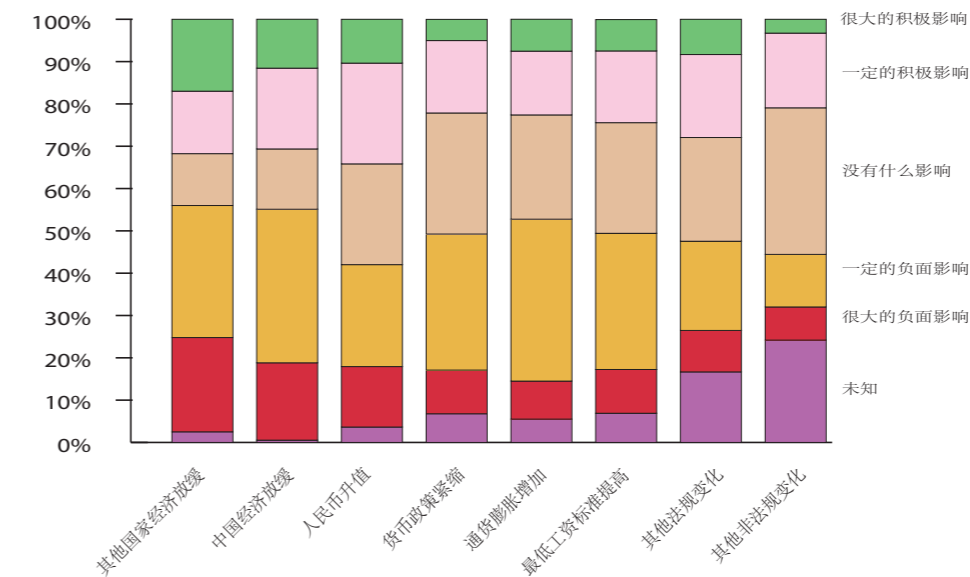
negative impact on participants' operations. The negative effects of economic slowdown in China and in other places were roughly equally attributed as causes for concern, which is unsurprising given the heavy investment of most participants in the China market. Also significant, however, is that the number of respondents concerned about RMB appreciation relatively low given the recent state of macroeconomic discourse in the United States and elsewhere outside of China.

**问题：在你看来，2008年中国的经济改革在何种程度上影响到贵企业在华南地区的经营？**



在过去几年的调查中，受访企业认为中国的经济改革总体上对他们的经营起了积极的影响。尽管今年反映改革有负面影响的企业数目略有上升，但是还是有至少80%的企业认为改革有积极的作用。

**问题：在你看来，你认为将来的发展会怎样影响贵企业在华南地区的经营？**



为了体现以下三个问题的回应并非地方性、个别性，而问题中涉及的变化覆盖整体环境及全球趋势，问题详述的这些“当前事件”涉及六个潜在问题，这些问题加在了2008年的报告中，并且今年做了修整。

在回复当中，“中国经济放缓”、“其他国家经济放缓”、“通货膨胀增加”和“货币紧缩政策”被认为是对经济环境负面影响最大的。大多数受访企业都在中国市场投放了大量投资，他们认为无论是中国经济放缓还是其他国家经济放缓所产生的负面影响都同样令人担忧。此外，有部分受访企业表示他们也对近期美国及其他国家在宏观经济阐述中提到人民币升值相对较低的问题非常关注。

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**Q: In your opinion, what are the top 5 challenges that hinder or limit your company's opportunities for growth in South China?**

1. Regulatory issues (Chinese government)
2. Rising labor costs
3. Local competition
4. Lack of qualifiable managerial and specialist talent
5. Exchange rate issues

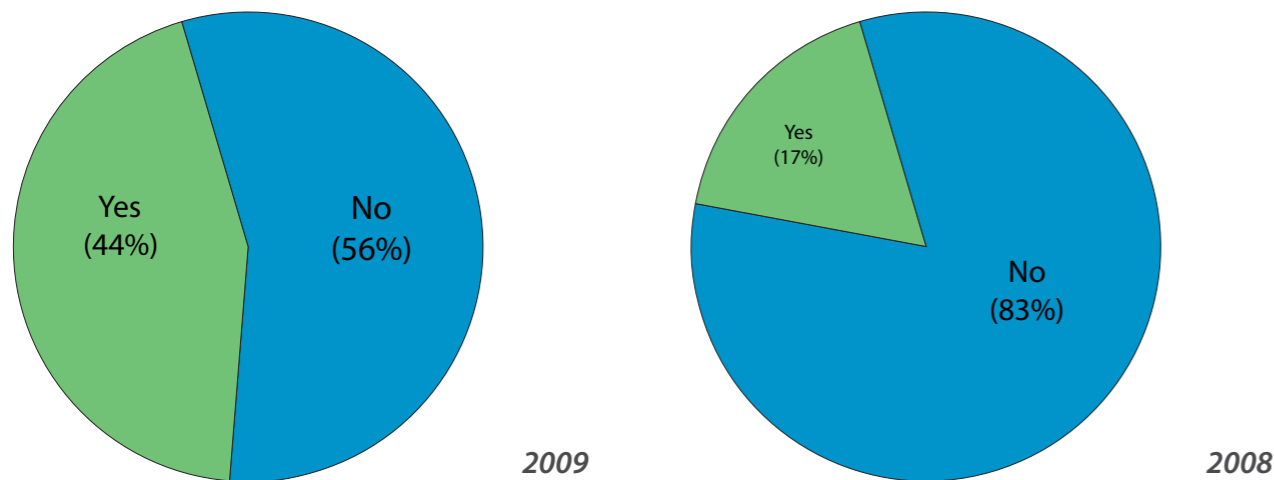
"Regulatory changes by the Chinese government" continues, for the fourth consecutive year, to be listed as both the greatest challenge now and in the coming three years to companies in South China. "Rising labor costs," "lack of qualifiable managerial and specialist talent" and "local competition" were similarly cited as top challenges both now and in the coming three years, also consistent with prior years' results. "Exchange rate issues" were again, as in 2008, the fifth-most cited immediate challenge, although in the three-year timeframe foreign competition was reported as a more pressing challenge (also consistent with 2008's results).

**Q: In your opinion, what will be the top 5 challenges over the coming 3 years that will hinder or limit your company's opportunities for growth in South China?**

1. Regulatory issues (Chinese government)
2. Rising labor costs
3. Local competition
4. Lack of qualifiable managerial and specialist talent
5. Foreign competition

The remarkable persistence of these issues as the most-reported concerns for businesses both at present and in the following three years is significant, although to what extent these concerns are based on documented changes rather than speculation or a lack of systemic confidence is not immediately evident.

**Q: Has your company made specific preparations for emergency situations, such as a potential outbreak of Avian Influenza ("Bird flu") or an earthquake or other natural disaster?**



In light of the severe winter storms and the earthquake in Sichuan over the past 12 months, this question has been updated this year to include natural disasters in addition to hazards to public health. Thankfully, the trend toward fewer companies making specific preparations that had been observed since 2006 has reversed, and now 44% of companies report having some form of contingency plan should an outbreak of Avian Influenza or a natural disaster occur.

**问题：在您看来，哪五项是阻碍或限制贵企业在中国华南地区发展的主要挑战？**

1. 法规问题（中国政府）
2. 劳动力成本增加
3. 本土竞争
4. 缺乏高素质管理和专业人才
5. 汇率问题

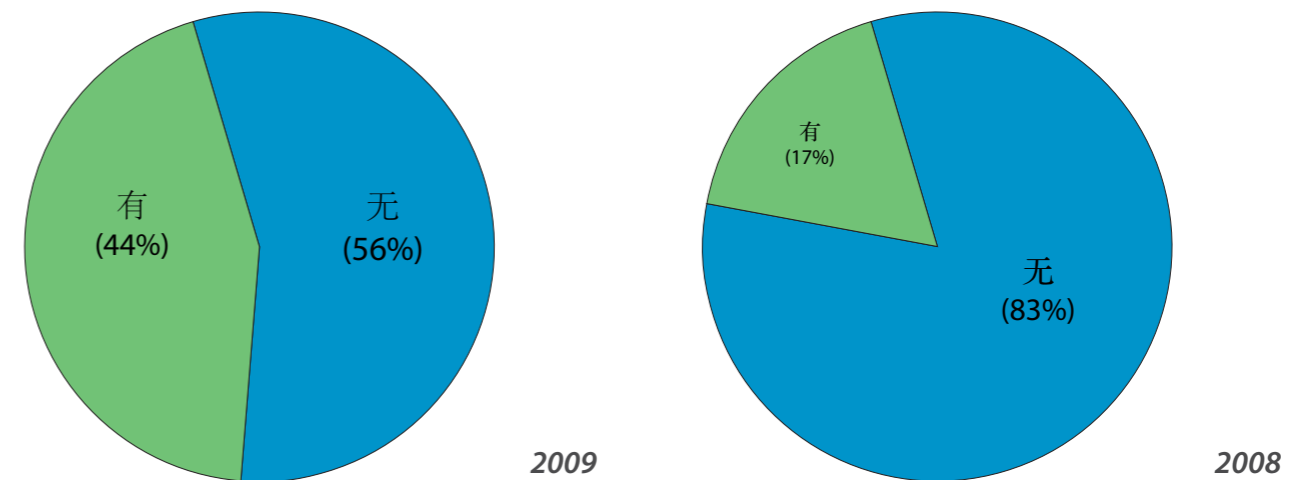
“中国政府的法律法规问题”连续第四年仍然是现在和以后三年在华南地区的企业发展面临的巨大挑战。与往年的调查结果一致，人力资源成本的增加，缺乏合格管理和专业人才以及本地竞争也是企业现在和今后三年发展中面临的最主要挑战。与2008年的结果相同，排名第五位的当前挑战是汇率问题，而未来三年所面临的更大压力挑战则是外国竞争。

**问题：在未来三年中您认为对贵企业在华南地区发展形成障碍或限制的五大挑战是？**

1. 法规问题（中国政府）
2. 劳动力成本增加
3. 本土竞争
4. 缺乏高素质管理和专业人才
5. 国外竞争

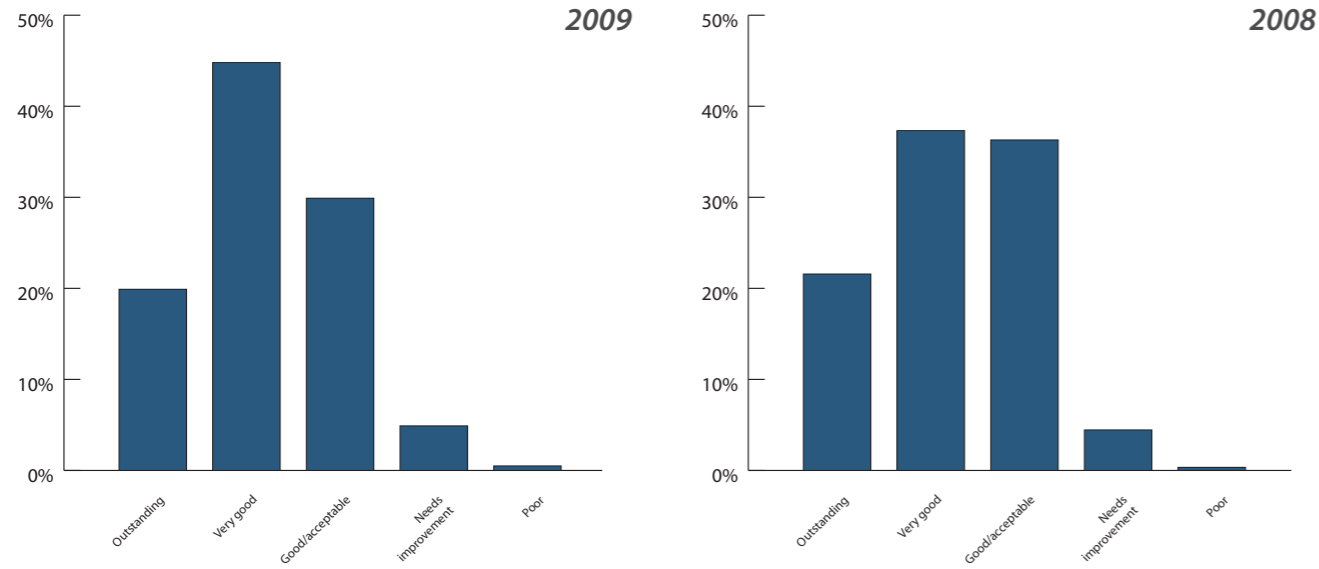
当前及未来三年内企业最为关心的影响其发展的这些问题的持续性是非常显著的，然而问题影响的范围给基于书面文件的变化，而不是投机或缺乏系统性的信心。

**问题：企业是否对可能发生的紧急情况，比如禽流感爆发、地震或其他自然灾害，做好特别的准备？**



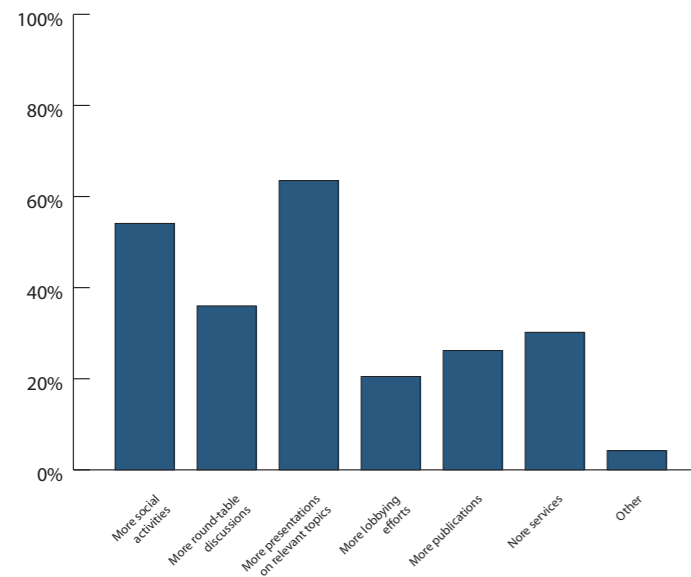
除了危害公共健康，今年的这一问题包含了自然灾害。幸运的是，2006年以来只有较少的企业为相关突发事件做出明确准备的这种趋势得到逆转，今年，44%的受访企业表示他们已做出应对紧急情况的措施，预防禽流感爆发或自然灾害的发生。

**Q: How would you rate AmCham South China's 2008 performance on delivering programs and activities that match your expectations and needs?**



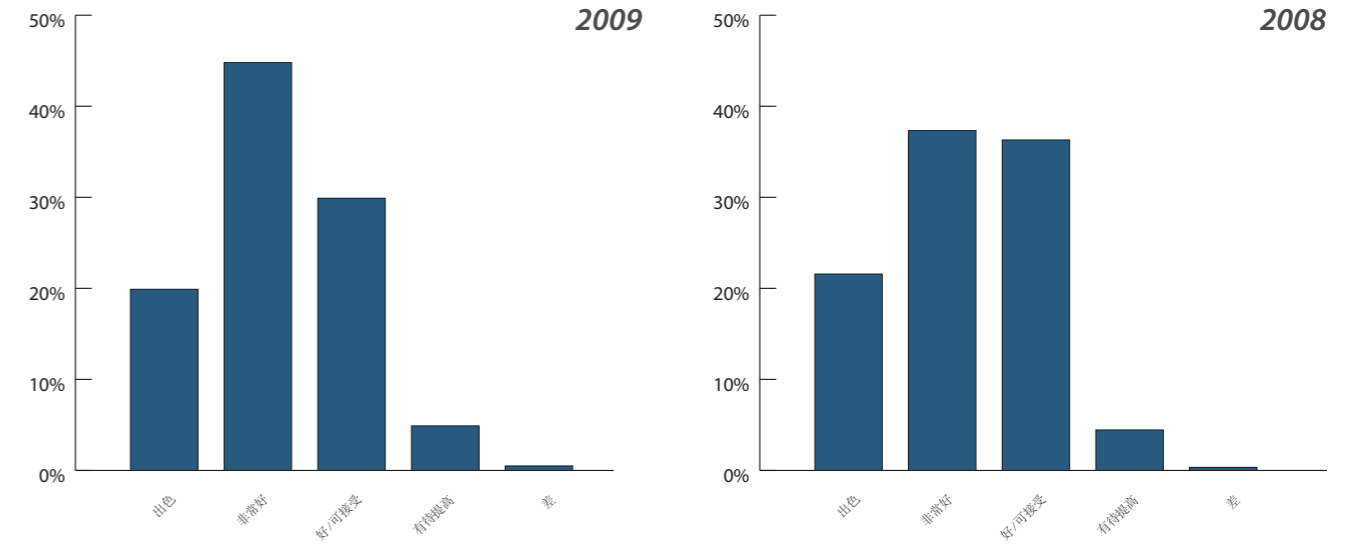
This year, 95% of participants rated AmCham South China's performance as good, very good or outstanding, and 64% of participants indicated very good or outstanding performance. This is consistent with results from the past three years.

**Q: In what areas would you recommend future improvements in AmCham's programs and services?**



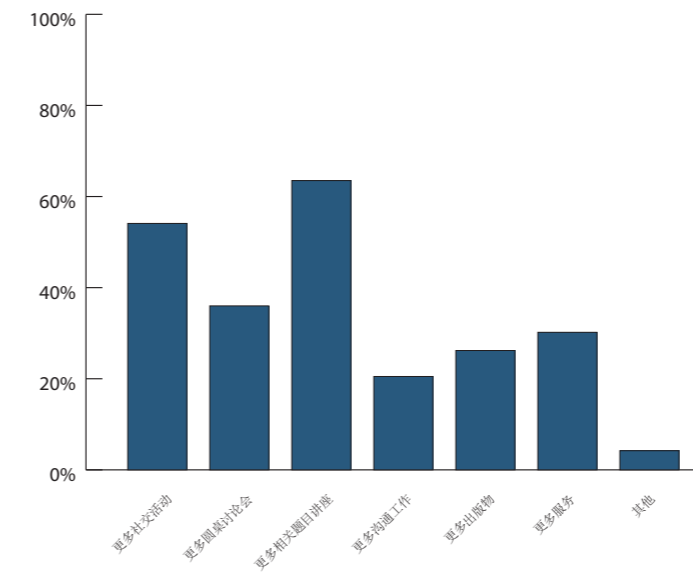
Also as in past years, responses to this question varied, although nearly 64% of participants indicated that they would appreciate "more presentations on relevant topics."

**问题：在开展项目和活动方面，你如何评价华南美国商会2008年的工作表现，有多少项目和活动是符合你的期望与需要？**



今年，95%的受访企业对华南美国商会的工作评价为好、非常好或出色，其中评定非常好和出色的比例达到64%，这与前三年的结果是相一致的。

**问题：你认为华南美国商会在项目和服务方面还有哪些地方需要提高？**



如过去几年的情况类似，这个问题的回复多种多样。但接近64%的受访者指出，他们普遍希望商会能够组织“更多相关题目讲座”。

# *ECONOMIC OVERVIEW*

经济概况



## Overview: Greater South China

GREATER SOUTH CHINA is one of the most economically dynamic regions in the world and one that is of particularly great significance for the manufacturing industry, both domestically and internationally. The historic growth of South China's economy has created an immense economic network with strong links to the global marketplace.

As the first area of China to be opened up to overseas business following Deng Xiaoping's famous proclamation that "to be rich is glorious," the Pearl River Delta (PRD) is one of the country's most advanced and competitive regions, with world class local- and foreign-owned original equipment manufacturer (OEM) operations. Consistent with the strategic direction articulated by the Central Government over the past year, these manufacturers are striving for technological innovation to move up the value chain and to enhance their competitiveness in a wider range of products. Given a total population of around 41.5 million across the Pearl River Delta (21.5 million officially registered inhabitants and an estimated 20 million migrant workers), the region certainly has the workforce to continue to drive the economy forward.

Covering an area of some 42,800 square kilometers, the PRD is commonly defined as including nine cities: Guangzhou, Shenzhen, Dongguan, Foshan, Huizhou, Jiangmen, Zhaoqing, Zhongshan, Zhuhai. Of these, Guangzhou (the capital of Guangdong Province) and Shenzhen, (China's first and most successful Special Economic Zone) are major, first-tier cities. While the Chinese government's definition of the PRD does not include Hong Kong or Macau, the two Special Administrative Regions have long played crucial roles in the economic fabric of South China and together with the mainland cities above form what is often denoted the "9 + 2" or Greater Pearl River Delta region.

Although all nine cities are subject to the same provincial government regulations and policies, municipal governmental implementation of these policies varies widely. Earlier reform and opening up in some areas (notably Shenzhen) and the relative strength of transport links have also led to certain discrepancies across the region.

According to the "Plan for Modernization Construction of the Pearl River Delta Economic Zone," a great metropolitan ring circling the Pearl River mouth, including two centers (Guangzhou and Shenzhen) and three metropolitan regions (Middle, East and West Bank of the Pearl River Mouth Met-

ropolitan Regions), forms part of the Pearl River Delta.

The Middle Metropolitan Region, with Guangzhou at the core and including Foshan, Nanhai, Panyu, Shunde, Sanshui, Huadu, Zengcheng, Conghua and other cities, will become the center of politics, education, culture, science and research, finance, commerce and trade, information and transportation, and the second industrial base for high-and-new tech and high value-added industries.

The East Bank Metropolitan Region, with Shenzhen at the center, includes Huizhou, Dongguan, Huiyang, Huidong and Bolo. Bordering Hong Kong, it will become the shop front of the Pearl River Delta Economic Zone to the world, and a base for the development, production and application of high and new technology (especially microelectronic technology) as well as the energy and heavy chemistry industries.

The West Bank Metropolitan Region, comprising Zhuhai, Jiangmen, Zhongshan, Xinhui and Heshan, is rapidly becoming a metropolitan region with energy and heavy chemical industries as the backbone. Household appliances and machine manufacturing will also be prevalent due to the availability of capital and technology.

The Guangdong government also plans to raise the urban population to 65 percent by 2010. Per capita disposable income of urban residents was RMB11,547 in 2006. Under the plan per capita disposable income of urban residents in Guangdong also is expected reach RMB18,000 by 2010, with rural per capita disposable income rising to RMB6,200 in the same period.

Rules, procedures and regulations are changing fast in China. Several interesting changes have been made at the national level, from VAT refund amendments, to Individual Income Tax Declaration adjustments and the recent promulgation of the new Corporate Income Tax Law and Labor Contract Law that came into effect in 2008. However, regulations at the local level tend to change even faster and can often have yet more significant effects on foreign investors than the generally well-publicized national changes.

As China's manufacturing center, the PRD colloquially known as the country's "beating (economic) heart," hosting direct or indirect production for all kinds of sold goods and famous brands worldwide. Manufactured goods, outsourced

## 经济概况：华南地区

华南地区是世界上最具经济活力的地区之一，对国内外制造业来说更是尤其重要。华南地区经济的历史性增长为全球市场提供强而有力的经济网络。

作为在全中国首个对海外经济开放的地区，珠三角是全国最发达且最富竞争力的地区之一，拥有众多世界级本地或外资原始设备制造商 (OEM) 生产运作。与去年中央政府提出的战略方向一致的是，这些生产商正努力以技术创新来提升价值链，以提高更多类型产品的竞争力。珠三角地区总人口约4150万（官方登记居民人数为2150万，统计外来工人数为2000万），无疑拥有足够的劳动力以推动其经济发展。

珠三角地区覆盖面积达42800平方千米，包括九个城市：广州、深圳、东莞、佛山、惠州、江门、肇庆、中山和珠海。其中，广州（广东省省会）和深圳（中国首个及最成功的经济特区）为主要的一线城市。虽然中国政府对珠三角地区的定义并不包括香港和澳门，这两个特别行政区长期以来都在华南地区经济结构中扮演非常重要的角色。

尽管这九个城市全部都受同一个省政府法规和政策的管理，各市级政府对这些政策法规的实施层次有些差别。早期实现改革开放的地区（比如深圳），在地缘位置上都拥有临近港澳的优势。较早开放地区的经济发展程度也由于地理位置存在差异，比如珠三角东部地区的深圳和东莞就发展较早。

据“珠三角经济区现代化建设计划”指出，围绕珠江口的大都市圈，包括两个中心（广州及深圳）和三个大都市区域（珠江口中部、东部及西岸的都市区），该大都市圈构成了珠江三角洲的一部分。

以广州为核心的中部大都市区，包括佛山、南海、番禺、顺德、三水、花都、增城、从化和其他城市，将发展成政治、教育、文化、科研、金融、商贸、信息及运输中心，和高新技术及高附加值产业的第二大产业基地。

以深圳为中心的东岸大都市区，包括惠州、东莞、惠阳、惠东和博罗。毗邻香港，此区将成为珠三角经济区面向世界的门户，以及高新技术（尤其是微电子技术）和能源、重化工业的发展、生产及应用基地。

以珠海、江门、中山、新会及鹤山组成的西岸大都市区正迅速成为以能源及重化工业为支柱的大都市区。因为充足的资金和成熟的技术，家用电器和机器制造业

也相当普遍。

广东省政府同样计划到2010年使城市人口比重增加到65%。2006年城市居民税后人均收入为11547元人民币。根据该计划，广东省城市居民税后人均收入到2010年预期将达到18000元人民币，同期农村居民人均个人收入将上升到6200元人民币。

中国的法规、程序和制度变化较快，从“出口退税政策”的变化，到“个人所得税申报”调整，再到最近的新《企业所得税法》的颁布和2008年起实施的《劳动合同法》，全国性的法律法规发生了一些意义重大的变化。然而，地区性法规的变化比全国性法规的变化更快，对国外投资者的影响也往往更显著，有时在区域竞争力方面会有一些影响。

作为中国的制造业中心，珠三角被誉为中国“跳动的经济心脏”，直接或间接地掌握着全世界各种各样销售产品和知名品牌的生产。被国内企业和台资、港资企业外包生产的产品数量达到中国出口总量近三分之一，2007年总值超过2.87万亿元人民币（4200亿美元）。此地区在2006年取得的外商直接投资占国内外商直接投资总量将近四分之一，总收益为992亿元人民币（145亿美元），年均增长率约为10%。

随着过去五年全球竞争加剧，外国投资者投资结构的变化跟中国法规的变化一样快。法规的变化往往令中国更加符合加入世贸组织时的承诺，随着外国投资者利润空间的缩小，他们逐步开始加强自身实际的承诺。外包商变得越来越注重直接生产或更大范围相关服务的发展。小型贸易商寻求更有效的运营，而大型贸易商及分销商则寻求对物流、质检、售后服务或海关相关领域的全面掌握。

这就意味着珠三角地区为保持其市场地位而生产迁移的中小型外资企业正面临着中国和其他外资企业日益激烈竞争。在同一个地区找到两家（或更多）业内领先的竞争企业并不稀奇，这些企业甚至来自欧洲同一个国家。在制衣、鞋业、皮革或五金、电子相关产品等低技术行业间的竞争日趋激烈，由于利润空间的缩小，达到最高的生产效率是保持竞争力的必要条件。

此外，在薪酬上升的同时可用工业用地逐渐减少，与此同时，工业基地的总体质量得到了提升，各地政府倾向于非资本集约、高附加值或环保投资项目的审批，迫使低附加值工业企业向珠三角以外的其他地区或者邻近各省转移。一些地方政府已经开始执行更加严格的审

to the PRD by domestic and foreign enterprises, accounted for nearly a third of China's total exports, worth over US\$420 billion in 2007. The region accounted for almost a quarter of China's foreign direct investment in 2006 with an income of US\$14.5 billion, averaging an annual increase of approximately 10 percent.

Due to growing global competitiveness in the last five years however, the kinds of investment structures explored by foreign investors have been evolving as fast as China's changing regulations have. As the regulations change, often to bring China in line with its WTO commitments, foreign investors have begun to increase their commitments on the ground as their profit margins have tightened up. Outsourcers increasingly have become more focused on direct production or on development of a wider range of related services. Small traders have looked for a more effective presence on the ground, while big traders and distributors have sought full control of logistics, quality control, after sales services or customs related matters.

This has meant that small and medium-sized foreign invested companies present across the PRD, who have often been obliged to relocate production to remain in the market, are facing aggressive competition from domestic companies as well as from other foreign-invested enterprises. It is not uncommon to find two (or more) leading competitors neighbors in the same zone. Competition has been even fiercer in low-tech sectors such as garments, shoes, leather or simple hardware and electronic related goods, as changes to the regulatory environment have shrunk profit margins so much as to drive companies out of business.

Furthermore, as salaries rise, usable industrial land becomes less plentiful, and the overall quality of the industrial base increases, local governments are declining to approve industries that are not capital intensive, high value-added, or environmentally friendly, forcing embattled low value-added industries elsewhere in the PRD if not to neighboring provinces or out of China altogether. Some local governments have begun directly managing the industrial makeup of their local economies through regulatory changes, ranging from increased minimum registered capital thresholds (some as much as tenfold so as to attract only larger and better structured and capitalized manufacturing investment) to more stringent criteria for total investment or output value per square meter invested.

The trends described above can be seen as the results of a maturing economy which will bring plenty of new opportunities for foreign investors, bolstering an increased Chinese purchas-

ing power and a need to become aware of the social responsibilities that must be faced to continue favorable trends. Despite these rapid changes, reports continue to indicate that the vast majority of foreign-invested enterprises on the ground are already profitable, and should remain so.

By focusing on the development of its manufacturing industry, Guangdong is committed to becoming one of the most important manufacturing bases of the world, while Hong Kong is focusing on promoting modern logistics, finance and trading with an objective to turn itself into one of the world's most important centers for the modern service trade industry. Likewise, Macao is relying on continuing to build its tourism and convention industries. The advantages bestowed for these three parties are complementary to each other and joint development will be achieved for all of them.

In the meantime, the "Pan-Pearl River Delta Economic Zone" is already taking shape at a fantastic speed. Thus, the dominant and regionally superior position of Guangdong is being brought into full play, and in return, offering a broader hinterland for business development. The PRD continues to strongly contribute to China's economic well-being, but there is a strong emerging trend for development outside of Central Guangdong, and significant amounts of investment to the east, west and south can be expected in the future. Of the four provinces falling under the South China umbrella, the PRD can anticipate many interesting developments in the future, although there is no doubt that South China will remain "the beating (economic) heart of China" for many years to come.

批制度来改变当地的产业基础，比如提高最低注册资金门槛，以达到更高的整体投资标准或每平方米投入产出量，某些地方的最低注册资金门槛提高了十倍，希望仅引进更大规模和资金投入的制造业投资。

随着上述趋势发展，中国将发展成能为外国投资者带来众多新机遇的成熟经济体；中国的消费能力也将得到更好的支撑；促进可持续性发展的企业社会责任实施将更普遍。从美国商会和其他商业机构每年进行的经济情况调查，到专业的经济相关机构所发布的经济报告都肯定了包括华南地区在内的绝大多数在华外资企业都实现了盈利，并将在未来几年保持这一状况。

广东省注重制造业发展，因此将致力于把自身塑造为世界最重要的制造业基地之一；香港则注重促进现代物流、金融和贸易的发展，目标是将其自身转变为世界最重要的现代服务贸易产业中心之一。同样，澳门将继续努力发展其旅游业、会展业及博彩业。这三者的优势在于它们彼此互补，能够促成彼此共同发展。

同时，“泛珠三角”经济区正迅速成型。因此，广东省突出、优越的区位优势得到充分体现，并相应为商业发展提供更广阔的腹地。毫无疑问，在未来相当长的一段时期，珠三角地区将继续保持其“跳动的经济心脏”的地位，为中国经济的健康发展做出重大贡献。然而，在广东省中部以外同样出现强劲的发展势头，东部、西部和南部在未来将吸引大量的投资。可以预见，华南地区覆盖的四省内，珠三角地区在未来将有长足的发展。

# Guangdong Province

GUANGDONG PROVINCE AND the key cities of the Pearl River Delta (PRD) are easily considered China's "beating economic heart" and this is not going to change any time soon. Without a doubt, Guangdong province has developed into one of the most important manufacturing bases in the world, providing job opportunities for 10 million people in the region and making significant contributions to the further development of both China and the world economy.

## History

The moniker "Guang" means "expanse" or "vast" and has been associated with the region from the Western Jin Dynasty onwards. Guangdong has a long trading history that tracks back to the 16th century when the province had extensive links with the rest of the world, particularly through the cities of Guangzhou and Macau. In the modern era its economy has flourished thanks to Deng Xiaoping's open door policy that since 1978 has enabled the province to take advantage of its access to the ocean, its proximity to Hong Kong, and its historical links to overseas Chinese. All of this has contributed to Guangdong becoming one of the richest regions in the nation, with the highest GDP among all provinces.

## Geography

Situated in the southern part of China, Guangdong borders with Jiangxi and Hunan provinces to the north, Fujian province to the east, Guangxi Zhuang Autonomous Region to the west and faces the South China Sea to the south with its 4,300 kilometer long coastline. It covers a total area of 179,756 square kilometers and houses a total population of 91.9 million (including a permanent population of 74.73 million). There are 14 cities and counties, notably Guangzhou, Shenzhen, Dongguan, Foshan and Zhuhai. From 2005 to 2010, the province is giving top priority to the development of solar, wind, tidal, marsh gas and other clean and recycled energies, in its effort to become a model region for environmental protection.

## Infrastructure

Guangdong has built a complete transportation network for water, land and air. Its proximity to Hong Kong and Macao—the major transshipment points for the province's exports—and these regions' port infrastructure for international

shipments add to the competitiveness of Guangdong as a production location. The government has a number of big plans involving 26 projects and some RMB57.1 billion investment, focusing on building "Two networks, two ports" (road and rail network, ports and airports). The expansion of the Port of Guangzhou and the new Baiyun International Airport are a step towards attaining the province's ultimate goal of becoming the transportation hub for and main gateway to South China.

## Roads

Guangdong has arguably the most developed network of road and highways of all provinces and municipalities in China with more than 70 percent of Guangdong's cargo volume being transported by road. Vital transport links to container terminals in Guangzhou, Shenzhen, and Hong Kong along the Guangzhou-Shenzhen Highway and National Highway 107 are highly developed. Plans are now afoot to build 22 new superhighways of almost 30,000 kilometers, including 2,500 kilometers of expressways, with an investment of US\$36 billion throughout the province by the end of 2010. This will bring total length of the region's roadways to 140,000 kilometers, including 5,000 kilometers of expressways. Further plans are in the pipeline to improve highway links to the neighboring provinces of Fujian and Jiangxi, as well as to complete the Guangdong section of the Beijing-Zhuhai Expressway.

## Railways

Guangdong is home to between eight and nine percent of the nation's population, but only two percent of China's total railway lines. As a result plans have been made to increase the existing 19,000 kilometers of railways to 29,000 kilometers by 2020. When completed, traveling time from Sichuan, Fujian, Guizhou, Jiangxi and Hunan to Guangzhou will be reduced by half.

The Beijing-Guangzhou Railway and Beijing-Kowloon Railway are the major networks that run through Guangdong Province and together with the Guangzhou-Meixian-Shantou and Sanshui-Maoming lines, they handle about seven percent of Guangdong's cargo volume. A number of new projects are also under construction including high-speed railway links between the cities of Meizhou and Shantou, Shantou and Jieyang, Chaozhou and Jieyang and finally, Xiamen and Shenzhen.

# 广东省

广东省和珠江三角洲地区（珠三角）的一些重点城市被誉为中国的“经济心脏”，并在短期内不会改变。毫无疑问，广东省已经发展成为世界上最重要的制造基地之一，该地区已为1千万人提供就业机会，为中国和世界经济的发展做出了重要贡献。

## 历史

从西晋起，该地区被命名为“广”，是指“广阔”或“辽阔”的意思。广东有着悠久的贸易历史，最早可追溯到十六世纪，该省——特别是通过广州和澳门——已与世界其他地区建立广泛的联系。在当代，受益于邓小平的开放政策，当地经济得到繁荣的发展。自1978年以来，广东省积极利用其拥有海洋资源、邻近香港、是历史侨乡等优势，促成了该地区成为全国最富有和国内生产总值最高的省份。

## 地理

广东省坐落在中国的南部，与江西和湖南接壤，东靠福建，西连广西，而南面则拥有4300公里海岸线的中国南海。该省总面积为17.9756万平方公里，总人口9190万（包括常住人口7473万）。下设14个市、县，主要城市为广州、深圳、东莞、佛山和珠海。从2005年至2010年，该省将优先发展太阳能、风能、潮汐能、沼气和清洁能源，努力发展成为一个环保示范区。

## 基础设施

广东省已建成一个完善的水路、陆路和空路交通网络。临近的香港和澳门——全省主要的出口转运点——拥有国际航运基础设施，增加了广东省作为生产地的竞争力。政府有一系列大的计划，包括26个项目、571亿元投资及重点建设的“两网两港”（公路网、铁路网、航空港、海港）。扩充的广州港和广州白云国际机场，是全省实现其成为交通枢纽和华南地区主要门户这一最终目标的第一步。

## 公路

广东可以说是全国各省市中公路网最完善的省份，全省70%以上的货运量通过公路实现。通过广深高速以及107国道连接广州、深圳、香港的集装箱码头的交通运输高度发达。规划中总投资为360亿美元，规模3万公里，其中2500公里高速公路的22条路线遍布省内，将于2010年底前动工。这将使该地区公路总里程增加至14万公里，其中5000公里为高速公路。远景规划正在研究中，其中包括改善连接邻近省份福建、广西的公路交通以及完成京珠高速广东省内段的建设。

## 铁路

广东省拥有占全国总数8%至9%的人口，而铁路却只占全国总里程的2%。规划中目前19000公里的铁路总里程将于2020年前增至29000公里。届时，四川、福建、贵州、广西以及湖南至广州的旅程时间有望减半。

贯穿全省的京广、京九铁路动脉，与广梅汕和三茂铁路共同承担着广东货运总量的7%。包括连接梅州与汕头，汕头与揭阳，潮州与揭阳，以及厦门与深圳等城市的几条新高速铁路正在建设中。

## 空路

广东省拥有广州白云国际机场，以及分别位于在深圳、汕头、珠海、佛山、湛江和梅州的共七个大中型机场。耗资26亿美元的白云国际机场2004年8月启用，目前连接国内90个城市及国外25个城市，已形成运送2500万旅客，100万吨货物以及飞机173000架次的年吞吐能力。

2007年，联邦快递公司敲定将其投资超过1.8亿美元，于2008年投入运营的中转中心落户白云机场，这无疑是对白云机场的一个直接肯定。在深圳、珠海机场等干线以及汕头、梅州和湛江机场等干支线的配合下，白云机场已被打造为广东省的交通枢纽。

## 港口和水路

广东全省的年货物吞吐能力为1838万国际标准箱。主要沿海港口包括世界十大港口之一的深圳盐田港，以及广州港、湛江港、汕头港、蛇口港和一些其他优质深水港，广州港是全国第三大港口，仅次于上海和宁波。广东省约有泊位3100个，货物吞吐总量超过5亿吨，为超过130个国家的1100个港口提供服务。约20%的省内货物通过省内各个港口运送，然而大多数的货物运输仍通过陆路散货集装箱设备实现。

## 城市基础设施

广东省内第一期的液化天然气（LNG）项目于2006年完成，意味着进口的天然气可通过管道网络直供广州、深圳、东莞和佛山。第二期的液化天然气项目预计将于2008年完工，该项目将供气至肇庆、惠州、中山、江门和珠海。

## 经济和投资环境

广东省和该地区其他主要城市被誉为中国经济的心脏。该省是世界上最重要的制造业基地之一，为当地提供了1000万个就业机会，并拉动了整个珠三角地区经济

### Airports

Guangdong has seven airports including the Guangzhou Baiyun International Airport, and six other big airports located respectively in Shenzhen, Shantou, Zhuhai, Foshan, Zhanjiang and Meizhou. The US\$2.6 billion Baiyun International Airport now has connections to more than 90 domestic and 25 international destinations after opening for traffic in August 2004. Furthermore, it has the capacity to handle volumes of around 25 million passengers, one million tons of cargo and up to 173,000 aircraft annually.

In 2007, the airport also received a welcome boost with FedEx's decision to build a US\$181 million transport hub at the airport, which should be fully operational by 2008. Baiyun airport serves as the hub of air transport in Guangdong, with airports in Shenzhen and Zhuhai playing the role of trunk airports and smaller airports in Shantou, Meizhou and Zhanjiang acting as feeders.

### Ports and waterways

Guangdong's total annual goods handling capacity is 18.38 million TEUs. The main coastal ports include Yantian Port of Shenzhen—one of the top 10 ports in the world—as well as Guangzhou Ports, Zhanjiang Port, Shantou Port, Shekou Port and some deepwater fine ports. The Port of Guangzhou is the nation's third-largest after Shanghai and Ningbo. Guangdong serves over 1,100 ports in more than 130 countries and regions and has an estimated 3,100 berths which can handle a volume of more than 500 million tons in total. An estimated 20 percent of Guangdong's cargo traffic is transported by waterways which feed into Guangdong's port infrastructure, although the majority of its cargo volume reaches bulk container facilities by land.

### City infrastructure

The first phase construction of the province's LNG (Liquefied Natural Gas) project was completed in 2006, meaning that imported natural gas can be supplied to Guangzhou, Shenzhen, Dongguan and Foshan through the gas pipeline network. The second phase of the LNG project, which will transport gas to the cities of Zhaoqing, Huizhou, Zhongshan, Jiangmen and Zhuhai, will be completed in 2008.

### Economy and investment climate

As mentioned above, Guangdong is one of the most important manufacturing bases in the world, providing job opportunities for 10 million people in the region and leading the economic development of the PRD. It also earns the highest GDP in the country and accounts for more than one-third of its foreign trade—Guangdong's GDP, in fact, surpassed that

of Taiwan in 2007.

As China's most popular destination for foreign direct investment, the province is home to nearly a quarter of China's foreign-invested enterprises. These account for more than half of Guangdong's exports and total industrial output. In 2007, exports reached US\$369.35 billion, an increase of 22.2 percent over the previous year.

Guangdong's GDP reached RMB3 trillion in the same year, having grown at a rate of 14.5 percent. Per capita GDP was reported RMB32,713, while total retail sales for the year surpassing RMB1 trillion.

The province has been successful in building a strong, export-based light manufacturing industry. Its nine key industries are textiles and garments, food and beverages, construction materials, electronics and information technology, electrical appliances and machinery, petrochemicals, forestry and papermaking, pharmaceuticals, and automobiles.

Now, it wants to develop its heavy, new and high technology industries. For 2007, industrial production value was totaled RMB1.49 trillion. Exports during the same period amounted to US\$369 billion while imports reached US\$264.

Electronic communications, transportation equipment manufacturing, and electrical machinery manufacturing are expected to be the province's main drivers for industrial growth in the future.

Foreign-invested enterprises in the province play an important role. In 2007, newly-approved FIEs numbered 9,506 with used FDI amounting to RMB17.13 billion. Foreign investment in the province has historically been concentrated in manufacturing industries, including computers and computer accessories, biological products, mechanical and electrical products, refined chemicals, hardware, in addition to more traditional industries such as toys and garments.

Being a manufacturing base, Guangdong imports a large number of capital and intermediate goods including raw materials, parts and components, electronics, machinery, and complete equipment. It has, throughout its history, been a popular destination for both domestic and Hong Kong investors, in addition to more recent Western arrivals.

More than 200 countries and regions have trade ties with the province, and investments originating from more than 100. In total, there are reported to be more than 90,000 foreign-invested enterprises and nearly 3,000 representative of

the development. The province's GDP is located at the top of the nation, and occupies one-third of the total amount of foreign trade in the country.

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### Economic Development

Guangdong is the earliest province to implement reform and opening up in China's interior. In 1979, the first special economic zone was established in Guangdong. In the past twenty years, Guangdong has successfully integrated into the international economic system. To date, Guangdong has 18 national-level economic technology development zones and 64 provincial-level economic technology development zones. Many important development zones are located in Guangdong, including the Shenzhen-Dongguan Development Zone (such as the Huizhou Zhongkai High-tech Zone, the Foshan National High-tech Zone, the Shenzhen High-tech Zone, and the Zhanjiang High-tech Zone).

### Tourism and Sightseeing

Guangdong's greatest attraction still lies in its four famous mountain ranges—the Danxia Mountains, the Xiyao Mountains, the Luofushan Mountains near Boluo, and the Dinghu Mountains. In addition, the long history of Shaoguan Nanhua Temple, the beautiful scenery of Shantou, and the beautiful beaches and long coastline of over 3,000 kilometers are also its tourism hotspots. The southern part of Guangdong also has the special economic zone of Shenzhen, the former British colony of Hong Kong, and the former Portuguese colony of Macau. Guangdong has a subtropical climate, with an average annual temperature of 19-26°C.

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fices, examples being Maersk, whose largest global office is in Guangdong, while others like Suzuki and Intel have moved parts of sensitive departments such as R&D to Guangdong. The major investors in the province are Taiwan, Japan, South Korea, Singapore and the U.S. Non-state enterprises are drivers of the economy, accounting for more than 80 percent of the growth in Guangdong's industry.

The provincial government envisions Guangdong's future as being a regional financial center, modern logistics hub, and international business travel and shopping center. It encourages development in the wholesale and retail, logistics, finance, convention and exhibitions and business services sectors.

The province also has a wealth of talented and skilled employees, in addition to 30 million migrant workers. It has 71 colleges and universities, 37 adult higher education junior schools and 181 provincial level engineering research centers.

### **Development zones**

Guangdong has the longest history of practicing an "open" policy in the mainland. Three out of the four first Special Economic Zones established in 1979 are in Guangdong province. Over the past 20-plus years, Guangdong has been striving to integrate itself into the international economic system. Presently, there are 18 national economic and technological development zones and 64 provincial economic and technological development zones. Some of the more important zones in Guangdong including the Shenzhen-Dongguan Development Zones Cluster (encompassing the Huizhou Zhongkai Hi-Tech Industry Development Zone, the Foshan State-Level Hi-Tech Industry Development Zone, and the Shenzhen Hi-Tech Industry Development Zone) and the Zhanjiang Hi-Tech Park.

### **Travel and tourism**

Guandong's major attractions include four famous mountains: Danxia Mountain in Shaoguan, Xiqiao Mountain in Nanhai, Luofu Mountain near Boluo and the Dinghu Mountain in Zhaoqing. In addition, there is the Nanhua Temple in Shaoguan, Shantou's beautiful countryside scenery, and some excellent beaches along the thousand kilometers of coastline. In the south of the province is China's Special Economic Zone with well known cities like Shenzhen, the former British colony of Hong Kong, and Zhuhai on the border with the former Portuguese enclave of Macau. The province is characterized by a subtropical climate, with annual average temperatures ranging from 19 to 26 °C.

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# Fujian Province

LOCATED ON THE mainland facing the Taiwan Strait, Fujian represents one of China's most developed economies. The province is a major destination for Taiwanese and Hong Kong investment and its economic future will remain closely linked to that of Taiwan's, even moreso now as transportation, logistic and commercial links continue to be developed.

## History

Records show that Fujian had human life and activity as far back as the Neolithic Age. In 1689, the Qing dynasty officially incorporated Taiwan into Fujian province; later to be separated into its own province in 1885. Until the 1950s, Fujian was the most secluded provinces of the PRC, due to the relative lack of rail and underdeveloped networks of paved roads. Beginning in the 1970's, however, the provincial economy started to grow at a rapid pacet, benefiting from its proximity to Taiwan. In 2003, in fact, Xiamen's GDP per capita ranked 8th among 659 Chinese cities—ahead of Shanghai and Beijing.

## Geography

Located on China's southeastern coast, Fujian province faces the island of Taiwan on the east and borders Zhejiang province to the north, Jiangxi province to the west and Guangdong to the south. It covers a total area of 120,000 square kilometers and has a total population of 34.7 million. Its coastline stretches 3,324 kilometers encompassing 1,401 islands of different sizes, and because of its location, Fujian is a vital navigation hub between the East China Sea and the South China Sea. It is also one of the Chinese provinces closest to Southeast Asia, West Asia, East Africa and Oceania. The province is divided into nine prefectures, 85 counties and 1,111 townships. By the end of 2005, 95 nature reserves covered a total area of 540,500 hectares, accounting for 4.5 percent of the province's total area.

## Infrastructure

The province has strived hard in recent years to improve its infrastructure, adding 166 kilometers of new roads and 155 kilometers of railways in addition to other improvements.

### Roads

There are 54,876 kilometers of highways, including 727 ki-

lometers of expressways, in the province. Three of the most recent infrastructure projects have been the Zhangzhou-Zhaoan Expressway (costing US\$624 million), the Fuzhou-Ningbo Expressway (US\$98 million) and the Senmingshi-Fuzhou Expressway (US\$1.40 billion). For the 11th five-year plan (2006-2010), Fujian will more than double the length of its expressways to 2,450 kilometers.

### Railways

Railway lines connect Fuzhou and Xiamen with the national network. The Fujian sections of the Ganzhou-Longyan Railway and the Wenzhou-Fuzhou Railway have received investments of US\$465 million and US\$596 million respectively. In order to attract Taiwanese investment, Fujian intends to increase the length of its rail network by 50 percent to 2,500 kilometers between 2006 and 2010.

### Airports

The major airports are Fuzhou Changle International Airport (FOC), Xiamen Gaoqi International Airport (XMN), Quanzhou Jinjiang Airport (JJN), and Nanping Wuyishan Airport (WUS). Fuzhou is capable of handling some 6.5 million passengers per year and has an annual cargo capacity of over 200,000 tons. The airport serves direct links to 45 destinations including international routes to Japan, Malaysia, Thailand, Singapore and Hong Kong.

### Ports and waterways

Major seaports include Fuzhou, Quanzhou, Mawei, Meizhou (passenger only), Zhongyin (cargo only), Dongdu, and Maluan (near Xiamen).

## Economy and investment climate

Fujian's GDP reached RMB916.01 billion in 2007, up by 15.10 percent from the previous year. The province's per capita GDP reached RMB25,662 with total retail sales amounting to RMB318.79 billion.

During the same period, total industrial production value came to RMB398.07 billion. The province's key industries have traditionally been agriculture, footwear and clothing, with a recent shift towards high-technology and electronic goods.

Top global companies in the province include Dell, Eastman Kodak, and Boeing. It is home to China's largest iron

# 福建省

地处长达180公里台湾海峡的内陆一方，福建海岸线绵长且无障碍，意味着它一直是中国对外贸易最开放的省份之一，而它现在已是中国经济最发达的地区之一。由于其地理位置及长期存在的文化联系，福建省是台湾（及香港）商人投资的主要目的地。其经济前景将继续保持与台湾的密切联系，并从台湾持续升温的关系中得益。

## 历史

资料显示，福建省人类活动的遗迹可以追溯到新石器时代。1689年，清朝正式将台湾纳入到福建省；此后至1885年分开各自设省。到20世纪五十年代，由于缺乏铁路及落后的公路网络，福建成为中国最隐秘的省份。1970年开始，得益与其临近台湾的地理优势，福建省的经济开始迅速增长。在2003年，厦门的人均国内生产总值在全国659个城市中排名第八，超过上海与北京。

## 地理

坐落于中国东南海岸，福建省东临台湾、北接浙江、西连江西、南邻广东。覆盖面积12万平方公里，总人口3470万。该省海岸线蜿蜒3324公里，环绕1401个大小不同的岛屿，也正因为其特殊的地理位置，福建是我国东海和南海一个至关重要的航海港口；也是中国最靠近东南亚、西亚、东非和大洋州的省份之一。福建省划分为9个辖区，85个县和1111个镇。截止到2005年，95个自然保护区盖总面积54万公顷，相当于福建省总面积的4.5%。

## 基础设施

福建省近年致力于努力发展基础设施，改善其他方面设施之余，新建公路166公里和铁路155公里公路。

## 公路

福建省内公路全长54876公里，包括727公里高速公路。近期三个大型的基建项目分别是：漳州－诏安高速公路（总造价6.24亿美元），福州－宁波高速公路（总造价9800万美元），三明市－福州高速公路（总造价14亿美元）。在第十一个五年计划（2006-2010）期间，福建增加高速公路总长两倍多至2450公里。

## 铁路

连接福州和厦门的铁路与国家铁路网相连。福建省内的赣州－龙岩铁路和温州－福州铁路投资额分别是4.65亿美元和5.96亿美元。为了吸引台商的投资，福建省政府计划增加50%的铁路网路长度，在2006年到2010年期间，铁路总长将达2500公里。

## 空路

福建省主要的机场有福州长乐国际机场（FOC），厦门高崎国际机场（XMN），泉州晋江机场（JJN）和武夷山机场（WUS）。福州每年可以接待650万旅客，货运吞吐量超过20万吨。机场的航线直达45个目的地，包括日本、马来西亚、泰国、新加坡、香港等国际线路。

## 港口和水路

福建省主要的港口包括：福州、泉州、马尾、湄洲（仅限客运），中银（仅限货运），东渡和马峦（临近厦门）。

## 经济和投资环境

福建省是中国最活跃的经济区域之一。2007年，该省GDP达到9160.1亿元人民币，同比上升15.1%。人均GDP达到25662元人民币，零售总额达到3187.9亿元人民币。

同年，工业生产总值达到3980.7亿元人民币。该省重点产业包括传统的农业、鞋类、服装，近期则将重心转向高新技术和电子产品。

在福建省投资的全球领先企业包括戴尔、伊士门·柯达和波音公司。这里的铁矿石储粮具中国之最，也是甘蔗、花生和柑橘的生产大省。当前，该省主要的支柱产业包括电子及信息科技、机械设备和石油化工。其他产业包括水产业、建材、建筑、电子、渔业、机械、化工及纺织。

2007年，福建省出口额达到494.4亿美元，进口总额达到245.2亿美元。实际利用直接投资额上升了13.2个百分点，达到556亿元人民币。

重点产业如轻工业、电子产业、机械工业及石油化工业的产出正逐年上升。2007年工业固定资产投资比率增长超过38%，达到4321.7亿元人民币。同年内，1723家新的外资企业获批成立。

福建省也是台商和港商钟爱的投资地点，尤其是在制鞋、金属制品和电子产业，因此该省可以依靠其自身能力发展经济，保持台商贸易和投资最佳目的地之一的地位。如今，来自上海、江苏和广东的外商直接投资与福建的竞争愈趋激烈。

## 开发区和泉州港

福建省努力逐步建设5个国家的工业园区——福

ore reserves and is among its largest producers of sugar cane, peanuts, and oranges. Currently, major pillar industries are electronics and information technology, machine equipment, and petrochemicals. Other industries include aquaculture, building materials, construction, fishing, machinery, petrochemicals and textiles.

For 2007, exports reached US\$49.94 billion while imports came to US\$24.52 billion. Used FDI increased by 13.20 percent to US\$8.13 billion.

Total output in the key sectors of light industry, electronics, machinery, and petrochemicals is increasing. Industrial fixed asset investment grew by more than 38 percent in 2007, reaching RMB432.17 billion. During the same year, 1,723 new FIEs were approved.

Fujian is also a major destination for Taiwan and Hong Kong investment particularly in the footwear, metal goods, and electronics sectors, and the province's economic future will likely depend on its ability to maintain its position as one of top destinations for trade and investment from Taiwan. There is now increasing competition for FDI coming from Shanghai, Jiangsu, and Guangdong.

### Development zones and the Quanzhou Port

Major efforts are underway to build five state-level industrial parks – in Fuzhou (Mawei) for display parts, Fuqing for monitors, Xiamen for semi-conductor illumination systems, Quanzhou for micro-wave communication equipment, and Putian for LCDs – along the coast of Fuzhou and Xiamen.

There is an increasing focus on the new- and high-tech industries. The two national-level and five provincial-level high-tech development zones in Fuzhou and Xiamen will be used as bases for establishing some 100 new- and high-tech demonstration projects and 150 such enterprises for an output exceeding RMB100 million. Over the next few years their output is projected to grow by over 20 percent annually and represent a 30 percent share in the province's total exports. The major focus will be on the development of integrated circuit, software, optoelectronic, biotechnology, environmental protection and new materials industries.

#### *Fujian Integrated Refining and Ethylene Joint Venture Project*

This Joint Venture Project was launched in 2005 and aims to provide a world-class integrated refining and petrochemicals base in Quangan District, Quanzhou. It will boost the development of China's petrochemical industry and make a

substantial contribution to the continuing prosperity and economic development of the west coast of the Strait.

This joint venture project of FPCL (50 percent), ExxonMobil China Petroleum and Petrochemical Co., Ltd. (25 percent) and Aramco Overseas Company B.V. (25 percent) is the largest world-class Sino-foreign refining and petrochemicals project ever attempted in China and will expand the existing refinery at Fujian Petrochemical Co., Ltd. (FPCL) from four million to 12 million tons-per-year and provide 600,000 to one million tons of ethylene annually. In 2006, the Fujian Provincial Government stated that they planned to make an investment of around RMB156 billion between 2006 and 2020 towards the construction of around 150 petrochemical units with upstream/downstream integration to develop Meizhou Bay, located between Quanzhou and Putian, into a sophisticated petrochemical base.

#### *Quanzhou Port*

Located on the mid-coast of Fujian, Quanzhou Port primarily acts as a shipping channel to nearby Taiwan. In 2005 the port saw over 400 million tons of total throughput, of which 6.35 million tons was container throughput. This ranks it as the 13th largest container port in China, and the eighth for overall throughput. Taiwan is keen to increase shipping through Quanzhou as well as other ports along Fujian, and is heavily investing in the province's infrastructure to improve mainland transportation links.

### Travel and tourism

Fujian's major attractions include the beautiful scenery of Mount Wuyi (listed as a UNESCO World Heritage Site in 1999), Gulangyu Island in Xiamen, Guanghua Temple in mainland Putian, Kaiyuan Temple (Quanzhou), Mount Tailao (Fuding), Nanshan Temple (Zhangzhou), the Matsuo pilgrimage centers around Meizhou Island (Putian Municipality), Yongquan Temple (Fuzhou) and more.

The province's domestic tourism industry is growing, seeing an annual revenue of RMB57.8 billion in 2005, up 24.9 percent from 2004. Fujian is characterized by year-round warm and humid climate, with annual average temperatures ranging from a low of 17°C to a high of 21°C.

州（马尾）以显示器件为主，福清以显示器为主，厦门以半导体照明系统为主，泉州以微波通信设备为主，位于福州和厦门沿岸地区的莆田为液晶显示器为主的。

重点发展高新技术产业的趋势也有所增加。位于福州和厦门的两个国家级和五个省级高新技术开发区将成为建设100个高新技术示范项目和150个产量将过1亿元人民币的高新技术企业的基地。在未来几年中其产值预计增长20%以上，并占全省出口总额的30%。园区主要的重点将放在发展集成电路、软件、光电、生物科技、环保和新材料产业。

### 福建综合炼油乙烯合资项目

此合资项目于2005年启动，旨在泉州泉港区世界一流的综合性炼油和石化基地。该基地将推动中国石化工业的发展，并对海峡两岸的持续繁荣和经济发展做出重大贡献。

这个合资项目中福建炼油化工有限公司（FPCL）占50%，埃克森美孚中国石油化工有限公司占25%而Aramco的海外公司BV公司25%，是世界上最大的中外合资炼油和石化项目。将福建炼油化工有限公司现有的年产量从400万吨增加到1200万吨，并能年产乙烯60万至100万吨。2006年，福建省政府表示在2006年和2020年间，他们计划总投资约156亿元人民币，在位于泉州和莆田之间湄洲湾兴建由150个的石油化工单位组成的石化基地。

### 泉州港

泉州港位于福建省海岸线中部，是通往台湾的主要航道之一。2005年，该港口总吞吐量超过400万吨，其中635万吨是集装箱吞吐量，是中国排名第13位的货柜港。台湾与泉州及其他福建的港口船舶往来持续增加，因此在全省投资大量的基础设施，以改善台湾与内地的交通。

### 旅游与观光

福建的主要景点包括风景美丽武夷山（在1999年被联合国教科文组织列为世界遗产）、厦门的鼓浪屿、莆田的光华寺、泉州的开元寺、福鼎的太姥山、漳州的南山寺、湄洲岛的妈祖庙和福州的涌泉寺等。

全省旅游业进一步发展，2005年营业额达578亿元人民币，比2004年增长24.9%。福建全年气候温暖湿润，年平均气温为17°C-20°C。

# Guangxi Zhuang Autonomous Region

THE GUANGXI ZHUANG Autonomous Region has the distinct geographic advantage of bordering Vietnam to the west and having access to Hong Kong and Macau via the Xi River. It is China's only region or province in the west with open sea port facilities. The Central Government has continued to emphasize the importance of the region and its development in the coming years, which will be doubly important as the ASEAN corridor continues to develop in parallel.

## History

The region officially became part of China in 214 BC, when the army of the Qin Dynasty claimed most of the southern provinces, including Guangdong. In 1955 the province was reconstituted as Guangxi Zhuang Autonomous Region, and since the 1960s the economy has been energized thanks to the development of its transportation infrastructure. Guangxi Zhuang is now one of China's most visited provinces, and is home to world-renowned tourist destinations such as Guilin and Yangshuo.

## Geography

Located in southern China, Guangxi Zhuang borders Yunnan province to the west, Guizhou province to the north, Hunan to the northeast, Guangdong to the southeast and Vietnam and Beibu Bay to the southwest. It covers a total area of 236,661 square kilometers and has a total population of 49.61 million. Guangxi is divided into prefecture level-cities, 56 counties, 34 districts, 12 ethnic autonomous counties and seven county-level cities. The region's major industry is mining and its mineral resources include crude oil, natural gas, coal, iron, zinc, nickel and bauxite. The area also boasts the biggest deposits of tin, manganese and indium in China.

## Infrastructure

The province benefits from a strong strategic location as the hub both for transportation to China's west and also into the ASEAN corridor. The growing tourism industry has to some extent modernized the air and road infrastructure: since 2004, more than RMB10 billion has been budgeted for the construction of railways, ports, roads, and power and water supply facilities to further accommodate increasing industrial throughput.

### Roads

By end of 2006 there were 62,024 kilometers of road in Guangxi, including just over 1,500 kilometers of expressway. In 2007, the province announced its plan to invest RMB18 billion into its transportation infrastructure development, including 300 kilometers of new highways. Nanning, Liuzhou and Guilin are the land transportation hubs in Guangxi, and to accommodate the Western Region Development Strategy, the Guangxi government will expedite the construction of highways within the region that form an integral part of the Southwest Sea Passage Expressway, allowing Chongqing and other cities in Sichuan Province to have a more efficient link to the sea.

### Railways

Between 2006 and 2010, RMB100 billion will be invested into Guangxi's railway infrastructure.

The Nanning-Kunming rail line into Yunnan province is one of the most modern in China. In 1998 the government completed the project, linking Kunming and Nanning and offering an important alternative transportation route between Guangxi, Guizhou and Yunnan. The project cost more than RMB20 billion and took seven years to complete.

### Airports

There are three major airports in Guangxi in Guilin, Nanning and Beihai, as well as the airports of Liuzhou, Wuzhou and Yulin which are under construction. The region is served by 22 international and domestic airlines with regular flights to Beijing, Shanghai, Hong Kong and more. Additionally, direct routes for Beijing-Nanning-Hanoi (Vietnam) and Guilin-Fukuoka (Japan) have recently opened to facilitate regional travel. Guilin airport is both one of China's busiest and most efficient.

### Ports and waterways

Important seaports include Beihai, Qinzhou and Fangchenggang. Inland river ports such as Nanning, Wuzhou and Guigang are also significant in the region. Beihai's port has a total handling capacity of more than 20 million tons. The island of Wuzhou presents good harbor facilities and is strategically placed to handle distribution to and from Guangxi, Guizhou and Sichuan. The nearby Pearl and Xijiang rivers also make for an efficient transportation network and Guangxi has a short coastline on the Gulf of Tonkin. Both Fangcheng and Beihai ports have established economic relations and trade ties with

# 广西壮族自治区

广西壮族自治区西临越南，通过西江与香港和澳门连接，拥有独特的地理优势。广西是中国西部唯一一个拥有海港设施的省份。中央政府不断强调该地区的重要性及其在未来中国与东盟合作中发展前景。

## 历史

公元前214年，当时为统一中国的秦军攻占了大部分的南部省份，包括广东。广西也在此时正式成为中国的一部分。1955年，该省重组为广西壮族自治区，并自上世纪60年代以来，由于运输基础设施的发展大大活跃了当地经济。广西壮族自治区现在是中国的最大的旅游省份之一，桂林和阳朔等世界知名的旅游目的地就位于此处。

## 地理

广西自治区位于中国南部，西接云南、北靠贵州、东北连湖南、东南至广东而西南临越南和北部湾，其总面积达236661平方公里，总人口为4961万。广西分为地级城市，包括56个县，34个区，12个民族自治县和7个县级城市。该地区的主要工业是采矿业，矿产资源包括原油、天然气、煤炭、铁、锌、镍和铝矾土。该地区还拥有中国最大存储量的锡、锰和钨。

## 基本设施

广西自治区作为中国西部和东盟走廊的运输枢纽，受益于强有力的战略位置。日益增长的旅游业已在一定程度上使空路和公路基础设施实现了现代化：自2004年以来，超过100亿元的预算已被投入到兴建铁路、港口、公路、电力和供水设施当中，以进一步满足日益增长的工业吞吐量。

## 公路

截至2006年底，在广西已建成62024公里的公路，包括超过1500公里的高速公路。2007年，广西宣布为运输基础设施发展投资180亿元的计划，其中包括300公里的新建公路。南宁、柳州和桂林是广西陆路运输的枢纽。为了适应西部大开发战略，广西政府将加快兴建公路，以在该地区加速形成西南出海通道高速公路的整体部分，使重庆及四川省的其他城市有一个更便捷的出海通道。

## 铁路

从2006到2010年，广西将投入1000亿元人民币用于铁路建设。

通往云南省的南昆铁路是中国最现代的铁路之一。政府于1998年完成此项目，连接昆明与南宁，为广西、

贵州和云南三省提供了一条重要的运输枢纽。该项目耗资超过200亿元人民币，费时七年完成。

## 空路

广西三大机场包括桂林、南宁及北海机场，此外还有在建中的柳州、梧州及玉林机场。整个地区拥有22条国内、国际航线，包括往返北京、上海、香港及其他地区的航班。此外近期还开通了北京—南宁—河内（越南）和桂林—福冈（日本）的直达航班。桂林机场是国内最繁忙同时也是效率最高的机场之一。

## 港口和水路

广西重要的海运港口包括北海、钦州、防城港。重要的内陆河港包括南宁、梧州和贵港。北海港口的吞吐量超过200万吨。梧州岛拥有先进的港口设施，占据广西、贵州及四川货物往来经销的重要战略位置。临近的珠江及西江为广西提供了高效率的运输网络，广西同时也拥有北部湾一段较短的海岸线。防城和北海港都跟近百个国家及地区建立了经贸关系。

连接萍乡港及越南谅山的运输通道促进了中越的边境贸易及旅游业的发展。同时为游客开通从南宁到越南下龙湾的水路也在计划中。

## 经济和投资环境

广西省政府把促进旅游、农业和采矿作为提高该地区经济的目标。据统计，2007年该地区GDP为5885.9亿元人民币，比2006年上升14.9%。人均GDP同样达到12408元人民币，而总零售额则达到1891.9亿元人民币。

同一时期，广西也面临2499亿元人民币（365.4亿美元）的贸易逆差，出口额达349亿元人民币（51.1亿美元），出口额达285亿元人民币（41.7亿美元）。

广西主要产业包括制糖、冶金、化学药品、工程、电子、制药及水泥制品业。当年工业生产总值达到2001.2亿元人民币，作为中国领先蔗糖制造基地，广西年蔗糖产量超过两亿吨。

广西轻工业产品包括纺织品、纸、面粉、丝绸、皮革、火柴、药品以及香松树胶、蔗糖、染料、油脂等。松木树脂是梧州特有的出口商品。其他重工业包括柳州的炼铁、炼钢产业；南宁和梧州的机械产品以及柳州的水泥制造。

农业同样是该地区的主要产业。主要谷类作物包括

nearly 100 countries and regions.

The transport route linking Pingxiang port with Lang Son in Vietnam helps to boost Sino-Vietnamese border trade and tourism. There are also plans to open a water-land transport route for passengers traveling from Nanning to Vinh Ha Long in Vietnam.

### Economy and investment climate

Guangxi's government aims to facilitate tourism, agriculture and mining to improve the region's economy. In 2007, the region reported a GDP of RMB588.59 billion, an increase of 14.9 percent from the previous year. Per capita GDP also reached RMB12,408 while total retail sales amounted to RMB189.79 billion.

During the same period, the region suffered from a trade deficit worth US\$36.54 billion with exports amounting to US\$5.11 billion and imports reaching US\$4.17 billion.

Major industries in Guangxi include sugar processing, metallurgy, chemicals, engineering, electronics, pharmaceuticals and cement production. Total industrial production value reached RMB200.12 billion for the year. It is the leading producer of sugar in China, producing more than 200 million tons annually.

The region's light industries produce textiles, paper, flour, silk, leather, matches, pharmaceuticals, as well as sandarac gum, sugar, dyestuffs, oils and fats. Heavy industries include the cement-, iron- and steelworks at Liuzhou and machinery production in Nanning and Wuzhou.

Agriculture is also a key industry in the region. Major grain crops include rice, maize, wheat, and sweet potatoes. The leading commercial crops include peanuts, sesame, ramie, tobacco, tea, cotton, and indigo. Along the coast, fishing remains an important local industry.

Guangxi is also a major source of fruits, most notably pomelos, tangerines, mandarin oranges, lemons, lychee, pears, papayas, bananas, pineapples and water chestnuts. There are two annual harvests of rice.

Efforts are being made by the regional government to increase foreign and domestic investment into the region. Global companies like Toyota, General Motors, NEC, IBM and Coca-Cola all have investments in Guangxi.

Situated on the southern coast, Beihai is also rapidly develop-

ing as a tourist resort and seaport as well as a center for energy production as well as petrochemical and metal processing in the region.

### Development Zones and the Beihai Port

There are two technology related zones in Nanning, border economic cooperation zones in Dongxing and Pingxiang, a high-tech zone in Guilin, an export processing zone and a national tourism zone in Beihei, and an economic zone in Yongning.

#### *Pingyang Trans-border Zone*

In 2007, China and Vietnam agreed to set up an 8.5 square kilometer joint trans-border economic cooperative zone in the city of Pingyang and Liangshang province of Vietnam. This trans-border area will contain a logistics cooperation area and a machining cooperation area. Like other cross-border zones, it carries special exemptions from taxation—products made in this area will only be subject to 50% of the normal tax when they enter the neighboring markets in Vietnam.

#### *Nanning High and New-Tech Industrial Development Zone*

The zone is located in the suburb of Nanning city and was approved by the State Council in December 1992 to develop capital-intensive and high value-added technologies. Foreign investments are encouraged particularly in the areas of bio-engineering, new building materials and information technology.

#### *Guilin High and New-Tech Industrial Development Zone*

This was the first State-level high and new-technology industrial development zone in Guangxi. The zone's utilized foreign investment has exceeded US\$56.6 million since 1995 and it has attracted investments from NEC, Nokia and others.

#### *Beihai Silver Beach Tourist Holiday Zone*

Approved by the State Council in October 1992 as one of the 11 state-level vacation and tourism development zones, total investment here has far surpassed RMB400 million.

#### *Pingxiang Border Trade Development Zone*

Approved by the State Council in September 1992 to develop border trade with Vietnam, an international railway and highway run through this 7.2 square kilometer zone. Customs, exporting specialists and transport companies are all prominent here.

#### *Wuzhou Export Goods Processing Area*

Established in September 1991, it is designed to develop high-tech export goods, as well as automobile components,

rice, corn, wheat and sweet potatoes. Leading economic activities include花生、芝麻、苧麻、玉米、烟草、茶叶、棉花和靛蓝。

广西同样是水果之乡，最出名的有柚子、橘子、柑桔、柠檬、荔枝、梨、木瓜、香蕉、菠萝和栗子。该地区水稻一年两熟，并出产木业产品檀香木和软木。渔业仍是广西沿海当地主要产业。

广西当地政府努力增加该地区的国内外投资。跨国企业如丰田、通用汽车、日本电气（NEC）、美国国际商用机器公司（IBM）、可口可乐等公司纷纷落地广西。

座落于广西南岸的北海，作为旅游度假圣地，海港、能源产品及石化、金属加工中心，也正迅速地发展。

### 开发区

南宁有两个科技园，东兴和凭祥有边境经济合作区，桂林有一个高新区，北海有一个出口加工区和一个国家级旅游区，永宁有一个经济区。

#### **平阳跨国边境经济合作区**

2007年，中国与越南达成协议，计划在广西的平阳市和越南的梁山省共同建设一个占地8.5平方公里的跨国边境经济合作区。该合作区将包含一个物流合作区和一个加工合作区。类似其他跨境经济合作区，该合作区也享有税收方面的特殊减免政策，当产品进入越南市场时，将被征收仅50%的税金。

#### **南宁国家级高新技术产业开发区**

高新区坐落在南宁市郊。1992年12月经国务院批准成为国家级高新区。鼓励外资投向生物工程学，新兴建筑材料以及信息技术等领域。

#### **桂林市国家高新技术产业开发区**

此开发区是广西第一个国家级的高新产业开发区。自1995年，开发区总计利用外资总额达5660万美元，吸引了NEC，诺基亚等跨国公司的投资。

#### **北海银滩度假区**

该度假区于1992年10月经国务院批准成为11个国家级旅游度假开发区的其中之一，总投资超过4亿元人民币。

#### **凭祥边境经济合作区**

1992年9月，经国务院批准，旨在发展中越边境贸易的凭祥边境经济合作区成立，其总面积为7.2平方公里，拥有国际化铁路和高速公路贯穿此区域。海关、出口商和运输公司在地区充当重要角色。

### **梧州对外加工区**

成立于1991年9月，园区设计发展高科技出口产品、汽车零部件、装配、电子产品及其他商品。

### **东兴边境经济合作区**

1992年9月，经国务院批准，东兴边境经济合作区和凭祥边境经济合作区同时设立，旨在发展与越南的边境贸易。成立至今，广西壮族自治区政府积极鼓励在该地区投资并获得了卓有成效的回报。2005年该区工业增加值为1263亿元人民币（比2004年增长了18.9%），进出口量达到超过51亿美元（比2004年增长了20%）。

### **北海港**

位于广西自治区最南边，北海港作为中国和东南亚之间的航运业的主要枢纽，连接起70个不同地区220个海港的运输。北海港拥有多个集装箱停泊处，吞吐量为2万吨到5万吨的散货或者是集装箱运输。8条专用海港铁路线连接所有本地区的主线路。

北海港是东南亚与中国石油运输的发展枢纽。目前已拥有16艘超过10万吨的吞吐量的油轮。化学品、金属、非金属矿石、木材和肥料都是北海港的主要运输物品。此外，当地的旅游业持续发展，海港的旅客年接待量已经超过了3万人次。

### **旅游和观光**

广西的主要旅游景点包括引人入胜的龙脊梯田（世界上最险峻的梯田，被誉为“世界梯田之冠”），北部的少数民族村，在凭祥城附近的岩画，得天瀑布，以及中国最好的内陆海滩。另外，著名的旅游地阳朔和桂林全年接待数以百万的游客参观自然而成的喀斯特石灰岩山峰，漓江和优美的自然景色。广西省处于热带地区，气候炎热潮湿，平均气温为17-23℃。

assembly, electronics and others.

#### ***Dongxing Border Trade Development Zone***

Along with the Pingxiang Border Trade Development Zone, it was approved by the State Council in September 1992 to develop border trade with Vietnam. Since then, the government has consistently encouraged investment in the province and is finally seeing the results of this drive. The zone's industrial added value totaled RMB126.3 billion in 2005 (up 18.9 percent from 2004) and import/export volume reached more than US\$5.1 billion (up 20 percent from 2004).

#### ***Beihai Port***

Situated at the southern most point of the Guangxi Autonomous Region, Beihai port looms as a major point of shipping trade between China and South-East Asia, and currently links 220 ports in over 70 different regions. The port has several container berths, capable of handling ships from 20,000 dwt (dead weight tonnage) to as large as 50,000 dwt for either bulk or container transport. The eight specialized rail lines in the port connect to all the major lines in the area.

The port is a developing hub for the shipping of oil between South-East Asia and China. It currently has as many as 16 oil tanks with a capacity of over 100,000 tons. Other major products handled here are chemicals, metal and nonmetallic ore, woodchips and fertilizers. Furthermore, its tourism industry continues to develop, and the port is capable of handling in excess of 30,000 passengers annually.

#### **Travel and tourism**

Guangxi's major attractions include the spectacular Longji Rice Terraces (some of the steepest in the world), minority villages in the north, rock paintings near the town of Pingxiang, the Detian Waterfall and China's best mainland beaches. In addition, the famous destinations of Yangshuo and Guilin receive millions of tourists all year round who come to visit the natural karst limestone peaks, the Li river and the beautiful scenery. The province is characterized by tropical heat and humidity with average temperatures ranging from 17 to 23°C.

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# Hainan Province

COMMONLY REFERRED TO as the “Hawaii of China,” Hainan Province consists of several islands, the largest of which is called Hainan Island or Qiong’ ai. It is the second largest island in the country and is a popular holiday destination. It is home to the Li minority as well as other ethnic groups who still practice their folk customs and unique living habits, and in earlier times would perhaps have been better known as the “Elba of China.”

## History

In the past, Hainan has been an exile location for criminals, and historically part of Guangdong and Guangxi provinces. In 1944, it became Hainan Special Administrative Region with 16 counties, containing the South China Sea Islands. On May 1, 1950, the Special Administrative Region became an Administrative Regional Office – a branch of the Guangdong provincial government. By 1988 Hainan was finally named province and given the status of Special Economic Zone.

## Geography

Located in the South China Sea, Hainan is separated from the mainland by the Qiongzhou strait, which is more than 20 kilometers wide. The province covers a total area of 35,000 square kilometers and has a population of 8.2 million. Hainan’s neighboring countries include the Philippines in the east, Malaysia and Brunei in the south, Indonesia in the southwest, and Vietnam in the west. The province includes some 200 South China Sea Islands, three cities, nine counties and seven autonomous counties. Its administrative regions are Hainan Island, and Xinsha, Zhongsha and Nansha Archipelagos. Hainan is home to 68 nature reserves and is rich in natural resources including iron and salt mined in Yinggehai on Hainan Island, petroleum from the South China Sea, minerals from the seabed, tropical plants and all kinds of aquatic products.

## Infrastructure

A number of big infrastructure projects have revitalized the province in recent years including the Guangdong-Hainan railway, the Century Bridge and Qiongzhou Strait Tourism Holiday Area. However, there still remain some areas that need further infrastructure development – for example there are only three expressways, all leading primarily to tourism destinations. Annual typhoons have been historically so severe so as to cripple all transport and communication with

the mainland.

### Roads

Hainan’s land communication relies mainly on a highway network that links up all parts of the province via three north-south and four east-west arterial highways that lead directly to all ports, cities and counties. Three highways link Sanya and Haikou, the island’s major urban centers. Local highways stretch even farther into 318 villages and towns as well as all scenic spots on the island.

### Railways

The first cross-sea railway in China, the Guangdong-Hainan Railway, was opened to traffic on April 18, 2007. It is a vital part of the railway network in China as it links Hainan with the Beijing-Kowloon, Beijing-Guangzhou, and Nanning-Kunming railways. It is estimated that the tourism industry of Hainan will benefit greatly from its opening since railway freight is much cheaper than air freight.

### Airports

There are two international airports, the Meilan International Airport in Haikou and the Fenghuang International Airport in Sanya. From these two, scheduled flights reach 39 domestic and various international destinations, including Hong Kong, Singapore, Bangkok and Kuala Lumpur. As part of an effort to reduce air traffic into Beijing, Hainan Airlines has cut as many as eight services per week to the capital.

### Ports and waterways

Marine transport is an integral part of Hainan’s infrastructure. The province has 68 natural harbors, of which 24 have been developed into ports, including the four largest, Haikou, Sanya, Basuo and Yangpu. Other major harbors include Qinglan, Puqian, Xincun, Baimajing, Bo’ao and Xinying. The ports of Haikou and Sanya have opened 69 ocean navigation lines to reach overseas ports in 24 foreign countries and regions.

## Economy and investment climate

In 2007, Hainan’s GDP was reported as RMB122.96 billion, an increase of 14.5 percent. Primary industry increased by 31 percent, secondary industry by 29 percent and tertiary industry by 39 percent. Fixed asset investment in the island reached RMB502.25 billion, a growth of 17.9 percent from the previous year.

# 海南省

海南省，被誉为“中国的夏威夷”，由若干岛屿组成，其中最大的岛叫海南岛或琼崖岛，是中国第二大岛屿，也是非常受欢迎的旅游圣地。海南省是黎族和其他少数民族之乡，这些少数民族至今仍保留着其质朴敦厚的风俗和独特的生活方式，而在古时候，这里曾是流放官员之所。

## 历史

过去，海南曾是犯人流放地，属广东省管辖。1944年，设立海南特别行政区，包括16个县和南海海岛。1950年5月1日，设立海南行政公署，为广东省人民政府派出机关。至1988年，成立海南省和海南经济特区。

## 地理

海南省位于中国南海海域，与内陆被宽约20公里的琼州海峡隔开。全省总面积3.5万平方公里，总人口820万。海南省东濒菲律宾，南望马来西亚和文莱，西临越南民主共和国，东南与印度尼西亚为邻。全省有200多个南海海岛，3个城市，9个县和7个自治县，行政区包括海南岛、西沙群岛、中沙群岛和南沙群岛。海南省内有68个自然保护区，天然资源丰富，有铁矿、海南岛莺歌海的盐场、南海海底石油、海底矿产、热带植物和各种海产品。

## 基础设施

近年来，几项大型基础建设项目使海南省恢复生气，其中包括粤海铁路，世纪大桥和琼州海峡旅游度假区。然而，部分地区的基础建设有待进一步发展——举例来说，省内仅有三条高速公路，主要连接各旅游点。历年强台风曾切断与内陆的联系，使交通运输陷于瘫痪。

## 公路

海南省内交通依赖环岛高速公路网为主，三条南北走向和四条东西走向的主干高速公路，通达各港口和市县。三条南北走向的高速公路连接岛内两个主要的城区中心。省内高速路延伸至318个村镇和所有景点。

## 铁路

2003年1月7日，我国第一条跨海铁路——粤海铁路开通。作为连接海南与京九线、京广线及南昆线的纽带，是全国铁路运输网络的重要部分。粤海铁路的开通为人们出入提供了一个比乘飞机省钱的新通道，将极大有利于海南的旅游发展。

## 空路

海南现有两个国际机场，分别是海口美兰国际机场和三亚凤凰国际机场，现有飞往39个国内外城市及地区的定期航班，包括香港、新加坡、曼谷和吉隆坡。近日，为配合北京的航空流量管制，海南航空每周得减少达8个飞往首都的航班。

## 港口与水路

海运是海南交通运输的重心。全省共有68个天然港，其中已开发的有24个，其中最大的是海口、三亚、八所和洋浦，其他主要港口有清澜、铺前、新村、白马井、博鳌和新盈港。现已开通69条航线，贯穿海口、三亚和世界24个国家和地区的海路运输网络。

## 经济与投资环境

2007年，海南省的GDP为1229.6亿元人民币，上升了14.5%。第一产业增加31%，第二产业上升29%，第三产业上升39%。海南岛吸收固定资产投资达5022.5亿元人民币，同比增长17.9%。

同期，城市居民税后人均收入为10997元人民币，零售额上升17.4%，达到3619.7亿元人民币。

除旅游业外，海南省的主要产业为基础农业；天然橡胶、咖啡、热带花、椰子、西瓜和香蕉之类的热带水果都是这里的主要作物。海南岛不仅是中国70%钛矿的蕴藏地，还是主要的产盐中心，更是南中国海的石油和天然气开采的基础设施基地。

2007年该省出口额达到1257亿元人民币（183.8亿美元），进口额达3776亿元人民币（552亿美元）。主要出口产品包括水产品，家具和木材，电气和电子产品，钢铁产品等。

海南岛拥有全国42.5%的热带大陆，用以发展农业、林业、畜牧业及渔业。岛上的气候使得农作物一年两熟或一年三熟。

海南岛的土地有七种主要用途：耕作、橡胶种植、热带作物种植、林业、牲畜饲养、水产、烟叶种植。当前，约320万公顷的土地已被开发利用，约26万公顷土地尚未开发。

2007年，海南省政府批准成立了172家外资企业。私人投资常常着眼于批发和零售贸易、农业、林业、畜牧业、渔业、制造业、房地产业及建筑企业。

During the same period, per capita disposable income for urban resident was RMB10,997 with retail sales growing by 17.4 percent to RMB361.97 billion.

Apart from tourism, its major industries are primarily agricultural; natural rubber, coffee, tropical flowers and tropical fruits such as coconuts, watermelons and bananas are all major crops. The island is also a major salt production center in addition to being home to 70 percent of China's titanium reserves. The island is furthermore an infrastructure base for oil and gas operations in the South China Sea.

Exports for 2007 amounted to US\$18.38 billion while imports came in at US\$55.2 billion. Main exports included aquatic products, furniture and wood, electrical and electronic products, and iron and steel.

Hainan Island holds 42.5 percent of the nation's total tropical landmass used for agriculture, forestry, animal husbandry and fishery. Due to the island's tropical climate, plants are able to yield two or three crops annually.

The island has seven major categories of land usage: farming, rubber planting, growing tropical crops, forestation, livestock breeding, aquaculture, and tobacco growing. Currently, 3.2 million hectares of land have been cultivated, with 260,000 hectares remaining untouched.

In 2007, the government approved 172 new foreign invested enterprises. Private sector investment is usually involved in wholesale and retail trade, agriculture, forestry, animal husbandry, fisheries, manufacturing, real estate and construction enterprises.

The province is also one of China's most oil rich areas. Off-shore reserves in the Beijingwan, Yinggehai, Qiongdongnan, Zhuijiangkou, and other basins are estimated to be at a total of 5.8 trillion cubic meters of natural gas and 29.1 billion tons of oil.

Since 1996, Hainan has supplied Hong Kong with 2.9 billion cubic meters of natural gas annually through a 770 kilometer-long pipeline.

Hainan is also the only place in China that allows foreign tourists to visit without a visa as long as they are part of a tour group organized through China National Tourism Agency-approved international agencies.

## Development zones and ports

### *Yangpu Economic Development Zone and Yangpu Bonded Harbor Area*

The zone was approved in 1992 by the State Council with an area of 31 square kilometers which has since paved the way for a number of high-level infrastructure projects and large-scale development. The zone is situated on the Yangpu Peninsula in the northwest of Hainan Province and is 128 kilometers from Haikou city and 145 kilometers from Haikou Meilan International Airport. Surrounded by sea on three sides with a 24 kilometer long coastline, it is home to Yangpu Harbor (a state category-one port) which is strategically located on the international sea route of Singapore-Hong Kong-Shanghai-Osaka and is in close proximity to a number of key Asian destinations.

There are ample rich resources of natural gas, rubber, sea salt, quartz sand, iron ore, titanium ore, ocean biology and tropical plants. Yangpu Peninsula features over 20 bays and a 150 kilometer-long coastline including more than 70 kilometers of deepwater coastline. It can accommodate more than 80 piers with tonnage ranging from 10,000 to 300,000. In Yangpu Bay, the average water depth is 11 meters and 24.6 meters at the deepest. As such, 30,000-ton ships can enter and exit the bay without being effected by tide.

Oil deposits in the whole province are between 23 and 30 billion tons, accounting for one third of China's total. It is one of the places where the oil and gas of four oceans meet and has been dubbed "the second Persian Gulf". The South China Sea Yinggehai Basin, 200 to 300 kilometers from Yangpu, has an estimated gas deposit of approximately 600 billion cubic meters. Production capacity for natural gas in the area surrounding Yangpu is expected reach 25.7 billion cubic meters by 2015.

The zone has invested more than RMB6 billion in large-scale infrastructure projects, including a water and power supply, and has finished the construction of a main road network in addition to an overhaul of its communications and services sectors. COSCO and China Shipping have opened fixed lines from Yangpu to Hong Kong, Tianjin and Dalian. It is estimated that the handling capacity of Yangpu Harbor reached 30 million tons by the end of 2007. The development zone is connected with Hainan West Expressway via a finely built exit road. The newly opened Guangdong-Hainan Railway also provides an efficient goods transportation channel with the mainland.

In late 2007, the State Council moved ahead with plans for the Yangpu Bonded Harbor Area, the country's fourth bond-

海南省也是中国石油最丰富的地区之一。位于近海的北京湾、莺歌海、琼东南、珠江口和其他盆地贮存了天然气共计5.8万亿立方米和石油共计291亿吨。

从1996年开始，海南省通过770公里长的管道为香港提供的天然气就达到每年29亿立方米。

海南还是中国唯一允许外国游客不需要签证即可逗留15天的地区（除了那些由中国国家旅游局允许的国际旅行社组的团以外）。

## 开发区和港口

洋浦经济开发区和洋浦自由贸易港区

洋浦经济开发区是在1992年由国务院批准，总占地面积为31平方公里，这里发展一些高层次的基础建设项目和大规模发展奠定了基础。该区位于海南岛西北的洋浦半岛，距离海口市市区128公里，距离海口美兰国际机场145公里。三面环海，有着24公里的海岸线，该区拥有国家一级港口洋浦港。洋浦港处于新加坡—香港—上海—大阪国际航线的战略位置，离一些重要的亚洲港口很近。

海南省有着丰富的天然气、橡胶、海盐、石英沙、铁矿石、钛矿石、海洋生物和热带植物资源。洋浦半岛拥有20个海湾以及150公里长的海岸线（其中70公里为深水海岸线）。这些海岸线可以改造为80个排水量从1万到30万吨级的港口。在洋浦湾，平均水深为11米，最深处可达24.6米。因此，3万吨的轮船可以自由进出而且不受潮汐的影响。

全省的原油储量为230亿至300亿之间，占中国原油储量的三分之一。这里是四大洋原油和天然气汇合的地方，又被称为“第二个波斯湾”。南中国海的莺歌海盆地，距离洋浦200至300公里，估计有着大约6000亿立方米的天然气储量。估计到2015年，洋浦地区的天然气出产总量将达到257亿立方米。

洋浦保税港区已投资超过60亿元人民币建设大型基建项目，包括供水、供电，并已建造完成主要道路网和完善其通讯及服务等行业。中远集团和中国海运开辟了从洋浦港到香港、天津和大连的固定航线，据估计到2007年底洋浦港的货物吞吐量已达3000万吨。该开发区通过一个新建成的匝道连接海南西部高速公路。近期启用的粤海铁路，也提供了联通内陆的高效货物运输通道。

2007年底，国务院提出计划在海南省建立洋浦保税港区，作为中国的第四个保税港，代表着中国与东南亚国家联盟（东盟）正朝着建立自由贸易区迈出了坚实的一步。

洋浦保税港区位于洋浦开发区内，占地面积9.21平方公里，将分为三期建设完成，第一期工程已开始建设，建设费用估计会超过500亿元人民币。该区将汇聚年生产总值1000亿元人民币的企业，在2012年前每年可以创造120亿元人民币的税收。该港口将被改造成为一个石油、天然气、化学原料及纸浆的物流中心，以及作为中国的一个重要的化工产品加工制造业基地。

沿着50公里长的海岸线上，洋浦港可以提供1万至30万吨码头泊位80个，并对进口货物提供税收优惠，以及对中国制造的商品实行出口退税；此外，在保税港区内的公司间的贸易将免征增值税和消费税。

投资洋浦经济特区、洋浦经济开发区和洋浦自由贸易区将享受一系列特殊优惠政策。作为唯一的国家级经济开发区，保税区也可以享受到优惠政策。其他吸引投资措施包括：取消进口配额，关税或外汇管制的优惠，以及在区内居住生活的外国人的居留证，工作证及入息税的豁免。

中国目前还有其他三个保税港区：上海的洋山深水港，天津的东疆港区以及辽宁省的大连港大窑湾港区。

凭借其独特的地理优势，洋浦势将成为一个现代化的港口工业区，成为未来的东盟自由贸易区的一个重要枢纽。

## 亚龙湾国家旅游度假区

在过去的十年中，亚龙湾开发股份有限公司对该旅游区一期总面积10.34平方千米的地区进行了基础设施的建设，并计划加大开发的力度，建设豪华别墅和其他国际级的旅游设施。根据《亚龙湾国家旅游度假区总体规划》，该旅游区的总面积为18.6平方千米，包括六个功能区域，称为度假中心、红树林区、高尔夫/酒店区、农业园区、东海岸区和西海岸区。

## 旅游与观光

仅2006年一年，15万名游客到海南参观，这个数字保持了24%的年均增长率。全省的主要景点包括保存完好的雷虎岭火山，诸如三亚落笔洞的众多岩洞，以及其他历史遗迹。岛内许多地方都有风景优美的温泉，为度假区的发展提供了优越的条件。海南省为典型的热带海洋性气候，有较为频繁的热带风暴和台风，年平均气温为22.9 °C。

ed port in Hainan Province—representing yet another of the steps China is taking towards establishing a free trade zone with the Association of Southeast Asia Nations (ASEAN).

The Area lies within the zone and covers 9.21 square kilometers, which will be completed in three stages, the first phase of which has already begun construction. Construction is estimated to cost upwards of RMB50 billion and the area will host industries with a total output value of RMB100 billion, generating RMB12 billion in taxes annually by 2012. The port will be transformed into a logistics center for oil, natural gas, chemical materials and paper pulp, as well as being a key processing base for chemical products in the country.

The port can house 80 berths, each of which will handle 10,000 to 300,000 tons of goods, along its 50-kilometer-long coastline and offers tax breaks on imports as well as rebates on China-made commodities; furthermore, trade between companies inside the harbor area will be exempt from value added and consumption taxes.

There are also special preferential policies for investment in the Yangpu Special Zone, Development Zone and Free Trade Zone. It is the only state-level economic development zone in China that also enjoys the policies granted to bonded zone. Other investment incentives including no import quotas, customs duties or foreign exchange controls, as well as residence permits, work permits and income tax exemptions for foreigners living within the zone.

There are currently three other bonded port areas in China: Yangshan Port in Shanghai, Dongjiang Port in Tianjin and Dayaowan Port in Dalian, Liaoning province.

With its unique location advantage, Yangpu is set to become a modern port industry district in China and an important hub for the future ASEAN free trade zone.

#### *Yalong Bay National Resort*

For the past 10 years, Yalong Development Co. Ltd has developed the infrastructure for Phase I of this resort, covering a total area of 10.34 square kilometers, and plans to increase the depth of the on-going development by building luxury villas and other world-class tourism facilities. According to the Master Plan, the area will eventually encompass 18.6 square kilometers, and consist of six function areas, namely the Resort Center, Mangrove District, Golf/Residential District, Agricultural Valley District, Eastern Beachfront and Western Beachfront.

#### **Travel and tourism**

In 2006 alone, 15 million tourists visited Hainan, and the figure has kept growing at an annual rate of 24 percent. The province's major attractions include the well preserved Leihuling Crater, a number of karst caves such as the popular Luobi Cave in Sanya, and many historical sites. The island's many hot springs are all located in places with attractive landscapes, providing excellent conditions for developing holiday resorts. The province is characterized by a tropical maritime climate, with frequent tropical storms and typhoons, and an average annual temperature of 22.9°C.

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# Hong Kong Special Administrative Region

SITUATED AT THE center of East Asia and within walking distance of Shenzhen, Hong Kong is one of the world's most dynamic economic regions and is a key pillar in today's global economy. Since it returned to Chinese management in 1997, Hong Kong has been a model for the success of the "One Country, Two Systems" doctrine. Hong Kong has the benefit of a comprehensive public transportation system, good communication infrastructure along with high quality accommodation and entertainment facilities.

Hong Kong is the world's 12th largest trading economy, the sixth biggest foreign exchange market and 15th largest banking center. It is Asia's second biggest stock market after Tokyo.

The territory has since experienced strong and broad-based economic growth in recent years. In 2007, Hong Kong's real GDP grew by 6.3 percent to US\$207.2 billion.

Per capita GDP was US\$29,900. During the same period, inflation was reported at 2 percent and the unemployment rate fell to 4 percent.

The major economic sectors of Hong Kong include trade and logistics, tourism, financial services, and professional services. Mainland China is Hong Kong's largest trading partner and is the largest source of external direct investment in Hong Kong, worth US\$260 billion—approximately 35 percent of Hong Kong's total inward investment. The relationship between the mainland and Hong Kong covers a wide range of activities ranging from traditional areas such as import/export, wholesale/retail, banking, transport and warehousing, to newer areas such as real estate, hotels, financial services, manufacturing and infrastructure development.

It is estimated that there are over 2,000 mainland-backed enterprises registered in Hong Kong with total assets exceeding US\$220 billion. During 2007, retail sales increased by 12.8 percent while total exports rose to US\$344.6 billion, a growth of 9.2 percent. Imports during the same period came at US\$367.7 billion, for a trade deficit worth US\$23.1 billion (approximately 6.3 percent of total import value).

The relationship between the mainland and Hong Kong goes both ways. Hong Kong continues to maintain its position as the largest source of overseas direct investment for the mainland.

An estimated 17 percent of the mainland's total foreign trade was handled through Hong Kong. According to China's customs statistics, Hong Kong is the country's third largest trading partner after Japan and the United States, contributing nine percent of China's total trade.

As of January 2008, there are six banks and seven representative offices incorporated in the mainland and operating in Hong Kong. These include the Bank of China, Industrial and Commercial Bank of China, Agricultural Bank of China and China Construction Bank.

There are many advantages for foreign enterprises considering investing in Hong Kong. The region advocates and practices free trade and a liberal investment regime with low taxation and no discrimination against foreign investments.

It also has a dependable legal system with an independent judiciary making it one of the world's freest and most service-oriented economies. It has the world's seventh largest foreign exchange reserves and is the second largest recipient of foreign direct investment in Asia.

# 香港特别行政区

香港坐落于东亚的中心，与深圳仅咫尺之遥，是世界上经济最活跃的地区之一，也是全球经济的重要支柱之一。自从1997年回归中国，该地区一直是“一国两制”的成功典范。香港拥有优越的综合公共交通运输系统，良好的通讯基础设施，高质量的餐饮服务和娱乐设施。

香港是世界第十二大贸易型经济体，第六大外汇市场，第十五大银行中心，是继东京之后的亚洲第二大股票市场。

几年来，香港经验丰富、包罗万象的经济范围增长显著。2007年，香港实际GDP增长了6.3%，达到1.42万亿元人民币（2070亿美元）。

人均GDP为204516元人民币（22900美元）。同期，通货膨胀率为2%，失业率下降到4%。

香港主要经济领域包括贸易与物流、旅游、金融服务、专业服务及其他生产服务等。中国大陆是香港最大的贸易伙伴，也是外来直接投资的最大来源，总值达1.78万亿元人民币——占香港所吸收的外来投资的35%。大陆与香港之间的关系涉及范围广泛，包括如进出口、批发零售、银行业、运输及仓储等传统领域，和房地产、酒店、金融服务、制造业及基础设施建设等新领域。

据统计，已有超过2000家大陆企业在香港注册，注册资本超过1.5万亿元人民币（2200亿美元）。在2007年间，零售额上升了12.8%，出口总额上升至2.36万亿元人民币（3446亿美元），上升了9.2%。同期进口额达到2.52万亿元人民币（3677亿美元），贸易逆差1580亿元人民币（231亿美元），约占总进口价值的6.3%。

大陆跟香港之间的关系是互相促进的。香港继续保持其大陆最大海外直接投资来源的

地位。同时，大陆以2600亿美元的投资总额成为香港外部投资第二大来源，占该地外来直接投资总量35%。尽管香港的资金主要投向轻型制造产业，而酒店与旅游相关设施、房地产以及基础设施的投资也不断增加。

据统计，大陆外贸总额的17%都经香港处理。中国海关统计数据示，继日本和美国后，香港是中国大陆第三大贸易伙伴，占中国贸易总额9%。

2008年1月，在大陆和香港均开展业务的有六家银行和七个代表处，包括中国银行，中国工商银行，中国农业银行和中国建设银行。

投资香港的考虑对许多外国企业来说益处良多。香港地区提倡并实行自由贸易和自由投资体系，没有贸易壁垒、低税收、不针对外国投资的自由投资环境。

香港同样有着一套可靠的法制系统和独立的司法系统，使其成为世界上最自由、最以服务为导向的经济体之一。香港有着世界上第七大外汇储备，而且是亚洲第二大外商直接投资的接受者。

## Macau Special Administrative Region

MACAU IS AN excellent business base for tapping the huge Asian markets. It has an ideal location that enjoys close connections with mainland China, Hong Kong, Taiwan and Southeast Asian countries. Investors can easily collect information and find business partners in the region. Macau's quiet and comfortable living environment also makes it attractive to foreign professionals. The government has been vocal in affirming confidence in Macau's future prosperity and stability under the "One Country, Two Systems" doctrine.

A Special Administrative Region of China, Macau is a free port with an independent tax zone. In 2007, it continued to be one of the top gambling and tourist destinations in the world, reporting a gross gambling revenue of US\$10.34 billion, an increase of 47 percent over 2006's figures. GDP for the year was US\$15 billion with per capita GDP reaching US\$28,853.

In 2007 27 million visitors arrived in Macau, 22.7 percent more than in the previous year. In addition, visitor spending not including gaming expenses grew by 13.9 percent. Its other growth areas included finance, insurance, construction, real estate and manufacturing. Macau exports textiles, garments, toys, electronics, and footwear.

The city's top trade partners are mainland China, Hong Kong, Japan, the EU, Taiwan and the United States. According to the government's Statistics and Census Service, for the first 11 months of 2007, total export value fell by 1.4 percent to US\$2.3 billion while imports grew by 18.5 percent to US\$4.9 billion for a total trade deficit of US\$2.6 billion.

It is often commented that due to Macau's increasing operational costs it is no longer suited for labor-intensive industries and should see its textile and garment exports shrink further in the years to come.

Macau's gambling industry accounts for an estimated 40 percent to its GDP. For 39 years the industry was monopolized by Hong Kong tycoon Stanley Ho's Sociedade de Turismo e Diversoes de Macau, but this changed in 2001 when casino licenses began to be offered to other casino operators.

Gambling in Macau has changed dramatically since the days when the Sands Macao Casino opened in May 2004. Today, major international casino operators like Wynn Resorts and MGM Mirage have come to the island to build huge casinos.

Accordingly, the huge casino industry has strongly supported the tourism industry, which now contributes roughly 25 percent of Macau's GDP.

Macau is also taking a page from Las Vegas and turning to the lucrative trade show circuit. Having surpassed Las Vegas in gambling revenue in 2006, the city is looking to broaden its economic base by keeping tourists in town for longer periods of time. While casino earnings constitute nearly all of Macau's tourism earnings, in Las Vegas they constitute only about 40 percent of tourist-related revenue, indicating that tourists to Macau tend to stay for only a day or two, gambling and then leaving.

The first trade exhibition to take advantage of the recent boom in hotel capacity was Mega Macao, the first ever trade exhibition of its kind in Macau. The fair, which ran between the two phases of the Canton Fair, was held in the Venetian Convention and Exhibition Center. Open since August 2007, the center (part of the Venetian Macau mega resort complex) features 100,000 square meters of conference and exhibition space, 70,000 square meters of which is dedicated to exhibitions and can accommodate up to 5,000 booths at a time.

In June 2006, Macau signed the milestone economic and trade cooperation agreement "Pan-Pearl River Delta Co-operation Framework Agreement" with the nine provinces in the mainland and Hong Kong to facilitate further economic cooperation in the future.

The territory benefits from its free port status, ideal location, excellent telecommunication and financial systems, and competitive workforce. In addition, companies investing in the territory are qualified for many tax exemptions. The local government is committed to improving its legal framework developing its offshore businesses. There are tax incentives for offshore businesses that include exemptions from income tax, industrial tax, and stamp duties.

## 澳门特别行政区

澳门对开发潜力巨大的亚洲市场来说是一个绝佳商业基地，享有与中国大陆、香港、台湾、南亚国家邻近的理想地理位置。投资者可以便捷地搜集到该地区的信息，找到商业合作伙伴。澳门安静舒适的居住环境同样吸引着外国专业人才。澳门政府一直对该地区在“一国两制”理念下未来的繁荣稳定表示非常有信心。

作为中国的特别行政区，澳门是有着独立税区的自由港。2007年，澳门继续其世界博彩及旅游圣地之一的角色，其博彩业收入为707亿元人民币（103.4亿美元），比2006年增长了47%，当年GDP为1026亿元人民币（150亿美元），人均GDP达到19354.5元人民币（28853美元）。

2007年，澳门的游客量达到2700万人次，比2006年增加了22.7%。此外，除博彩消费外，游客消费增长了13.9%。其他增长的领域包括金融、保险、建筑、房地产和制造业。澳门出口的产品包括纺织品、服装、玩具、电子产品及鞋类。

澳门最大的贸易伙伴是中国大陆、香港、日本、欧盟、台湾及美国。据政府数据及统计局数字显示，2007年的前11个月，澳门的出口总额下降了1.4%至157亿元人民币（23亿美元），进口增长了18.5%至335亿元人民币（49亿美元），贸易逆差共计178亿元人民币（26亿美元）。

根据资料显示，运营成本不断上升令澳门不再适合劳动密集型产业发展，预计其纺织品及服装出口在未来将进一步缩减。

据统计，澳门的博彩业为其GDP贡献将近40%。在过去的39年里博彩业都由香港大亨何鸿燊的澳门旅游娱乐股份有限公司所垄断，而2001年，其他赌场获发经营牌照时，这一切就发生了变化。

自从澳门金沙娱乐场在2004年5月开张以来，澳门的博彩业就发生了巨大的变化。现在，像澳门永利酒店、澳门美高梅酒店等主要国际赌场运营商已经进驻澳门，建立起超大型的赌场。同样地，超大型博彩业已大大的带动了澳门的旅游业，现在旅游业已占澳门GDP的约25%。

澳门也从拉斯维加斯的业绩里分了一杯羹，并且逐渐转向经营利润丰厚的巡回贸易展。在2006年，在博彩业利润超过了拉斯维加斯后，澳门正寻求通过在更长

时期内维持其旅游业的兴旺来扩张其经济基础。博彩业的盈利已几近成为澳门旅游业的所有盈利，而在拉斯维加斯，博彩业的盈利只占其与旅游业相关产业盈利的40%，这就意味着访澳游客更倾向于逗留一两天，赌博完毕便离开。

澳门威尼斯人酒店举办了首个贸易展，充分利用了最近大增的酒店旅客承载量。这个贸易展是澳门首个此种类型的展会，在二期广交会休会期间在威尼斯人会展中心举行。自2007年8月开业以来，该会展中心（澳门威尼斯人渡假村的一部分）的会展空间占地十万平方米，其中七万平方米被用于展览，一次性可容纳五千个展位。

2006年6月，澳门与大陆九省及香港签订了对经济及贸易合作具有里程碑意义的“泛珠三角合作框架协议”，旨在促进将来与各方的经济合作。

澳门地区是自由港，享有理想的地理优势、优越的通讯和金融系统，和富有竞争力的劳动力资源。此外，在该地区投资的公司资质都足以享受多项税收减免。当地政府致力于改善其法制框架，以发展其离岸商业。离岸商业的税收优待包括所得税、工业税及印花税的减免。

