

GUANGZHOU FOREIGN INVESTMENT DEVELOPMENT REPORT 2024

广州外商投资发展报告
2024



广州市商务局
Guangzhou Municipal Commerce Bureau



广州外商投资企业协会
Guangzhou Association of Enterprises with Foreign Investment





卷首语 Preface

广州，一座历史悠久、文化灿烂的城市，她依珠江而建，向南海而兴，以“花城”之名享誉世界。广州素有“千年商都”之称，自秦汉海上丝绸之路的扬帆，历经唐宋元明清的辉煌，是中国历史最悠久且唯一从未关闭过的对外通商口岸，至今依旧续写着不朽的篇章。在这片充满活力的土地上，历史与现代交织，传统与创新共融。在“一带一路”的宏伟蓝图中，广州这颗21世纪海上丝绸之路的璀璨明珠，以开放的胸怀拥抱世界多元文化，构筑起一座连接中国与世界的文化桥梁。

2023年4月，习近平总书记在广州视察时强调，希望外国投资者抓住机遇，到中国来，到广东来，到粤港澳大湾区来，深耕中国市场，创造企业发展新辉煌。作为中国重要的国家中心城市、国际商贸中心、国际性综合交通枢纽和国际交往中心，广州一直是外资企业读懂中国的重要窗口、投资中国的重要门户。面对世界百年未有之大变局，全球行业领导者、战略投资者坚定选择广州、拥抱广州、扎根广州。今天，广州站在新的历史起点，“二次创业”再出发，提出“大干十二年、再造新广州”，努力打造产业友好型、企业友好型、企业家友好型、科学家友好型的营商环境，努力做到市场氛围最好、政务服务最优、综合成本最合理，让企业、企业家、科学家在广州更好发展、更快成功。

珠江浩荡，云山巍峨。广州正以其独特的地理优势、雄厚的经济实力和开放包容的文化魅力，向世界各地的投资者张开怀抱。我们诚挚地欢迎全球企业家来到这里，安家立业，感受广州的创新活力，共享广州的发展机遇，更好实现城企互利共赢。

Guangzhou, a city with a rich history and vibrant culture, is situated along the Pearl River and has flourished facing the South China Sea. Known globally as the “Flower City,” Guangzhou has earned its reputation as a “Millennium Trade Hub.” Since the days of the maritime Silk Road in the Qin and Han Dynasties and through the glory of the Tang, Song, Yuan, Ming, and Qing Dynasties, it has been China’s oldest and continuously open international trading port, continually adding to its storied legacy.

On this dynamic land where history and modernity intersect and tradition meets innovation, Guangzhou shines as a brilliant gem on the 21st-century Maritime Silk Road. Embracing global cultural diversity with an open heart, it serves as a cultural bridge connecting China with the world.

In April 2023, President Xi Jinping, during his visit to Guangzhou, highlighted the importance for foreign investors to seize the opportunity to come to China, Guangdong, and the Greater Bay Area, deeply engaging with the Chinese market and achieving new business successes. As a key national center city, international trade hub, comprehensive transportation nexus, and global communication center, Guangzhou has long been a crucial gateway for foreign businesses looking to understand and invest in China.

Amidst unprecedented global changes, industry leaders and strategic investors from around the world are confidently choosing Guangzhou, embracing it, and establishing a strong presence here. Today, Guangzhou stands at a new historical starting point, embarking on a “second wave of entrepreneurship” with a vision to “dedicate twelve years to revitalize Guangzhou by doubling its current 3 trillion GDP.” The city aims to foster a business environment that is friendly to industries, businesses, entrepreneurs, and scientists, striving for the best market conditions, optimal government services, and most reasonable overall costs. The goal is for enterprises, entrepreneurs, and scientists to thrive and succeed more rapidly in Guangzhou.

With the vast Pearl River and the majestic Baiyun Mountain as its backdrop, Guangzhou, with its unique geographical advantages, robust economic strength, and inclusive cultural charm, extends a warm welcome to investors from around the world. We invite global entrepreneurs to settle here, experience Guangzhou’s innovative spirit, share in its development opportunities, and achieve mutual success between the city and businesses.



目录 CONTENTS

卷首语 Preface

part1 外商投资在广州 Foreign Investment in Guangzhou

- 在穗外企贡献卓越 Outstanding Contributions
- 外企活力持续增强 Continuous Growth

04-11

part2 商业机遇聚广州 Business Opportunities Gather in Guangzhou

- 扩大开放 Expanding Opening-Up
- 物阜民丰 Wealthy
- 人丁兴旺 Populous
- 活力四射 Vibrant
- 融商汇链 Connections

12-17

part3 产业链条汇广州 Industrial Chains Converge in Guangzhou

- 支柱产业 Pillar Industries
- 新兴产业 Emerging Industries
- 未来产业 Future Industries

18-29

part4 营商环境看广州 Business Environment Shines in Guangzhou

- 投资成本洼地 Investment Cost Advantage
- 湾区枢纽中心 GBA Transportation Hub
- 人力资源高地 Human Resources Hub
- 投资兴业福地 Open and Innovative Governance

30-34

part5 宜商宜居融广州 Guangzhou: A City Ideal for Business and Living

- 涉外服务机构 Foreign Service Institutions
- 便捷生活环境 Convenient Living Environment

35-39

编后语 Postscript

40

外商投资在广州

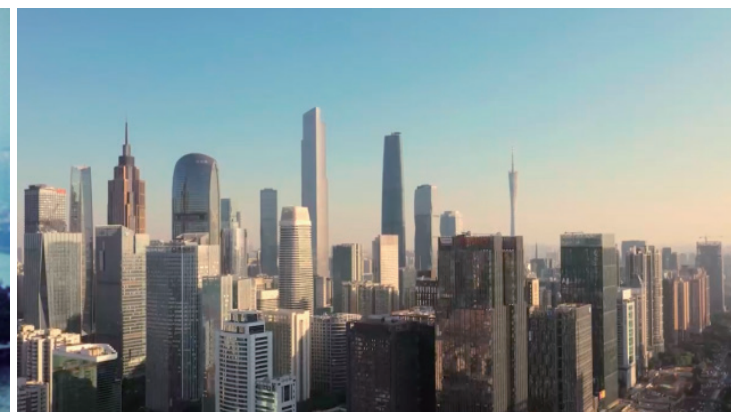
FOREIGN INVESTMENT IN GUANGZHOU



十九世纪中期的柯拜船坞旧照
Photos of the Couper Dock from the mid-19th century



80 年代初白天鹅宾馆旧照
White Swan Hotel from the early 80s



珠江新城
Zhujiang New Town

广州是中国历史最悠久且唯一从未关闭过的对外通商口岸。

中国历史上最早的兴办的第一个外资企业——柯拜船坞，由英国人于 1845 年在广州黄埔长洲岛投资建设。上世纪八十年代，国内第一家由外商投资、建设、经营并对民众开放的白天鹅宾馆开业当年即盈利，带动了包括宝洁、百事、丰田在内的大批外资企业将目光投向了“中国的南大门”。

Guangzhou, the longest-standing port for foreign trade in China, has never closed its doors to international commerce.

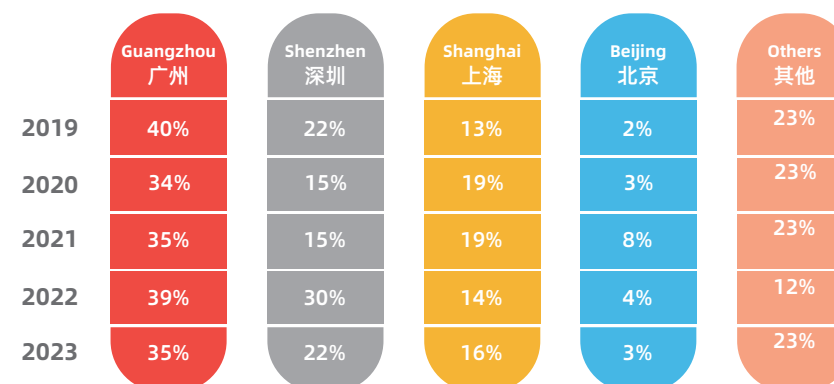
The first foreign-funded enterprise in Chinese history, the Couper Dock, was established by the British in 1845 on Changzhou Island, Huangpu District of Guangzhou. In the 1980s, the White Swan Hotel, the first hotel entirely funded, built, and operated by foreign investment that was open to the public, turned a profit in its inaugural year. This success attracted numerous foreign-funded enterprises, including Procter & Gamble, Pepsi, and Toyota to focus on "the southern gateway of China."

外商投资首选目的地

The Preferred Destination for Foreign Investment

华南商会 2024 年《华南地区经济情况特别报告》显示，广州连续第 7 年为外商投资首选目的地。

The 2024 "Special Report on the Economic Situation in South China" by the South China American Chamber of Commerce shows that Guangzhou has been the top destination for foreign investment for the seventh consecutive year.



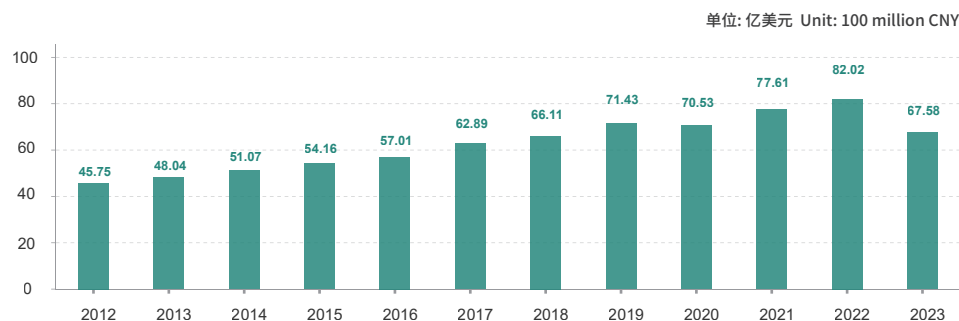
01 在穗外企贡献卓越

Outstanding Contributions of Foreign-funded Enterprises in Guangzhou

改革开放至今，广州吸引和使用外资规模一直位居全国前列，连续多年保持稳定增长。

Since the reform and opening-up, Guangzhou has consistently ranked among the top cities in the country for attracting and utilizing foreign investment, maintaining stable growth.

■ 2012~2023年广州实际使用外资情况 Actual Use of Foreign Capital in Guangzhou from 2012 to 2023



2022

实际使用外资首次突破 80 亿美元

In 2022, actual use of foreign capital in Guangzhou surpassed 8 billion USD for the first time.

2023

实际使用外资 483.2 亿元（折合 67.58 亿美元），占广东省比重 30.4%。

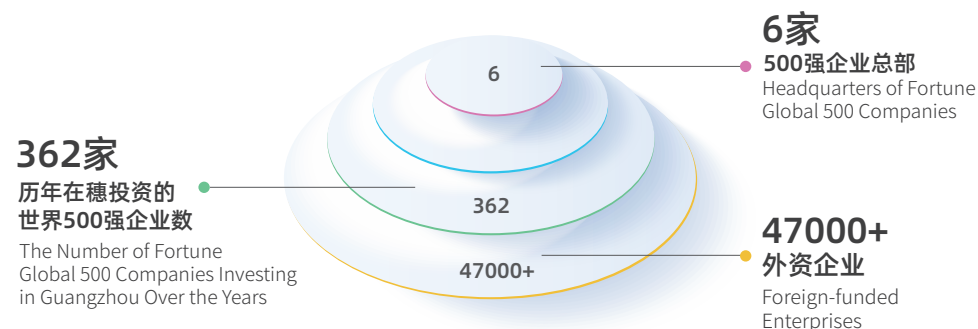
In 2023, actual use of foreign investment in Guangzhou reached 6.758 billion USD, accounting for 30.4% of Guangdong Province.

24 家

全球独角兽企业

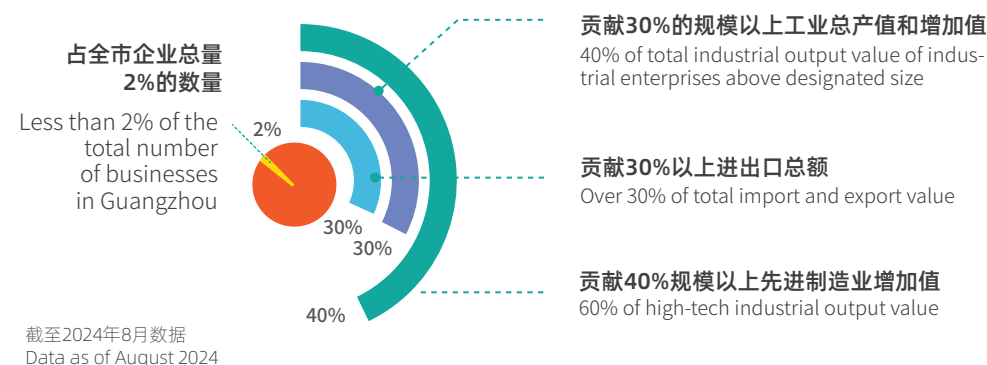
2023 年，广州是独角兽数量增长最快的中国城市，增长 22 家，比 2022 年增加 12 家。2024 年全球独角兽再增加 2 家，达到 24 家。

In 2023, Guangzhou saw the fastest growth in the number of unicorns among Chinese cities, with 22 new additions, 12 more than in 2022. By 2024, the global total is expected to increase by 2 more, reaching 24.



外资企业以占全市企业总量 2% 的数量，贡献了全市超过 30% 的进出口总值和规模以上工业增加值、超过 40% 的规模以上先进制造业增加值，是广州经济社会发展的重要支撑力量。

Foreign-invested enterprises, making up only 2% of the total number of businesses in the city, contribute over 30% of the city's total import and export value and above-scale industrial added value, as well as over 40% of the added value of the advanced manufacturing sector, serving as a crucial support for Guangzhou's economic and social development.



02

外企活力持续增强

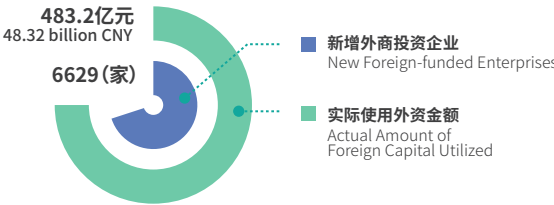
Continuous Growth in New Foreign Investments

2023 年新增外资企业数量 6629 家，实际使用外资金额 483.2 亿元。新增投资涉及领域广泛，制造、贸易、商业服务、科技研发等仍然为外商投资主要领域。

In 2023, Guangzhou welcomed 6,629 new foreign-invested enterprises with actual foreign investment amounting to 48.32 billion CNY. The new investments span a wide range of sectors, with manufacturing, trade, business services, and technology research and development remaining the primary fields for foreign investment.

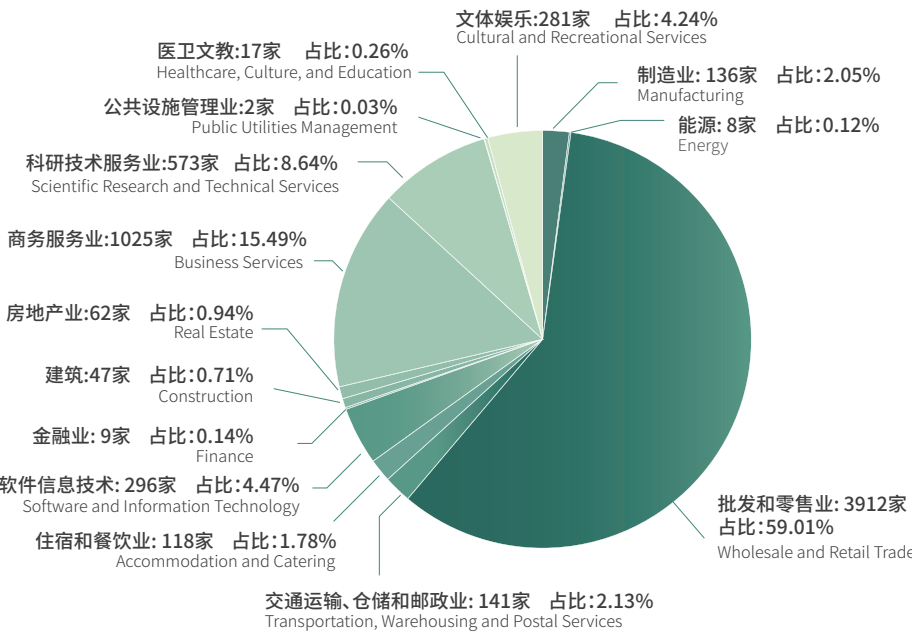
投资领域分布

Distribution of
Investment Sectors



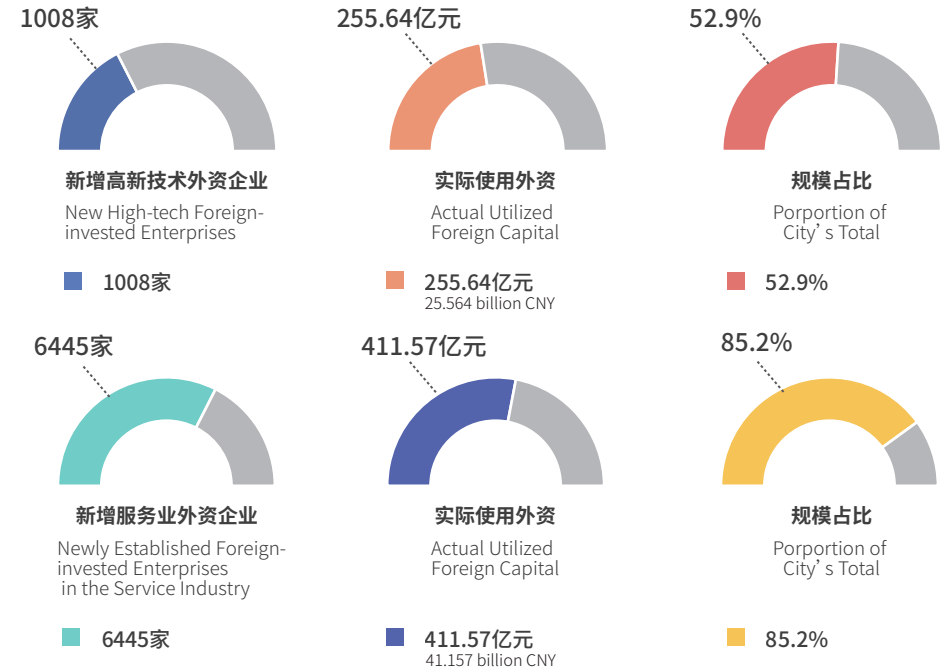
2023年新增外资涉及行业领域

Industry Sectors for New Foreign Investments in 2023



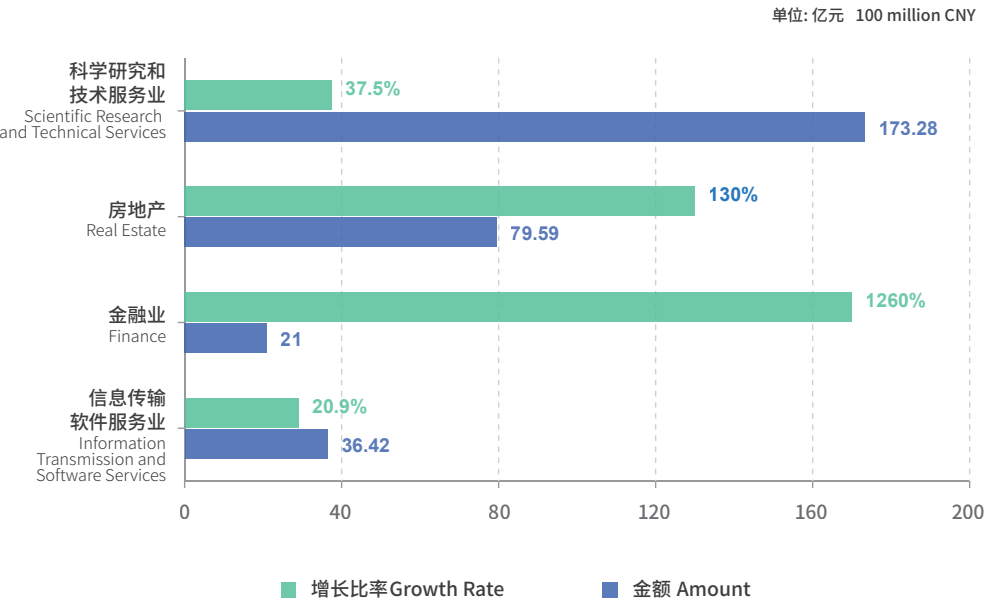
2023年新增高新技术、服务业使用外资概况

Overview of the Use of Foreign Capital in New High-tech and Service Industries in 2023



2023年外资服务业增长情况

Growth of Foreign Investment in Service Industry in 2023



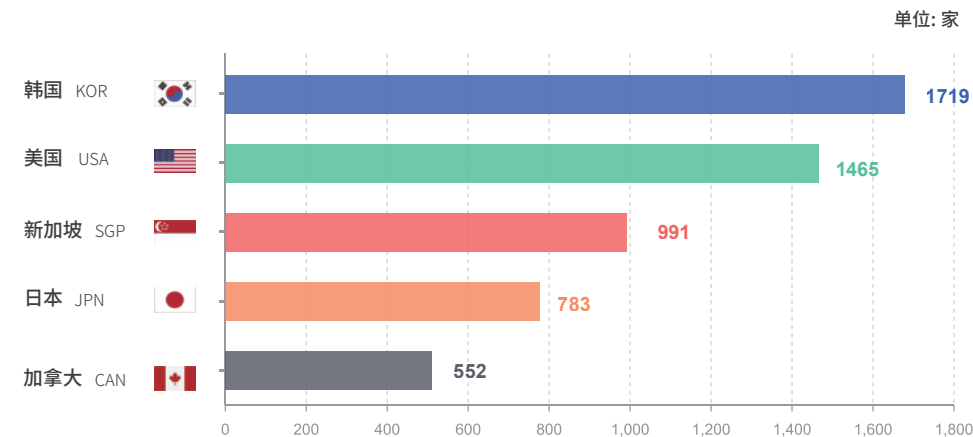
投资来源地 Source of Investment



2023外商投资来源地前5位 Top 5 Sources of Foreign Investment in 2023

实际使用外资金额 Actual Amount of Foreign Capital Utilized	Top5	新设外资企业数量 Number of Newly Established Foreign-funded Enterprises	Top5
港澳台地区 HK/MO/TW	426.84 (亿元)	港澳台地区 HK/MO/TW	2651家
法国 FAN	14.33 (亿元)	韩国 KOR	178家
日本 JPN	7.79 (亿元)	美国 USA/ 新加坡 SGP	92家
英国 GBR	6.70 (亿元)	加拿大 CAN	71家
新加坡 SGP	5.72 (亿元)	日本 JPN	26家

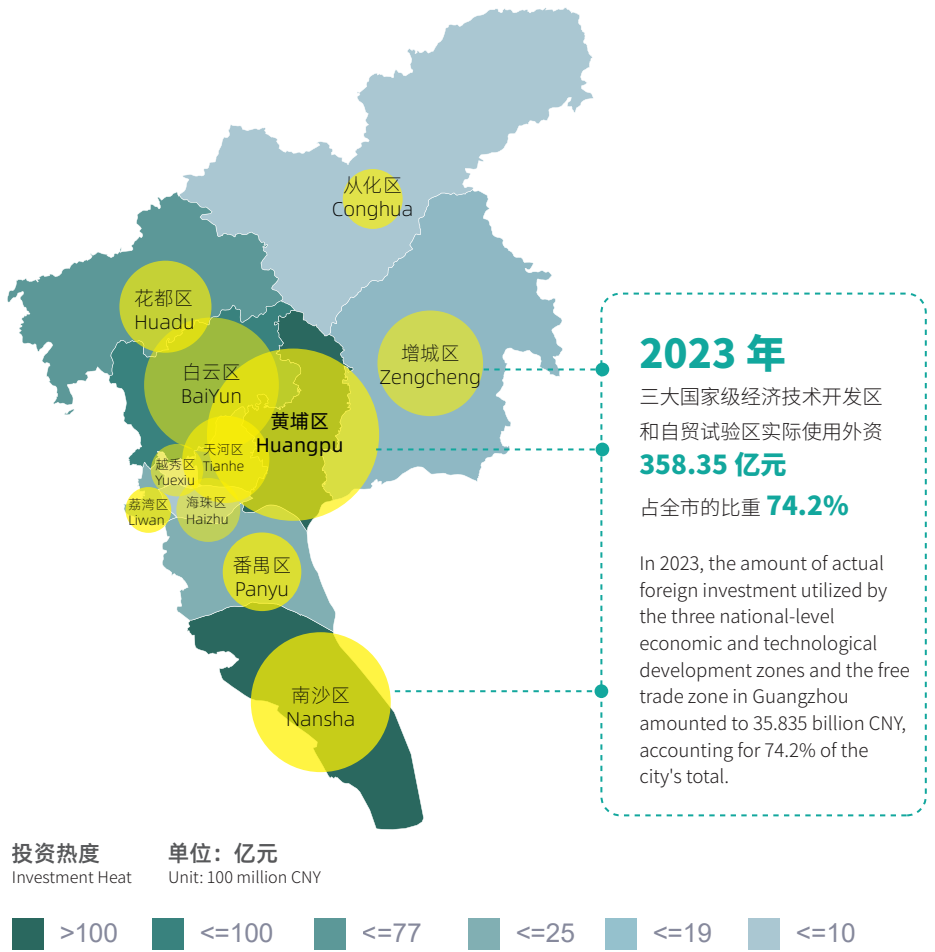
截止2023年在穗外商投资企业数量前5位投资国别 Top 5 Countries of Foreign Investment in Terms of the Number of Foreign-funded Enterprises in Guangzhou as of 2023



投资区域分布 Regional Distribution of Investment

国家级经济技术开发区、自由贸易试验区是广州对外开放前沿和外资集聚高地。2023年广州开发区实际使用外资首次突破 30 亿美元，连续 5 年位居国家级经开区之首，南沙开发区连续 2 年位居全国第二。

National-level Economic and Technological Development Zones and Free Trade Zones are the forefront of Guangzhou's opening up to the outside world and key hubs for foreign investment. In 2023, the actual foreign investment in Guangzhou Development District exceeded 3 billion USD for the first time, maintaining the top position among national-level economic and technological development zones for five consecutive years. Nansha Development Zone has ranked second nationwide for two consecutive years.



商业机遇聚广州

BUSINESS OPPORTUNITIES GATHER IN GUANGZHOU

01 扩大开放 Expanding Opening-Up

2022年12月, 国家赋予广州开展**服务业扩大开放综合试点**, 在科技服务、专业服务、批发和零售服务、商务服务、物流运输服务、居民服务、教育服务、金融服务、健康医疗服务、电力等能源服务、电信服务、文化服务、法律服务等 13 个领域赋予高水平开放政策。

In December 2022, the country authorized Guangzhou to carry out a comprehensive pilot program for expanding the opening of the service industry, implementing high-level opening-up policies in 13 sectors: scientific and technological services, professional services, wholesale and retail services, business services, logistics and transportation services, residential services, educational services, financial services, healthcare services, energy services such as electricity, telecommunications services, cultural services, and legal services.

2024年9月, 国家发布《外商投资准入特别管理措施(负面清单)(2024年版)》, 自2024年11月1日起施行, **制造业领域外资准入限制措施全面取消**。对负面清单之外的领域, 按照内外资一致原则管理, 给予外商投资企业国民待遇。

In September 2024, the country issued the Special Administrative Measures for the Access of Foreign Investment (Negative List) (2024 Edition), which will take effect on November 1, 2024. Restrictions on foreign investment in the manufacturing sector will be completely lifted. For areas not on the negative list, management will be conducted according to the principle of equal treatment for domestic and foreign investments, granting foreign-invested enterprises national treatment.

2024年9月, 国家同意允许在**广州设立外商独资医院**(中医类除外, 不含并购公立医院), 在**南沙自由贸易试验区允许外商投资企业从事人体干细胞、基因诊断与治疗技术开发和技术应用, 以用于产品注册上市和生产**。

In September 2024, the country agreed to allow the establishment of wholly foreign-owned hospitals in Guangzhou (excluding traditional Chinese medicine hospitals and the acquisition of public hospitals) and permitted foreign-invested enterprises in the Nansha Free Trade Zone to engage in the development and application of human stem cell and gene diagnosis and treatment technologies for product registration and production.

02 物阜民丰 Wealthy

国际商贸中心和国际消费中心城市, 2021 年社会消费品零售总额首次突破万亿大关。2023 年社会消费品零售总额和进出口总额保持双破万亿, 先后 5 次荣获《福布斯》“中国大陆最佳商业城市”第一名, 2023 年《福布斯》中国消费活力城市全国第三。

Guangzhou is an international trade center and a global consumer hub. In 2021, its total retail sales of consumer goods surpassed the 1 trillion CNY mark for the first time. In 2023, both the total retail sales of consumer goods and the total import and export volume exceeded 1 trillion CNY. Guangzhou has been awarded the top position in Forbes' "Best Business Cities in Mainland China" five times and was ranked third nationally in Forbes' "Top 10 Vibrant Chinese Cities in Consumption" in 2023.

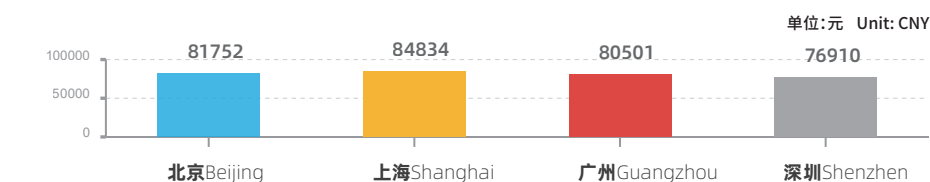
■ 社会消费品零售总额 \ 人均消费额 Total retail sales of consumer goods \ Per capita consumption



■ 住户存款总额 \ 人均住户存款 Total household deposits \ Per capita household deposits



■ 居民人均可支配收入 Per capita disposable income



来源: 各市政府工作报告、统计公报
Source: Work reports and statistical bulletins from various city governments

03 人丁兴旺 Populous

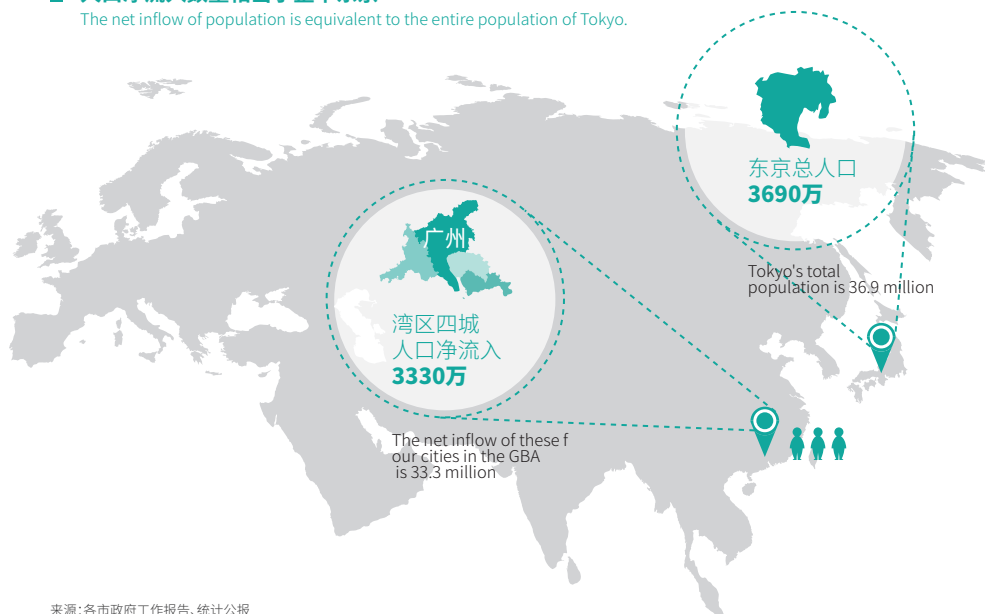


广州常住人口 1882.07 万，位居全国前五，粤港澳大湾区之首。人口净流入 888.92 万，位居全国前三。广东省流动人口超 5000 万人，其中广州、深圳、东莞、佛山四大城市人口净流入合计达到了 3330 万人，人口净流入数相当于整个东京。

Guangzhou has a resident population of 18.8207 million, ranking among the top five in the country and first in the Guangdong-Hong Kong-Macau Greater Bay Area (GBA). Guangzhou's net inflow of population stands at 8.8892 million, placing it third nationwide. Guangdong province has over 50 million migrant workers, with the four major cities of Guangzhou, Shenzhen, Dongguan, and Foshan collectively experiencing a net inflow of 33.3 million, equivalent to the total population of Tokyo.

■ 人口净流入数量相当于整个东京

The net inflow of population is equivalent to the entire population of Tokyo.



来源：各市政府工作报告、统计公报
Source: Work reports and statistical bulletins from various city governments

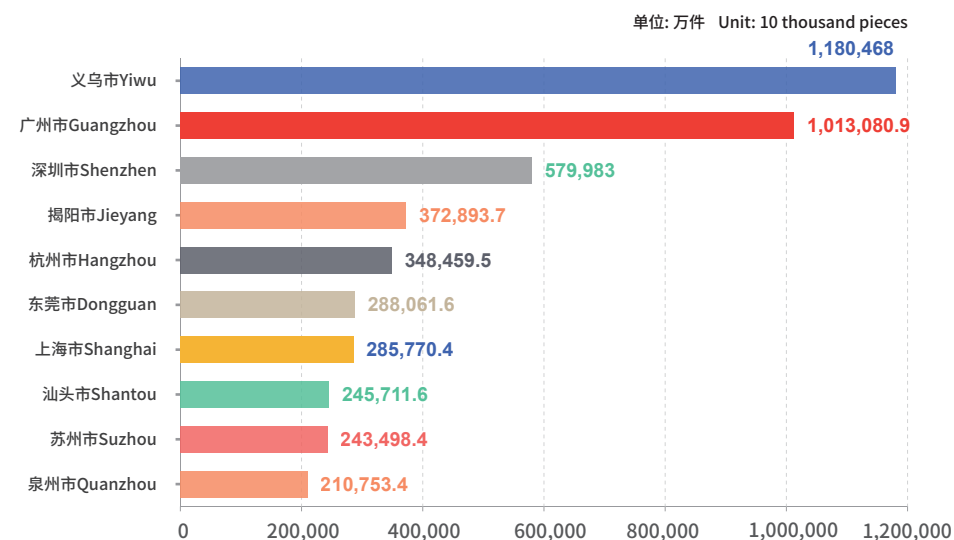
04 活力四射 Vibrant

广州以 101 亿件位居快递业务量排行榜第 2，得益于广州的制造业产业集聚、现代化物流基础和商贸综合服务能力。

Guangzhou ranks second in express delivery volume with 10.1 billion packages. This success is attributed to Guangzhou's manufacturing industry concentration, modern logistics infrastructure, and comprehensive commercial service capabilities.



■ 2022年快递业务量前10位城市 2022 Top 10 Cities by Express Delivery Volume



来源：国家邮政局 Source: State Post Bureau

05 融商汇链 Connections

专业市场链接全国

Professional markets link across the country.

港澳大湾区、珠三角核心城市，商贸业发达历史悠久，孕育了一批独具广州特色、功能清晰、颇具规模的商贸专业市场，涵盖四十多个商品门类千余个专业市场年交易额超万亿元，形成了闻名中外的专业市场经济模式，吸引来自世界各地客商到广州批量采购。

四成市场不仅影响中国价格，还影响国际价格，尤其纺织服装、中药材、塑料、木材、水产品等行业已形成了“广州价格”

Guangzhou, as a core city in the Greater Bay Area and the Pearl River Delta, has a long history of thriving commerce. It has nurtured a number of distinctive and well-defined commercial markets that are sizable and specialized. These markets cover over forty categories of goods, with more than a thousand specialized sub-markets generating annual transaction volumes exceeding 1 trillion CNY. This has established a renowned professional market economy model that attracts merchants from around the world for bulk purchases in Guangzhou.

40% of these markets not only influence domestic prices but also affect international prices, particularly in industries such as textiles, traditional Chinese medicine, plastics, timber, and aquatic products, with the "Guangzhou Price" now well-established.



现代会展辐射全球

Modern exhibitions have a global outreach.

创办于 1957 年的中国进出口商品交易会，是中国历史最长、层次最高、全球规模最大、商品种类最全、到会采购商最多且分布国别地区最广、成交效果最好的综合性国际贸易盛会，被誉为“中国第一展”。

Established in 1957, the China Import and Export Fair is the longest-running, highest-tier, largest-scale, and most diverse comprehensive international trade event in China, attracting the largest number of purchasers from various countries and regions, and achieving the best transaction results, often referred to as the "No. 1 Exhibition in China."

■ 第135届中国进出口商品交易会

The 135th session of the China Import and Export Fair

参展商家数：超 2.8 万家

The number of exhibitors exceeds 28000

出口成交额：27730 (百万美元)

Export transaction amount: 27730 million US dollars

境外采购商数：

Number of overseas purchasers

215 个国家和地区的 24.6 万人 (线下展)

246000 people from 215 countries and regions (offline exhibition)

229 个国家和地区的 40.8 万人 (线上展)

408000 people from 229 countries and regions (online exhibition)

■ 十大重点品牌展会

Top 10 Key Brand Exhibitions

中国 (广州) 国际家具博览会

中国广州国际家具生产设备及配料展览会

广州国际照明展览会 &
广州国际建筑电气技术展览会

中国 (广州) 国际建筑装饰博览会

广州设计周

广州国际汽车展览会

中国国际美博会

广州锦汉家居用品及礼品展览会

广州国际专业灯光、音响展览会

广州酒店用品展览会

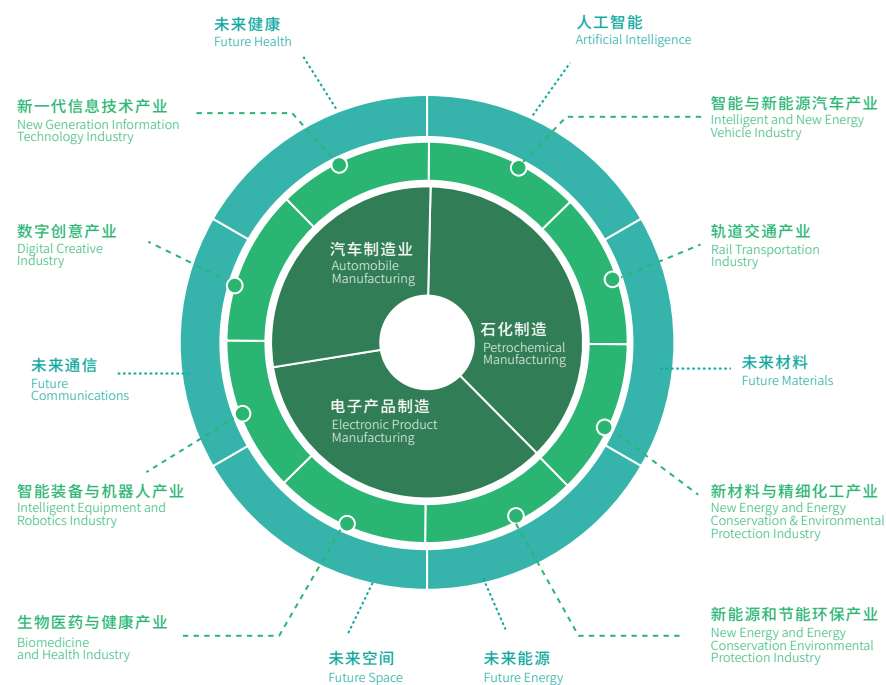
1. China (Guangzhou) International Furniture Fair
2. China Guangzhou International Furniture Production Equipment and Ingredients Expo
3. Guangzhou International Lighting Exhibition & Guangzhou Electrical Building Technology
4. China (Guangzhou) International Building Decoration Fair
5. Guangzhou Designweek
6. Guangzhou International Automobile Expo
7. China International Beauty Expo
8. Jinhan Fair for Home & Gifts
9. China (Guangzhou) International Professional Lighting and Sound Expo
10. Guangzhou Hotel Supplies Expo



产业链条汇广州 INDUSTRIAL CHAINS CONVERGE IN GUANGZHOU

南中国制造业中心、产业发展多元化，目前已形成了“三大支柱产业，八大新兴产业，六大未来产业”架构的产业格局。

As the manufacturing hub of South China, the diversified industrial development of Guangzhou has provided a solid foundation for the stable growth of the urban economy. Currently, Guangzhou has formed an industrial structure featuring "three pillar industries, eight emerging industries, and six future industries."



三大支柱产业
Pillar Industries

八大新兴产业
Emerging Industries

六大未来产业
Future Industries

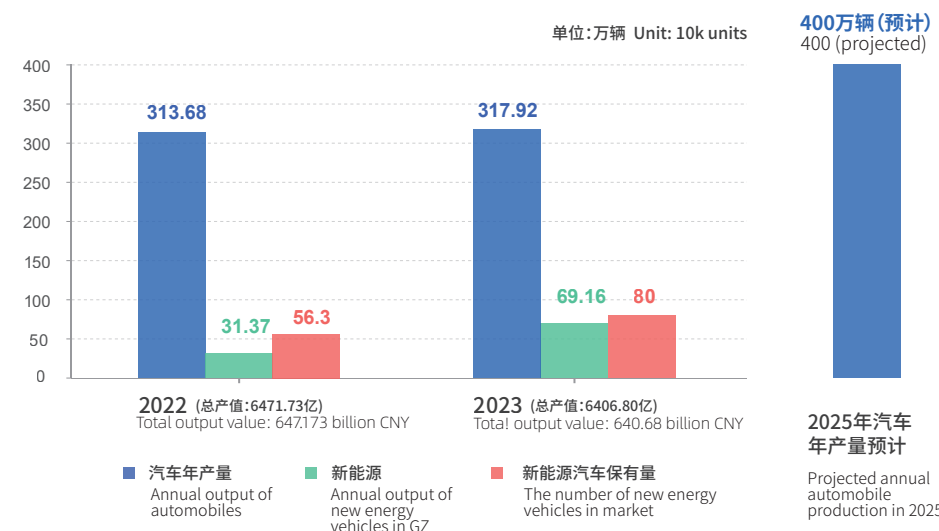
01 支柱产业 Pillar Industries

汽车制造

Automobile Manufacturing

汽车年产量突破 310 万辆，（2019~2023 年）连续五年居全国第一，基本达到“国内每 10 台车就有 1 台广州造”，预计到 2025 年，广州整车将实现 400 万辆产能。新能源汽车产量突破 65 万辆，全市新能源汽车保有量达 80 万辆，居全国城市前列。

The annual automobile production in Guangzhou has surpassed 3.1 million units, ranking first in the nation for five consecutive years from 2019 to 2023. This means that roughly 1 in 10 cars in China is produced in Guangzhou. By 2025, Guangzhou is expected to achieve a production capacity of 4 million vehicles. Additionally, the production of new energy vehicles has exceeded 650,000 units, with the total number of new energy vehicles in the city reaching 800,000, placing Guangzhou among the leading cities in China.



汽车制造外资代表企业 Representative Foreign-invested Automotive Manufacturers

TOYOTA

HONDA
The Power of Dreams

NISSAN

形成合资品牌和自主品牌共同发展的汽车品牌格局，三大汽车产业集群产值均超千亿元，12 家整车制造企业和 1200 多家汽车零部件企业，在整车制造、自动驾驶、车路协同、关键零部件等领域规模均处于全国前列。

A pattern of automotive brand development featuring both joint venture brands and independent brands has emerged. The output value of the three major automotive industry clusters exceeds 100 billion CNY, with 12 complete vehicle manufacturing enterprises and over 1,200 automotive parts companies, all of which rank among the top in the nation in areas including complete vehicle manufacturing, autonomous driving, vehicle-road collaboration, and key components.

整车项目方面

广汽埃安二线和第二智造中心
广丰五线等项目已竣工投产
小鹏汽车广州基地项目已开展试生产
完成年度投资计划108%
广汽本田新能源产能扩建项目正按计划推进。

Complete vehicle projects: GAC AION's second assembly line and second intelligent manufacturing center, along with several projects at Guangfeng, have completed construction and begun production. The XPeng base in Guangzhou has commenced trial production, achieving 108% of its annual investment goal, while the expansion project for GAC Honda's new energy production capacity is proceeding as planned.

零部件项目方面

现代汽车氢燃料电池系统、电堆建设项目已竣工；时代广汽动力电池项目完成年度投资计划的139%；广汽埃安自主电芯生产制造项目已开工建设。

Component projects: Hyundai's hydrogen fuel cell system and stack construction project have been completed; the Times-GAC power battery project has achieved 139% of its annual investment goal; and the self-developed production project for GAC AION's battery cells is underway.

产业园方面

广汽零部件（广州）产业园
南大国际智能汽配供应链产业基地已竣工
广汽智联新能源汽车产业园
小鹏科技园等重点项目建设顺利推进。

Industrial bases: GAC Parts and Components Guangzhou Industrial Park and the Nanda International Intelligent Auto Parts Supply Chain Industrial Base have been completed, with significant projects like the GAC's Industrial Park for Intelligent & Connected New Energy Vehicle and the XPeng's science park progressing smoothly.



电子产品制造产业

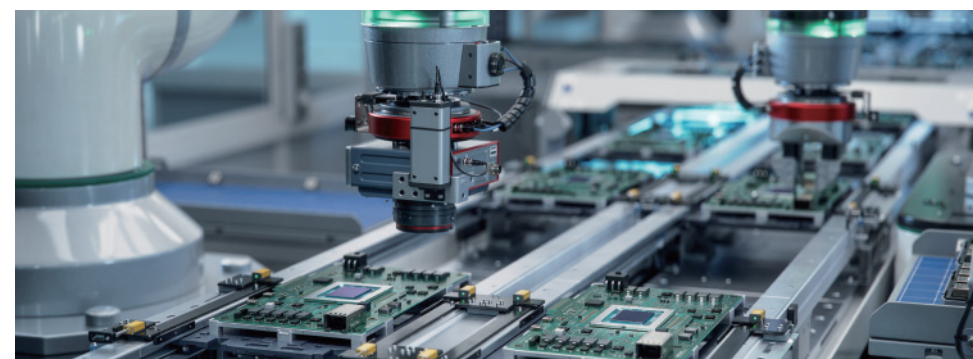
Electronic Product Manufacturing

广州是电子产品制造业强城，拥有从电子元器件、电子设备、消费类电子产品、工控电子、汽车电子、医疗电子在类的完善产业链。

显示面板产能全国第一，全球有近一半大尺寸 OLED 电视面板出自于广州。总规模超 2300 亿元，超高清视频显示产业产值近 4 年增长 36%，新型显示主控板卡出货量占全球比重超 35%、显示模组市场占有率、4K 板卡出货量连续多年全球第一。

Guangzhou is a strong city in the electronic product manufacturing industry, with a complete industrial chain that includes electronic components, electronic devices, consumer electronics, industrial control electronics, automotive electronics, and medical electronics.

Guangzhou is the national leader in display panel production, with nearly half of the world's large-size OLED television panels originating from the city. The total scale exceeds 230 billion CNY, with the ultra-high-definition display industry's output value growing by 36% over the past four years. The global market share of new display main control boards surpasses 35%, with continuous supremacy in the display module market and 4K board shipments ranking first in the world for numerous consecutive years.



石化制造

Petrochemical Manufacturing

产值规模超 3600 亿元,位居全省第一。

规模以上企业 1300 余家,规模超亿元企业 300 余家,产值规模达 100 亿元以上的企业有 5 家,规模以上日用化工、精细化工和化工新材料类企业 328 家,国家级专精特新“小巨人”企业超 30 家,国家级制造业单项冠军企业(产品)5 家。

The output value scale exceeds 360 billion CNY, ranking first in the province. More than 1,300 enterprises above designated size are registered, with over 300 enterprises reporting revenues exceeding 100 million CNY. There are five enterprises with output values exceeding 10 billion CNY, and 328 enterprises in daily chemicals, fine chemicals, and new chemical materials. There are over 30 national-level specialized and innovative "little giant" enterprises and five national-level single champions in manufacturing.

石油化工

Petrochemicals



日用化工

Daily Chemicals



化工材料

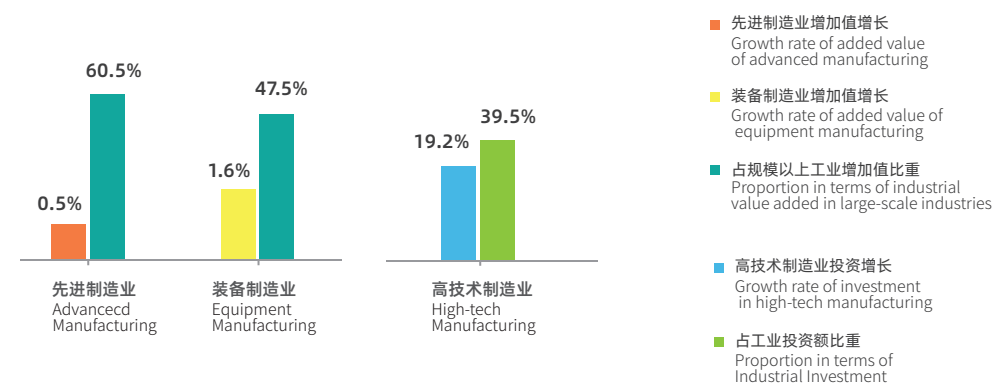
Chemical Materials



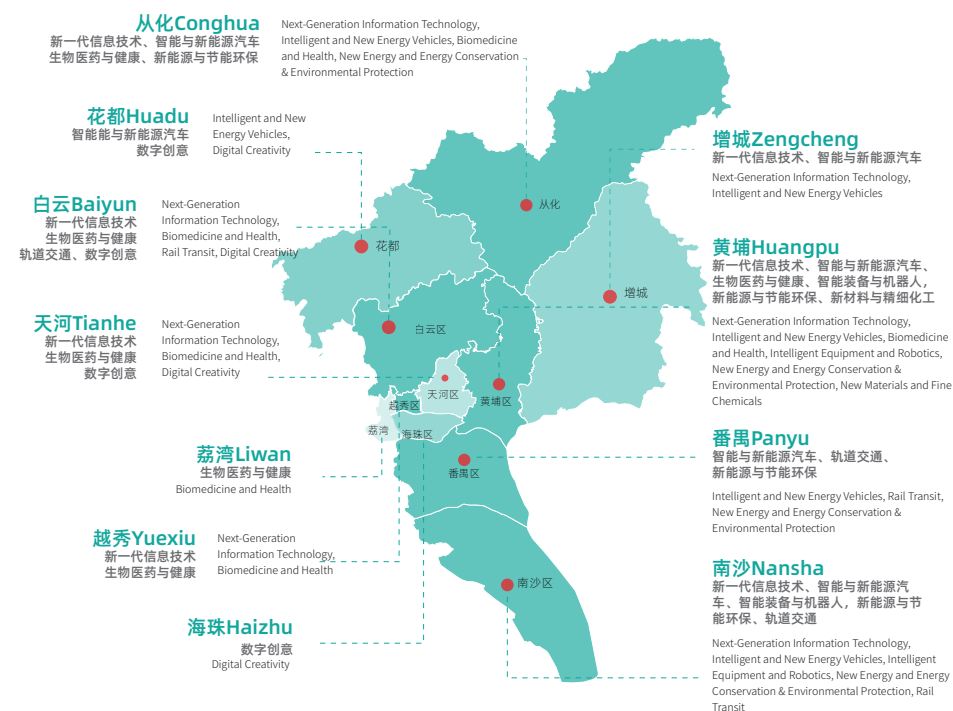
02 新兴产业 Emerging Industries

新兴产业合计实现增加值 9333.54 亿元,占地区生产总值比重为 30.7%。

The emerging industries collectively achieved a value added of 933.354 billion CNY, accounting for 30.7% of the regional GDP.



新兴产业重点发展区域 Distribution of Emerging Industries Development



来源:根据广州市人民政府办公厅关于印发广州市战略性新兴产业发展“十四五”规划的通知内容整合

Source: Integrated content from the notice issued by the General Office of the People's Government of Guangzhou regarding the implementation of the "14th Five-Year" Plan for the Development of Strategic Emerging Industries in Guangzhou

智能与新能源汽车产业

Intelligent and New Energy Vehicle Industry

自动驾驶道路测试和示范应用处于全国领先地位，共有 13 家企业 26 款车型共 270 台测试车辆开展道路测试，累计测试里程超 960 万公里，位居全国前列。

Guangzhou is a national leader in autonomous driving road testing and demonstration applications. A total of 13 companies with 26 vehicle models and 270 testing vehicles have conducted road tests, accumulating over 9.6 million kilometers in test mileage, which places it among the top in the country.

新能源品牌
New energy brands



智能驾驶
Smart driving

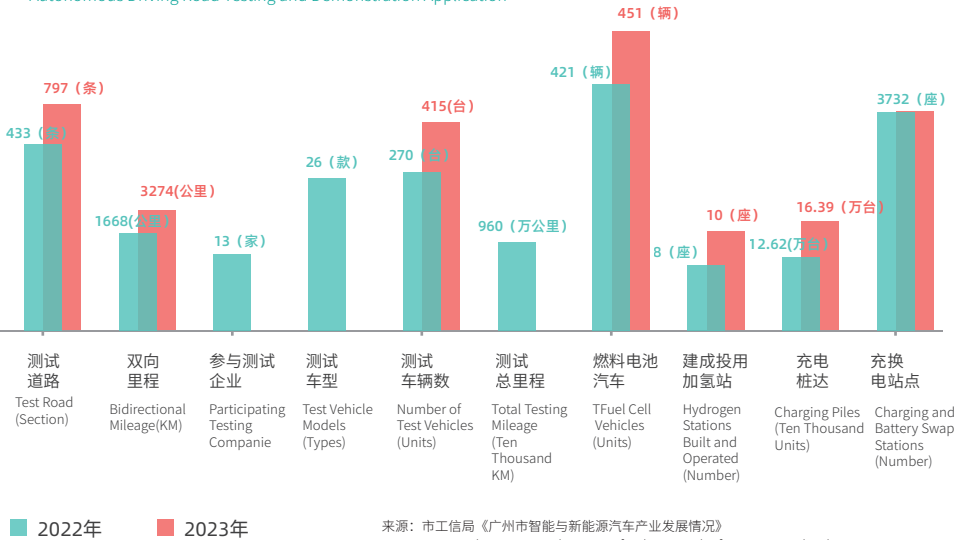


低空经济
low-altitude economy



■ 自动驾驶道路测试和示范应用

Autonomous Driving Road Testing and Demonstration Application



来源：市工信局《广州市智能与新能源汽车产业发展情况》
Source: Guangzhou Municipal Bureau of Industry and Information Technology
"Development Status of the Intelligent and New Energy Vehicle Industry in Guangzhou"

新能源和节能环保产业

New Energy and Energy Conservation Industry

依托本地丰富的可再生能源资源，大力发展电解水制氢技术，推动绿色、低碳的氢能生产。

Leveraging its abundant local renewable energy resources, Guangzhou is actively developing water electrolysis hydrogen production technology to advance green and low-carbon hydrogen energy production.



新一代信息技术产业

New Generation Information Technology Industry

产值超 4800 亿，其中软件与信息服务业 3100 亿，集成电路、印刷电路板业 154.8 亿。

The industry generated over 480 billion CNY, with the software and information service sector contributing 310 billion CNY and integrated circuits and printed circuit boards generating 15.48 billion CNY.



生物医药与健康产业

Biomedicine and Health Industry

全市最为活跃的新兴产业之一。产业规模、创新平台、企业数量等位居全国前列，发展水平跻身国家第一梯队。

科研实力雄厚，聚集了生物医药领域 3 位诺贝尔奖获得者，院士 55 人，形成了一支以诺贝尔奖获得者、“两院”院士和产业领军人才等为引领的多层次人才梯队。

As one of the most dynamic emerging industries in the city, this sector ranks among the top nationwide in terms of industry scale, innovation platforms, and number of enterprises, placing it in the leading tier at the national level.

The research strength is robust, with three Nobel Laureates and 55 academicians in the field of biomedicine, forming a multi-tiered talent pool led by Nobel Laureates, academicians from the "Two Academies" (Chinese Academy of Sciences and Chinese Academy of Engineering), and industry leaders.



智能装备与机器人产业

Intelligent Equipment and Robotics Industry

拥有智能装备产业企业 3000 余家，其中规模以上企业近 400 家，2022 年广州智能装备实现总产值 721 亿元，占全市高端装备制造业的 1/5，积聚了 40 多家机器人及智能装备企业。

There are over 3,000 enterprises in the intelligent equipment sector, including nearly 400 above designated size. In 2022, the total output value of intelligent equipment in Guangzhou reached 72.1 billion CNY, accounting for one-fifth of the city's high-end equipment manufacturing sector and attracting more than 40 robotics and intelligent equipment enterprises.



新材料与精细化工产业

New Materials and Fine Chemicals Industry

广州重点发展先进高分子材料、先进无机非金属材料、先进复合材料、先进合金材料、工程塑料及精细化工产品，加强石墨烯新材料、3D 打印高性能材料等前沿新材料研发与突破

Guangzhou is focusing on the development of advanced polymer materials, advanced inorganic non-metallic materials, advanced composite materials, advanced alloy materials, engineering plastics, and fine chemicals. The city is also enhancing research and breakthroughs in cutting-edge new materials such as graphene and high-performance 3D printing materials.



Connecting what matters.™

轨道交通产业

Rail Transit Industry

轨道交通产业创新差异化发展布局，谋划构建以广州为中心、辐射周边城市的都市圈快线网络，2023 年产值突破 2500 亿元，2025 年广州轨道交通产业规模有望达到 3000 亿元。

The rail transit industry is laying out a differentiated innovation development strategy, planning to establish a metropolitan express line network centered around Guangzhou and extending to surrounding cities. In 2023, the output value is expected to exceed 250 billion CNY. By 2025, the scale of Guangzhou's rail transit industry is anticipated to reach 300 billion CNY.



ALSTOM



数字创意产业

Digital Creative Industry

数字经济综合实力持续稳居全国第一梯队，2023 年数字经济核心产业增加值达到 3946 亿元，同比增长 8.6%，占全市地区生产总值的 12.8%，预计 2024 年数字经济核心产业增加值将迈上 4200 亿元新台阶。

The comprehensive strength of the digital economy continues to rank among the top tier nationwide. In 2023, the added value of the core industries of the digital economy reached 394.6 billion CNY, an increase of 8.6% year-on-year, accounting for 12.8% of the city's GDP. It is projected that in 2024, the added value of these core industries will reach a new level of 420 billion CNY.



Joyy



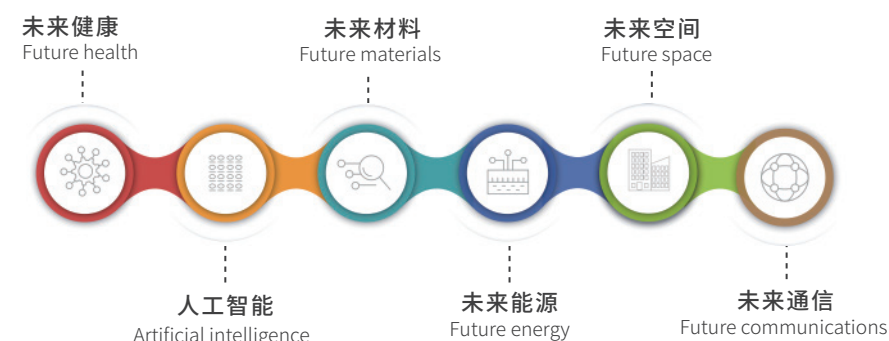
Mobvista

未来产业

Future Industries

广州正积极谋划推进未来健康、人工智能、未来材料、未来能源、未来空间、未来通信等产业发展。

Guangzhou is actively planning and advancing the development of future industries, including health, artificial intelligence, advanced materials, future energy, space technology, and future communications.



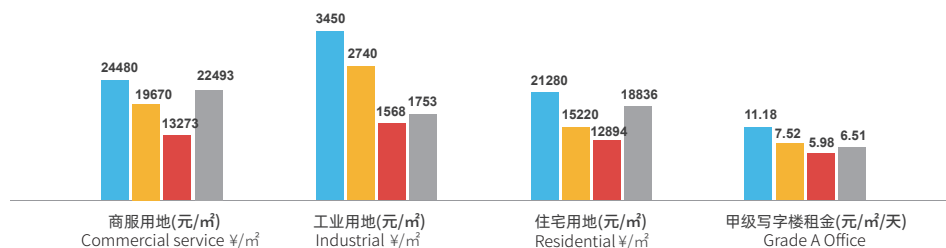
营商环境看广州 BUSINESS ENVIRONMENT SHINES IN GUANGZHOU

01 投资成本洼地 Investment Cost Advantage

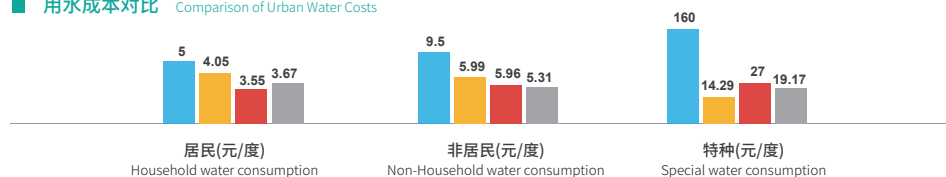
广州的商服、工业、住宅基准地价在全国四大一线城市之中最低，甲级写字楼日租金最低，用电成本一线城市最便宜。

Guangzhou has the lowest benchmark land prices for commercial services, industry, and residential use among the four first-tier cities in China. The daily rental rates for Grade A office buildings are also the lowest, and the costs of water and electricity are the most cost-effective in first-tier cities.

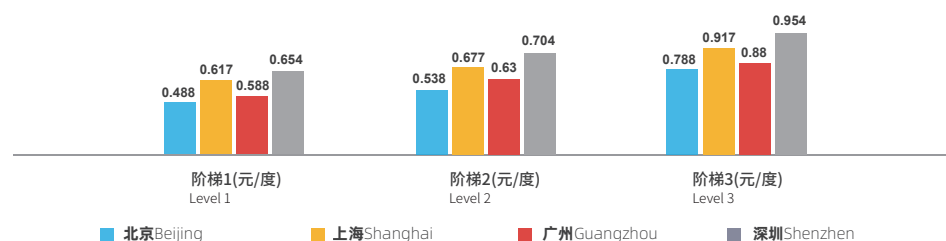
■ 商服/工业/住宅用地、甲级写字楼成本对比 Comparison of Costs for Commercial Services, Industrial, Residential, and Grade A Office Buildings



■ 用水成本对比 Comparison of Urban Water Costs



■ 用电成本对比 Comparison of Urban Electricity Costs



来源:网上公开信息数据截取整合
Source: Integration of publicly available online information data

02 湾区枢纽中心 GBA Transportation Hub

■ 湾区海陆空交通 Land, Sea, and Air Transportation in GBA



白云机场全国三大国际航空枢纽机场之一
Baiyun Airport is one of the three major international aviation hubs in the country.

旅客吞吐量 6317 万人次
Passenger throughput reaches 63.17 million.

NO.1
全国第 1
Top 1 of China

航线连接全球 234 个航点
The routes connect to 234 destinations worldwide

货邮吞吐量 203 万吨
Cargo and mail throughput amounts to 2.03 million tons.



广州港是国家主枢纽港和集装箱干线港
Guangzhou Port is a national primary hub port and a key container trunk port.

货物吞吐量达到 6.8 亿吨
Cargo throughput has reached 680 million tons.

NO.5
货物吞吐量
Cargo throughput

开通航线 260 条,其中外贸航线 154 条
A total of 260 routes have been opened, including 154 international trade routes.

集装箱吞吐量达到 2540 万标箱
Container throughput has reached 25.4 million TEUs.

NO.6
集装箱吞吐量
Container throughput

通达全球 400 多个港口
Connecting to over 400 ports globally.



广州南站特大型铁路枢纽
Guangzhou South Station is a major railway hub.

发送旅客 1.3 亿人次
1.3 billion passengers in total

NO.1
全国第 1
Top 1 of China

白云站是全国最大的
TOD 大型综合交通枢纽之一
Baiyun Station is one of the largest TOD comprehensive transport hubs in the country.



城市轨道交通
Urban rail transit.

总里程 675 公里
(地铁 653 公里、城际 22 公里)
Total length of 675 kilometers (metro 653 kilometers, intercity 22 kilometers).

NO.3
全国第 3
Top 3 of China

运营线路 18 条
A total of 18 operational lines

03 人力资源高地 Human Resources Hub

广州是中国通往世界的南大门，一直以来都是国际人才汇聚之地，作为粤港澳大湾区的核心城市吸引了不少国际人才的目光，成为工作、经商的优选之城。

Guangzhou is known as the southern gateway of China to the world and has long been a gathering place for international talent. As a core city in the GBA, it attracts considerable attention from global professionals, making it a preferred city for work and business.

■ 在穗外籍人士 Foreign nationals in Guangzhou

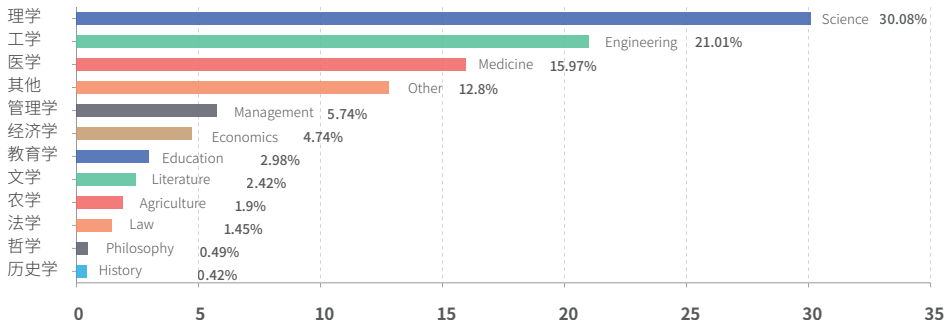


来源：广州市人力资源与社会保障局 Source: Guangzhou Human Resources and Social Security Bureau

海外留学人才 High-Quality Overseas Talent

40 岁以下拥有海外留学、工作经验国际青年人所读专业中，理工类学生占比超过五成。

Over 50% of international youth under 40 with overseas education or work experience are in STEM fields



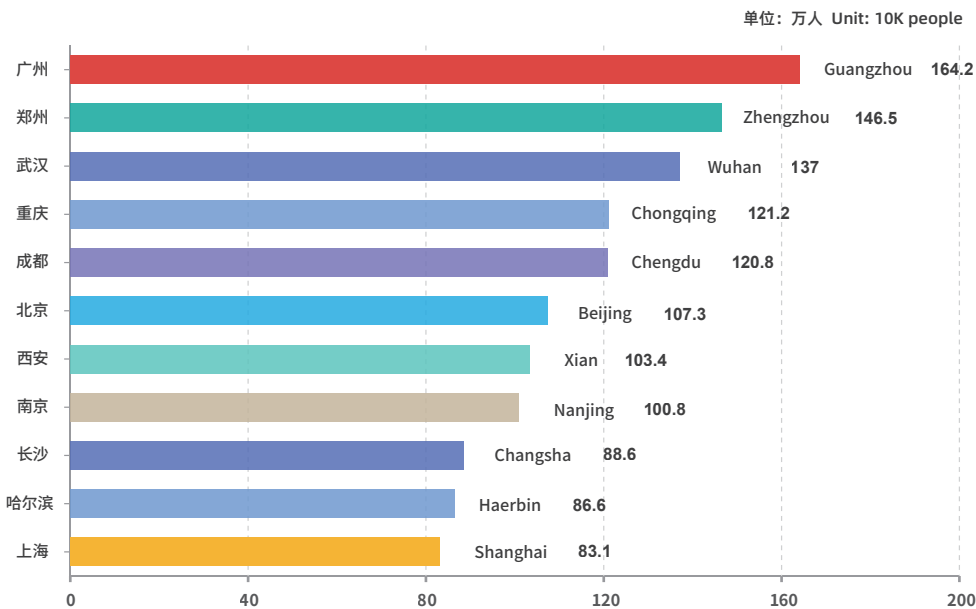
本地大专院校 Local Higher Education Institutions

广州拥有 86 所高校，其中 7 所双一流大学，是高校最多的城市之一，在校大学生总量 164.2 万，蝉联全国第一，每年为本地劳动力就业市场输送大量高素质新生力量。

集结了全省 97% 的国家重点学科、70% 的科技人员和 95% 的博士；各级重点实验室数量均居全省第一。人口结构年轻化、劳动人口受教育水平较高。

Guangzhou boasts 86 universities, including 7 Double First-Class universities, making it one of the cities with the highest number of institutions. The total student population is 1.642 million, maintaining its status as the city with the largest number of students in the country, contributing significantly to the local labor market by providing a large pool of high-quality fresh talent. It gathers 97% of the national key disciplines in the province, 70% of the scientific workforce, and 95% of PhD holders, with all levels of key laboratories ranking first in the province. The demographics are youthful, and the educational level of the labor force is relatively high.

■ 主要城市大学生总量排名 Ranking of Total University Students in Major Cities



来源：各地统计部门数据截取整合
Source: Data compiled from various local statistical departments.

04 投资兴业福地 Open and Innovative Governance

广州投资环境获得全球机构高度认可

Guangzhou's investment environment has gained high recognition from global institutions



惠企政策丰富

Rich Policies for Businesses

广州市重点产业促进政策

Key Industry Promotion Policies in Guangzhou



扫一扫
进入政策电子
手册查询
Scan the
QR code for details



广州市促进总部经济发展的若干措施

Measures to Promote the Development of
Headquarters Economy in Guangzhou



扫一扫
阅读
详细政策
Scan the QR code
for details



广州市促进外资高质量发展若干措施

Measures to Promote High-Quality Development of
Foreign Investment in Guangzhou



扫一扫
阅读
详细政策
Scan the QR code
for details



广州市投资政策大算盘

Overview of Guangzhou's Investment Policies



扫一扫
阅读
详细政策
Scan the QR code
for details



宜商宜居融广州 A CITY IDEAL FOR BUSINESS AND LIVING

01 涉外服务机构 Foreign Service Institutions

外国驻穗总领事馆 Foreign Consulates

外国驻穗总领事馆 69 个,数量居全国第二。

There are 69 foreign consulates in Guangzhou, ranking top in China

涉外商协会 Foreign Business Associations



律师事务所 Law Firms



会计师事务所 Accounting Firms



地产行 Real Estate Agencies



外资银行 Foreign Banks



02 便捷生活环境 Convenient Living Environment

签证办理 Visa Services

广州市公安局外国人出入境接待大厅位于广州市解放南路 155 号，专门办理外国人签证证件业务，并保留 24 小时内地居民自助办证区。网址：www.gzjd.gov.cn

The Public Security Bureau of Guangzhou has a dedicated reception hall for foreigners' entry and exit located at 155 Jiefang South Road, Guangzhou. It specifically handles visa and permit applications for foreigners and includes a 24-hour self-service area for local residents. Web: www.gzjd.gov.cn

涉外支付 Cross-Border Payments

为帮助外籍人士更好地了解在广州使用云闪付、微信、支付宝等移动支付，白云国际机场作为广州首个优化支付服务示范区，T1 航站楼国际到达行李提取大厅、T2 航站楼国际到达航站楼出口服务台现场可免费领取《外籍来穗人员支付服务手册》，并提供中英双语等多种语言的服务。

广州重点涉外区域已有超过 65% 的商户可以接受境外发行银行卡，可受理外卡的 ATM 覆盖率超过 95%，国外的银行卡也能够 ATM 上取现。

To assist foreigners in using mobile payments such as Union Pay, WeChat Pay, and Ali pay in Guangzhou, Baiyun International Airport has become the first optimized payment service demonstration area in Guangzhou. Visitors can pick up the "Payment Service Manual for Foreign Visitors" for free at the international arrival luggage claim hall in Terminal 1 and the exit service desk in Terminal 2, with services available in multiple languages, including Chinese and English.

Over 65% of merchants in key foreign-friendly areas of Guangzhou accept internationally issued bank cards, and the ATM coverage rate for foreign cards exceeds 95%, allowing withdrawals from ATMs with overseas cards.

医疗健康 Medical and Health Services

中国第三大医疗中心，作为粤港澳大湾区特有的政策，大湾区“港澳药械通”指定医疗机构，可为在穗港澳人士带来更优质的医疗服务。

Guangzhou is one of the third largest medical centers in China, There are nine designated medical institutions that participate in the "Hong Kong & Macao Registered Medicine Access to GBA" program, which provides higher quality medical services for individuals from Hong Kong and Macao.

“港澳药械通”指定医疗机构 Designated medical institution	网址 Website
中山大学附属第一医院 The First Affiliated Hospital, Sun Yat-sen University	https://www.fahsysu.org.cn
广东省人民医院 Guangdong Provincial People's Hospital	https://www.gdghospital.org.cn
中山大学孙逸仙纪念医院 Sun Yat-sen Memorial Hospital, Sun Yat-sen University	http://www.gzsys.org.cn
南方医科大学南方医院 NanFang Hospital, Southern Medical University	https://www.nfyy.com
广州市第一人民医院南沙医院 Guangzhou First People's Hospital (Nanshan)	https://www.gzhosp.cn
广东祈福医院 Clifford Hospital	https://www.cliffordhospital.org
广州和睦家医院 Guangzhou United Family Hospital	https://guangzhou.ufh.com.cn
广州现代医院 Modern Hospital Guangzhou	https://www.22221111.com
广州希玛林顺潮眼科医院 C-MER (Guangzhou) Dennis Lam Eye Hospital	https://www.gzcmer.com

子女入学 Enrollment of Foreign Nationals' Children

得益于粤港澳大湾区的经济发展和对外开放程度，广州作为外籍人士居住最多的城市之一，外籍人员子女学校数量一直居全国前列，办学投入和教育发展均处在较高的水平，充分满足来穗投资、就业、经商外籍人士的子女教育需求。

Thanks to the economic development and openness of the GBA, Guangzhou, as one of the cities with the largest expatriate population, ranks top in China for the number of schools for foreign nationals' children. The investment in education and development of these institutions are both at a high level, fully meeting the educational needs of the children of expatriates engaged in investment, employment, and business in the city.

广州市外籍人员子女学校(各区分布) Distribution of Schools for Foreign Nationals' Children in Guangzhou by District		
黄埔 Huangpu	广州美国外籍人员子女学校 (AISG) American International School of Guangzhou	
	广州贝赛思外籍人员子女学校 BASIS International School Guangzhou	广州科学城爱莎外籍人员子女学校 ISA Science City International School of Guangzhou
	广州诺地安格外籍人员子女学校 The Nord Anglia International School of Guangzhou	广州日本人外籍人员子女学校 Japanese School of Guangzhou
白云 Baiyun	广州市新侨外籍人员子女学校 Guangzhou SCA International School	广州奥伊斯嘉外籍人员子女学校 OISCA Guangzhou Japanese Kindergarten
	广州市英伦外籍人员子女学校 Britannia International School of Guangzhou	广州英国外籍人员子女学校 (BSG) The British School of Guangzhou
	广州广外外籍人员子女学校 GDUFS International School, Guangzhou	广州誉德莱国际学校 (UISZ) Utahloy International School Guangzhou
番禺 Panyu	广州加拿大外籍人员子女学校 Canadian International School of Guangzhou	广州市思慧外籍人员子女学校 Guangzhou Grace Academy
	广州韩国学校 Guangzhou Korea School	
天河 Tianhe	广州爱莎外籍人员子女学校 ISA International School of Guangzhou	广州暨大港澳子弟学校 (港澳) Affiliated School of JNU for Hong Kong and Macao's Students
	广州南沙民心港人子弟学校 (港澳) Minxin Hong Kong School (Guangzhou Nansha)	南沙区 Nansha
其他 Other	广州荔湾爱莎外籍人员子女学校 ISA Liwan International School of Guangzhou	荔湾区 Liwan
	广州增城誉德莱国际学校 (UISZ) Utahloy International School Zengcheng	增城区 Zengcheng



宜居生活 Livable Life

吃 Eating in Guangzhou	食在广州 广州酒家、 陶陶居、泮溪、北苑 Guangzhou Restaurant, Taotaoju Restaurant, Panxi Restaurant, Beiyuan Restaurant,
喝 Drinking in Pearl River Charm	珠江魅影 琶醍酒吧街、太古仓酒吧街、 猎人坊酒吧街、天河南咖啡街 东山口咖啡等 Zhujiang Party Pier Beer Culture & Art Zone, Taikoo Liquor Street, Hunter Square Bar Street, Tianhenan Street, DongshanKou Street.
玩 Visiting Attractions	旅游景点 小蛮腰、长隆、 永庆坊、珠江夜游 Canton Tower, Chimelong Tourist Resort, Yongqing Fang, Night Cruise on the Pearl River
逛 Shopping in Famous Commercial Areas	知名商圈 天河路商圈、北京路商圈、 上下九商圈、白云新城商圈 Tianhe Road commercial district, Peking Road, Shangxiajiu Pedestrian Street, Baiyun New City commercial district
买 Buying Renowned Old Brands	驰名老字号 皇上皇腊味、 莲香楼中式礼饼、 五羊雪糕、致美斋 King of Kings Chinese Sausages, Lianxianglou, Wuyang ice cream, Jammy Chai.

编后语 Postscript

《广州外商投资发展报告 2024》精心编纂，涵盖“外商投资在广州”“商业机遇聚广州”“产业链条汇广州”“营商环境看广州”以及“宜商宜居融广州”五大篇章。本报告不仅综合展现了广州外商投资的蓬勃发展、市场的巨大潜力、产业的完善优势、营商环境的卓越以及投资政策与生活环境的吸引力，更深化了对这座城市宜商宜居形象的认识。

我们相信，《广州外商投资发展报告 2024》将助您更全面地认识广州、体验广州。我们期待与您携手合作，共同书写繁荣发展的新篇章。在阅读本报告的过程中，如您有任何疑问或宝贵的意见与建议，敬请随时与我们联系。

在本报告的编纂过程中，我们得到了广州市各级政府部门、各区和重点园区的鼎力支持与协助。在此，我们向所有参与和支持本报告编写的团队和个人致以诚挚的感谢。同时，对于信任广州、选择广州、扎根广州的外商投资者，我们亦表达特别的感激之情，正是广大投资者对广州的厚爱，赋予了广州更加繁荣的今天和充满希望的明天。

The "Guangzhou Foreign Investment Development Report 2024" has been carefully prepared, covering five main sections: "Foreign Investment in Guangzhou," "Business Opportunities Gather in Guangzhou," "Industrial Chains Converge in Guangzhou," "Business Environment Shines in Guangzhou," and "Guangzhou: A City Ideal for Business and Living." This report comprehensively highlights the dynamic growth of foreign investment in Guangzhou, the city's immense market potential, its robust industrial advantages, exceptional business environment, and attractive investment policies and living conditions. It also offers a deeper understanding of Guangzhou's reputation as both a business-friendly and livable city.

We believe that the "Guangzhou Foreign Investment Development Report 2024" will provide you with a thorough insight into Guangzhou and enhance your experience of the city. We look forward to collaborating with you to write a new chapter of prosperity and growth. If you have any questions or valuable feedback while reviewing this report, please do not hesitate to reach out to us.

We would like to extend our sincere thanks to the various government departments, districts, and key parks in Guangzhou for their strong support and assistance in preparing this report. We also express our special gratitude to the foreign investors who have placed their trust in, chosen, and committed to Guangzhou. Their support has been instrumental in shaping the city's current prosperity and promising future.



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