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A hand in a white shirt cuff is holding a paper figure made of banknotes. The figure is composed of various banknotes, including 20 and 50 Hong Kong dollars, and is set against a blue background. The figure is a stylized human shape, possibly representing a consumer or a person. The hand is positioned on the right side of the figure, holding it from the back. The background is a solid blue color. The overall image is framed by a black border.

Consumer revolution in China, Guangzhou vs Shanghai and implications for Hong Kong

National consumption trends

图11 2006-2011年社会消费品零售总额及其增长速度

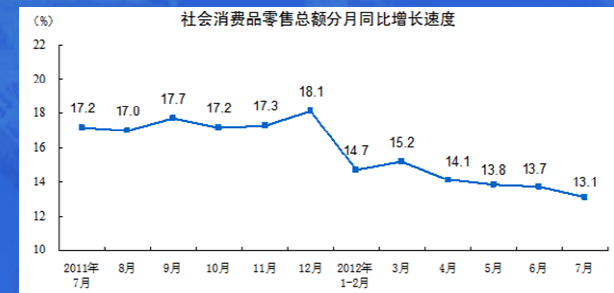
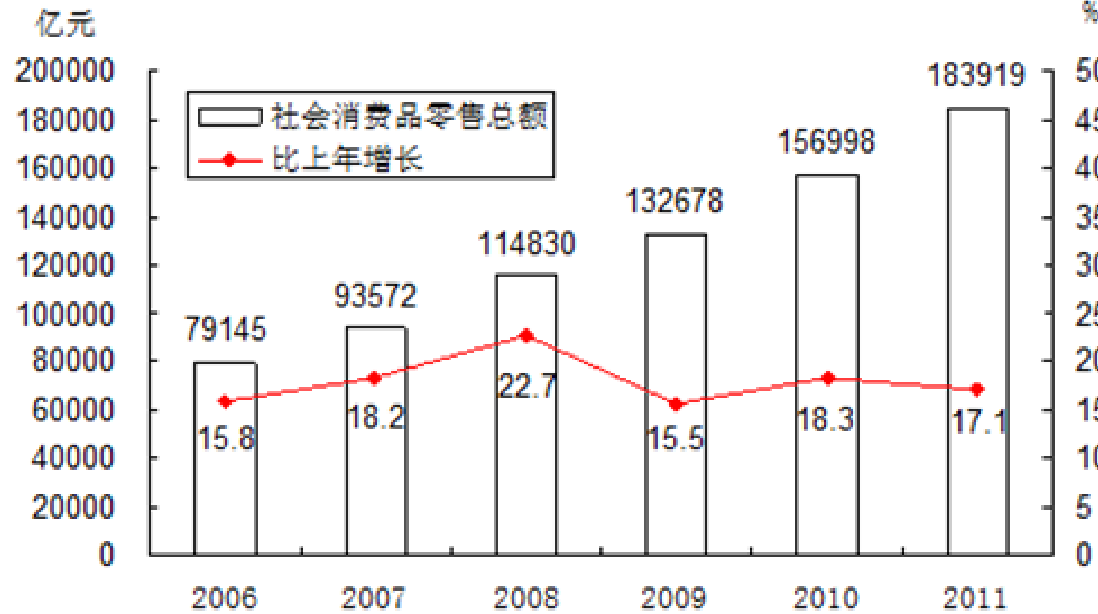


图15 2006-2011年农村居民人均纯收入及其实际增长速度

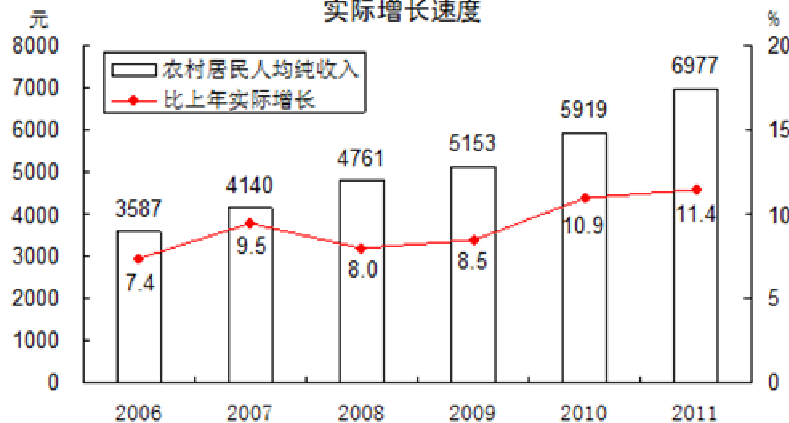
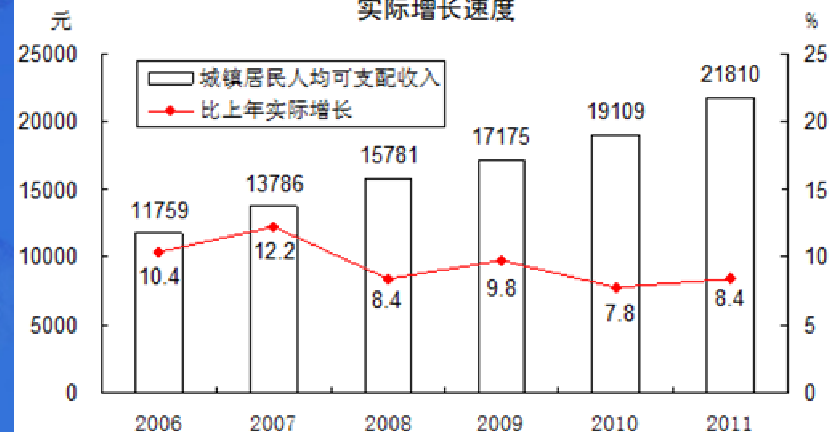


图16 2006-2011年城镇居民人均可支配收入及其实际增长速度





Guangzhou:
China's gateway to the world for
millennium & central city for the Pearl
River Delta region

Source:

http://wikitravel.org/en/Image:Guangzhou_map.png

Shanghai:
World City for Asia before 1949 & since then
national economic and financial centre of
China, becoming Asia's world city again in the
coming decades

Source:

<http://www.chinatouristmaps.com/provinces/shanghai.html>



Guangzhou versus Shanghai

1. Population (unit: 10,000 persons):

| Huku population | Guangzhou | Shanghai |
|-----------------|-----------|------------|
| 1980 | 502 | 1147 |
| 1990 | 594 | 1283 |
| 2000 | 701 | 1322 |
| 2005 | 751/950* | 1360/1778* |
| 2008 | 784/1018* | 1391/1888* |

Note: *permanent resident population

Source: Official statistics of Guangzhou and Shanghai Governments

| Unit: 10,000 yuan | Guangzhou | | Shanghai | |
|-------------------------|-----------|-------|----------|-------|
| | 2005 | 2008 | 2005 | 2008 |
| Per capita GDP | 11.16 | 12.09 | 9.49 | 10.17 |
| Per capita retail sales | 4.71 | 5.15 | 3.40 | 3.59 |

Note: based on permanent resident population

Guangzhou versus Shanghai

2. Residents annual incomes, 2011 (unit: yuan per year)

| Shanghai | | Guangzhou | |
|-----------------|-----------------|-----------------|-----------------|
| Urban residents | Rural residents | Urban residents | Rural residents |
| 36,230 | 15,644 | 344,438 | 14,818 |
| +13.8% | +13.8% | +12.8% | +16.9% |

Comparison of economic scales of Guangzhou and Shanghai

| | Guangzhou | | Shanghai | |
|-------------------------------------|-----------------------|----------------------|----------------------|----------------------|
| | GDP | Retail sales | GDP | Retail sales |
| 1980 | 58 | 30.64 | 312 | 80.43 |
| 1990 | 320 | 147.78 | 782 | 333.86 |
| 2000 | 2,493 | 1,120.97 | 4,771 | 1,722.27 |
| 2010 | 10,604.48 | 4,476.38 | 16,872.42 | 6,036.86 |
| 2011 | 12,303.12 (+11.0%) | 5,243.02 (+17.1%) | 19,195.69 (+8.2%) | 6,777.11 (+12.3%) |
| Proportion of Guangzhou to Shanghai | | | | |
| 1980 | 18.6% | 38.1% | 100% | 100% |
| 1990 | 40.9% | 44.3% | 100% | 100% |
| 2000 | 52.3% | 65.1% | 100% | 100% |
| 2010 | 62.9% | 74.2% | 100% | 100% |
| 2011 | 64.1% | 77.4% | 100% | 100% |

Guangzhou has been catching very fast with Shanghai in domestic economic development because of its auto & petro-chemical industrial development in the 2000s & its retail sales covering a larger hinterland than the PRD with little competition in Southern China

Shanghai – development strategy of the 12th FYP

Four centres:

1. International economic centre;
2. International financial centre – experiment of renminbi full convertibility & global clearing centre for renminbi;
3. International trade centre – commodity markets (oil, diamond), corporate operation, logistics & clearing centres, duty free shopping zone & international trade demonstration zone;
4. International shipping centre – now world's largest container port and largest all-round port, development of shipping value chain including finance & services.

上海市城市总体规划图

The Comprehensive Plan of Shanghai Metro-Region (1999-2020)

城镇体系

Urban Structure of Cities and Towns



Spatial development pattern of Shanghai, 2004 vs 2011-15





上海轨道交通示意图



示意图仅供参考，具体站点未定，以政府公布为准。



Hongqiao transport hub for both railways & aviation – vs Pudong

Shanghai serves as the gateway behind overseas market and the large hinterland covered by the emergent HST & inter-city railway networks

长江三角洲地区城际铁路网规划图

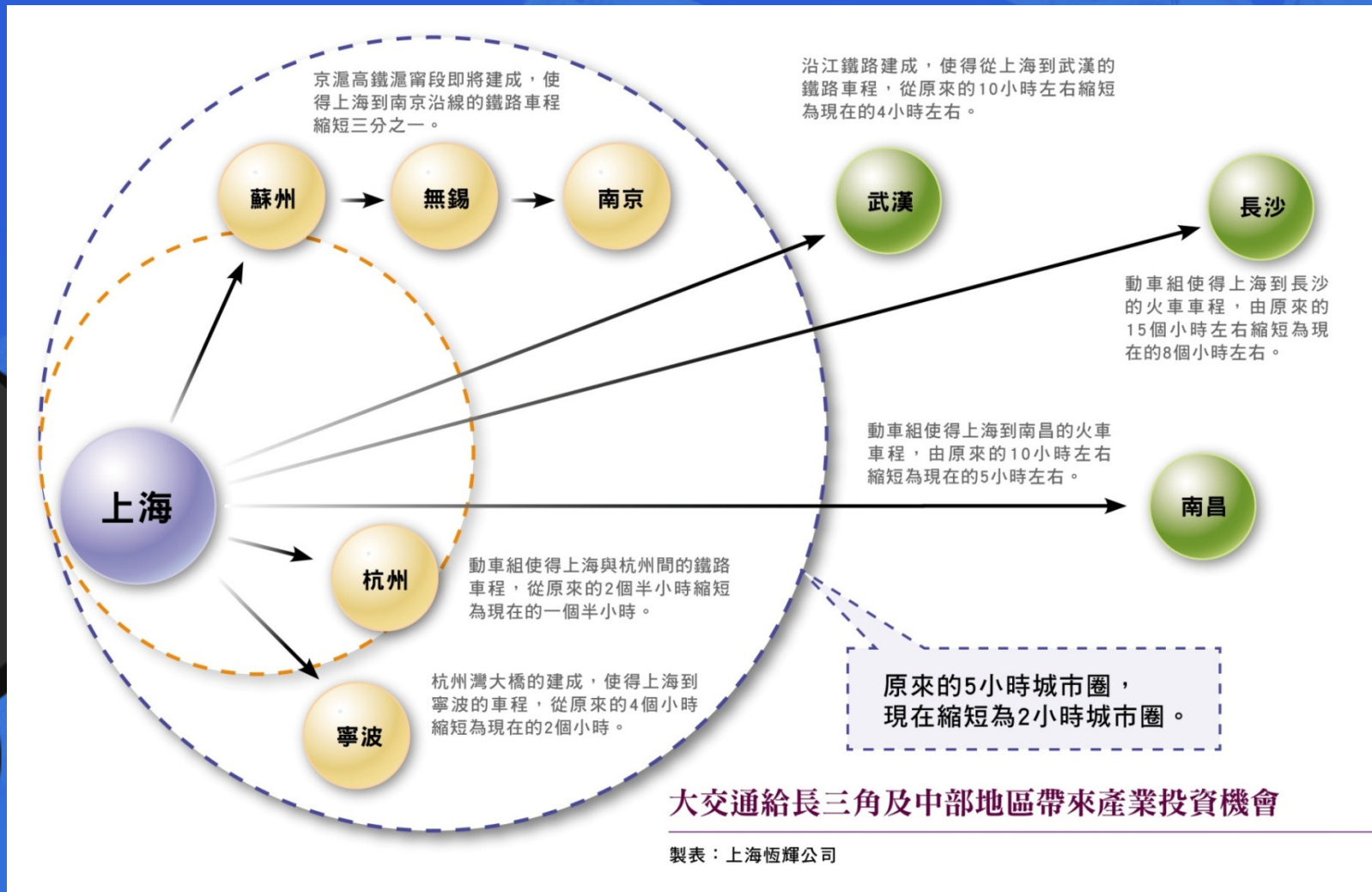


Source: 长三角地区城际铁路网揭秘, 365家居网, 2010-4-7 10:10:24.

YRD regional inter-city network and national HST network by 2020



Radiation of economic influences of Shanghai as the national and East & Central China central city



Source: <http://www.trademag.org.tw/content02.asp?id=519444&type=21&url=%2Findex.asp%3Fno%3D21>

Guangzhou – development strategy

National central city:

1. International trade and commercial centre;
2. World cultural city;
3. National innovation city;
4. Comprehensive gate city;
5. Livable preferential region in Guangdong

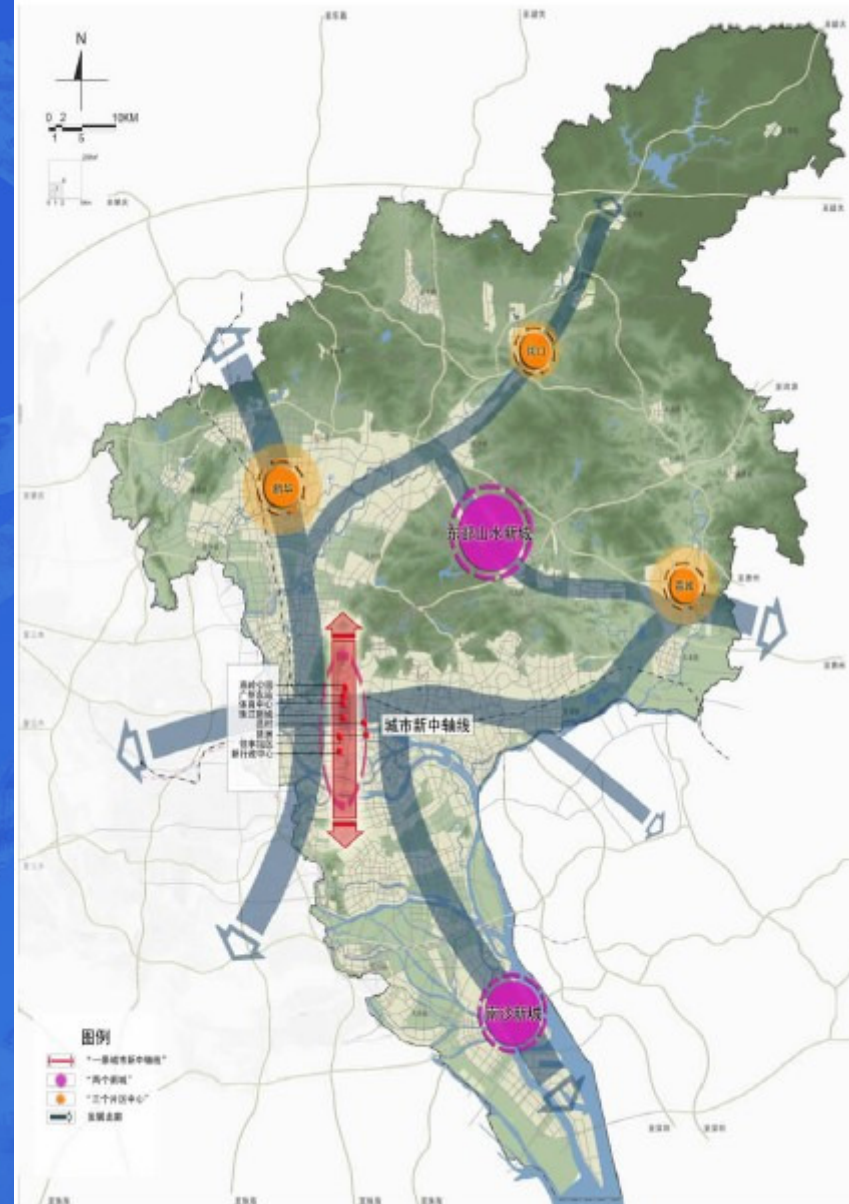


Spatial development pattern of Guangzhou of the 12th FYP

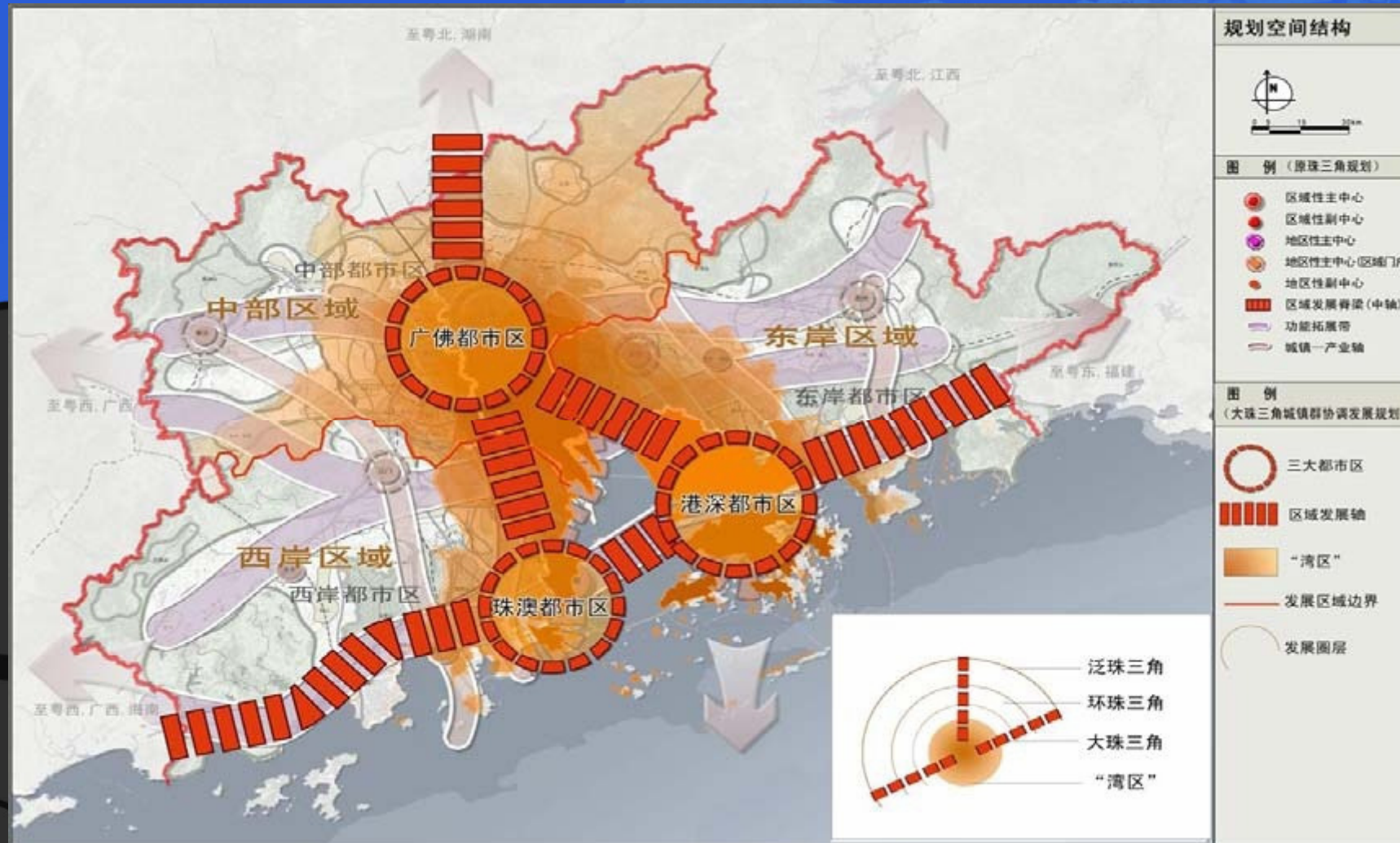
Spatial reorganization continues the expansion drive since 2000 but with focus on services development and metropolization

“一轴”即城市新中轴线；
“两城”即东部山水新城和南沙新城；
“三中心”即花都新华、增城荔城、从化街口三个片区中心。

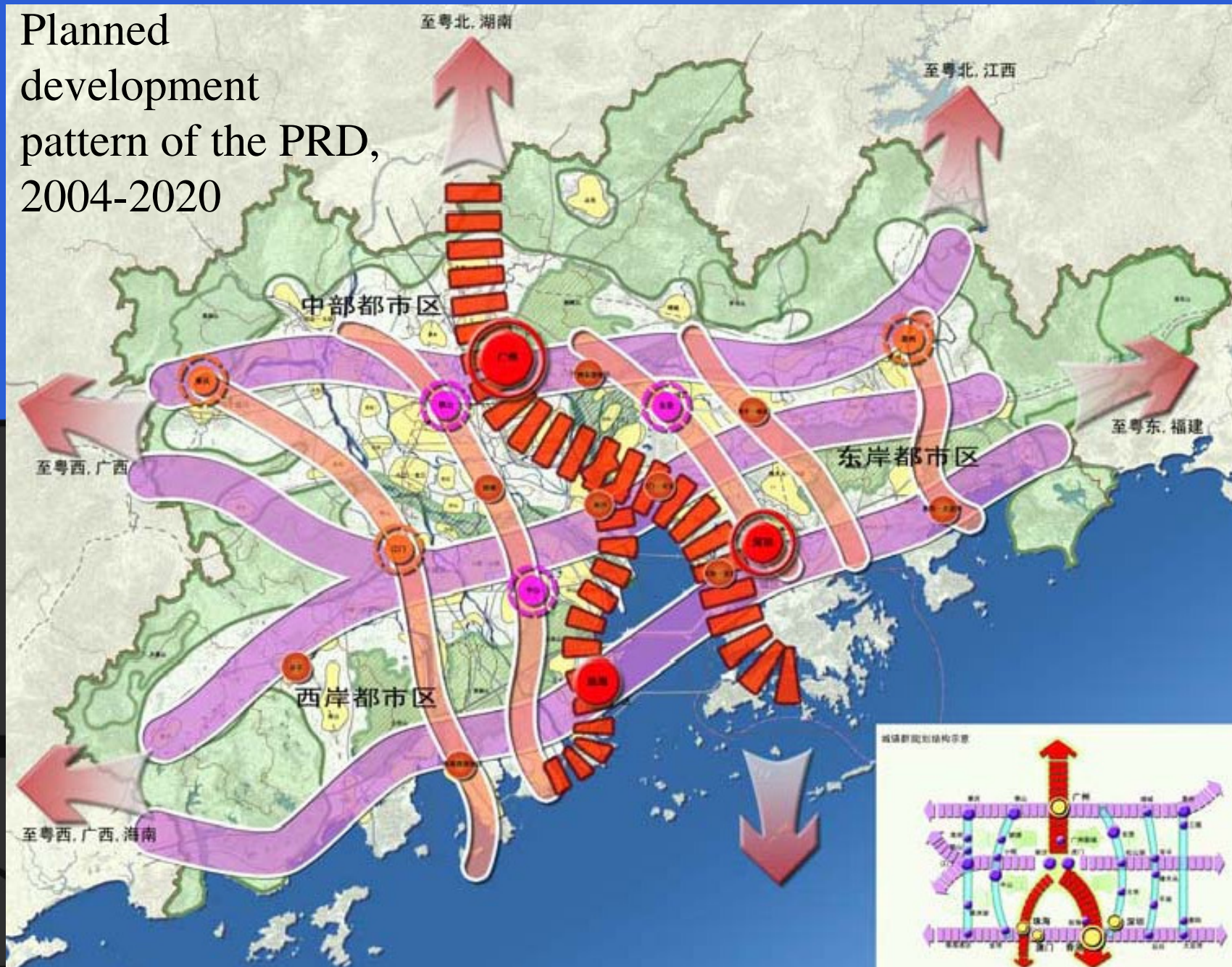
附图 2：一轴两城三中心示意图



Guangzhou as the centre for regional development and planning



Planned
development
pattern of the PRD,
2004-2020



Expansion of metro in Guangzhou to 2015: inward integration

2011-2015 年广州轨道交通建设方案图例

| 2010 年建成线路 | | |
|-----------------|---------------|----------|
| 小计 | | 215.7 公里 |
| 广佛线(广州段)龙溪 - 西朗 | | 5.92 公里 |
| 2012 年建成线路 | | |
| 6号线一期 | 浔峰岗 - 长湴 | 24.3 公里 |
| 6号线二期 | 长湴 - 香雪 | 17.6 公里 |
| 7号线一期 | 广州南站 - 大学城南 | 17.1 公里 |
| 8号线 | 凤凰新村 - 文化公园 | 1.2 公里 |
| 9号线一期 | 飞鹅岭 - 高增 | 19.8 公里 |
| 小计 | | 80.0 公里 |
| 广佛线 | 西朗 - 沥滘 | 11.4 公里 |
| 2015 年建设方案 | | |
| 3号线东延段 | 番禺广场 - 清流 | 12.2 公里 |
| 4号线南延 | 金洲 - 资讯园 | 11.7 公里 |
| 7号线二期 | 大学城南 - 大沙东 | 11.2 公里 |
| 8号线北延 | 文化公园 - 白云湖 | 15.0 公里 |
| 11号线 | 火车站 - 赤岗 - 东站 | 42.4 公里 |
| 13号线 | 凤岗 - 新塘 | 59.8 公里 |
| 14号线 | 嘉禾 - 街口 | 51.2 公里 |
| 14号支线 | 钟落潭 - 知识城 | 13.4 公里 |
| 16号线 | 新塘 - 荔城 | 31.7 公里 |
| 小计 | | 248.7 公里 |

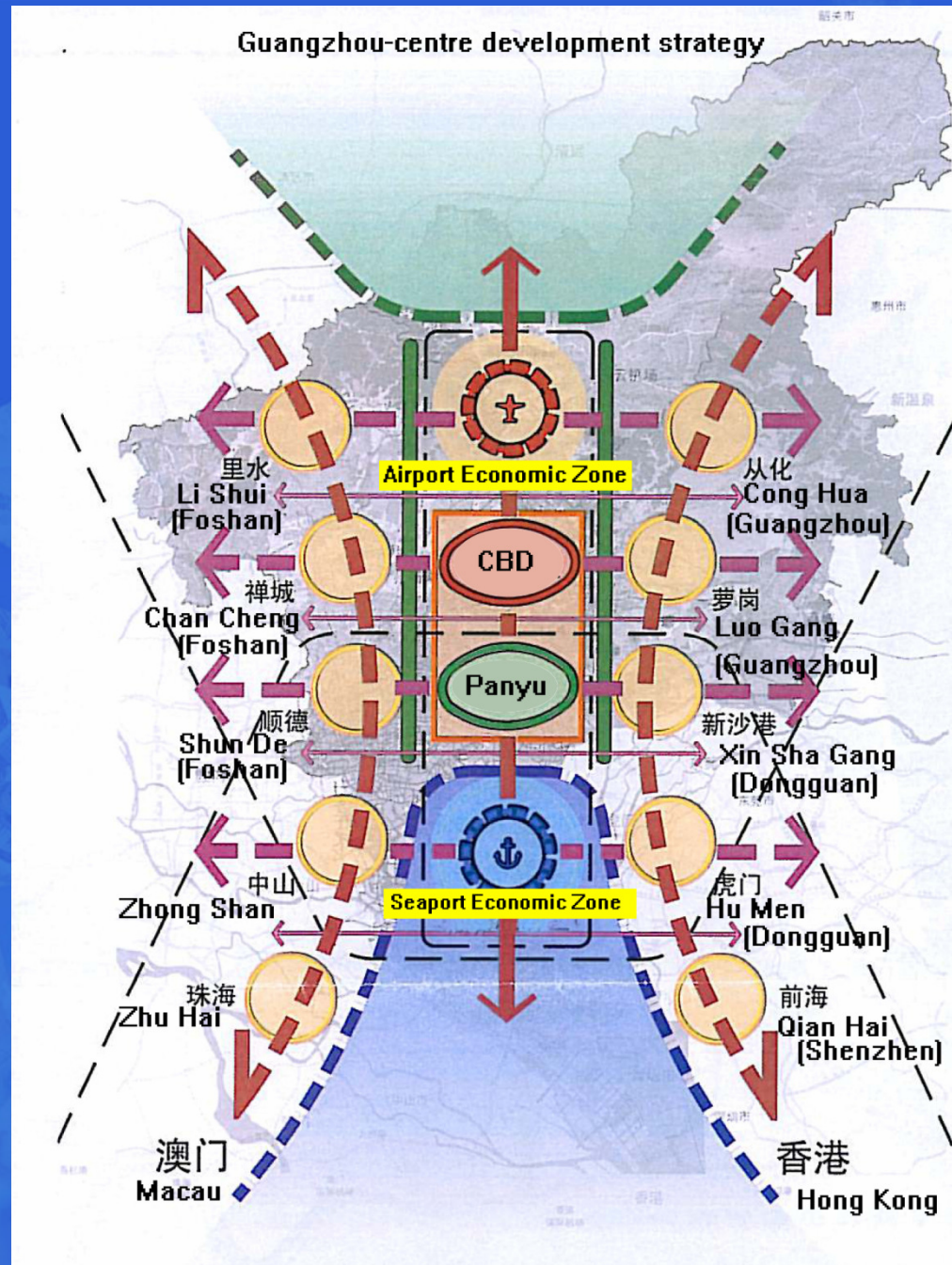
- 枢纽站
- 换乘站
- 一般站

备注: 限于篇幅, 本图并不完整。

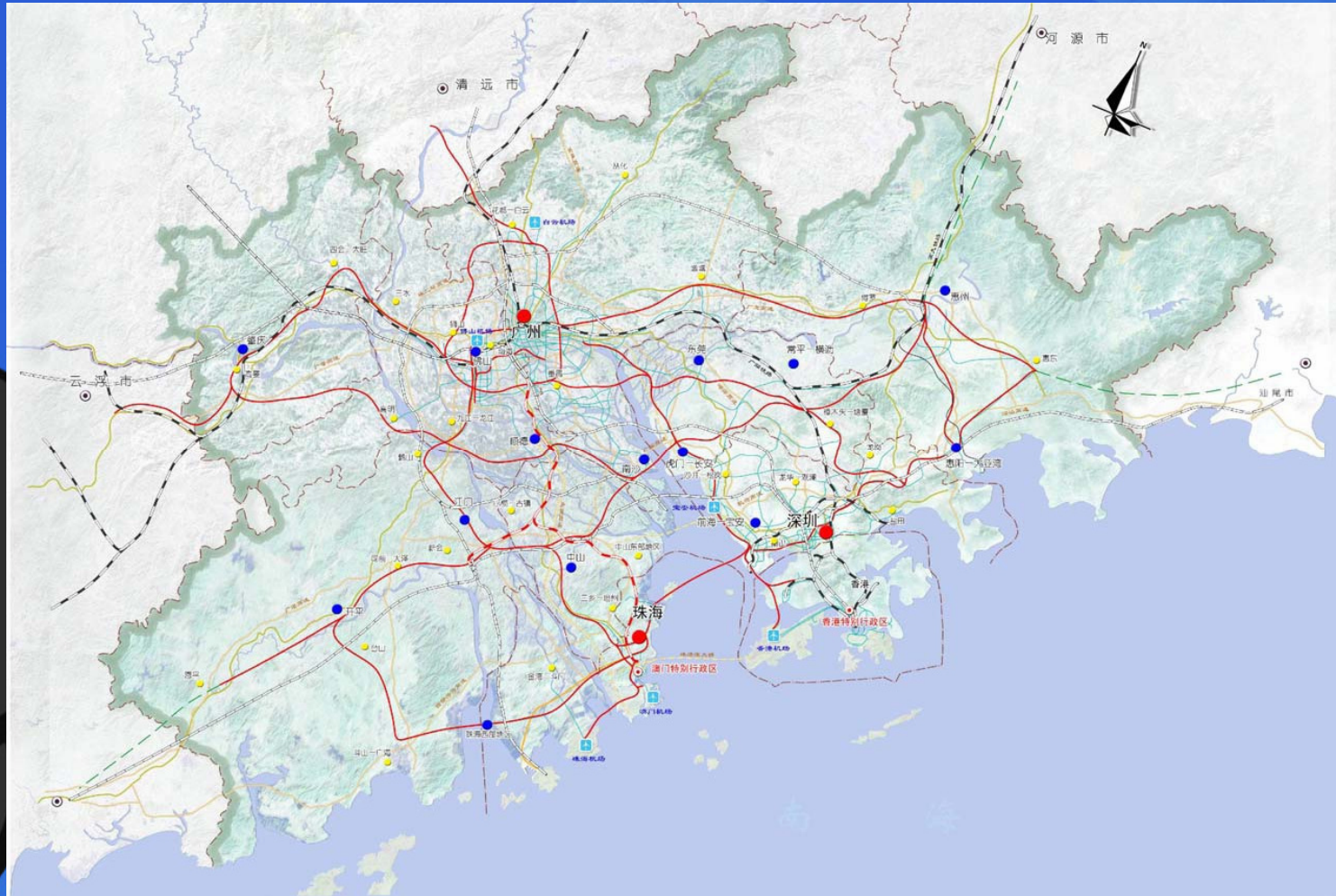


Source: http://www.gz.gov.cn/vfs/content/content_pl.jsp?contentId=758879&catId=133

Regional railway network combined with local government planning in Guangzhou will transform the spatial organization of the Pearl River Delta region into a Guangzhou-centric metropolitan region putting pressure on other competitive large cities in the region, Shenzhen and Hong Kong, and a process of urban polarization with smaller cities



The 2009 revised development plan of the inter-city railways in the Pearl River Delta region in Guangdong for 2020



Source: 广东省发展和改革委员会, 《珠江三角洲地区城际轨道交通规划(修编)(2008-2030年)》, 2009年。

Implications for Hong Kong

1. National and global positioning of Hong Kong – what is role of its self-proclaimed Asia's world city –
 - international financial centre for China or for Southeast Asia? (in competition with Shanghai which has the national and regional governments supports);
 - primary central city in the PRD and in Southern China? (in competition with Guangzhou which has become the transport hub for Southern China & regional financial centre);
 - national tourism destination and shopping centre? (low value-added because of lack of local production & product development and labour intensive services with little learning & upgrading potentials – lock-in trap);
2. Hong Kong's relationship with Guangzhou (PRD) and Shanghai (YRD)?