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NETHERLANDS BUSINESS SUPPORT OFFICE WUHAN
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This report is part of a series of economic overviews of important regions in China, initiated and developed by the Netherlands Economic Network in China. For more information about these reports, visit www.zakendoeninchina.org or contact the Netherlands Embassy in Beijing at pek-ea@minbuza.nl.

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CONTENTS

This report provides an overview of the economy of Central China’s Hubei Province; what it is today and in which direction it is heading. We introduce both the province’s key cities and the roles they play in the province’s economy and main industries. We give an overview of the opportunities the region has to offer for Dutch businesses in a wide range of sectors.

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GENERAL INTRODUCTION OF HUBEI PROVINCE

NETHERLANDS ECONOMIC NETWORK IN CHINA
The Dutch economic network in China consists of the embassy in Beijing, the four Consulates-General in Chongqing, Guangzhou, Hong Kong and Shanghai, and six Netherlands Business Support Offices (NBSOs).

The NBSOs, a network of 22 offices in nine countries, were set up by the Ministry of Economic Affairs (via NL Agency) to support Dutch businesses in international trade and investment. The NBSOs are particularly effective in supporting small and medium-size enterprises (SMEs).

In China, there are currently six NBSOs (Chengdu, Dalian, Jinan, Nanjing, Qingdao and Wuhan). The NBSO in Wuhan covers the province of Hubei which is located in central China. Wuhan is the biggest and most important city in central China with a total population of approximately 10 million. In addition to helping Dutch companies come to China, NBSOs do interdependent research and support Chinese investors in entering the Netherlands.

GEOGRAPHY
Hubei is situated in central China. Central China consists of the provinces: Shanxi, Henan, Anhui, Hubei, Hunan and Jiangxi. Taking Wuhan, the capital of Hubei, as the centre of a circle, within 1,000 kilometres, you can reach Beijing and Tianjin in the north, Guangzhou and Hong Kong in the south, Shanghai, Hangzhou and Taipei in the east, and Chongqing, Chengdu and Xi’an in the west, covering 70% of the large and medium sized cities in China.

The Jianghan Plain takes up most of the central and eastern part of Hubei, while the west and the provincial border areas are more mountainous. The highest peak in Hubei is the Shennong Peak, found in the Daba Mountains in the western part of the province; it has an altitude of 3105 m. Hubei covers an area of 185,900 km2, about 4.5 times the size of the Netherlands; from east to west it covers 740 km and from north to south 470 km. The total population of the province is approximately 61 million.

The name of the province Hubei means north (bei) of the lake (hu), the lake refers to the Dongting Lake, situated between provinces Hubei and Hunan. The province has rich water resources as it is home to many rivers and lakes. Hubei has, within its territory, 1,193 rivers with a total length of 35,000 km. Also China’s longest river, the Yangtze River, flows for 1061 km through the province. Numerous lakes of different sizes dot the Jianghan Plain giving the province the name, “Province of Lakes”. It is one of the most fresh water lake intensive provinces in China. Internationally the province is probably most know for the Three Gorges Dam located in Yichang, in the western part of the province.

Lying in the sub-tropic zone, Hubei has four distinctive seasons. The average temperature is 0 degrees Celsius in winter and 30 degrees Celsius in summer. Hubei has abundant rainfall and sunshine year around.
ECONOMIC OVERVIEW OF HUBEI PROVINCE

ECONOMY
While visiting Wuhan in 2009, Premier Wen Jiabao stated that the central government anticipates for Wuhan to take the leading role in the development of the central region of China. In the same year, the State Council of China approved the plan for “Facilitating the Rise of Central China” and it has officially become a national strategy to build Wuhan to be the strategic supporting point for the rise of central China. Wuhan is and will be the largest transportation hub in central China, bridging east and west, and north and south. Wuhan boasts the largest river-port in China and the largest airport of central China. With the opening of the 3rd airport terminal in 2014, the annual passenger capacity of the airport will reach 38 million.

Hubei is the hydropower base of China. It boasts abundant water resources and its hydropower facilities are capable of generating 31.334 million KW of electricity. The Three Gorges Project, presently the largest hydropower project in the world, is located in Hubei province. This project alone has a total installed capability of generating 18.2 million KW.

The pillar industries of Hubei are: automobile, iron and steel, petrochemical, food processing, equipment manufacturing, electronic information and textiles. Furthermore the province is strong in the metallurgical industry, hydropower, shipbuilding, and logistics. It takes the leading place in China in the R&D of photoelectron and Global Positioning Systems (GPS).

In terms of total GDP Hubei ranked 9th in China with a total GDP of 363 billion USD (2012). The annual GDP growth rate in 2012 was 11.3% well above the national average GDP growth rate of 7.8%. Hubei is catching up with the provinces located on the east coast of China, of all provinces in the top 10 only Sichuan showed higher GDP growth rates.

HISTORICAL CONTEXT
The history of Hubei can be traced back for over 5,000 years ago; to the time when Shennong the Great Emperor, the first ancestor of the Chinese nation, was born in Suizhou, Hubei. The Relics of Panlong City excavations in Wuhan have a history of more than 3,500 years. It is one of the oldest cities discovered in China.

The Chu Culture originated in Hubei, being one of the main Chinese cultural schools. The Chu culture arose from the ancient Kingdom of Chu during the Spring and Autumn Period (770 BC - 476 BC). In the Three Kingdoms Period (220 AD - 280 AD), Hubei was an area contested by all strategists of the time and for this reason many famous historical events took place here. The most famous one being the Battle of Red Cliffs.

In more recent times, Hubei has played an important role in the history of China. The modernizing reforms of the founder of modern industry in China, Zhang Zhidong, made Hubei and especially Wuhan into a prosperous centre of commerce and industry. Hubei is known as the birthplace of China’s modern industry. Wuhan became one of the biggest centres of modern industry, commerce, culture and education in China. Hanyang Iron factory built in Wuhan in the 1890s was the first modernized iron and steel complex in Asia. In this period Wuhan was known as ‘Da Wuhan’, which can be translated into ‘big’ or ‘great’ Wuhan.
and was considered the second most important city in China, after Shanghai. In recent years Wuhan is looking to revive the ‘Da Wuhan’ slogan and once again be one of China’s leading industrial and commercial cities.

The uprising of the 1911 revolution, known as the Wuchang Uprising, occurred in Wuhan. Under the leadership of Dr Sun Yat-sen, the revolution ended the feudalism which lasted for more than 2,000 years and the Republic of China was formed.

### QUICK FACTS 2012

<table>
<thead>
<tr>
<th>Capital</th>
<th>Wuhan</th>
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<tbody>
<tr>
<td>Population</td>
<td>61 million</td>
</tr>
<tr>
<td>Size</td>
<td>185,900 km²</td>
</tr>
<tr>
<td>Total GDP</td>
<td>363 billion USD</td>
</tr>
<tr>
<td>Total GDP ranking</td>
<td>9th</td>
</tr>
<tr>
<td>GDP per capita</td>
<td>6,111 USD</td>
</tr>
<tr>
<td>GDP per capita ranking</td>
<td>13th</td>
</tr>
</tbody>
</table>
| Sister province / city relations | Hubei Province - Gelderland (April 24, 2006)  
Wuhan City - Arnhem (Sep 7, 1999) |
| Industries   | Automobile, iron and steel, petrochemical, food processing, equipment manufacturing, electronic information and textiles |
| Major Export items to the Netherlands | Garment / textile products, mobile phones, ships, medical products, chemicals and small machineries |
| Major Import items from the Netherlands | Marine equipment, machinery, raw material, waste paper and chemicals |

Source: China statistics information
REGIONAL CONTEXT

MAIN CITIES

The main cities in Hubei are Wuhan, Yichang, Xiangyang, Jingzhou and Huangshi. Wuhan, being the capital of Hubei, forms the provincial centre while the cities of Xiangyang and Yichang are the two provincial sub-centres.

WUHAN

Wuhan is the capital of Hubei province and the largest city of central China; the population of Wuhan is just over 10 million (2012). Wuhan is known as the Heart of China’s Economic Geography and is a traditional inland transportation hub, it is also an important industrial, educational and research base. Wuhan is within a radius of 300km from the other major cities in central China such as Changsha, Zhengzhou, Hefei and Nanchang.

Wuhan serves as the political, economic, educational and cultural centre of Hubei Province. The city comprises of three sections, i.e. Hankou, Hanyang and Wuchang, also known as the “Three towns of Wuhan”. Wuhan is the biggest water, land and air transportation hub in central China, making it known as “the gateway to nine provinces”. Wuhan stands out as China’s geographical “heart”, as it is ideally situated within 1,000km of cities including Beijing, Shanghai, Guangzhou, Chengdu and Xi’an. This 1,000km radius covers over 1 billion of China’s population and 90% of the total economy in China. The geographical location of Wuhan creates a unique transportation advantage. Wuhan forms the intersection of the Beijing-Hong Kong high speed railway and the Shanghai-Wuhan-Chengdu passenger line. Wuhan also boasts the largest airport in central China; Wuhan Tianhe Airport. The airport sees an increasing number of international flights, currently it serves over twenty international routes. Air France-KLM started operating a direct flight from Paris to Wuhan.

Wuhan Metro currently consists of two lines with a total of 47 stations, and a total operating length of 57 km. According to plan the main city line network will reach 333 km with a total of 309 stations by 2017. In the future, 66 percent of the population of Wuhan will live within a walking distance of 600 meters from a metro station.

Wuhan is known as the “River City”; it is where the world’s third largest river, the Yangtze River and its largest tributary, the Han River, converge. Water forms a large part of the city’s urban area, making up 25% of its urban territory, which is the highest proportion among major cities in China. Wuhan boasts nearly 200 lakes, where the East Lake area of 33 square kilometres, is China’s largest lake within a city.
Wuhan is central China’s commercial and financial centre. Early last century, Hankou (one of the towns of Wuhan) had become China’s second largest trade port, and one of China’s four major financial centres. There is an old saying that “Goods sell well when they reach Hankou”. Today, the business battleground still attracts millions of merchants. Currently, the city has nearly 120,000 commercial outlets and the city’s total retail sales rank 5th in China. Wuhan is home to three commercial enterprises which rank among the national top 30 of chain enterprises. The French supermarket chain Carrefour, Germany’s Metro, America’s Wal-Mart and other international retail giants have entered Wuhan. IKEA is expected to open Asia’s largest IKEA shopping centre in 2015. Wuhan has become central china’s financial centre; over 2100 banks, insurance companies, and securities institutions have set up offices in the city.

In terms of industrial development, the city focuses on the photoelectron and information technology sectors, modern manufacturing, steel and new material sector, bioengineering and new medicine sector, logistics and the environmental protection sector.

8+1 CITY RING

The planning and organization of the formation of the Wuhan city cluster, also known as the “8+1 city ring” are crystalizing. This plan consists of taking Wuhan and eight neighboring cities as one metropolitan area and carry out master planning, social planning and economic planning in this metropolitan context. The concept is managed from provincial level and Wuhan takes the lead.

The Wuhan city cluster refers to a group of cities with Wuhan at its core, while the other eight cities: Huangshi, Ezhou, Xiaogan, Huanggang, Xianning, Xiantao, Qianjiang and Tianmen, lie within a 100-kilometer radius. The combined population of the Wuhan city cluster exceeds 30 million.

YICHANG

Yichang, the second city in Hubei (in terms of urban population), is located in the western part of Hubei Province. The city has a total population of 4.15 million, in which the urban population accounts for 1.34 million. The city is at the juncture of the middle and upper reaches of the Yangtze River and forms the gateway to Sichuan Province to the west. Yichang has received world-wide fame because of its Three Gorges Dam, the largest hydropower project in the world. Yichang boasts large amounts of hydroelectric power, water and mineral resources.

Yichang is connected by high-speed rail, there is a direct connection with the cities of Wuhan, Hefei and Nanjing, while the high-speed line between Yichang and Chengdu (with a stop in Chongqing) is under construction. Wuhan can be reached in approximately 2 hours by high-speed train. The Yichang Sanxia airport has flights to over 20 destinations in China including Beijing, Shanghai and Hong Kong.
Xiangyang has an urban population of around 466,000 while its outlying county contains approximately 5.8 million people. Xiangyang is located in the middle reaches of the Hanjiang River in the northwest of Hubei Province. The river runs through the city, dividing the city in north and south.

Xiangyang has good rail, highway, river and air transportation facilities. Xiangyang can be reached within 2.5 hours from Wuhan by high-speed train. The Hanjiang River and four other rivers are open to commercial navigation year-round and the Xiangyang Liuji Airport has flight routes to major cities throughout China including Beijing, Shanghai, Chongqing and Guangzhou.

Textile production is the mainstay industry of Xiangyang followed by machinery manufacturing, chemical processing, electronics, and the manufacturing of construction materials. Agricultural resources are significant with Xiangyang’s main products being grain, cotton, vegetable oil crops, tobacco, tea and fruit. As the home of Dongfeng Motors, Xiangyang is a well-known automobile hub. Other large industries are: energy resources, aviation, medicine, new materials, food processing and military products.
MAIN SECTORS/INDUSTRIES

Hubei and its capital Wuhan are widely known as a heavy industry base of China. The province’s pillars of industry are automotive, metallurgy, shipbuilding, machinery and high-tech. Other important industries are energy, light textile, chemical and bioengineering, electronics, building materials, laser technology and telecommunications. These industries are concentrated in different parts of the province.

- East Hubei: electrical power, petroleum, chemical and textile.
- South Hubei: automotive, electronics.
- North Hubei: textile and heavy duty automotive.

Main export items from the Netherlands to Hubei include marine equipment, machinery, raw material, waste paper and chemicals. The export items from Hubei Province to the Netherlands include garment and textile products, mobile phones, ships, medical products, chemical products and small machinery.

LOGISTICS

Due to its central location Hubei has huge regional transportation advantages. The provincial government is promoting Wuhan, upgrading it to a modern logistics industry. The goal is to build a national logistics hub city with a good layout of modern logistics parks, logistics centres and distribution centres for both domestic and overseas markets. By the end of 2014 China will have built a high speed passenger transport network of “four horizontal and four vertical” passenger lines, making an eight-hour provincial capital traffic circle. Wuhan is at the intersection of this high-speed rail network, and will have a 3.5 to 4-hour traffic circle with China’s key central cities: Beijing, Tianjin, Shanghai, Chongqing, and Guangzhou. In addition China will make Wuhan the shipping centre of the middle section of the Yangtze River: reflecting the fact that the city is already a traffic hub for air, rail, and road transport. Wuhan New Port, which covers the cities of Wuhan, Ezhou, Huanggang and Xianning, aims to become a port transporting billions of containers.

IRON & STEEL

The steel industry is one of the main industrial pillars of the local economy. The most famous company in this sector is the Wuhan Iron and Steel Corporation (WISCO). WISCO ranks third in the production of iron and steel and first in steel slab in China. It recently acquired Kunming Iron and Steel Corporation to consolidate its strong position in China and abroad.

PETROCHEMICAL

The petrochemical industry is one of the pillar industries of Hubei Province. Petroleum extraction, petroleum refining, chemical industry for agricultural use, basic chemical raw materials and rubber processing take the leading role in this industry. Chemical materials produced in Hubei include sulphur iron ore, phosphorus ore, crude oil, sulphuric acid, caustic soda, synthetic ammonia and chemical fertilizer.
AUTOMOTIVE

Hubei ranks second, after Shanghai, in the automotive industry, with Dongfeng Motor Company being the second largest auto maker in China. The most important factories are scattered around the cities of Wuhan, Xiangyang and Shiyan. The joint venture Dongfeng – Citroën – Peugeot is one of the largest automobile manufacturing enterprises in China. Dongfeng also has a sedan producing joint ventures with Honda, Nissan and Kia. Its truck and heavy vehicle production is located in Northern Hubei. Many domestic and international manufacturers and suppliers of auto parts, among those the Dutch companies Philips Automotive Lighting and Akzo Nobel Powder Coating, are located in Hubei. For Dutch auto parts companies, Wuhan can represent several good opportunities.

EQUIPMENT MANUFACTURING

Wuhan is the birthplace of China’s modern industry. Due to the presence of a large steel and iron industry it also became one of the major equipment manufacturing bases in China. Wuhan is seeking to update its ‘old’ manufacturing industry into an advanced manufacturing hub. Hubei has a wide range of equipment it manufactures, such as: machine tools, electric appliances, petrochemical machinery, heavy mining machinery, food packing machinery, engineering machinery, agricultural machinery, combustion engine, cultural and office equipment, etc.

HIGH TECH

The Hubei provincial government is supporting investments in the high-tech sector. The East Lake Development Zone, also known as the “Optical Valley of China”, is located in Wuhan. It aims to develop the biggest optical electronic information industry base in China. It attracts worldwide attention by keeping a stable growth rate of 30% annually for more than 10 years. Wuhan’s optoelectronic information industry occupies an important global position; optical fiber cable and optical devices accounted for 25% of global market share.

BIO-TECH

The Wuhan Biolake, which was established in 2008, is the third largest bio-industry park in China. Over the past four years, 370 enterprises settled down including the Fortune 500 companies Bayer, Pfizer, Thermo Fisher, Fresenius Kabi, Syngenta and Honeywell. Biolake focuses on biological pharmacy, biological agriculture, medical devices, biological manufacturing, health care service and bio-energy.
EDUCATION

Hubei is one of the most developed provinces in education and scientific research. There are over 120 higher learning institutions, including two of the Top Ten Universities in China (Wuhan University and Huazhong University of Science and Technology). Furthermore, Hubei is home to 7 key universities listed in the National 211 Project, a project with the intent of raising the research standards of high-level universities. Up to the end of 2010, the population of undergraduate students in higher learning institutions of Hubei reached 1.4 million and that of the postgraduate students reached 103,000.

AGRICULTURE

Hubei is a major agricultural province in China, due to its rich resources in arable land and water, often called ‘Land of Fish and Rice’. The most important products of its agricultural output are meat, poultry & eggs, grain/rice, cotton and vegetable oil. More area specific outputs are citrus fruit, lotus roots and, due to its many lakes, aquatic products.

As to the exports of agricultural products, Hubei has a leading position in terms of output and quality of meat, poultry and eggs. Other important agricultural export products are aquatic products, among which river crabs, tortoises and soft-shelled turtles, freshwater shrimps and many kinds of fish. Other products like vegetable oil, rice, live pigs, cotton, raw silk, raw lacquer and edible fungus constitute the remaining share of the agricultural export of Hubei. Hubei has a well-developed market distributing system. The wholesale markets at the producing area and the wholesale markets at the selling area are scattered all over the province, which connects millions of small domestic productions with large, changeable markets. Apart from domestic supermarkets, the foreign supermarket chains Carrefour, Wal-Mart and Metro are present in the province. They are rapidly gaining market share. In 2008, SPAR also entered the Hubei market, mainly targeting the western part of the province in cooperation with a local supermarket chain.

Recently, the Wuhan government is seeking to build up a modern and knowledge intensive urban agricultural cluster, mainly consisting of intensive animal husbandry, dairy and horticulture (both vegetables and flowers).

TOURISM

Hubei is rich in tourism resources. The famous Three Gorges (Sanxia) together with the Three Gorges Dam is by far the most famous and visited tourist attraction in Hubei. Wudang Mountain, Yellow Crane Tower and Jingzhou Ancient City are all renowned places for tourists. Tourism in Hubei accounts for 7% of its total GDP, signifying its importance for the provincial economy. The large majority of tourists are Chinese and due to the convenience of the high-speed trains from other major cities to Wuhan, is bound to increase the coming years.

The direct Air France – KLM flight between Paris and Wuhan has increased the number of tourists from Central China visiting Europe and especially France. Also for Dutch organizations operating in the tourist industry there will be possibilities to profit from this direct flight.
OPPORTUNITIES FOR DUTCH COMPANIES

Investors into Hubei can take advantage of:
- the position of Hubei as a logistic hub in Central China serving 400 million potential customers in central China;
- the importance of Hubei as one of the biggest manufacturing bases in China;
- the talent pool of highly educated staff and the abundance of low cost labour;
- abundance of energy and water resources;
- preferential policies by the central government due to the ‘Go West’ and ‘Rise of Central China’ campaigns supporting Hubei;
- low real estate rates (especially compared to China’s east coast);
- new and developing infrastructural facilities.

The central government’s “Go West Policy” and strategy “Rise of Central China” give preferential treatment to foreign companies that move their activities westwards. This includes availability of funds for big public projects. Chances can be found in large scale infrastructural projects with a national scope (highways, high speed railway, shipping navigation) as well as tenders in nationally important and government-commissioned projects like sustainable development, energy related or environmental projects. In general, large-scale improvements in the public space like new roads, reforestation, modernisation of agricultural and complex urban transport projects are commissioned by the local governments and open to Dutch companies to bid on.

The rapid economic development of Hubei and especially Wuhan puts pressure on its resources. Hubei will continue to push forward with urban planning and construction, while at the same time it wants to ensure that a sustainable environmental policy is followed and implemented. This will offer opportunities for Dutch companies active in sectors such as urban planning, clean energy and environmental technology.

A number of economic development zones of various levels stimulate investments with preferential policy packages. New companies can enjoy preferential treatment such as up to 3 years tax breaks, one-stop-shop for all the company’s formalities, free or low cost rent of small office space for a certain period of time, etc.
A 2011 study released by the UK Trade & Investment states that Wuhan offers good opportunities for European companies in setting up production centres for the domestic (Chinese) market and in establishing Research and Development (R&D) centres. According to the report, Wuhan offers a good logistics network, low labour costs, low energy costs and preferential government policies which makes it suitable for local production for the domestic markets. Due to Wuhan’s large pool of university educated workers, the presence of reputable universities and science and technology facilities, high government spending on science and education and a high concentration of technology development zones, it is suitable to set up R&D centres.

Both the population of Wuhan and its per capita income is growing rapidly. A McKinsey report estimates that Wuhan’s GDP will grow with over 400% by 2025. Furthermore, China’s central government is committed to increase domestic consumption and reduce the dependence on exports. Dutch companies can benefit from the growing consumer market in China, also because Western products are still highly regarded in China, especially in the food sector.
CONCLUSION

Wuhan is the centre of Central China as well as the economical heart of China. Wuhan has enormous strategic advantages for companies that are looking for a central location for the manufacturing and distribution of its goods. The Wuhan city cluster exceeding 30 million people, the five provinces of Central China with a population of 400 million and the area within a 1000 km radius covering 90% of the country’s GDP and 85% of the population, can be easily reached from one central location.

Also other cities in Hubei get increased attention from the provincial government. Yichang, in the western part of the province, and Xiangyang, in the north, are the provincial sub-centres. Hubei province wants to accelerate the development of these two sub-centres in order to spread the economic development more evenly over its province. However, the fact remains that Wuhan is the economic, educational, cultural and political heart of the province. Of the 120 higher educational institutions in Hubei an impressive 85 are located in Wuhan.

Many production bases in the east of China are moving to Central and West China as the country’s inland economies are developing. Companies can take advantage of the lower production costs in the central provinces of China as well as the efficiency of its logistics infrastructure. High-ranking universities, such as Wuhan University and the Huazhong University of Science and Technology, continue to take their place as top universities in China. Wuhan’s educated labour pool gives foreign firms an even greater reason to locate their headquarters in Wuhan. France, the US, Korea, and soon the United Kingdom have consulates in Wuhan, which serves as another indicator of the growing importance of the inland city.
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China Statistics Information

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Website of Yichang Government: en.yichang.gov.cn
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