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耿玉德 著

林业产业 化研究



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序

产业化是现代社会化大生产的产物，是实现工业化的必由之路，是促进信息化带动工业化进而实现国民经济现代化的重要途径，是实施可持续发展战略的要求。产业化，首先要形成产业，但不是形成了产业就是产业化了，还要将“产业”“化”了。形成产业，既包括已形成的传统物质生产部门的产业，也包括非物质生产部门将可能形成的新兴产业，既包括有形物质产品产业，也包括无形非物质产品（生态、社会效益产品，知识、信息、技术产品等）产业。化，就是市场化、企业化、专业化、协作化、一体化、区域化、社会化、效益化经营。产业化既是现代产业的一种质态，也是现代产业经营方式的一个根本变革过程。产业化已经成为当今世人关注的热门话题，都在广泛讨论农业产业化、高新技术产业化、信息产业化、住宅产业化、城市污水处理产业化、教育产业化、体育产业化等等。林业产业化问题也在讨论之列，不过由于林业产业化还处于起步阶段，还多是在农业产业化范畴内涉及。

林业虽然广义属于大农业范畴，但是由于林业的特殊性，农业产业化已不能涵盖林业产业化的全部、甚至主要内容，必须单独加以讨论。林业是一个特殊行业，它虽然具有物质产业部门的性质，但它更是一个生态环境建设部门。森林是陆地生态系统的主体，林业是生态环境建设的主体，是从事维护国土生态安全、促进经济社会可持续发展、以向社会提供森林生态服务为主的行业。它承担着培育、管护和发展森林资源，保护生物多样性、森林景观、森林文化

遗产和提供多种林产品的根本任务，肩负着优化生态环境和促进经济发展的双重使命。由此，不仅使林业产业化具有了与农业产业化等明显不同的特点，而且也为研究林业产业化问题带来很大难度。迄今为止，国内外的相关研究还只是参照农业产业化研究，就林业多种经营、林纸等林产工业进行了一定的、零散的、较浅层次的研究工作，尚缺乏从理论与实践的结合上系统、深入的研究，耿玉德做了认真的探索，实为难能可贵。

什么是“林业产业化”？目前从不同角度有多种定义，耿玉德在对其进行认真、系统研究，明确把握必要原则的基础上，给出了很好的较全面、科学的定义：“林业产业化是指以市场需求和社会需求为导向，以效益（生态、经济、社会）为中心，以森林资源及生态环境产业为基础，正确确定主导产业和支柱产业，分区、分类生产，协同经营，实行企业化管理，社会化服务，一体化经营，形成上连基地、下连市场的由结构合理、有机构成的多条足够长的产业链组成的产业体系。”在这部《林业产业化研究》著作中，作者站在林业可持续发展、林业社会化、林区工业化、林业现代化的高度，对林业产业化做了系统、深入研究，提出不少创新观点，做了许多创造性工作：针对传统林业产业划分的弊端，对林业产业进行了重新划分，提出各产业处于不同层次，且互为作用、互为推动，共同构成完整的林业产业体系。研究了林业产业化的特征、标志，提出了一般产业化模式和林业产业化总体模式框架。特别构建了符合国有林区特点的生态环境产业、林产品加工产业、非林非木利用产业的不同产业化模式。构建了以节点企业相互链接，物流、资金流、技术信息流和服务流相配套的林业产业链以及符合国有林区特点的特色产业链群。构建了林业产业化三个方面、四个层次的评价指标体系。有针对性地提出了发展林业产业化的相关对策、措施。

这些成果对我国林业实现跨越式发展都具有重要的理论、学术研究和实践指导意义。

《林业产业化研究》一书是耿玉德基于他的博士学位论文整理出的一本专著，尽管还具有探索性质，但仍不失为一本较高水平的著作，使人读后开阔视野、启发思路。愿本书能受到广大读者的青睐。

蒋敏元
2002年6月

摘 要

我国林业经过 50 多年的改革与发展，目前正在由传统林业向现代林业过渡，实施林业产业化是实现林业现代化的重要途径。本书遵循相关产业理论，从林业产业结构优化、林业产业升级、林业产业组织完善的角度出发研究林业产业化问题，为实现我国林业的这一过渡提供了坚实的理论基础。该研究无论对解决我国林业目前所存在的诸多问题，还是对未来林业的发展，都具有重要意义。

传统林业是单一木材生产的产业，这是对林业产业认识的不完整。从理论上说，林业产业结构的转换包括林业产业数量的构成及其质态的变化，而这种变化取决于产业地位的更迭和它们在经济发展中作用的变化。在实践中，森林资源产业、生态环境产业、林业高新技术产业等已经或正在崛起，并且在经济可持续发展中占据越来越重要的地位。本书对林业产业进行了新的分类，既包括了传统产业，也包括了这些新兴产业。同时指出：这些产业处于不同层次，且相互作用、相互推进，共同构成了完整的林业产业体系。这种林业产业划分，为林业产业的全面经营和实施林业产业化奠定了理论基础。

林业产业化是对林业经营方式的根本变革，是对林业产业组织的重构，它是以森林资源和生态环境产业为基础，以综合效益发挥为核心，通过分区、分类生产，协同经营，所形成的结构合理、多条足够长的产业链有机构成的林业产业体系。它体现了森林资源和生态环境产业的基础性、三大效益的协同性、林业产业经营的系统性及林业经营的社会性特征。这些特征也充分反映了林业“两大体系”建设、林业可持续发展、林区工业化进程的要求，从而有力推

动了林业现代化进程。

本书在深刻分析影响实施林业产业化的因素基础上,运用相关理论并针对林业产业特点,研究并提出了林业产业化模式,并就模式运行所涉及的市场体系、资源基地建设、主导产业选择等重要方面进行了深入研究。

国有林区林业是我国林业发展和生态环境建设的主体,但是国有林区林业在管理体制、林业产业组织等方面的问题也较为突出,国有林区实施林业产业化是化解这些矛盾、更好地发挥主体作用的现实选择。本书全面评析了国有林区的林业发展过程,分区对国有林区林业产业进行了重新定位,对国有林区森林资源管理体制进行了重构,在此基础上分类构建了国有林区生态环境产业化模式、林木资源利用产业化模式、非林非木资源利用产业化模式。构建了以各企业相互链接,物流、资金流、信息流、服务流相配套的林业产业链体系。

实施林业产业化必须从宏观和微观上具备一定条件。从宏观上需要全社会对林业的全面认识、林业市场体系的完善、适度的政策扶持、加强领导与协调、建立完善的社会化服务体系等;从微观上要求林业企业自组织能力的提高、科技水平的提升、企业间关系的理顺等。为使林业产业化有效实施,从林业产业化效益、林业产业化程度、林业产业链效果三个方面建立了林业产业化评价指标体系。

实施林业产业化是一项复杂的系统工程,由于涉及方方面面的关系,在实施过程中一定会遇到很多的问题。只有采取有效的措施,才能保证林业产业化的顺利实施。本书从林业政策、林业企业科技创新、林业产业化运行机制、林业社会化服务体系四个方面,提出了实施林业产业化的对策措施。

ABSTRACT

Through more than 50 years of reformation and development, the forestry of China is transforming from traditional forestry to modern forestry, and now putting forestry industrialization into practice is an important path by which we can realize forestry modernize. In this thesis we will follow the related industry theories and study problems of the forestry industrialization from such point of views as to upgrade forestry industry, optimize the structure of forestry industry and perfect the organization of forestry industry. And these provide a firm academic base for realizing the transformation. It has important significance not only to solve problems what China forestry is facing now, but also to develop the future forestry.

There is an incomplete cognition about forestry industry in traditional forestry that lumber produce is the singleness function of forestry. Theoretically, the transformation of the forestry industry structure includes both quantitative form of forestry industry and qualitative variety of it, and this variety is determined by the shift of industry's status and the change of its function in economic development. In practice, forest resource industry, environment industry and forestry high technology industry have grown up or are growing, and they play more and more important role in economic sustainable development. Basing on this analysis, we assort the forestry industry in a new way in this thesis. It includes not only traditional industry, but also new industry. Here we must point out: these industries are in different degrees, and

they react each other, boost each other, and make up of an integrated forestry industry system together. And this kind of compartmentalization establishes a theoretic base for the whole management of forestry industry and the implement of forestry industrialization.

Forestry industrialization is a radical reform of forestry managerial method. It is a reconstruction of forestry industrial organizations. Based on forest resource and ecological environmental industry, it centered around the realization of comprehensive results. It is a industrial system of forestry with reasonable constructor and a lot of long enough industrial chains by producing in accordance with zone, type and common management. It emphasized the following characters such as the base of forest resource and industry of ecological environment, coordination of three results, system of forestry industrial management, as well as socialization of forestry management, which reflect the two system of forestry, sustained development of forestry, the demand of forestry industrial procedure so that it can further forestry modernization powerfully.

This thesis profoundly analyzes factors which affect the completion of forestry industrialization, follows relevant theories, refers to industrial characters of forestry, so that it can study and put forward the pattern of forestry industrialization, deeply study the market system according to operation of pattern, construction of the resource base, as well as leading industry.

The state owned forestry companies are main part of forestry development in our country, but they have many troubles in managerial system, forestry industrial organization. The only solution is forestry industrialization carried out in state owned forest zones, which can solve contradiction, realize the main function perfectly. This thesis analyzes the development of state owned forestry widely, redefines

the state owned industry of forestry classified by zone, reconstruct the managerial system of forestry source in state owned forest zones, which construct industrial pattern of ecological environment in state owned forest zones classified by type, industrial pattern of utilization in the resource, industrial pattern of utilization in other resource. This thesis construct an industrial chain of forestry which connect relevant companies, flow of material, capital, information and service.

Implementing forestry industrialization must have definite condition from macroscopical and microcosmic aspect. From macroscopical it needs that society completely understand forestry, consummate forestry market system, moderate policy support, enhance lead and harmony, constitute perfectly social service system and so on; from microcosmic it needs that forest enterprise enhance organization ability, advance lever of science and technology, manage connection between enterprises and so on. In order to effectively implement forestry industrialization, thesis constitutes appraising guideline system of forestry industrialization according to benefit of forestry industrialization, degree of forestry industrialization and effect of forestry industry chain.

Implementing forestry industrialization is a complex system project. Because including many connections we must meet much question and difficulty during implementing it. Only adopting effectively measure can ensure complete implementing of forestry industrialization. Thesis brings forward countermeasure and measure of Implementing forestry industrialization and relates to forestry policy, science and technology innovation of forestry enterprises, forest industrialization movement system and forest social service system.

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