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Special Report 2008

The 2008 Special Report on the State of Business in South China

2008年华南地区经济情况特别报告

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 intedned 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 other 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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Study executed by **Hewitt Associates Consulting (Shanghai) Co., Ltd.** on behalf of the American Chamber of Commerce in South China

华南地区经济情况调查由翰威特咨询（上海）有限公司代表华南美国商会执行。

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The American Chamber of Commerce in South China (AmCham South China) is a non-partisan, non-profit business organization, certified in 1995 by the U.S. Chamber of Commerce in Washington D.C. AmCham South China represents more than 1,200 American and International companies doing business in South China.

华南美国商会（美国商会）是一家无党派、非盈利性商业组织，由设在华盛顿特区的美国商会总会批准，于1995年成立。华南美国商会代表了在华南地区投资经营的超过1200家美国及国际企业。

The American Chamber of Commerce in South China

The 2008 Special Report on the State of Business in South China

华南美国商会

*2008*年华南地区经济情况特别报告

Contributors

翰威特 Hewitt

For more than 65 years, Hewitt Associates has provided clients with best-in-class human resources consulting and outsourcing services. Hewitt consults with more than 3,000 large and mid-size companies around the globe to develop and implement HR business strategies covering retirement, financial and health management; compensation and total rewards; and performance, talent and change management. Located in 33 countries, Hewitt employs approximately 23,000 associates. For more information, please visit www.hewitt.com.

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DEZAN SHIRA & ASSOCIATES

Dezan Shira & Associates are a full service, national China business advisory, tax and accounting practice. Established in 1992, the practice assists multinational clients assess, establish and maintain their tax, financial and legal compliance in China, in particular focusing on profitability, regulatory evolution, and operational management. With a fully English language speaking staff of both Chinese and foreign qualified lawyers, accountants and researchers, the practice has handled work in China for over 1,600 international clients. Dezan Shira & Associates comprises 9 offices in China, 4 in India and plans to open 2 offices in Vietnam during the first quarter of 2008.

协力商业顾问有限公司是全面服务中国企业，提供咨询、税务和会计方面的服务。成立于1992年，该公司协助跨国客户评估、设立和维护在华的税务、财务及法规遵从的方面事务，特别在收益率、法规评估和管理等方面尤为突出。该公司所有员工英文流利，并拥有中外高素质律师、会计和研究人员，在华服务于超过1600家国际客户。截至2008年第一季度，协力商业顾问有限公司已在中国设有9个办事处、印度设有4个办事处，并计划在越南开设2个办事处。

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Special thanks to Northwest Airlines, who provided a lucky study participant with a round-trip air ticket to the United States, and without whose support the study, and this *Special Report*, would not have been possible.

特别鸣谢美国西北航空公司为此次调查受访者提供抽奖奖品——往返美国机票一张。正是因为拥有各界对调查的广泛支持，这本“特别报告”才能得以完成。

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President's Report

I

On the basis of our annual study of the regional business environment—compiled in this *2008 Special Report on the State of Business in South China*—which encompasses more than 400 companies in South China, of diverse international origin and with a combined global revenue exceeding 97 billion U.S. dollars, I am pleased to report that the state of business in South China inarguably remains excellent.

To say that the state of business merely "remains" excellent, however, does not do justice to the dynamism of this remarkable regional economy.

This is a place where, as noted in *The Atlantic Monthly* by James Fallows, shipping containers are leaving PRD harbors at a rate of "one per second, round the clock and year-round."

This is a place where 9 out of 10 participating companies are already profitable, or will be profitable in 2 years or less; this is a place that one hears has become one of the top three markets in the world for Ferraris and Rolls-Royces, and this is a place where a setback for one industry is transmuted into a ten-fold opportunity for others:

In mid-2007, three changes were made to processing trade categories and VAT rebate policies that, in aggregate, saw the costs of business for highly labor-, energy- and environmentally-intensive industries increase by as much as 17%. Thus began a migration of effected companies moving westward—Guangxi being a key destination as its policies are more accommodating than the already highly-developed areas in the east—freeing land and resources for a new stratum of cleaner, more efficient and higher value-added industries while at the same time offering the opportunities enjoyed by the PRD and other regions over the past several decades to no less-capable areas targeted for industrial development in coming years. The flow of commerce, in a single sweep, has been redirected through South China's economy to accomplish a broad set of goals and to offer twice as many opportunities as existed previously. Moreover, despite these sudden and, for some industries, disruptive changes, fewer than 10% of study participants indicated that there had been a "significantly negative" impact on their business operations—fewer, in fact, than those who indicated a "significantly positive" impact by the same changes.

This is a business environment that is continually fine-tuning and realigning itself to take advantage of new opportunities and reach goals that will benefit not only the many peoples of South China, but also its trading partners the world over.

II

This year, 419 companies participated in the State of Business in South China study, compared to 364 in 2007 and 161 in 2006. Reflecting a diversity consistent with previous years, nearly 50% of participants this year reported having been in China for 10 years or more, complemented by nearly 10% who have only arrived in the past 24 months.

50% of these 419 also report employing more than 250 individuals each, with more than a quarter of those employing more than 5,000 people each. Applying this demographic breakdown for number of employees to AmCham South China's 1,200 member companies in Guangdong, Guangxi, Hainan and Fujian indicates that AmCham South China members are responsible for a minimum of 1,500,000 jobs in China for highly skilled executives—and not including millions more jobs created through OEM partnerships, outsourcing and more.

As noted last year, one of the most significant trends tracked by this annual study is that the number of companies involved in selling to the increasingly discerning local market, moving up the value chain and conducting full-scale business operations in China is rapidly increasing: this year, 57.5% of companies are providing goods or services directly to the China market from their South China operations. Last year this figure was 50.1%, and in 2006 it was 46%.

Furthermore, we can only expect this burgeoning focus on participating in the Chinese market to increase: following a precedent set in 2006 and surpassed in 2007, companies continue to report investing vast amounts of profits into their China operations—more, even, than they budgeted for. In 2007, the budgeted reinvestment reported by participants until the end of that year totaled 3.3 billion U.S. dollars; in 2008 participants reported an actualized reinvestment volume of 4.3 billion U.S. dollars, a 30% increase on what had been planned.

Looking into the future, the planned reinvestment over the next three years for the 400 some participants in this year's study is at minimum 16 billion U.S. dollars—and much of that, rather than additional foreign direct investment, is indicated to be coming from the RMB profits of on-the-ground operations in South China.

III

Companies in South China, with head offices not only in the United States, but of a global provenance spanning Greater China, the E.U. Asia Pacific and the rest of the world, are nearly unanimously reporting success. In 2006 we made an effort to segregate and analyze data for U.S. companies against that for other foreign invested enterprises, and we found little to no difference across the board. This has been the same every year since—there is, in this data, no significant benefit to being headquartered in any one location over the others. We understand this as every indication of a prosperous, dynamic and international market-based economy. Barriers to trade are isolated events rather than sustained grievances. South China today evokes the Hong Kong that Milton Friedman strolled through in his seminal PBS documentary *Free to Choose*—filmed literally within walking distance from Shenzhen—and if Hong Kong's recent history is any point of reference for the future development of South China, it is clear that we may expect as many future successes as we have already been witness to since the "opening up" of China 30 years ago, and successes that moreover promise to be of a unique new character best suited to the cities, provinces and the nation which have borne them.

This does not happen but for the active efforts of supportive governments who as a whole continue to show dedication to fostering and empowering commerce.

The fact that even for issues that, as discussed above, have wrought dramatic upheavals for many companies the loudest and most impassioned voices have questioned not why or if to comply with changes to the environment, but how best to do so speaks of a procedure and a mutual openness that is not only functional, but improving steadily.

The fact that despite such issues 87% of companies continue to rate the business climate in South China as being good, very good or outstanding speaks of a pursuit for efficiency and even perfection, rather than a struggle against uneven odds.

The fact that this year's data shows a remarkable dearth of participants identifying visa issues as a business challenge—along with estimates that the U.S. Consulate General in Guangzhou's visa approval rating is higher than 75%—speaks of an increasingly streamlined process for the facilitation of U.S.-China trade, and of great efforts being made daily by offices of both governments to enable businesses to expand, capture new markets and form new partnerships across borders and cultures.

The fact that nearly half of companies in South China with global annual revenue of 500 million U.S. dollars or more contribute at least 500 million U.S. dollars to that total from China alone speaks of a most remarkable economic momentum that is far more likely to balance U.S.-China trade than even the most ambitious legislation.

IV

The American Chamber of Commerce owes a debt of gratitude to Hewitt Associates, who executed this study on our behalf and without whose continuing efforts this *Special Report* would not have been possible, to Dezan Shira & Associates, whose expertise is comprehensively illustrated in the "South China Economic Overview" following the study results, and finally to Northwest Airlines, whose consistent generosity consistently sends lucky AmCham members to the United States, round-trip and free of charge.

Finally, I must thank the more than 1,200 members of our American Chamber of Commerce in South China, whose most infectious passion and dedication have allowed our organization to blossom into what we are today, and whose support and insight will no doubt empower our future, collective, success.

In conclusion, I would like to refrain my belief that the trends discussed above and throughout the rest of this document, apparent now for three years running, indicate a vibrant and dynamic first-world economy in South China. Companies are succeeding faster and more frequently than in any other economy I have witnessed. It is safe to say that the state of business in South China is, remains and has every indication of continuing to be excellent.

Thank you,

Harley Seyedin
President
The American Chamber of Commerce in South China

会长报告

一

根据我们所作的年度华南地区经济情况调查结果——已经编译成这本《2008年华南地区经济情况特别报告》——今年有逾400家在华南地区经营的企业参与调查，它们的总部来自世界多个地区，全球年收入总计超过970亿美元。在此，我很欣喜的向各位报告：不容辩驳，华南地区的经济情况继续保持良好。

说起该地区经济情况仅仅“保持”良好，并不是对当地卓越的经济活力进行评判。

该地区被James Fallows在《大西洋月刊》中评价为“一年当中，每小时，每秒钟”都有航运集装箱离开珠三角地区的海港。

该地区十分之九的企业已经实现盈利或预计在未来两年甚至更短时间内实现盈利；该地区是法拉利和劳斯莱斯全球排名前三位的消费市场之一；该地区随着一种产业的消退向其他具有十倍发展机遇的产业转移：

2007年中，加工贸易分类和增值税退税政策发生了三个变化，合计起来，劳动密集型、能源密集型和环境依赖度大产业的成本增加高达17%。从而引起了企业向西部地区迁移——由于比东部高度发达地区更加优惠的政策，广西逐渐成为一个关键的目的地——西部欠发达地区为更清洁、更高效、更高附加值产业提供免费的土地资源，与此同时，还提供未来几年与珠三角及其他地区过去几十年同样的工业发展机遇。单就商业流通来说，它已经通过华南地区的经济发展有所改变，实现了一系列发展目标，且提供的发展机遇是过去的两倍。此外，尽管出现了对某些产业来说突发的负面变化，仅有不到10%的受访企业表示这些变化对他们的经营产生了“很大的负面影响”。其实，这一数字比表示相同变化对其经营产生“很大正面影响”的企业数量要少。

该地区的经济环境正在持续调整和重组，从而能够发挥优势迎接新机遇、实现新目标，并以此让华南地区的人民和他们来自世界其他地区的贸易伙伴共同获利。

二

今年，有419家企业参与华南地区经济情况调查，相较2007年有364家，2006年有161家。反映出与往年一致的多样性，近50%的受访企业表示已经在华经营10年或更长时间，相对而言，约10%的企业刚刚在过去24个月中来到中国。

419家企业的50%表示他们各自雇用超过250名员工，其中有四分之一企业的员工人数超过5000人。从人口统计学的角度来细分华南美国商会位于广东、广西、海南和福建各省的1200多家会员企业，他们至少承担了中国至少150万名高技能职位——这还不包括会员企业在华的OEM、外包和其他合作厂家所提供的数百万个就业机会。1

正如上一年，该年度调查显示出的显著趋势是：在日益成长的本地市场销售商品的企业数量增长，而在中国进行的全面大规模商业运作也在增加：今年，57.5%的受访企业在华南地区的营运方式为直接向中国市场提供产品或服务。去年这一数字为50.1%，而2006年是46%。

此外，我们期待企业侧重中国市场参与的萌芽能够继续增长：继续2006年出现的先例和2007年的超越，企业继续表示会将他们在中国业务的利润额进行再投资——数字甚至比他们的预算投资还大。2007年，受访者报告的再投资预算截至年底达到33亿美元；2008年，受访者报告上年度的实际再投资额为43亿美元，超出计划投资30%。

展望未来，参与本年度调查的400多位受访者表示他们未来三年的计划投资总额至少达到160亿美元——当中除了外商直接投资外，其它是在华南地区当地经营所获的人民币利润。

三

华南地区的企业，无论是来自美国还是包括大中华、欧盟、亚太地区以及世界其他地方的跨国公司，几乎一致表示他们在当地的经营取得成功。2006年，我们将美国企业和其他国家企业分开分析，但得出的结果区别很小甚至一致。这样的情况每年出现，数据中并没有因为总部所在地不同而在盈利方面有明显的不同。我们明白这是繁荣昌盛的国际化市场经济的表现。贸易壁垒只是少数个案而非持续不平衡。如今华南地区像Milton Friedman在他与美国公共广播公司合作的记录片《选择的自由》中展现的香港一样——拍摄从香港步行即可到达的深圳开始——如果香港的近代史对华南地区的未来发展有什么借鉴之处的话，我们可以很清晰的预见到，自从30年前中国实行“改革开放”以来，大家已经见证了无数成功，而更多的成功也将指日可待，因为这一政策符合有中国特色社会主义建设需要，且最大地满足各省、市及全国的经济发展需求。

也许未来的成功暂未发生，但这是支持型政府的积极作用，它们不断为扶植和促进贸易发展做出贡献。

上述讨论的问题虽然引起了强烈的反响，但很多公司谈论的最大声、最热烈的问题不是为什么或者如何遵从环境的改变，而是在此环境下如何做的最好。这说明讨论过程和相互公开不仅起到很好的作用而且稳步改善。

尽管有上述问题存在，仍有87％的受访企业继续评价华南地区的经济情况为好、非常好或出色的事实证明，企业考虑的是效率和尽善尽美，而不是为不平等斗争。

今年的数据显示受访者对签证问题是经营挑战的认同有很明显的下降。据估计，美国驻广州总领事馆的签证申请通过率超过75％。这说明改善美中贸易的进程在不断加强。两国政府都在为扩大经营、开发新市场和形成新的跨界、跨文化合作积极努力。

近半数全球年收入5亿美元或更多的企业仅在中国就获利近5亿美元的事实说明，显著的经济因素远比严格的立法更有助于平衡美中贸易。

四

华南美国商会非常感谢代表我们执行此次调查的翰威特咨询公司。如果没有该公司的不懈努力，我们就无法完成这份“特别报告”。刊登在调查结果之后的是由协力商业顾问有限公司提供的非常专业的，综合性举例阐述的“华南地区经济概况”，在此也表示深深的感谢。最后还要感谢美国西北航空公司同样慷慨的为参与此次调查的幸运会员提供赴美的免费往返机票。

最后，我必须要感谢1200多位华南美国商会的会员，因为你们的激情感染和贡献才使我们的组织得以不断壮大。毫无疑问，你们的支持和见识将促成大家未来全体的成功。

总而言之，我想在此重复前文讨论过并贯穿全文的我所坚信的趋势：显而易见，从现在开始到未来三年中，华南地区将形成充满活力、生机勃勃的第一世界经济。企业将更快取得成功，这种情况比我亲见的其他经济体系发生的更频密；种种迹象都表明，华南地区的经济情况将继续保持良好。

哈利·赛亚丁
华南美国商会　会长

Study Results

(12)

调查结果

(24)

At a glance:

The State of Business in South China

About **50% of companies have been in China for 10 years or more**

Nearly **60% of companies are providing goods or services in China rather than manufacturing solely for export**

Production of goods or services for the China market continues to be the #1 priority for companies in South China, and opportunities in the local domestic market is by far the top reason for companies to set up operations here

Nearly half of companies with global annual revenue of more 500 million U.S. dollars contribute more than 500 million from China alone

3 out of 4 companies are already profitable and 9 out of 10 will be within 2 years or less—in addition, 69% of profitable companies are meeting or significantly exceeding budget expectations

In 2007 twice as many companies than had planned invested more than 50 million U.S. dollars each

23% of companies expect to invest 50 million U.S. dollars or more in the next three years

More than 30% of companies also have offices in western China—already complementing the development goals articulated by the 17th Party Congress and the 11th 5-Year Plan

87% of companies think the business environment in South China is good, very good or outstanding

Regulatory changes by the Chinese government continue to be the biggest concern for companies for the third year in a row, but the issues listed are consistently national-level changes, not local ones

About this study

This report summarizes the findings of the 2008 Business Climate Study, conducted by the American Chamber of Commerce in South China in partnership with Hewitt Associates.

This year 419 companies participated, compared to 364 in 2007 and 161 in 2006. The study was conducted between January 22nd and March 7th, 2008.

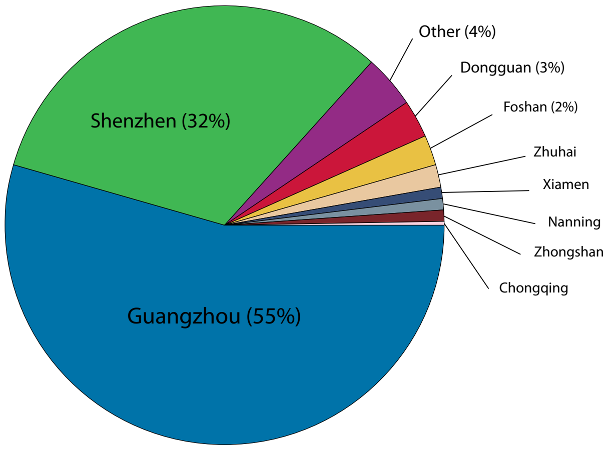
Participants in the study came from a sampling of member companies of the American Chamber of Commerce in South China, other international firms and joint-ventures in South China, and local Chinese companies. Because of the diverse international nature of the participants as a whole, we feel that these results are relevant not only as a metric of AmCham members' business operations in South China, but also of the greater business clmiate and international community in South China as a whole.

Furthermore, we are pleased to report that 2008's results almost universally continue trends observed in 2006 and 2007, indicating this study's value for watching the overal development of South China through both micro and macro trends. Where appropriate, these ongoing trends are discussed in the commentary accompanying the data in the following pages.

Finally, in an effort to maintain consistency throughout data sets dating back to 2006, only minor changes for grammar and clarity were made to questions in the study, with the exception of a new question added in 2008 regarding current events that measures companies' reactions to eight major developments in the business environment which have become relevant since the close of the 2007 study: "In your opinion, how have, and how do you expect, the following developments to effect your business operations in South China?"

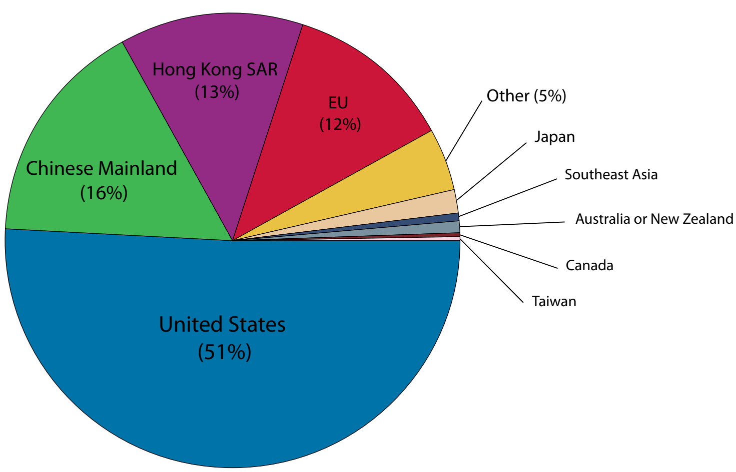
Demographics

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



Similar to 2007 and 2006 and consistent with AmCham South China's member demographics, the majority of participants are based in Guangzhou and Shenzhen, with other cities being far less represented. The 8% decline in participants from Guangzhou, coupled with the 8% increase in participants from Shenzhen, is likely due to this questionnaire being administered at one AmCham event in Guangzhou and Shenzhen each, rather than being administered exclusively online.

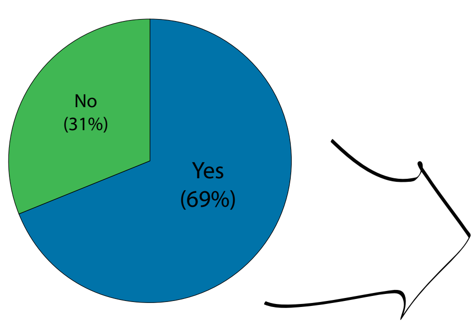
Q: Where is your parent or holding company located?



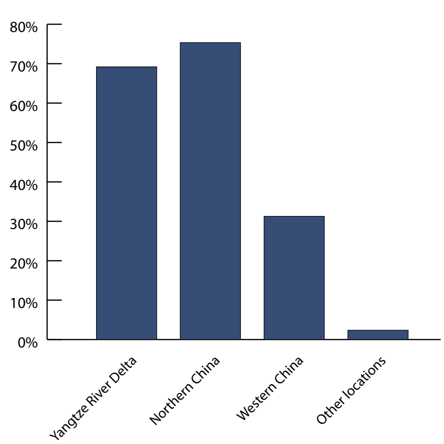
Consistent with results from the previous two years, approximately 50% of responding companies are headquartered in the United States, with Chinese (mainland) and Hong Kong SAR companies being second- and third-most represented (16% and 13% respectively). In addition, approximately 12% of participants had parent or holding companies in the European Union, with the rest having somewhat diverse origins.

Q: Does your company or group have offices in other parts of China?

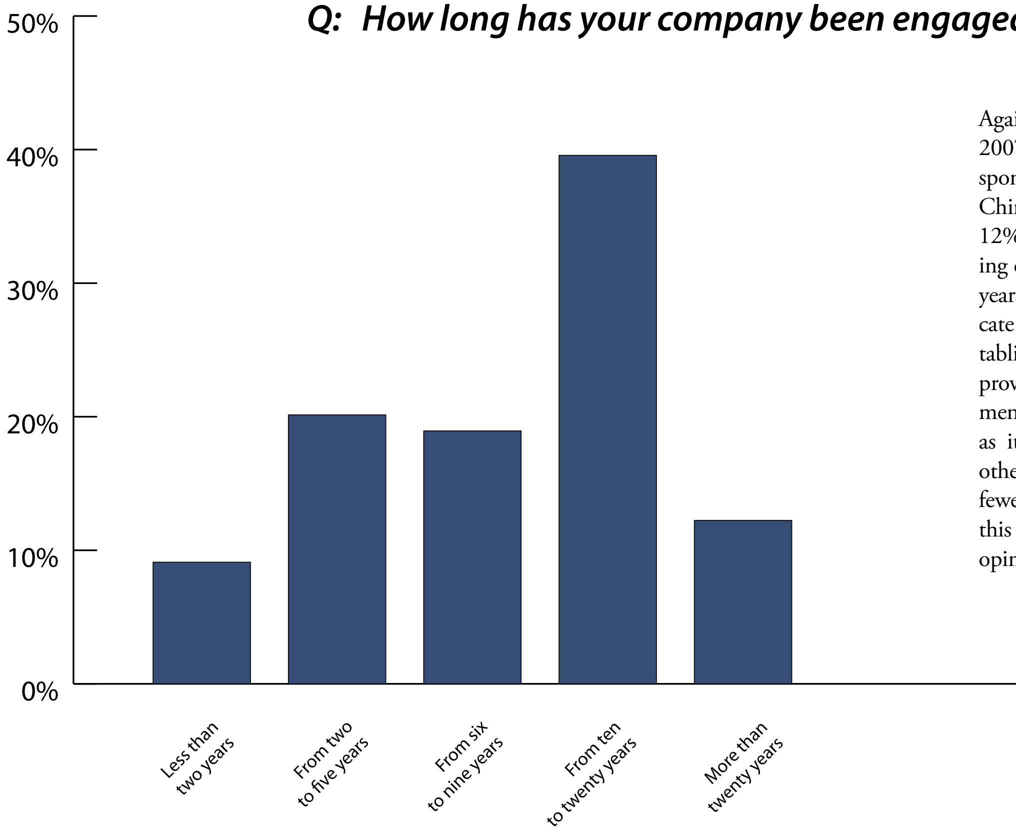
As in 2007 and 2006, more than two-thirds of participants also have offices in other parts of China, with consistent representation in the "traditional" Yangtze River Delta and northern areas of China with nearly equal distribution (skewing this year towards "Northern China" compared to the "Yangtze River Delta" in 2007). Also similarly to previous years, approximately 30% of companies also had offices in western China.



Q: If so, where?



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



Again consistent with results from 2007 and 2006, the majority of respondents have been operating in China for more than 10 years, with 12% or participating companies having operated in China in excess of 20 years. As before, these numbers indicate a high level of maturity and establishment among participants, and provides confidence in their assessment of the overall business climate as it relates to this study, with the other half of respondents and their fewer than 10 years of experience in this market providing a balance of opinion.

Q: Which of the following categories best describes your company's business activities in South China?

Continuing the trend dating back to 2005, the number of companies engaged in "services" has steadily grown, this year reaching 57.5% of the total, up more than 7% from last year, and 11% from 2006. The number of companies reporting being involved in producing goods exclusively, meanwhile, has dropped this year to 42.5% (from 49% in 2007 and 54% in 2006).

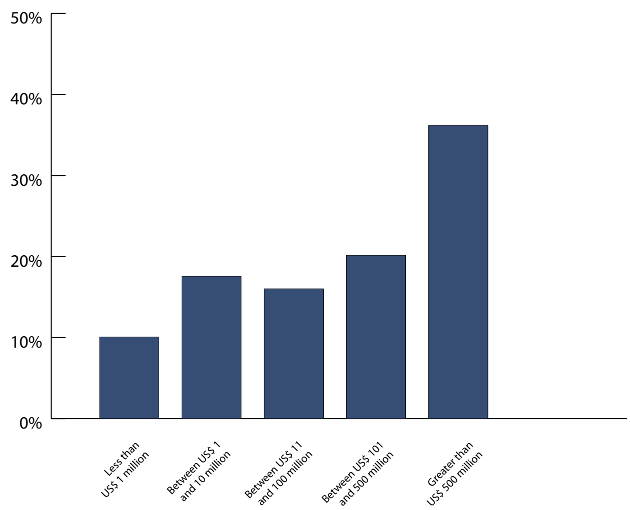
The top three reported industries for companies involved in manufacturing goods were, in order of precedence, "Other" (for the most part, sporting goods, cosmetics, household products and other consumer goods), "Electronic equipment, household appliances and components" and "Semiconductors and other electronic components", which replaced "Chemicals" as the third most commonly reported industry. This is significant as it mirrors the desired shift to higher value-add industries as articulated in the 11th 5-Year Plan and the 17th Party Congress in 2007, and shows that companies in South China are on track to sustain these development goals in coming years.

The top three most commonly reported service industries—"Other" (spanning aircraft maintenance, oil & gas exploration, advertising, internet technologies and more), "Professional services" and "Business services", respectively—indicate a diverse and growing market for services in South China.

57.5%
Services

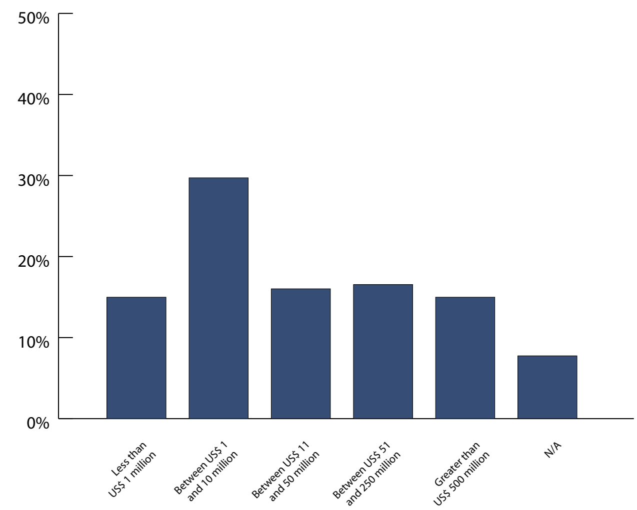
42.5%
Manufacturing

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



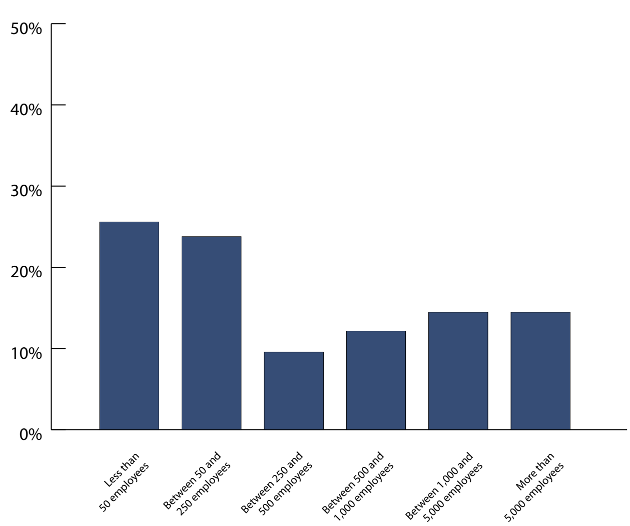
Similar to results in 2007 and 2006, companies with global annual revenue of greater than US$ 500 million are most represented, accounting for 36% of the total. This year also saw a 7% increase in the number of participants reporting global annual revenue of US$ 101 million to 500 million, offset by decreases in the number reporting 11 million to 100 million , 1 million to 11 million and less than 1 million U.S. dollars annually (decreases of 4.19%, 1.94% and 1.77% respectively).

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



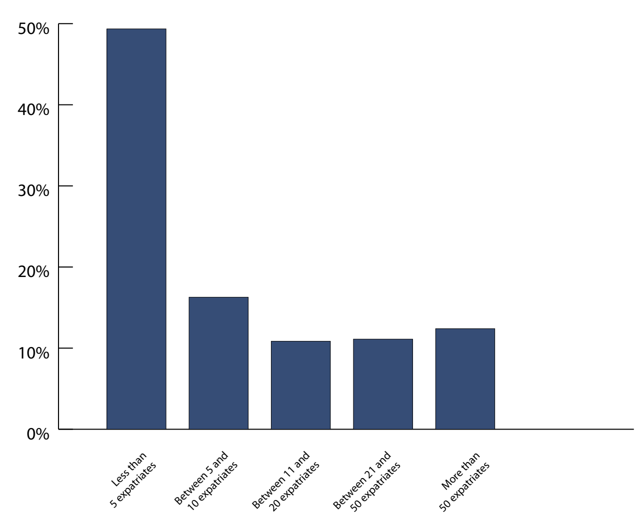
Approximately 32% of respondents currently have US$ 50 million or more in annual China revenue, and the number reporting US$ 250 million or greater this year reached 14.99%, up from 12.89% last year (and "off the scale" in 2006).

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



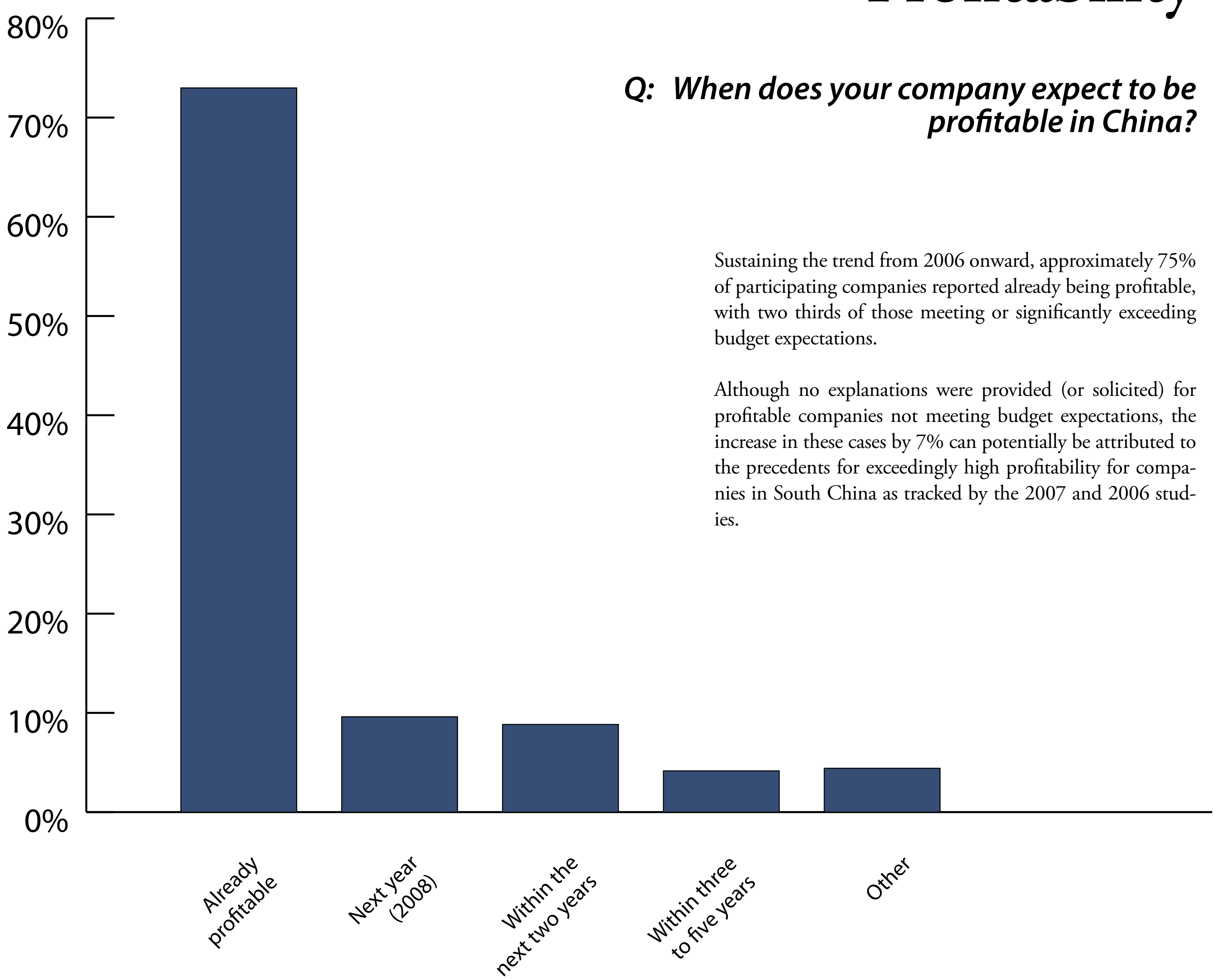
As in 2007 and 2006, approximately 50% of participating companies employ 250 individuals or fewer, and nearly 5% fewer companies reported having between 250 and 500 employees total. Offsetting this, over 5% more companies than last year reported employing more than 5,000 people in South China.

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



Again consistent with previous years, approximately 50% of companies also reported employing 5 or fewer expatriates, and two thirds reported employing 10 or fewer in total.

Profitability



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

Sustaining the trend from 2006 onward, approximately 75% of participating companies reported already being profitable, with two thirds of those meeting or significantly exceeding budget expectations.

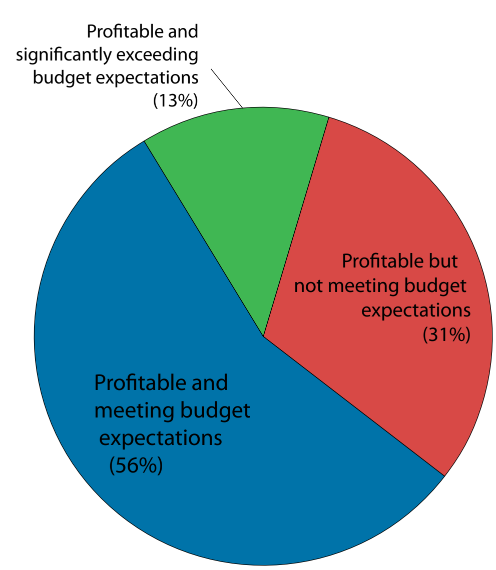
Although no explanations were provided (or solicited) for profitable companies not meeting budget expectations, the increase in these cases by 7% can potentially be attributed to the precedents for exceedingly high profitability for companies in South China as tracked by the 2007 and 2006 studies.

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

Interestingly, an analysis of profitability as a function of the number of years in China reveals that while 20% of companies who have been here for 2 years or less are already profitable, fully 78% that have been in China for more than two years are currently profitable—a number that increases to 85% of all companies that have been here for 10 years or more.

Finally, out of all companies that are not yet profitable, 91.43% expect to be profitable within the next two years, and 95.59% within 3 to 5 years.

The remaining 4.41% indicated the "Other" category, the majority of whom are non-profit organizations or representative offices, which do not, by definition, profit.



South China

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

Again continuing a trend beginning in 2006, the vast majority of participants in 2008 rank "Production of goods or services in South China for the China market" as being their top priority in South China. In the context of the trend in profitability, this indicates that the China market is more than diverse, robust and affluent enough to support companies' operations.

"Establish or expand a regional base" remains, for the second year in a row, the second-most important priority for participants, followed by "Produce goods or services in South China for the U.S. market" (which replaced "Benefit from lower labor costs" in the third position—which was itself down from the second-most important priority in 2006). Finally, "Produce goods or services in South China for markets other than the U.S. and China" ranked fifth for the third year in a row.

The consistency of these priorities in the top five for three years straight seems to indicate some stability not only in companies themselves, but also in the regional economy as a whole.

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 Benefit from lower labor costs in China

⑤ Produce goods or services in South China for markets other than the U.S. and China

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

① Overall China business activities

② Profits

③ Expansion of existing China facilities

④ Services provided in China

⑤ China market-share

Across 14 dimensions, the majority of responses indicated sustained positive change across the 2006, 2007 and 2008 results. This year, as in previous years, "Overall China business activities" was most reported as being forecasted to significantly increase, followed by "Profits", "Expansion of existing China facilities", "Services provided in China" and "China market share", in that order.

This further reinforces the continuing positive medium-term outlook articulated by participants from 2006 onward, and indicates that this outlook for the business climate in South China is expected to remain so for the foreseeable future.

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

Again, for the third consecutive year, "Opportunities in South China's domestic market" was ranked as the top reason for companies to set up operations in south China instead of other locations on the mainland. This result shows a strong covariance with "Production of goods or services in South China for the China market" in the "Companies' goals in South China" category, both being consistently ranked first across the 2006, 2007 and 2008 studies, and again points to the vitality of the domestic economy.

Rankings 2 through 5 also remain the similar, albeit with "Lower overall production costs" from 2006 not appearing in 2007 or 2008; "Greater openness than other places in China", "Transportation and logistical advantages", "Better infrastructure than other places in China" and "Proximity to Hong Kong" continue to be described as compelling reasons for companies to invest in operations in South China.

① Opportunities in South China's domestic market

② Proximity to Hong Kong

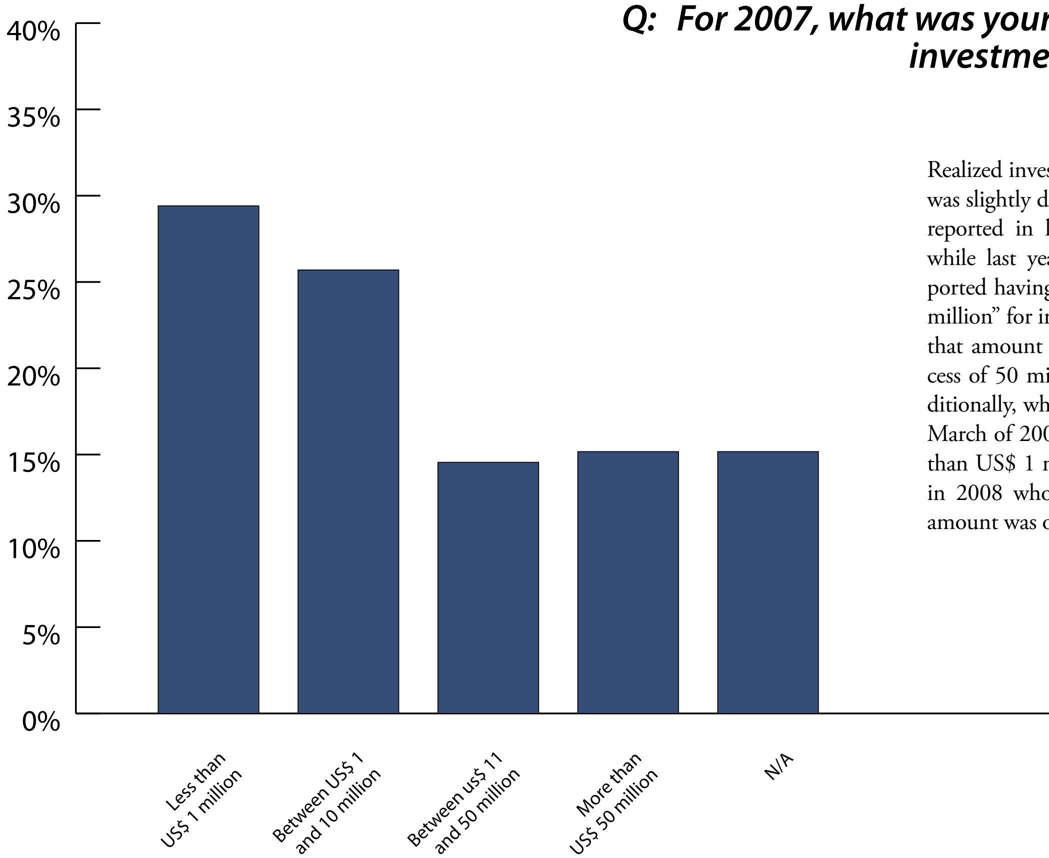
③ Transportation and logistical advantages

④ Greater openness than other places in China

⑤ Better infrastructure than other places in South China

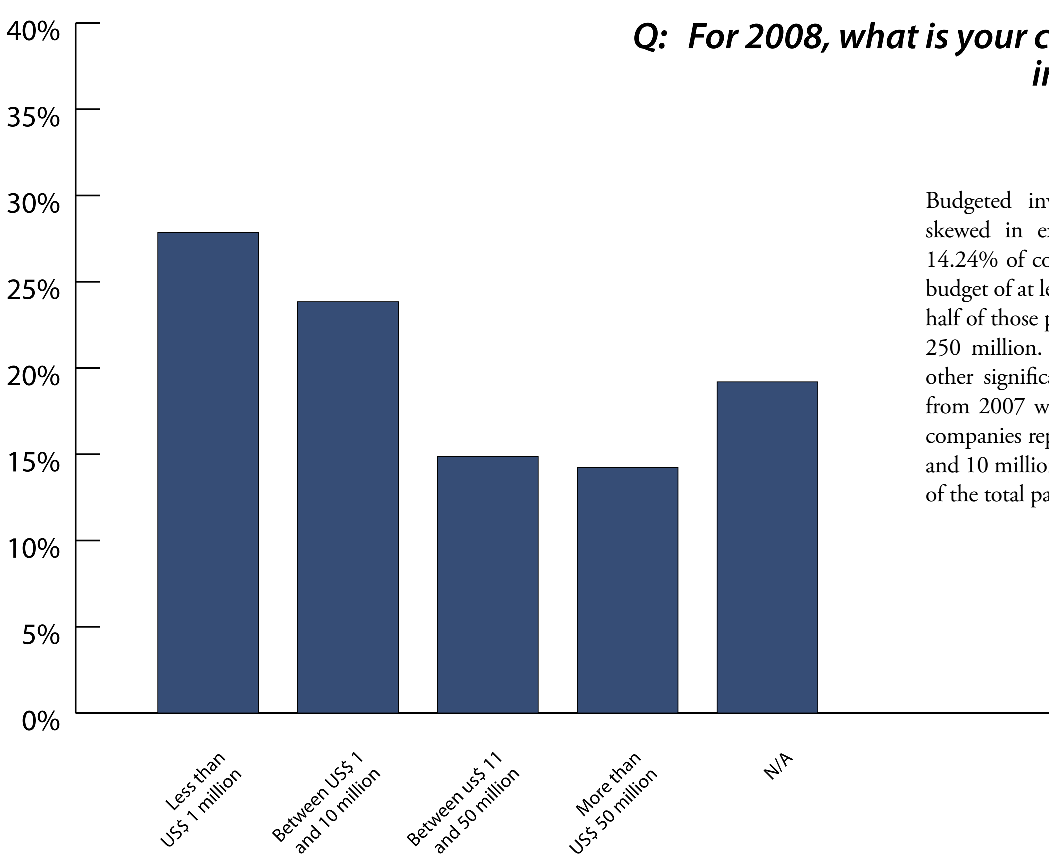
Investment trends

Q: For 2007, what was your company's realized investment volume in China?



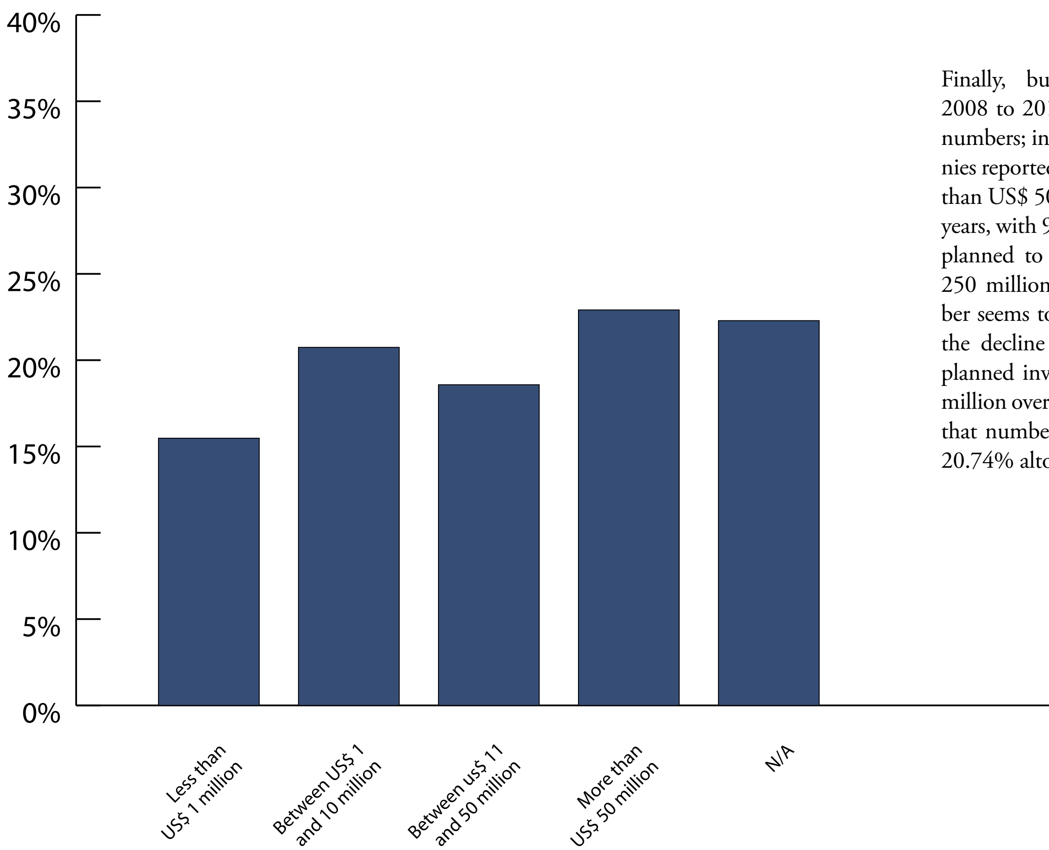
Realized investment in 2007, as it was in 2006, was slightly different than budgeted investment reported in last year's study. Most strikingly, while last year only 7.56% of companies reported having budgeted "Greater than US$ 50 million" for investment in South China, double that amount reported actually investing in excess of 50 million U.S. dollars over 2007. Additionally, while 37% of companies reported in March of 2007 that they planned to invest less than US$ 1 million, the number of companies in 2008 who reported actually investing that amount was only 29%.

Q: For 2008, what is your company's budgeted investment in China?



Budgeted investment for 2008 is similarly skewed in excess of US$ 50 million, with 14.24% of companies reporting an investment budget of at least that much, and approximately half of those planning to invest more than US$ 250 million. Somewhat surprisingly, the only other significant movement in these numbers from 2007 was the decrease in the number of companies reporting budgeting between US$ 1 and 10 million, which fell by 8.09% to 23.84% of the total participants.

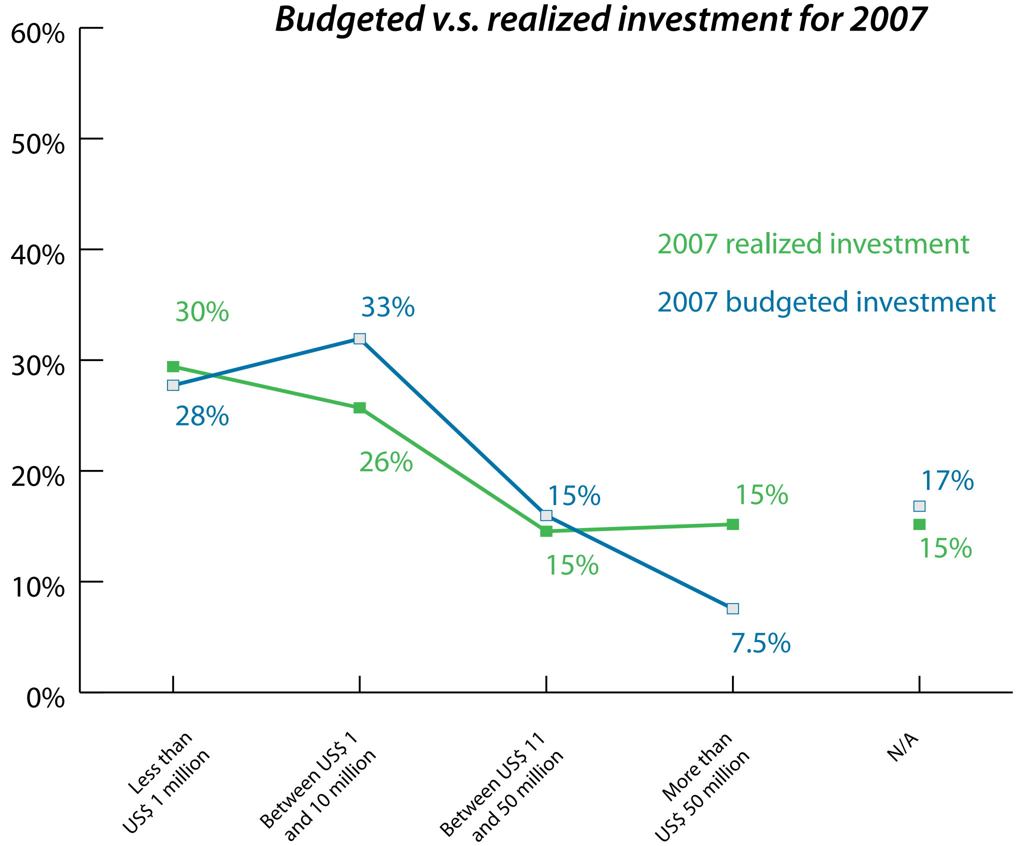
Q: *For the coming 3 years, what is your company's expected investment volume in China?*



Finally, budgeted investment for 2008 to 2011 is similar to the 2008 numbers; in total, 22.91% of companies reported planning to invest more than US$ 50 million in the coming 3 years, with 9.29% reporting that they planned to invest in excess of US$ 250 million each. Again, this number seems to be somewhat related to the decline in companies reporting planned investment of US$ 1 to 10 million over the next three years, with that number shrinking by 9.93% to 20.74% altogether.

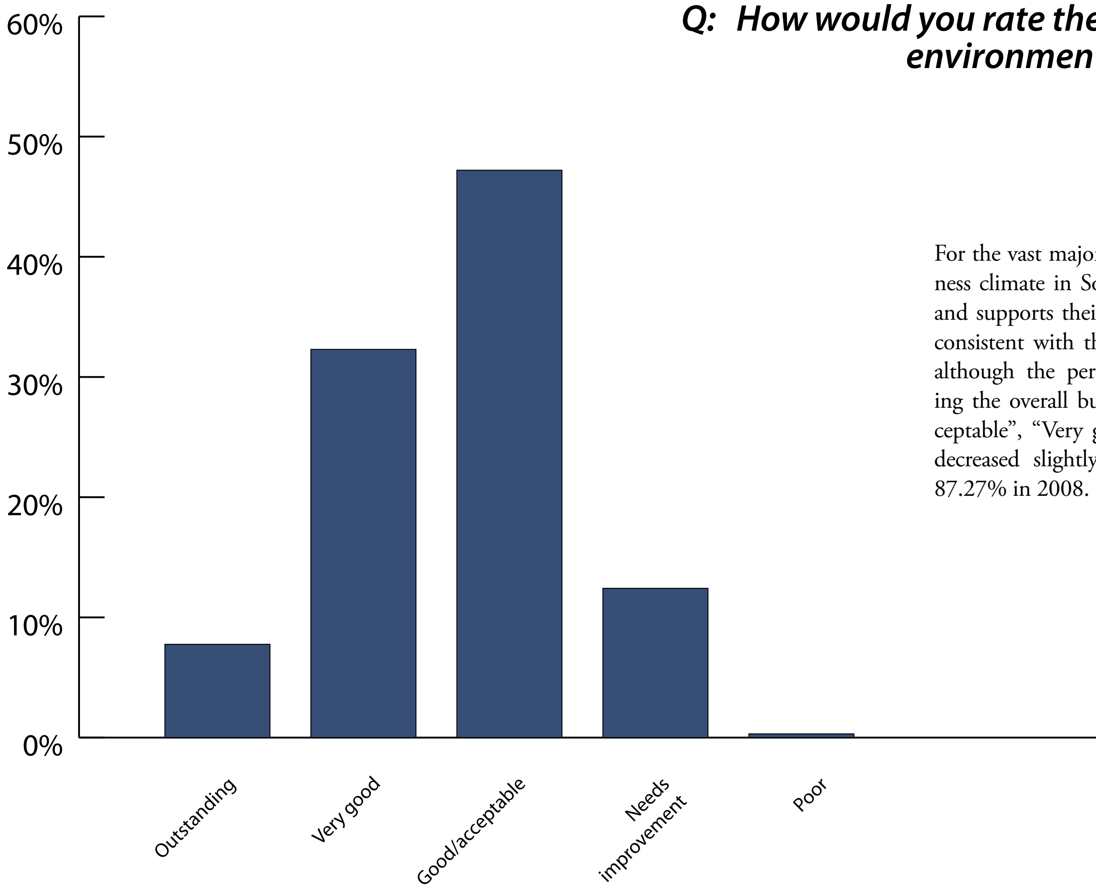
Note: In order to maintain consistency with trends beginning in 2006, the "Between US$ 50 and 250 million" and "Greater than US$ 250 million" categories are aggregated for analysis; the "Greater than US$ 250 million" category did not exist until this year (2008) and where this data is used as a separate category it is stated as such.

Budgeted v.s. realized investment for 2007



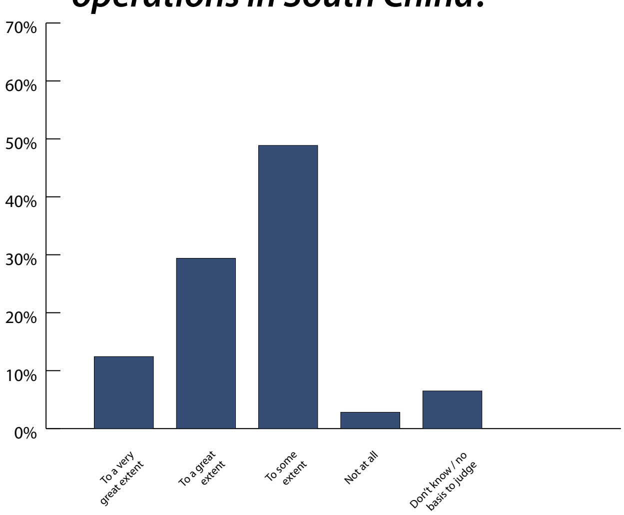
The business environment in South China

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

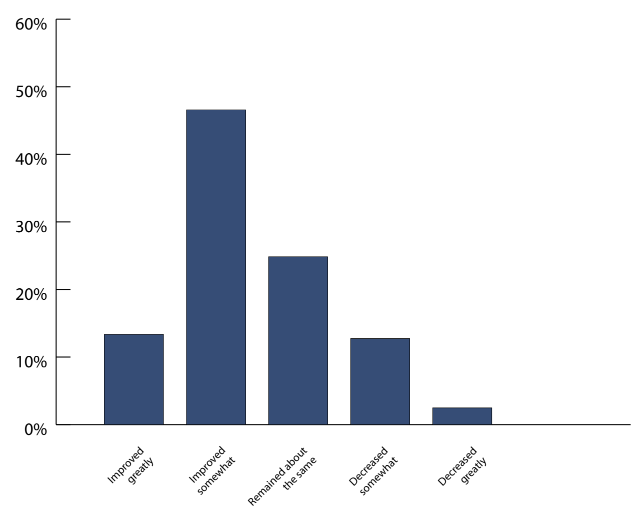


For the vast majority of participants, the business climate in South China remains positive and supports their business objectives. This is consistent with the 2007 and 2006 findings, although the percentage of respondents rating the overall business climate as "Good/acceptable", "Very good" or "Outstanding" has decreased slightly from 91.5% in 2007 to 87.27% in 2008.

Q: To what extent have China's economic reforms in 2007 effected your business operations in South China?

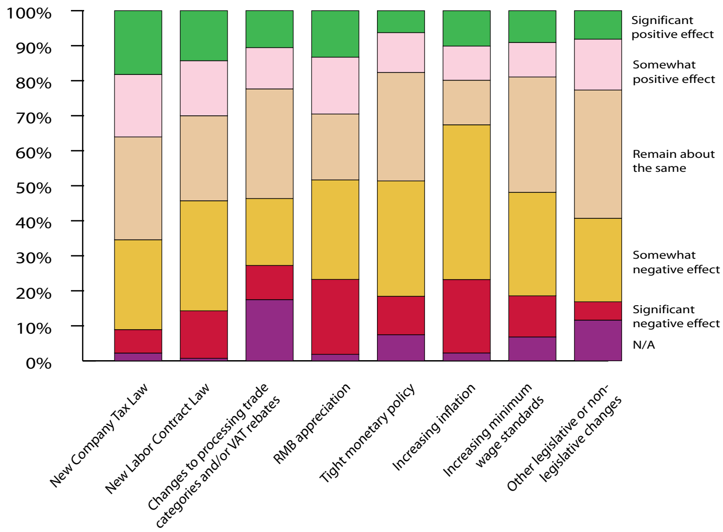


Q: Compared to 12 months ago, in your opinion the overall business environment in South China has…



Further evidence of this small shift in opinion can be found in participants ratings of the movement of the business environment over the past 12 months—only 59.94% of respondents in 2008 reported that in their opinion the business environment has greatly or somewhat improved, compared o 71.91% as of March 2007. Additionally, and consistent with results across the previous two years, more than 90% of companies indicated that China's economic reforms in 2007 had some, a great, or a very great effect on their business.

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



Some indication of the source of the minor shift in approval rating is evident in responses to a new "current events" question added to the study in 2008 which asked participants how their businesses were and will be effected by 8 recent developments arriving after the close of the 2007 study.

Across all listed developments, the most common choices were split evenly between the "Remain about the same" and "Somewhat negative effect" ratings (4 each), with the second most common responses distributed between the "Remain about the same", "Somewhat negative effect" and "Significant negative effect" categories. The third-most common rating for each development was more evenly distributed, with one, three, two, zero, one and one occurrence in each category respectively (spanning "Significant positive effect", "Somewhat positive effect", "Remain about the same", "Somewhat negative effect", "Significant negative effect" and "Not applicable").

The most popular reply in total was that "Increasing inflation has and will have a somewhat negative effect on my business in South China" (with 44.19% of all responses for that development).

While no single response category saw 50% or more of responses for that development, the general trend is for each of the developments listed to, on average, have no significant or a somewhat negative effect on operations moving forward.

Finally, it is important to note that while these questions ask about the business environment in South China specifically, most—if not all—of the 8 developments in this section can be safely considered national level issues and, in most ways, beyond the scope of the local governments of South China, whose approval rating may be suffering from misdirected anxiety about these national issues.

Q: In your opinion, what are the top 5 challenges that will hinder or limit your company's opportunities for growth in South China in 2008?

As in 2007 and 2006, "Regulatory changes by the Chinese government" continues to be ranked the greatest obstacle to current and future growth for the majority of participating companies in 2008.

"Rising labor costs" replaced "Lack of qualifiable managerial/specialist talent" as the second-most reported (with qualifiable managerial/specialist talent moving to fifth-most reported), and "Exchange rate issues" entered the top five for the first time as the third-most reported challenge. Finally, "Local competition" was ranked fourth.

① Regulatory issues (Chinese government)

② Rising labor costs

③ Exchange rate issues

④ Local competition

⑤ Lack of qualifiable managerial and specialist talent

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?

In the coming three years, participants expected these issues to remain highly relevant with the exception of "Lack of qualifiable managerial/specialist talent", which was supplanted by "Foreign competition" as the fifth-most reported challenge; this most likely indicates the continuing efficacy of Chinese education programs at delivering highly capable entrants to the workforce.

① Regulatory issues (Chinese government)

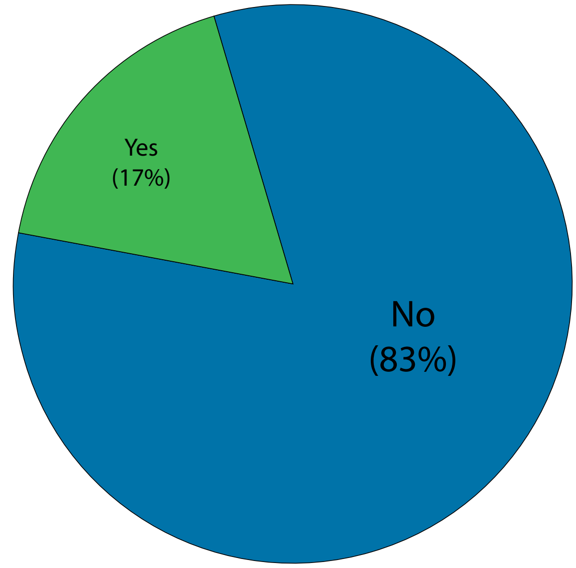
② Rising labor costs

③ Exchange rate issues

④ Local competition

⑤ Foreign competition

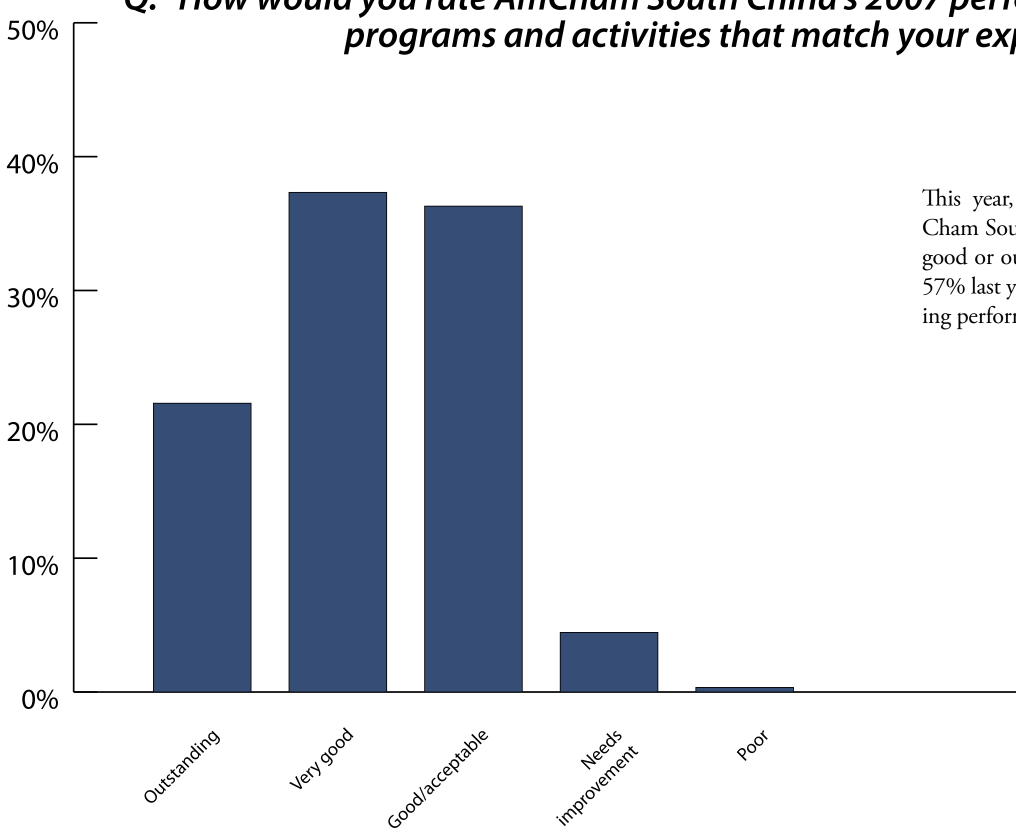
Q: Has your company made specific preparations for a potential outbreak of Avian Influenza ("Bird Flu")?



Continuing a shocking and potentially damaging trend from 2006, only 17.28% of participating companies indicated any specific preparations for a potential outbreak and subsequent epidemic of Avian Influenza, down nearly 30% from two years ago. This is particularly significant given South China's high probability of being severely effected should such an outbreak occur.

A portion of this lack of preparation can be potentially explained by a lack of immediate media coverage relative to previous years; regardless, it would be highly beneficial not only for companies and their employees, but also for employees' families and the greater community, to account and plan for such a contingency.

Q: How would you rate AmCham South China's 2007 performance on delivering programs and activities that match your expectations and needs?



This year, 95.21% of participants rated AmCham South China's performance as good, very good or outstanding, with a full 59% (up from 57% last year) indicating very good or outstanding performance.

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

As in 2007 and 2006, opinions on opportunities for AmCham to improve its service to members varied, but the most frequently noted (out of 7 total) were "more presentations", "more social activities" and "more round table discussions", in that order.

快速扫描
华南地区经济情况

约50％的企业在华经营10年或更长时间

近60％的企业在中国提供产品或服务，而非仅为出口加工

“为中国市场生产产品或提供服务”是企业在华南地区的首要发展目标，而当地国内市场的机遇是至今为止企业在该地区开展营运的首要原因

近半数全球年收入过5亿美元的企业仅在中国地区获利已近5亿美元

4家企业中有3家已经实现盈利，而10家企业中的9家预计在两年或更短时间实现盈利——除此之外，69％的盈利企业达到甚至大大超过自己的预期盈利预算

2007年实际投资超过5000万美元的企业是计划投资的两倍

23%的企业预计在未来三年中投资5000万美元或更多

过30%的企业已在中国西部设立办事处——顺应了与中共十七大和第11个“五年计划”相关的发展目标

87%的企业认为华南地区的营商环境是好、非常好或者出色

中国政府在法规方面的改变仍然是企业连续三年最关心的问题，但所列出的问题是全国性的变化，而非地区性的

关于此次调查

该报告总结了2008年经济情况调查的结果，由华南美国商会和翰威特咨询公司合作完成。

本年度有419家企业接受调查，相较2007年为364家，2006年为161家。调查在2008年1月22日至3月7日间进行。

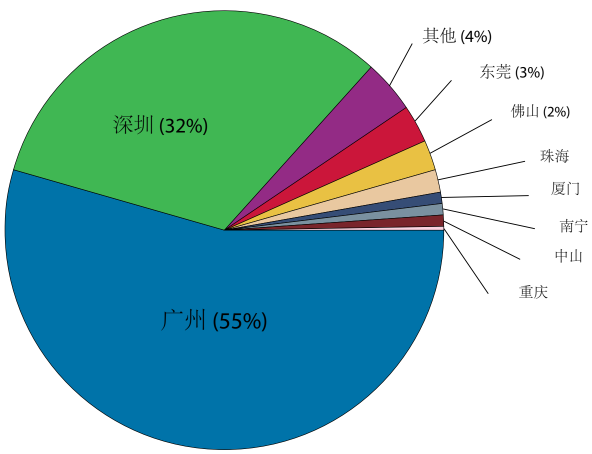
调查中的受访者来自华南美国商会会员企业、华南地区的其他国际公司和合资企业以及本土中国企业。由于各国受访者的多样性，我们感到这些结果不仅和美国商会会员在华南地区的经营状况相关，还与整体经济环境和华南地区各国际团体有关。

此外，我们欣喜的报道2006及2007年观察到的趋势在2008年的结果中依然相当普遍的持续，标志着调查对华南地区宏观和微观趋势发展观察的价值。这些进行中的趋势将在之后伴随相关数据进行适当的分析和解释。

最后，为努力保持自2006年以后数据的一致性，调查中的问题仅在文法及清晰度方面做了细微的调整，除了2008年增加了一个新的问题。该问题旨在估量企业对于2007年度调查结束后营商环境中发生的8项主要发展的反应：“在您看来，以下的发展对贵企业在华南地区的经营有何影响，或预计有何影响？”

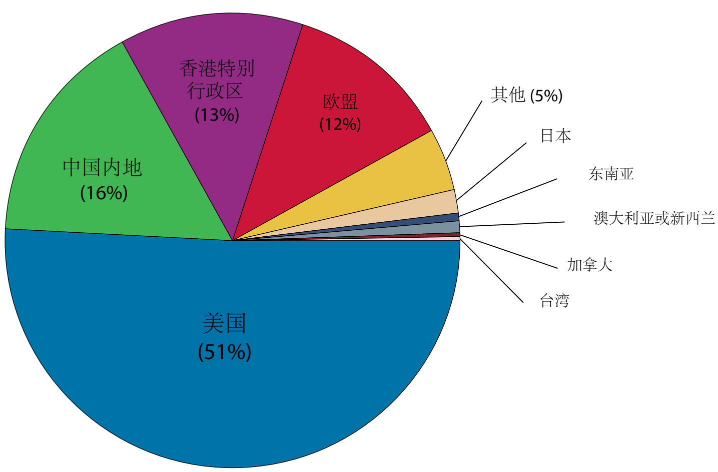
受访企业统计

问题：企业运营总部或办事处在华南地区的地点位于哪里？



与2006年和2007年的调查结果相似，受访的华南美国商会会员企业绝大多数都设在广州和深圳，仅有少数企业分散在其它地区。今年，广州地区参加调查的企业下降了8%，与此同时深圳上升了8%，产生这一结果的原因可能是商会在广州和深圳各举办的活动中对参与者进行了书面问卷调查，而非单一的在线调查。

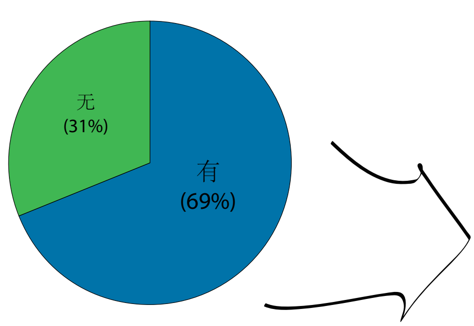
问题：企业总公司或控股公司的地点在哪里？



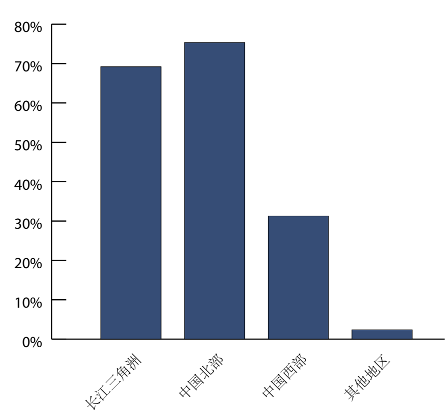
与过去两年的调查报告大致相同，约50%的受访公司总部设在美国，仅次之是中国（内地）及香港特别行政区的公司（本别为16%和13%）。此外，约有12%的受访企业总公司或控股公司在欧洲，其余企业来自世界其他地区。

问题：您所属企业或集团在中国其它地方设有办事处吗？

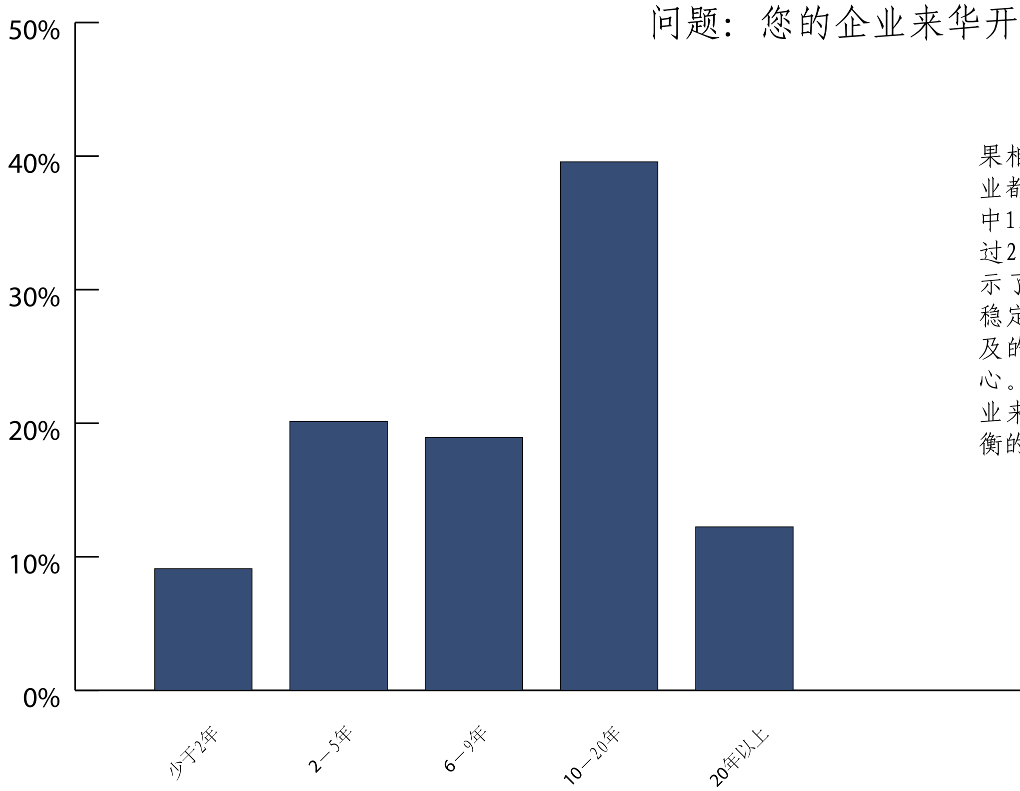
在2007和2006年度，超过三分之二的受访企业在中国其它地方设有办事处。这些办事处通常平均分布在“传统”的长江三角洲和中国北方地区（与2007年在“长江三角洲”设立办事处相比，更多的企业今年选择在“中国北方”设立）。与往年类似的是，约有30%的企业在中国西部有办事处。



问题：如果有，在哪里？



问题：您的企业来华开展业务已有多少年？



依然与2006年及2007年的结果相似，大部分受访者的所在企业都已经来华经营超过10年，其中12%的企业已经在华开展业务超过20年。一如以往，这些数据显示了受访公司群体的高度成熟与稳定，同时也为其对此次调查涉及的整体经济环境的评估提供信心。而另一半受访者及其所属企业来华不足10年的经验提供了平衡的观点。

问题：以下哪种行业描述与您所属的公司在华南地区的业务范围最贴切？

持续2005年以来的趋势，从事“服务业”的企业数量稳步增长，今年的调查结果达到57.5%，较去年增加7%，较2006年增加11%。于此同时，仅从事制造业的公司比例下降到42.5%（2007年为49%，而2006年为54%）。

在受访企业所属的行业类别中，按生产产品种类的优先顺序排列的前三名，首先是“其他”（主要是体育用品、化妆品、家庭用品和其他消费品），第二位是“电子设备、家用电器及配件”，而“半导体和其他电子元件”取代了“化学品”成为排名第三的生产行业。企业积极向高附加值产业转移是自第11个“五年计划”和2007年召开中共十七大以来显示出的意义深远的转变。同时，表明华南地区的企业在未来几年正在逐步实现它们的发展目标。

排名前三位最常见的服务行业——为别为“其他”（主要是飞机维修、石油与天然气的勘探、广告，互联网技术等等），“专业服务”和“商业服务”——显示出华南地区服务业的种类增加和市场增长。

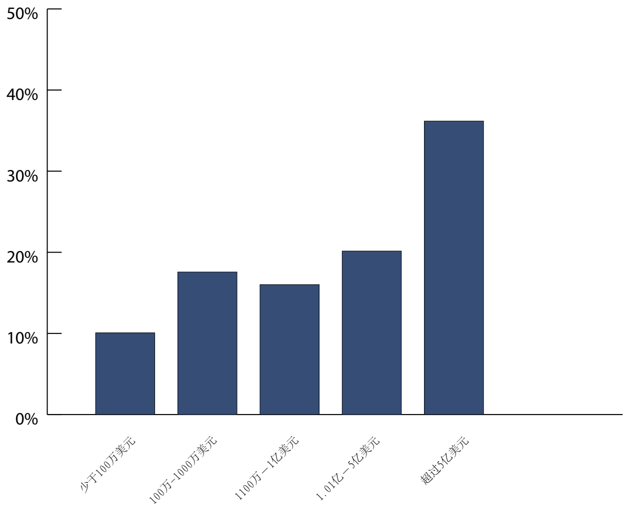
57.5%

服务业

42.5%

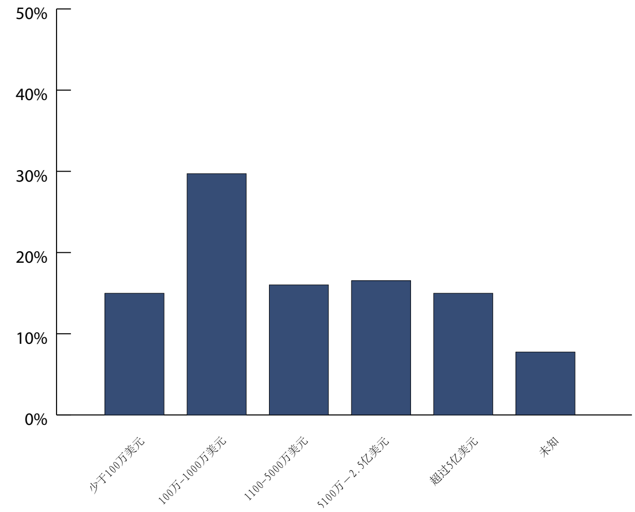
制造业

问题：您所属企业/集团在全球范围的年收入大约是多少？



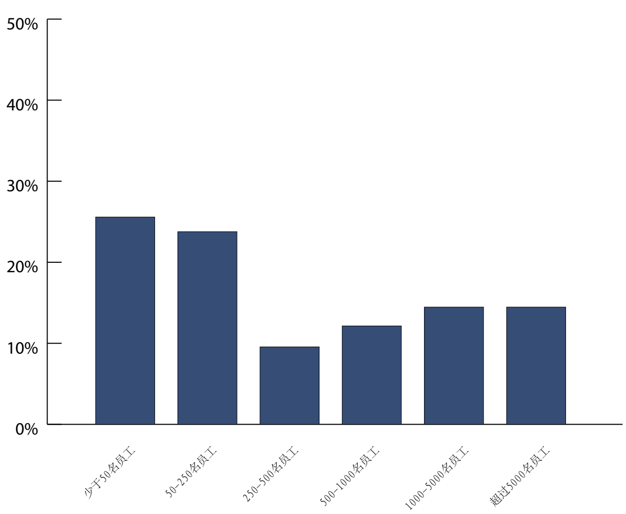
与2007年和2006年的结果近似，全球年收入超过5亿美元的企业占了最大比例，占36％左右。全球年收入在1.01亿美元至5亿美元之间的企业数量在今年的调查中上升了7％，与全球年收入在1100万至1亿美元之间、100万至1100万美元之间和低于100万美元的企业的减少比例相当（跌幅分别为4.19％、1.94％和1.77％）。

问题：您所属企业在中国的年收入总额大约是多少？



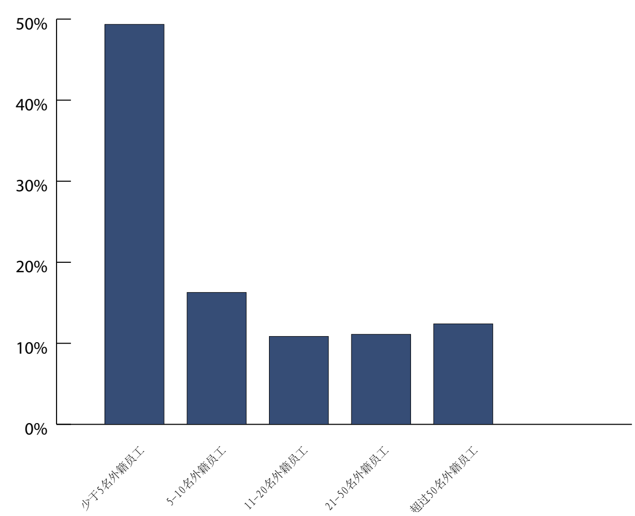
约32％的受访企业在华年收入总额达到或超过5000万美元，还有14.99%的受访企业今年的年收入达到甚至超过2.5亿美元，而去年同期的数据为12.89%（并在2006年达到“小康水平”）。

问题：您所属企业在中国的职员数量为多少？



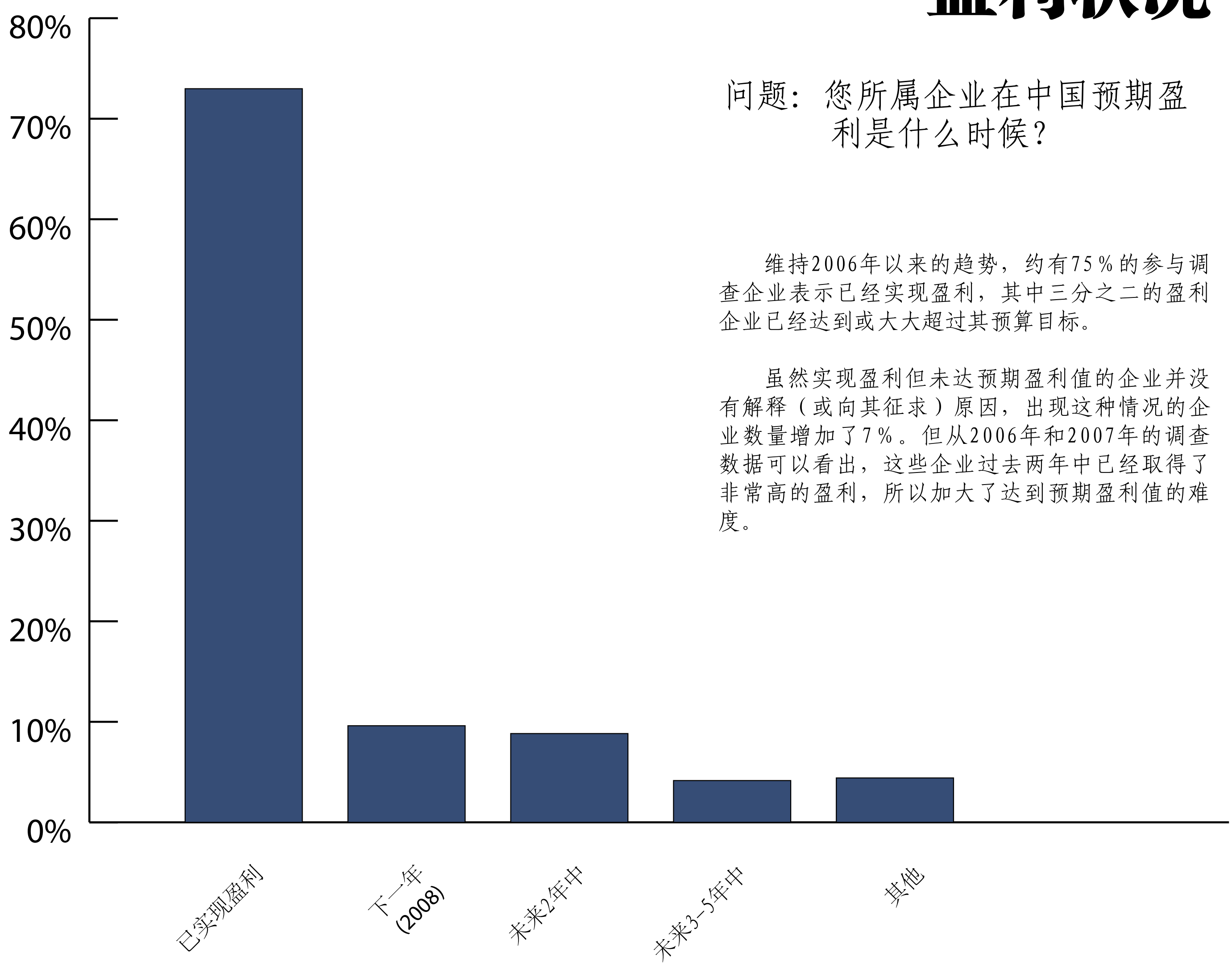
在2006年和2007年，约50％的受访企业在华聘请的员工数量为250名或更少；不到5％的受访企业在华招聘的员工数量为250至500名。与之相当，其在华南地区的员工数量超过5000名的受访企业比2006年上升5％。

问题：此外，有多少员工是外籍人士或持有外国护照？



与往年一样，大约有50％的受访企业聘请5位或更少的外籍人士，且三分之二的受访企业雇用的外籍人士数量为10位或更少。

盈利状况



问题：您所属企业在中国预期盈利是什么时候？

维持2006年以来的趋势，约有75％的参与调查企业表示已经实现盈利，其中三分之二的盈利企业已经达到或大大超过其预算目标。

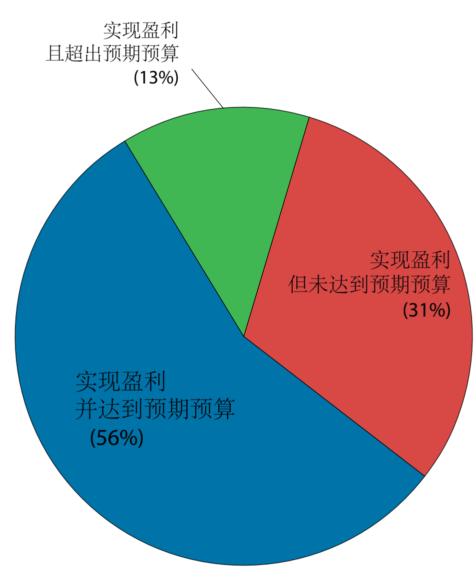
虽然实现盈利但未达预期盈利值的企业并没有解释（或向其征求）原因，出现这种情况的企业数量增加了7％。但从2006年和2007年的调查数据可以看出，这些企业过去两年中已经取得了非常高的盈利，所以加大了达到预期盈利值的难度。

问题：如果你所属企业已经实现盈利，则盈利状况如何？（以在华成立时间起计算）

有趣的是，关于企业盈利的调查数据表明在中国投资少于两年的企业有20％已实现盈利，在华投资超过两年以上的企业有78％已实现盈利，在华投资十年或以上的企业实现盈利的百分比更是增长到85％。

最后，对于那些未实现盈利的企业，有91.43％预计在两年内实现盈利，而95.59%预计在三到五年内实现盈利。

剩余4.41%的受访企业大多数是非盈利机构或代表处，不存在盈利方面的需求。



华南地区

问题：您所属企业在华南地区的发展目标是什么？

再一次延续2006年来的趋势，绝大多数受访企业将“以华南地区为基地向中国市场生产产品或提供服务”作为在该地区发展目标的首位。联系前文提到的盈利趋势，这表明多样、健全和丰富的中国市场足以支持企业在当地的经营。

“建立或拓展区域性经营基地”在受访者的回答中连续两年排名第二。紧接的是“以华南地区为基地向美国市场生产产品或提供服务”（该项取代排名上年度第三位的“从廉价劳动力中盈利”，它在2006年的调查结果中是第二重要的发展目标）。最后是连续三年排名第五位的“以华南地区为基地向美国和中国以外的市场生产产品和提供服务”。

过往三年排名前五位的发展目标的一致性不仅证明了企业本身的稳定，还显示了区域经济整体的稳定发展。

① 以华南地区为基地向中国市场生产产品或提供服务

② 建立或拓展区域性经营基地

③ 以华南地区为基地向美国市场生产产品或提供服务

④ 从廉价劳动力中盈利

⑤ 以华南地区为基地向美国和中国以外的市场生产产品和提供服务

问题：未来三年，您期望所属企业的运营在以下哪些领域有所改变？

① 全中国范围经营活动

② 盈利状况

③ 扩大在华现有设施

④ 在中国提供的服务

⑤ 中国的市场份

从14个方面来看，大部分受访者在最近三年中都表示了持续的积极变化。今年，和去年一样，“全中国范围经营活动”被预测为是最突出及意义重大的增长。紧接其后是“盈利状况”、“扩大在华现有设施”，“在中国提供的服务”和“中国的市场份额”等等。

自2006年以来，受访者持续的积极中期展望的进一步巩固，表示华南地区的经济环境的展望在未来是可以预期的。

问题：令您所属企业选择在华南地区而非中国其他地方进行商业运营的主要原因是什么？

连续第三年，“华南地区本地市场的机遇”仍然是企业选择在华南地区运营而非中国其他地区的最主要原因。此结果与“以华南地区为基地向中国市场生产产品或提供服务”选项在“企业在华南地区的发展目标”问题中排名强烈一致，两者从2006到2008年均一直排名第一，而且2008年再次被认为是当地经济的活力之所在。

第二到第五种原因的排行位置仍旧相同，尽管“较低的总体生产成本”这一原因除了在2006年的报告中出现以外，在2007和2008两年的经济调查中没有涉及。“比中国其他地区更大的开放性”、“运输和物流优势”、“比中国其他地区更完善的基础设施”和“邻近香港”继续被认为是吸引企业在华南地区投资的原因。

① 华南地区本地市场的机遇

② 邻近香港

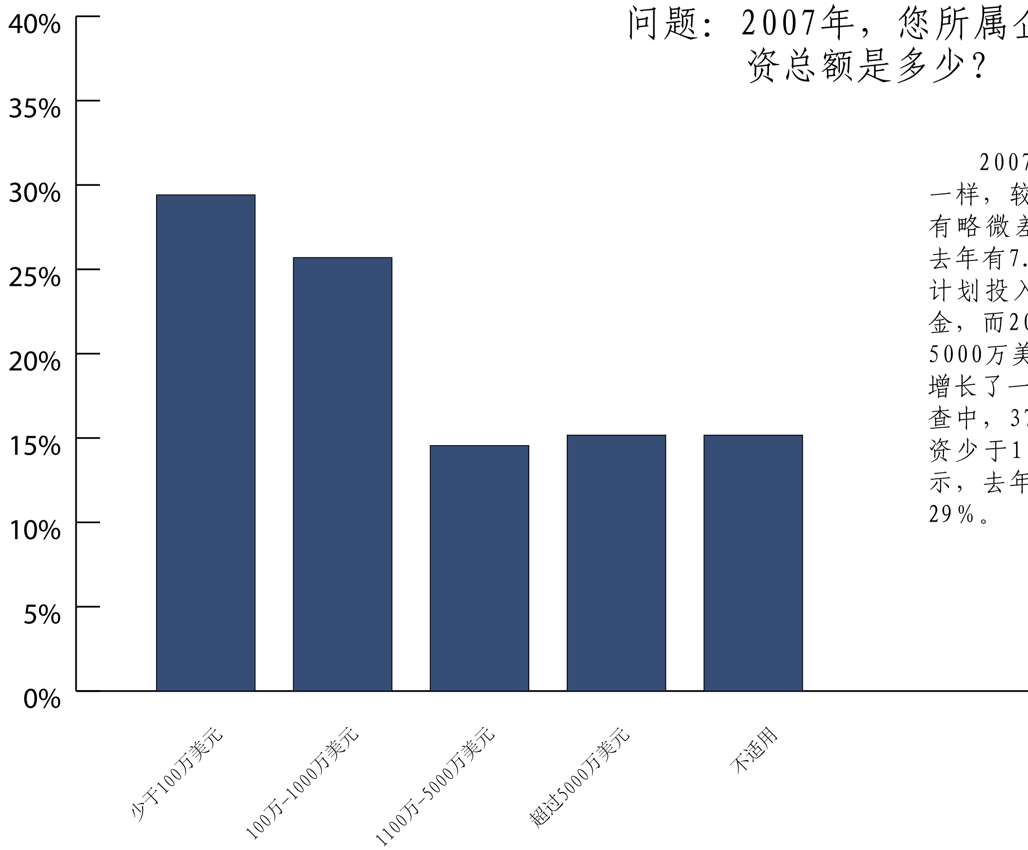
③ 运输和物流优势

④ 比中国其他地区更大的开放性

⑤ 比中国其他地区更完善的基础设施

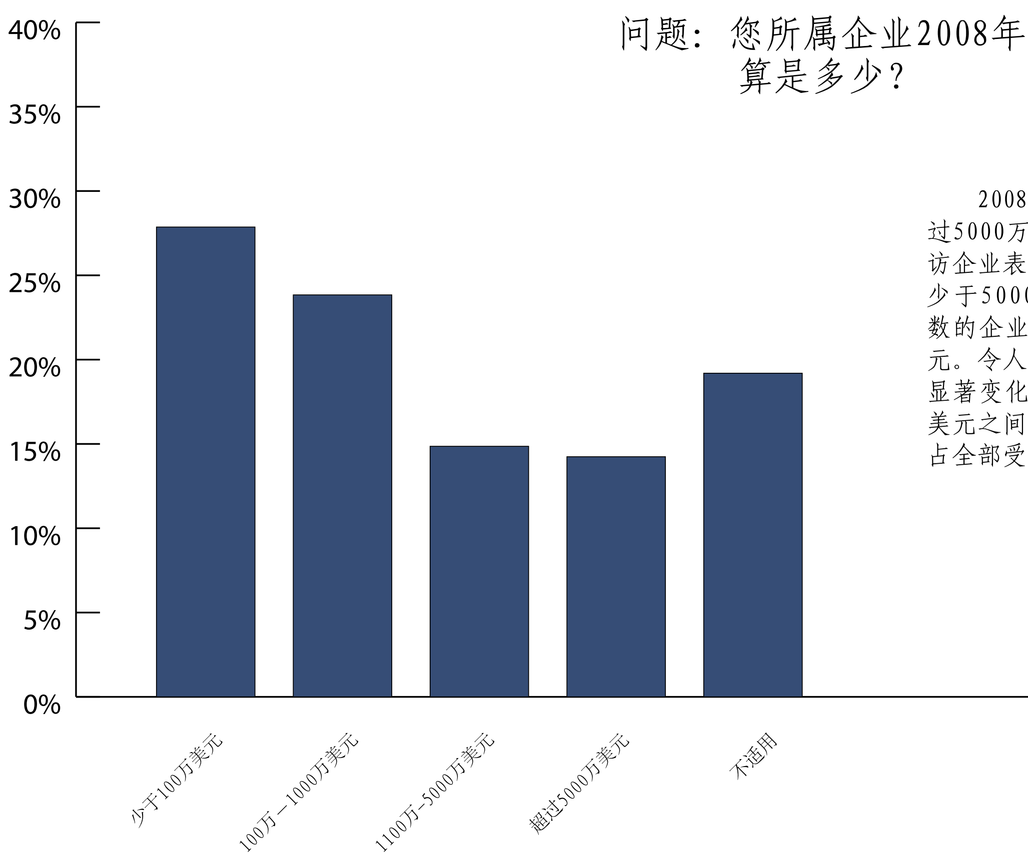
投资趋势

问题：2007年，您所属企业在中国的实际投资总额是多少？



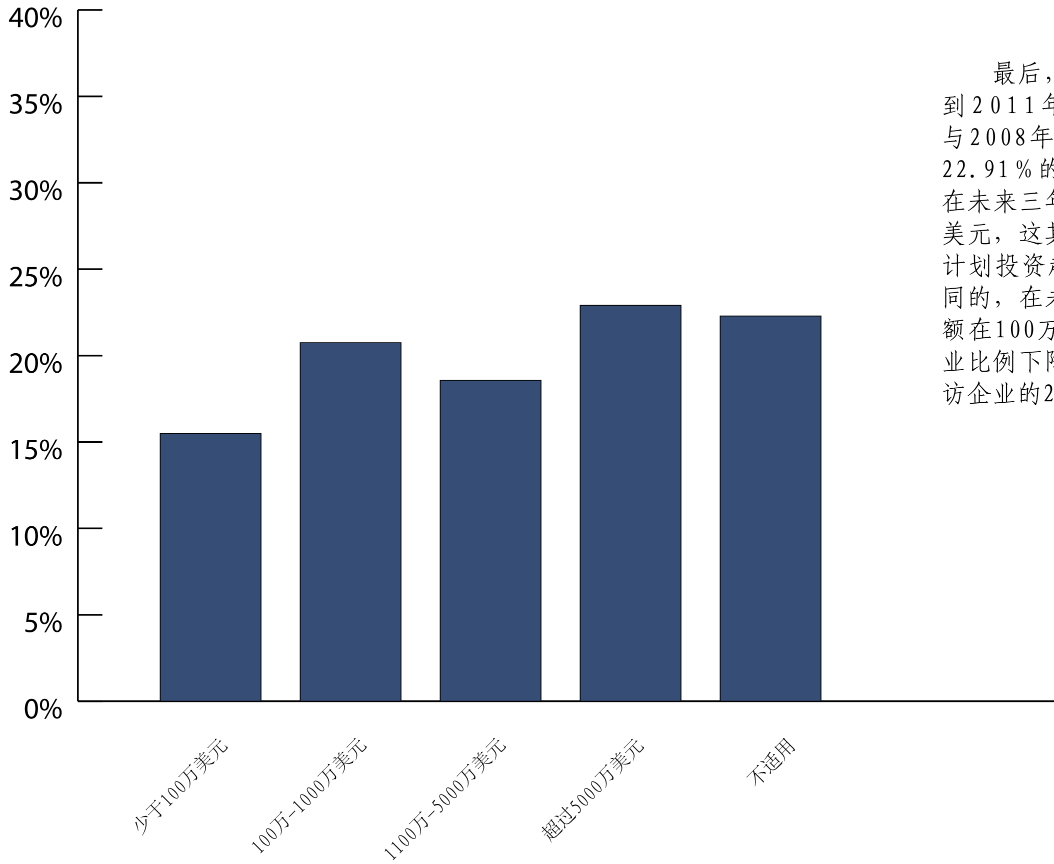
2007年的实际投资情况和2006年一样，较上一年度调查中的计划投资有略微差别。特别值得注意的是，去年有7.56％的公司表示对中国市场计划投入“超过5000万美元”的资金，而2007年在华实际投资额“超过5000万美元”的企业比例较调查结果增长了一倍。此外，在2007年3月的调查中，37％的企业表示在华的计划投资少于100万美元，但今年的调查显示，去年实际投资该金额的企业仅为29％。

问题：您所属企业2008年度在中国的投资预算是多少？



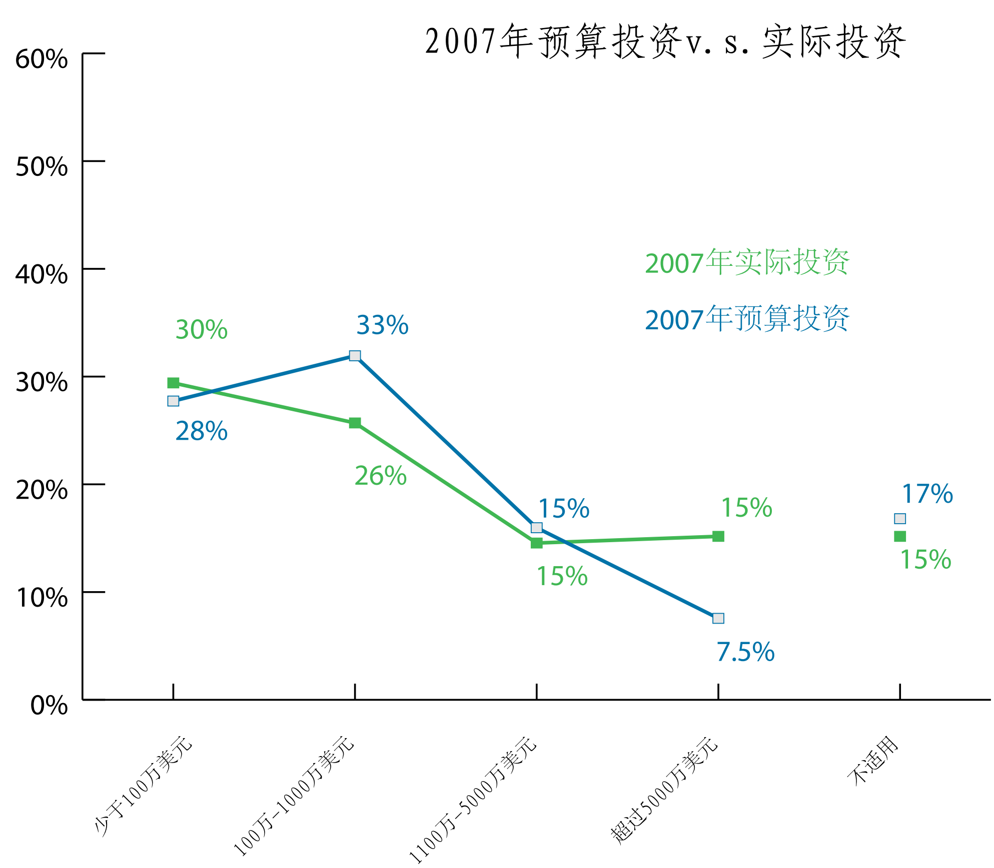
2008年度的预算投资额同样向“超过5000万美元”倾斜，有14.24％的受访企业表示2008年在中国的投资预算不少于5000万美元，并且这其中约有半数的企业表明将计划投资超过2.5亿美元。令人惊讶的是，这些投资数据另一显著变化是计划投资在100万到1000万美元之间的企业比例下降了8.09％，只占全部受访企业的23.84％。

问题：在未来三年内，您所属企业在中国的预计投资额是多少？



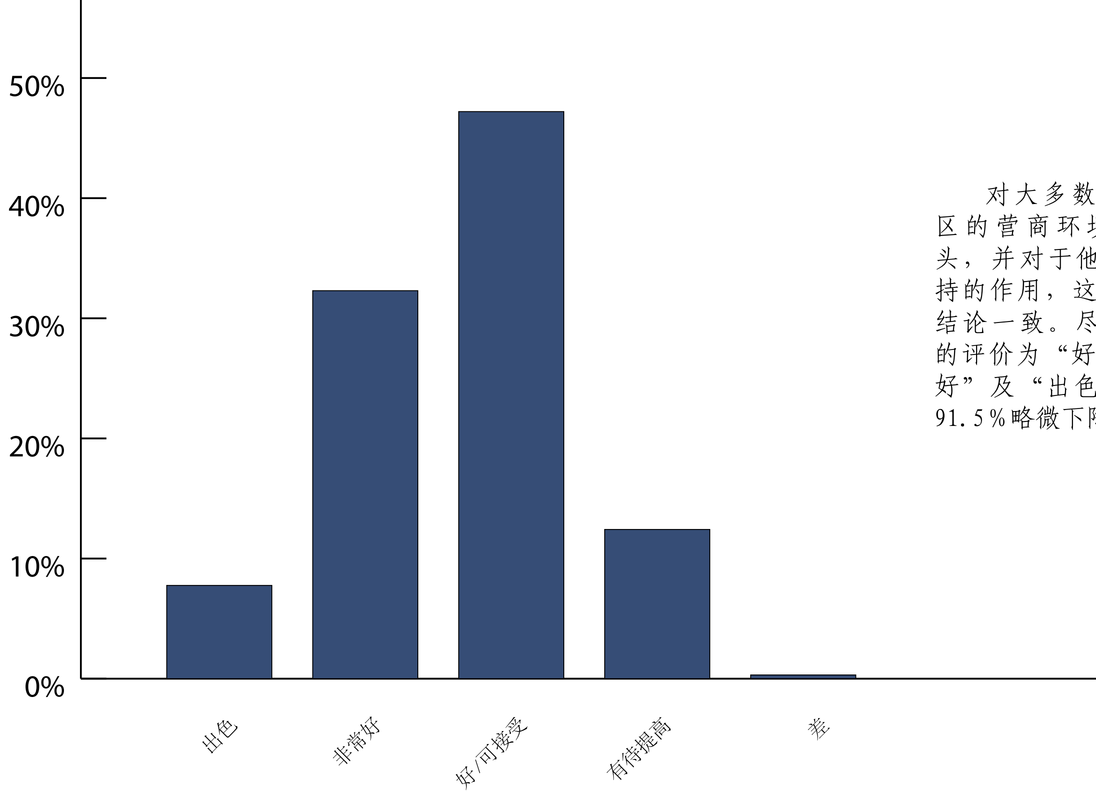
最后，受访企业在2008年到2011年的预期投资数额与2008年相近；总的来说，22.91%的受访企业表示计划在未来三年内投资超过5000万美元，这其中有9.29%的企业计划投资超过2.5亿美元。相同的，在未来三年内计划投资额在100万到1000万美元的企业比例下降了9.93%，只占受访企业的20.74%。

注释：为了与2006年开始的趋势保持一致，"0.5亿美元与2.5亿美元之间"及"超过2.5亿美元"合并为一个类别作分析；"超过2.5亿美元"类别直到今年（2008年）才存在，相关数据被做为一个单独的类别做分析阐述。



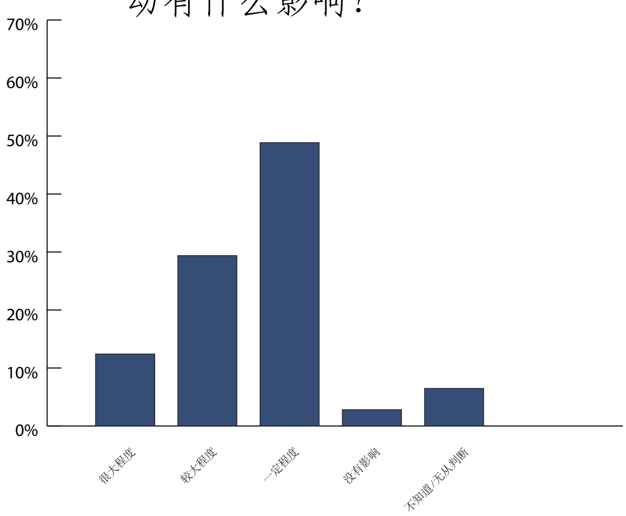
华南地区的营商环境

问题：您如何评价华南地区的整体营商环境？

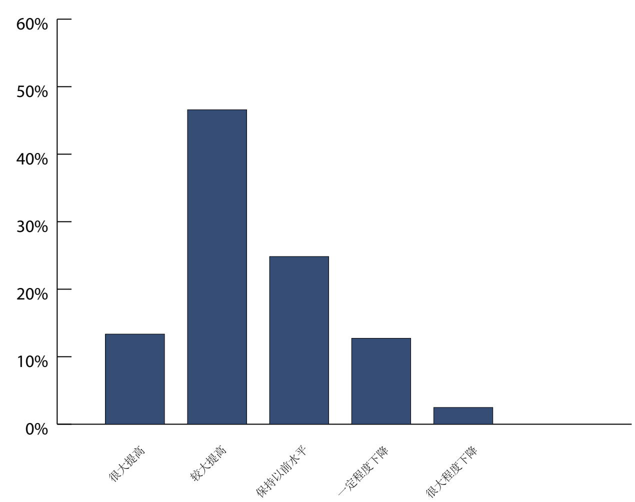


对大多数受访者来说，华南地区的营商环境持续积极的发展势头，并对于他们的经营目标起到支持的作用，这与2007年和2006年的结论一致。尽管如此，对营商环境的评价为“好/可以接受”、“非常好”及“出色”的百分比从2007的91.5%略微下降到2008年87.27%。

问题：在您看来，2007年中国的经济改革对贵企业在华南地区的商业活动有什么影响？

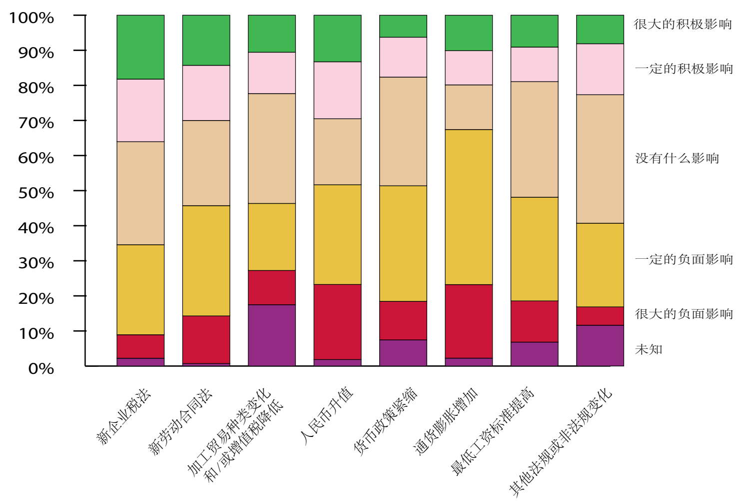


问题：与过往12个月相比，您认为华南地区的整体营商环境…



这种转变进一步证据在受访者对过去12个月营商环境的评估中体现——2008年仅有59.94%受访者认为有极大或者一定程度的改善，相比之下2007年3月的数据为71.91%。另外，和前两年一样，超过九成的企业表明2007年中国的经济改革为他们的经营带来一定、较大或极大的影响。

问题：在您看来，以下的发展对贵企业在华南地区的经营有何影响，或预计有何影响？



评价级别方面略微转变起因的某些迹象在受访者对“时事”这条新问题的回答中显而易见。2008年的调查中增加了一条“时事”问题，向受访者询问2007年调查结束后发生的八项发展对他们的经营已经及将会产生什么影响。

在所列出的发展中，最多的评价是“没什么影响”和“一定的负面影响”（各4项），第二种最普遍的答复是“没什么影响”、“一定的负面影响”及“很大的负面影响”。第三种对每项发展最普遍的评级分布均匀（“很大的积极影响”、“一定的正面影响”、“没什么影响”、“一定的负面影响”、“很大的负面影响”及“未知”）分别有一、三、二、零、一和一个被选。

回答中最普遍的选项是“持续的通货膨胀在某程度上对我公司在中国华南地区的业务已经或将要造成负面影响”（此选项占相应答复的44.19%）。

鉴于没有单一选项达到或超过50%的答复，平均起来，待选的选项情况没有对企业的发展运作造成很大或某种程度的负面影响。

最后，需要特别注意的是：虽然这些问题特别针对华南地区的营商环境，但本问题的8个选项大多数（或全部）可以等同于全中国的状况，大部分情况下，超出了华南地区政府的管理范围，评价级别时可能被错误焦虑全国性问题而影响。

问题：在您看来，下面选项中哪五项是阻碍或限制贵企业2008年在华南地区发展的主要挑战？

和前两年一样，2008年大多数受访企业依然认为“中国政府在法规方面的调整”是当前和未来发展的最大阻碍。

“劳动力成本增加”已取代“缺乏高素质管理/专业人才”成为排名第二的主要挑战（“缺乏高素质管理/专业人才”下滑到第五位）；而“汇率问题”则第一次入选第三名。最后，“本地竞争”排在了第四位。

① 法规问题（中国政府）

② 劳动力成本增加

③ 汇率问题

④ 本土竞争

⑤ 缺乏高素质管理和专业人才

问题：在您看来，下面选项中哪五项在未来三年中将会成为阻碍或限制贵企业在华南地区发展的主要挑战？

未来三年中，受访者预计除了“缺乏高素质管理/专业人才”将会被“海外竞争”取代成为第五位主要挑战外，其他的挑战将很有可能保持不变。这显示了中国教育计划为劳动力市场输送高素质人才的持续功效。

① 法规问题（中国政府）

② 劳动力成本增加

③ 汇率问题

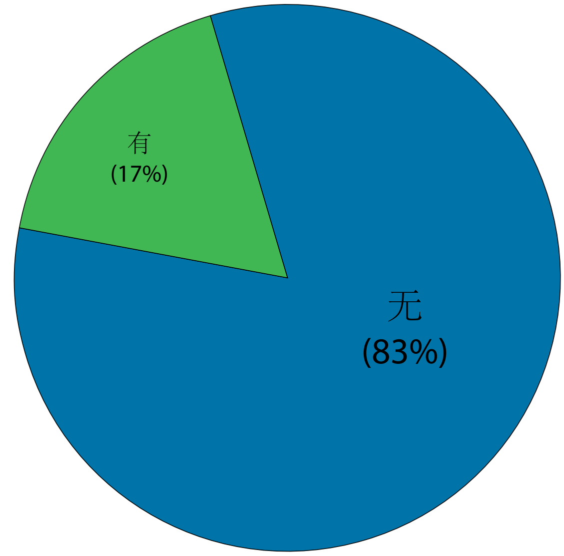
④ 本土竞争

⑤ 国外竞争

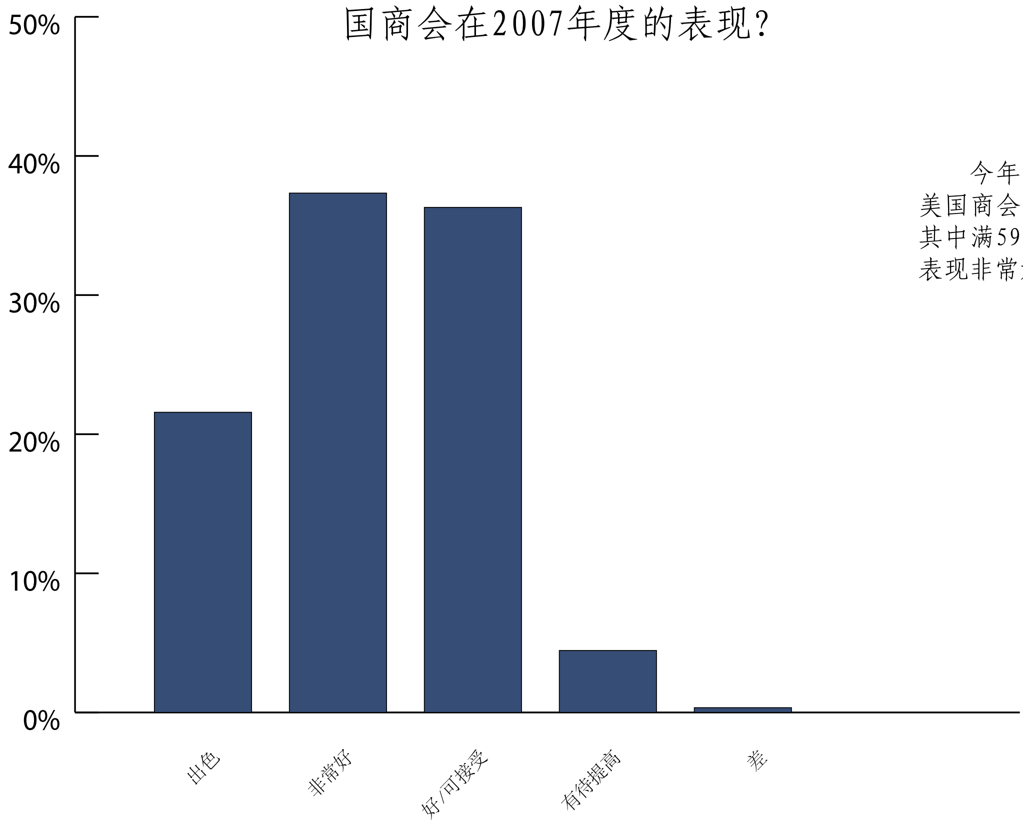
问题：您所属企业是否对潜在禽流感爆发的可能性做特别的准备？

延续2006年让人意外并伴随潜在破坏性的趋势，仅有17.28%的受访表明对禽流感爆发以及随后疫情扩散的可能性有所准备，与两年前相比下降了30%。因此，若禽流感爆发，将很有可能对华南地区的企业产生严重的影响。

部分未做准备的公司的理由是没有看到之前媒体的报道；无论如何，对此种紧急情况有所计划，这对公司、员工以及员工的家庭都是有益的。



问题：在举办活动是否满足您的期望和需要方面，您如何评价华南美国商会在2007年度的表现？



今年，95.21％的受访者评价华南美国商会的表现为好、非常好及出色，其中满59％（去年为57％）认为商会的表现非常好或出色。

问题：您认为美国商会在安排和服务方面还有哪些地方需要提高？

与前两年类似，认为美国商会提高自身服务和会员机会的看法多种多样，但最普遍被认为排名为（从7项中选出）“更多讲座”、“更多社交活动”及“更多的圆桌研讨会”。

ECONOMIC OVERVIEW

(38)

经济概况

(46)

Guangdong Province

Capitol: Guangzhou
Major cities: Shenzhen, Dongguan, Zhuhai

Fast facts

- *The largest GDP among all provinces and municipalities, accounting for 12.2 percent of the national total*
- *The highest industrial output value, accounting for about 14.3 percent of the national total*
- *The largest exports value, accounting for 31.6 percent of the national total*
- *The largest retail sales value of consumer goods, accounting for about 11.7 percent of the national total*

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.

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

Guangdong has China's highest GDP, accounts for more than one-third of China's foreign trade, and is the country's most popular destination for foreign direct investment (FDI). The province contains nearly a quarter of China's foreign-invested enterprises (FIEs), which generate more than half of Guangdong's exports and total industrial output. In 2006, Guangdong's GDP was RMB2.59 trillion and featured a growth rate of 14.1 percent, substantially higher than the national figure of 10.7 percent. In 2007, the province's leaders emphasized "quality over quantity" in economic development. Export and import growth is expected to remain above 20 percent for the next three years.

Guangdong has built a strong, export-based, light manufacturing industry, accounting for over half of the province's total industrial output with major products including electrical appliances (such as television sets, electrical fans and refrigerators) and other consumer goodss and is the leading province in the mainland in terms of aggregate economic results and industrial output. Its nine pillar industries are textiles and garments, food and beverages, construction materials, electronics and information technology, electric appliances and machinery, petrochemicals, forestation and papermaking, pharmaceuticals, and automobiles.

Guangdong is now moving towards heavy, new and high technology industries. The share of heavy industries in gross industrial output increased from 42.9 percent in 1999 to over 60 percent in 2006. From 2006 to 2007, the statistics indicated continued development consistent with this trend: industrial profits grew 21.6 percent and labor productivity 19.3 percent. Electronic communications, transportation equipment manufacturing, and electrical machinery manufacturing are expected to become the main driving force for the province's industrial growth. Recently, profits in oil processing, gas production and the mining of ferrous metals dropped significantly. Officials also continue to emphasize "the relatively slow development of the services sector". Tertiary industry GDP grew only 12.2 percent in 2006, 1.5 percent less than 2005, and as a proportion of GDP, the service sector amounts to 42.2 percent, down 0.9 percent.

Meanwhile, foreign-invested enterprises (FIEs) continue to play an important role accounting for 63.6 percent of Guangdong's gross industrial output and 64.9 percent of its exports in 2005, and with Guangdong accounting for around 30 percent of China's total utilized FDI in 2006. Used FDI was US$14.51 billion, up 17.4 percent from 2005. Foreign investment in Guangdong is mainly centered on the manufacturing industries including computer accessories, computer, biological products, mechanical and electrical products, refined chemicals, hardware and traditional industries such as toys and garments. In 2006, Guangdong imported US$225.27 billion (up 18.7 percent), again accounting for around 30 percent of the nation's total. Being a manufacturing base, Guangdong imports a large amount of capital and intermediate goods that include raw materials, parts and components, electronics, machinery, and completed equipment. In 2006, Taiwan was the largest exporter to Guangdong, accounting for 16.3 percent of the total.

Other major import sources include the United States, Japan, ASEAN and the EU.

Over 200 countries and regions have established trade ties with Guangdong, and over 100 countries and regions have invested in Guangdong. The top 500 multinationals have set up more than 400 enterprises in Guangdong. There are also more than 90,000 foreign-invested enterprises and nearly 3,000 representative offices of foreign enterprises; some of them, such as Maersk, have their largest worldwide office in the province, while others like Suzuki and Intel have moved major parts of sensitive departments (such as R&D) to Guangdong.

Guangdong is also becoming increasingly more market-oriented. Non-state-owned enterprises have played a significant role in economic development: non-state-owned enterprises account for more than 80 percent of the increase in Guangdong's industry. This has been aided by Guangdong's wealth of talented, skilled and high quality employees, including some 30 million migrant workers, who drive the economy forward. There are 71 colleges and universities, 37 adult higher education junior schools and 181 engineering research (technology) centers of a provincial level and above in the province.

In addition to its strong private sector, over the next five years Guangdong aims to further increase the relative share of its service sectors which, as noted above, accounted for 43.1 percent of GDP in 2005. At the same time Guangdong hopes to develop into a regional financial center, and modern logistics hub, as well as an international business travel and shopping destination. Development of specific sectors such as wholesale and retail, logistics, finance, convention and exhibitions and business (professional) services will undoubtedly see continuing strong support at the provincial level in coming years.

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.

Guangxi Zhuang Autonomous Region

Capitol: Nanning
Major cities: Beihai, Guilin, Liuzhou

Fast facts

- *China's first canal was built here by the Qin people*
- *75 percent of Guangxi is non-Han; the Zhuang, China's largest minority, have more than 15 million people in the province (90 percent of the total Zhuang population)*
- *Ranks 9th in land area and 11th most populated of all the provinces in China*
- *Is the largest sugarcane production base in China*

Guangxi is in a key position from where the government can make moves to develop its relations with other South East Asian countries. It borders Vietnam in the west and is connected to Hong Kong and Macau by the Xi River and is also China's only western area with open sea port facilities. The government has thus placed a strong emphasis on the importance of the province and its development in the coming years particularly in regards to future China-ASEAN cooperation.

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, nikel 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 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

The government of Guangxi is placing a strong focus on tourism, agriculture and mining to boost the region's economy. In 2006, Guangxi province reported a GDP of RMB480.2 billion, an increase of 13.5 percent from 2005 with per capita GDP reaching RMB10,240.

The main areas of industry are sugar processing, metallurgy, chemicals, engineering, electronics, pharmaceuticals and cement production. Guangxi produced 7.15 million tons of steel in 2006, a production increase of 37.6 percent on 2005. Automobiles also saw a substantial increase in production during 2006, with 518,000 cars manufactured: 32.5 percent more than 2005. Guangxi also produces over 200 million tons of refined sugar annually.

Guangxi's light industries produce textiles, paper, flour, silk, leather, matches, chemicals and pharmaceuticals, as well as sandarac gum, sugar, dyestuffs, and oils and fats. Pine resin is a particularly notable export commodity of Wuzhou.

Heavy industries include the cement, iron and steelworks in Liuzhou and machinery production at Nanning and Wuzhou. Pinyang produces such articles as ceramics, fans, felt caps, copperware, combs, brushes and straw bonnets.

Agriculture is also a key influencer in the economic development of Guangxi with sugarcane, bananas and pineapples dominant. Major grain crops include rice (with two annual harvests), maize, and wheat. The leading commercial crops include peanuts, sesame, ramie or China grass, tobacco, tea, cotton, and indigo. Guangxi is also a major producer of fruits—notably pomelos, tangerines, mandarin oranges, lemons, lychee, pears, papayas, bananas, and water chestnuts. Two annual harvests of rice are grown while the timber industry predominantly produces sandalwood and cork. Finally, fishing is also an important local industry.

Efforts have been made by the government to increase both foreign and domestic investment in the region and have met with growing success. Companies including Toyota, General Motors, NEC and IBM have all made significant investments.

Beihai, on the coast, has developed as a tourist resort and in addition to its large seaport, is an important center for energy, petrochemical and metal processing industries in Guangxi. In 2006, its utilized FDI was US$711 million, up 11.4 percent from the year before. Exports rose 21.5 percent to US$3.6 billion while imports also increased significantly by 33.4 percent, reaching US$3.08 billion.

Furthermore, the region is growing in importance as China continues to streamline its relations with countries in South East Asia. Its economic development in the coming years is likely to be connected to the developing relations that arise from further China-ASEAN discussions and potential treaties. Watch this space.

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, 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 dvelop, and the port is capble 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.

Fujian Province

Capitol: Fuzhou
Major Cities: Xiamen, Quanzhou, Zhangzhou

Fast facts

- *Jinjiang county, under the jurisdiction of Quanzhou, is the center of China's footwear industry and is home to eight of China's top 20 shoe manufacturers*
- *Is historically and culturally closely linked to Taiwan*

Located on the mainland side of the 180 kilometer Taiwan Strait, Fujian's long and accessible coastline has meant it has always been one of China's most open provinces for foreign trade, and it now has one of China's most developed foreign economies. Because of its location and long-standing cultural links, the province is a major destination for Taiwanese (and Hong Kong) investment. Its economic future will remain closely tied to that of Taiwan, and it looks to benefit from the continuing warming of relations across the Strait.

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 kilometers 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 province now boasts one of China's most developed economies in great part due to its Fujian's accessible coastline which has opened the way for foreign investment. GDP for 2006 was RMB750.16 billion, up 13.4 percent from the previous year. The per capita GDP stood at RMB21,152, up around 15 percent.

While Fujian's key industries traditionally have included agriculture, footwear and clothing, in more recent times there has been a shift toward high-technology and electronic goods. For example, Dell, Eastman Kodak, and Boeing all have considerable investments in Fujian. Fujian is home to China's largest iron ore reserves and is among the country's largest producers of sugar cane, peanuts, and oranges. Fujian's three pillar industries are electronics and information, machine equipment, and petrochemicals. Other industries include aquaculture, building materials, construction, electronics, fishing, machinery, petrochemicals and textiles.

Meanwhile, the province continues to develop: output in the key sectors of light industry, electronics, machinery, and petrochemicals have seen year-on-year increases and industrial fixed assets investment grew 38 percent in 2006, reaching RMB311.51 billion. Equally, the private sector in Fujian is reported to be rapidly expanding. Exports by local private sector companies grew 42 percent to US$10.7 billion in 2006, significantly faster than both state-owned enterprises and foreign-invested enterprises to become "the main engine of exports".

The province is also a major destination for Taiwan and Hong Kong investment particularly in the footwear, metal goods, and electronics industries and as a result is one of the wealthier provinces in China. By the end of 2006, just under 40,000 foreign invested enterprises had been setup in the province with contracted FDI amounting to US$101 billion. Taiwan accounted for US$1.95 billion in contracted FDI in 2006 alone.

Xiamen is an attractive coastal city and the major commercial center of Fujian. It enjoys an excellent living environment and is rightfully regarded as one of China's most pleasant coastal cities. Xiamen itself is a Special Economic Zone and as a result has attracted a significant amount of FDI. It was one of the first cities in China to be classified as a Special Economic Zone because of its cultural and geographical proximity to Taiwan from where (as mentioned above) much of Fujian's foreign investment comes. There are excellent port facilities and a successful FTZ. The city hosts the annual China International Trade Fair (CIFIT) every September.

In 2006, there were 2,162 new foreign funded projects in Fujian. Contracted foreign direct investment was US$10.82 billion, up 26.2 percent. The annual value of imports and exports totaled US$62.67 billion, of which exports valued US$41.27 billion, up 18.4 percent, and imports valued US$21.4 billion, up 9.3 percent.

Fujian's future will depend on its ability to maintain its position as one of the first destinations for trade with and investment from Taiwan with increasing competition now steering the focus away from the cities of Fuzhou and Xiamen, who are developing their trade with the Taiwan-controlled islands of Jinmen and Matsu, and over to Shanghai, Jiangsu, and Guangdong who are actively courting future Taiwanese investment.

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 Quangang 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 the13th 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 Matsu 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.

Hainan Province

Capitol: Haikou
Major cities: Sanya

Fast facts

- *In 2007, the government approved the construction of one of China's only four bonded ports in Hainan is the second largest ocean island and the smallest land province in China*
- *80 percent of Hainan's economy is tourism-related*
- *Is the second-largest ocean island and the smallest province by land area in China*
- *Is commonly known as "The Hawaii of China"*

Hainan Province consists of several islands, Hainan Island being the largest. The island, also known as Qiong'ai, is the second largest in China and a popular holiday destination. It is also the home of the Li as well as many other ethnic groups who hold to their folk customs and unique living habits, which have made the island even more valuable in regards to culture and tourism.

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

Commonly known as "The Hawaii of China" and thus, a popular tourist resort, in 1988 Hainan was named a province as well as a Special Economic Zone.

In 2005, the region saw double-digit growth with GDP of RMB90 billion (up 10.1 percent from 2004) and provincial revenue of RMB8.4 billion (up 22 percent). Fixed asset investment in 2005 reached RMB37.6 billion, up 15.7 percent from the previous year. Secondary industry saw the biggest growth in 2005, reaching RMB22.8 billion, an increase of 16.8 percent, primary industry reached RMB30.1 billion and tertiary industry RMB37.3 billion.

Its industries, apart from tourism, are primarily agricultural, producing natural rubber, coffee, tropical flowers, and tropical fruits such as coconuts and bananas (the latter mainly being exported overseas or to the north of China or Shanghai). Hainan has the largest proportion of primary sector industry in its GDP of all Chinese provinces. The island is also home to some 70 percent of China's titanium reserves and is a major salt production center, and finally serves as an infrastructure base for oil and gas operations in the South China Sea.

Hainan Island makes up 42.5 percent of the nation's total tropical landmass, which it uses for agriculture, forestry, animal husbandry and fishery. Hainan is known for its watermelons and is rich in agricultural resources. As a result of such excellent climatic conditions plants can yield two to three crops a year and thus, agriculture is an important area for business. The land in Hainan Island can be broken down into seven major categories of usage: for farming, rubber planting, growing tropical crops, forestation, livestock breeding, aquaculture, and for other purposes. Currently, 3.152 million hectares of land have been cultivated, while 260,000 hectares remain virgin soil, around 90 percent of which are potential farming lands. Numerous grain crops, industrial crops and fruits and vegetables (more than 120 different kinds) are grown on the island.

In 2006, its main exports included aquatic products, furniture and wood, electrical and electronic products, and iron and steel. The private sector is significant here with7,759 new private enterprises created in 2006, accounting for 85 percent of the total number of new enterprises, taking the total to 37,687. These private businesses are primarily involved in wholesale and retail trade, agriculture, forestry, animal husbandry, fisheries, manufacturing, real estate and construction enterprises. Labor and other costs are low – manual laborers commonly receive between RMB400 and 600 per month. The province is one of China's most oil- and gas-rich areas: offshore reserves in the Beijingwan, Yinggehai, Qiongdongnan, Zhujiangkou and other basins total 5.8 trillion cubic meters of natural gas and 29.1 billion tons of oil. Since 1996, Hainan has provided Hong Kong with 2.9 billion cubic meters of natural gas annually through a 770-kilometer pipeline.

Hainan hopes to propel the development of its tourism industry forward on a grand scale and is the only area in China that allows foreign tourists from some 21 countries to stay without a visa for up to 15 days (providing that they are part of tour groups organized by China National Tourism Agency-approved international agencies). Not surprisingly, Hainan is a hotbed for private enterprises such as Hainan Airlines.

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 bonded 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.

广东省

省会：广州
主要城市：深圳、东莞、佛山、珠海

主要指标
- 所有省市中GDP排名第一，占全国12.2%
- 拥有最高的工业产值，约占全国14.3%
- 拥有最大的出口量，占全国31.6%
- 拥有最大的消费品零售额，占全国11.7%

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、沼气和其他清洁及可再生能源，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

广东的国内生产总值（GDP）居全国首位，其外贸量占全国对外贸易总额的三分之一以上，而且是国内最受外商欢迎的外资直接投资（FDI）目的地。全省坐拥近全国总数四分之一的外商投资企业(FIEs)，这些外资企业的生产占据了广东出口贸易和工业总产量的一半以上。2006年，广东的国内生产总值为259亿元人民币，年增长率为14.1%，大大高于全国10.7%的增长率。而2007年，省领导强调经济发展必须“质量重于数量”。未来三年， 广东的进出口增长预计保持在20%以上。

广东省已建成一个较强的、以出口及轻工业为主，超过全省工业总产值一半的产业规模，其主要产品包括电器（如电视机、电风扇、冰箱）及其他消费品等，无论在经济总量上还是工业总产值上均处于国内领先地位。广东省的九大支柱产业分别为：纺织及成衣、食品及饮料、建筑材料、电子与信息技术、电器及机械、石化、林业及造纸、医药和汽车等。

广东省现正朝重工业、高新技术产业方向转型。其中重工业在工业总产值中所占比重已由1999年的42.9%升至2006年的逾60%。从2006年至2007年，统计数据表明省内工业发展维持这种趋势：其成果是工业利润增长了21.6%，生产率增长了19.3%。电子通信业、交通运输设备制造业，机电制造业预计将成为全省工业经济增长的主要驱动力。最近，石油加工业、煤、气生产和采矿业，有色金属冶炼等行业的利润明显下跌。同时政府官员也继续强调“服务业发展相对缓慢”。2006年全省第三产业的国内生产总值仅增长了12.2%，比2005年减少了1.5%，作为国内生产总值的组成部分，服务业的比重为42.2%，比同期下降了0.9%。

与此同时，外商投资企业（FIEs）在全省经济发展中继续扮演着重要的角色，2005年的数据显示，其分别占全省工业总值的63.6%和全省出口总额的64.9%，使广东省占2006年中国利用外国直接投资总额的30%左右。2005年起，广东利用的外国直接投资达145.1亿美元，增幅为17.4%。外商在粤的投资主要集中在制造业，包括电脑及电脑配件、生物制品、机电产品、精细化工、硬件和传统产业如玩具和服装等。2006年，广东省进口总额达2252.7亿美元（增幅为18.7%），占全国总额的30%左右。广东作为一个庞大的生产基地，吸引了丰富的资金，进口大量的半成品，包括原材料、零部件及元件、电子、机械、以及成套的生产设备。2006年，广东从台湾进口产品数量最大，占其进口总额的16.3%。

其他的主要进口地还有美国、日本、东南亚地区及欧盟。

目前已有200多个国家和地区与广东建立了贸易关系，100多个国家和地区在广东进行了直接投资。全球500强企业中在广东设立公司的已有400家，其中包括9万多个外资公司以及近3000个外企代表处，如全球物流业巨头马士基已将广州作为其在全球最大的办公地点，而日本铃木与美国英特尔公司也将其核心部门（如研发部）迁入广州。

广东省的发展日益市场化，非国有企业在经济发展中发挥了重要作用。非国有企业占据了整个广东工业增长的80%以上，这得益于广东丰富的劳动力资源以及大量高素质的员工，包括3000万的外来务工者，他们共同促进了广东的经济发展。广东还拥有71所高等综合院校，37所成人高等教育学校，以及181家省级以上的工程技术研究中心。

除了蓬勃发展的私营企业外，未来五年，广东更会致力于服务业的发展，提高其在GDP中的比重——2005年服务业在广东所占GDP的比重为43.1%。与此同时，广东希望发展成为区域金融中心、现代物流中心与国际商务旅游购物目的地。毫无疑问在接下来的几年里，批发零售、物流、金融、会议与展览还有专业的商务服务这些行业将会共同见证广东省政府对其的大力支持与发展。

经济开发区

广东是中国内地最早实施改革开放的省份，早在1979年第一批特别经济开发区中就有3/4设立在广东。在过去的二十年里，广东努力将其融入国际经济体系中。迄今为止，广东拥有国家级经济技术开发区18个，省级经济技术开发区64个。许多重要的开发区落户在广东包括深圳－东莞开发区群（如惠州仲凯高新区、佛山国家级高新区、深圳高新区以及湛江高新区。

旅游与观光

广东最大的吸引力还在于其四处著名的山脉——韶关的丹霞山、南海的西樵山、博罗附近的罗浮山和肇庆的鼎湖山。此外，韶关悠久的南华寺，汕头秀丽的乡村风景，美丽的海滩与长达数千米的海岸线也是其旅游的热点。该省的南部还有中国闻名的特别经济开发区深圳，前英国殖民地香港以及毗邻前葡萄牙殖民地澳门的珠海。该省地处亚热带气候，年平均气温为19－26℃。

广西壮族自治区

自治区首府：南宁
主要城市：北海、桂林、柳州

主要指标:
- 秦人在此建成中国的第一条运河
- 广西75%的人口为非汉族；中国最大的少数民族壮族在广西省拥有超过1500万的人口（占全国壮族总人口的90%）
- 广西土地面积居全国各省区第9位，人口数量居全国各省区第11位
- 是中国最大的甘蔗生产基地

广西处于中国与其他东南亚国家发展关系的关键位置。西部与越南接壤，东部以西江连接香港、澳门，也是中国西部地区唯一拥有开放海港设施的省份。因此，政府非常重视该省的重要地位，及其自身发展对于未来几年中国—东盟合作的意义。

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、锰和铟。

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

广西政府重视旅游业、农业及矿产业，以此来推动地区经济的发展。2006年，广西省GDP达4802亿元人民币，与2005年相比增加了13.5%，人均GDP达10240元人民币。

自治区主要产业包括制糖、冶金、化工、工程、电子、制药和水泥业等。广西2006年钢铁产量为715万吨，比2005年增长了37.6%。汽车产业在2006年持续增长，产量达51.8万辆，比2005年增长了32.5%。同时广西精糖的年产量达2亿吨。

广西的轻工业包括纺织、造纸、面粉、丝绸、皮革、火柴、化工及制药，以及香松树胶、染料、石油及脂肪。其中松木树脂更是梧州著名的出口商品。

重工业包括柳州的水泥及钢铁、南宁及梧州的机械产品。平阳的产品包括制陶业、风扇、毡制品、铜器、梳子、刷子和草帽。

农业也是广西壮族自治区经济发展的一个重要影响因素，主要农作物包括蔗糖，香蕉和菠萝等。该地区主要的谷类农作物包括水稻（一年两熟），玉米和小麦；而主要经济作物为花生、芝麻、苎麻、烟草、茶叶、棉花以及靛蓝等。广西也盛产水果，包括柚子、橘子、柑桔、柠檬、荔枝、桃子、木瓜、香蕉和荸荠等。一年两熟的水稻不断增产的同时，林业也发展地十分卓越，盛产檀香和软木等。最后，渔业也是本地一个重要产业。

在当地政府努力和领导下，外商及国内投资大幅度增加，并且取得显著的成功。丰田、通用汽车、NEC和IBM等公司都已经在当地进行重大投资。

沿海城市北海已经发展成为一个旅游胜地和大型海港的城市，也是广西一个重要的能源、石化产品及金属加工业的中心。

在2006年，其利用外商直接投资总额为7.11亿美元，与上年相比增长11.4%。出口总额增幅达21.5%，达到36亿美元。同时，进口总额增幅更达33.4%，共30.8亿美元。

此外，作为中国与其他东南亚国家的联系交流中心，广西地区就越显其重要地位。未来数年里，广西的经济增长将受中国－东盟对话的不断发展而影响。

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5万顿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℃。

福建省

省会：福州
主要城市：厦门、泉州、漳州、莆田

主要指标
- 隶属于泉州的晋江县，是中国制鞋业的中心和8个中国排名前20名鞋类制造商所在地
- 历史和文化与台湾有着紧密的联系

地处长达180公里台湾海峡的内地一侧，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，而它现在已是中国对外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11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

福州省主要的机场有福州长乐国际机场（FOC），厦门高琦国际机场（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

福建省因其便利的海岸线吸引外资，现已成为

中国发展最快的区域之一。2006年的GDP总值达到7501.6亿元人民币，比上年增长13.4%。人均GDP为21152元人民币，增长了近15%。

尽管福建的传统主要产业包括农业、制鞋业和服装业，近年来有朝高科技和电子产品转移的趋势。比如，戴尔、伊斯门·柯达和波音都在福建有可观的投资。福建是中国最大的铁矿石储量地，也是甘蔗、花生和柑橘产量最大的区域。福建的三大支柱产业为电子和信息、机械设备和石化产品。其它产业包括有水产、建材、建筑、电子、渔业、机械和纺织。

同时，该省继续发展：轻工业主要部门、电子、机械和石化产品的产量正在逐年增长，2006年工业固定资产投资增长38%，达到3115.1亿元。同样的，福建的私营企业据报道也快速增长。2006年当地私营企业出口额增长42%，达到107亿美元，比国有企业和外资企业发展迅速得多，成为“出口主要动力”。

福建省也是台商和港商钟爱的投资地点，尤其是在制鞋、金属产品和电子产业，因此福建也成为中国最富裕的省份之一。到2006年底，有近4万家外商投资企业在福建成立，直接外商投资额达到1010亿美元。台湾在2006年度直接投资额就达到19.5亿美元。

厦门市有着迷人的海岸线，是福建的主要商业中心。它有着优越的居住环境，被认为是中国最佳的海岸城市。厦门本身也是经济特区，吸引着大量外商直接投资。文化和靠近大部分外资来源台湾（如上文所述）的地理优势，使得厦门成为中国最早批准建立的经济特区城市之一。厦门有优越的港口设施和一个成功的自由贸易区。该城市每年九月份还主办一年一度的“中国国际投资贸易洽谈会”（简称CIFIT）。

2006年，福建共有外商投资项目2162个，签订的外商直接投资额为108.2亿美元，增长率26.2%。年进出口总额达到626.7亿美元，其中出口总额为412.7亿美元，增长18.4%，进口总额为214亿美元，增长9.3%。

福建的未来依赖于它维护自己作为台湾贸易和投资首选地区的能力，现在来自上海、江苏和广东的竞争逐日增加，这些城市也积极设法吸引未来的台湾投资，使得依靠与所属台湾的金门和妈祖岛屿发展贸易往来的福州和厦门等城市吸引力不再如旧。

开发区和泉州港

福建省努力逐步建设5个国家级的工业园区——福州（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个省级高新技术开发区将成为建设100个高薪技术技示范项目和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，旨在于泉州市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的做出重大贡献。

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400万吨到增加到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、福鼎的太牢山、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17－20℃。

海南省

省会：海口
主要城市：三亚

主要指标
- 2007年中国政府批准在海南省建设保税港，全中国仅有四个保税港
- 中国第二大岛屿和土地面积最小的省份
- 旅游业占海南省经济收入80%
- 为人熟知的“中国夏威夷”

海南省由多个岛屿组成，其中最大的岛屿是海南岛。海南岛也被称为琼崖岛，是中国第二大岛屿，著名旅游胜地。岛上生活着黎族等少数民族，至今保留着许多质朴敦厚习俗和生活习惯，使海南岛更具文化和旅游价值。

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业发展。

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

有“中国的夏威夷”之称的海南是著名的旅游胜地，1988年升格为省并成为经济特区。

2005年，该地区的国内生产总值达到900亿元人民币，增长幅度成两位数（比2004年增长了10.1%），省财政收入达到84亿元人民币（增长了22%）。该年的固定资产投入达376亿元人民币，比前一年增加了15.7%。2005年是二次产业发展得最快的一年，增长达228亿元人民币，幅度为16.8%，主要工业和第三产业的增长分别是301亿元和373亿元人民币。

除旅游业外，海南的主要产业是农业，主要产品有天然橡胶、咖啡、热带花卉和热带水果，如椰子和香蕉（后者主要出口到国外、华北及上海等地）。比起全国其它

省份，海南的基础工业占整体生产总值的比例最高，除了拥有占全国近七成的钛金属资源外，它还是主要的盐产地及南海石油工业基地。

海南覆盖全国42.5%的热带土地，有利于农业、林业、畜牧业及渔业发展。海南以出产西瓜等农产品为名。独特的天然气候，使每年农作物收成可以有两至三季，农业在海南经济中的占重要地位。整个海南岛地区主要划分为7个用途：农业、橡胶业、热带农业、林业、畜牧业、水产业等。现时有315.2万公顷的土地已被开发，另有的26万公顷尚未开发，其中约9成可作为农耕地。岛上种植了各类（超过120种）谷物、工业原料作物、水果及蔬菜。

2006年，海南对外出口的产品主要包括水产品、家具和木材、电子电器产品以及钢铁产品。2006年该省新增7759家私营企业，占新成立企业总数的85%，目前私营企业总量已达到37687家。这些私营企业主要经营批发零售业、农业、林业、畜牧业、渔业、制造业、房地产和建筑业。劳动力和其他相关成本较低——工人工资在每月400—600元人民币之间。海南省同时也是中国的石油和天然气大省：位于近海的北京湾、莺歌海、琼东南、珠江口和其它盆地储存了5.8万亿立方米天然气和291亿吨原油。从1996年开始，海南通过770公里的管道，每年向香港提供了29亿立方米的天然气。

海南省希望将旅游业推广到更大的规模。海南是中国唯一的一个允许来自21个国家的外国游客不需要签证逗留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队以外）。

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℃。

This *Special Report* consists of two parts:
此“特别报告”包括两部分内容:

1. **An economic overview of South China, printed courtesy of Dezan Shira & Associates Ltd.**
   由协力商业顾问有限公司授权刊登的华南地区经济概况

2. **The results of the *2008 State of Business* study, conducted on behalf of the American Chamber of Commerce in South China by Hewitt Associates Consulting (Shanghai) Co., Ltd.**
   由翰威特咨询(上海)有限公司代表华南美国商会执行的2008年华南地区经济情况调查报告