

刘志雄 / 著

中国食品工业发展 研究

Studies on the Development of
China's Food Industry

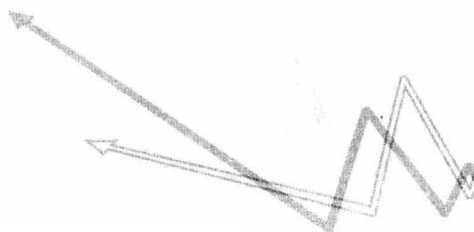


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著 者 / 刘志雄

出 版 人 / 谢寿光

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地 址 / 北京市西城区北三环中路甲 29 号院 3 号楼华龙大厦

邮政编码 / 100029

责任部门 / 皮书出版中心 (010) 59367127

电子信箱 / pishubu@ssap.cn

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摘 要

我国是一个人口大国和农业大国，食品工业事关国计民生，肩负着为我国居民提供安全健康食品的重任，同时也是国家经济发展水平和人民生活质量的重要标志。在过去的几十年间，我国食品工业取得了长足发展，食物综合生产能力得到大幅度提升，居民的营养水平明显改善。尤其在“十一五”期间，我国食品工业呈现快速发展的势头，总产值年增长率约为 24.7%，2010 年食品工业已完成工业总产值约 61273 亿元，约占工业总产值的 8.8%。

然而，随着我国工业化和城镇化的快速发展，以及经济全球化的加速，我国食品工业依然存在许多亟待解决的问题，例如食品工业产业竞争力不强、技术效率不高等。这些问题如果得不到很好的解决，那么，我国食品工业不仅难以满足我国居民对加工食品日益提高的要求，也将不利于其参与国际市场的竞争。

按照我国的行业标准分类，食品工业包括农副食品加

工业、食品制造业、饮料制造业和烟草制造业 4 个细分行业，而按照 SITC 的国际标准分类，食品工业可分为肉制品工业等 14 个细分行业。本书将根据研究的需要，在不同地方使用不同的分类方法。

本书的研究内容大致如下：

第一部分，回顾我国食品工业发展历程。主要集中分析我国食品工业的增长和空间分布状况，以及进行国际比较，旨在为本研究提供背景材料。研究发现，我国食品工业发展较快，集聚水平有一定程度的提高，但与发达国家相比，仍有较大差距；我国经济的不断发展，人口总量和结构变化、收入增长和居民生活节奏加快等成为推动我国食品工业增长的关键因素。

第二部分，考察我国食品工业增长过程中的产业竞争力变化情况。在这部分，首先，从整体产业层面分析我国食品工业的竞争力情况，并与世界主要国家的食品工业竞争力进行对比。研究发现，我国食品工业整体缺乏竞争力。其次，基于 SITC 标准分类，对 14 个细分产业的竞争力进行分析。研究发现，我国食品工业主要在劳动力密集型的细分产业上具有比较优势，但这种优势正在逐渐丧失，而土地密集型的产业则不具有比较优势。最后在上述研究的基础之上，运用 CMS 模型深入探讨了食品工业细分产业竞争力变化的深层次原因。研究发现，我国食品工业出口受一般增长效应和竞争力效应影响较大。

第三部分，针对食品工业的技术效率问题，本研究运用随机前沿生产函数分析我国 4 个细分食品工业的技术效率。研究发现，虽然我国食品加工业技术效率在稳步提高，但是其生产仍然存在显著的技术效率损失；东、中和西部地区食品加工业技术效率呈现一定差异，但整体来说差异不大；城镇和农村居民恩格尔系数、税率、农业资源禀赋、城市化率、FDI、食品安全等因素对食品工业技术效率和增长有一定影响。

第四部分，伴随我国改革开放的日益深化，食品工业的外商投资越来越多。如何评价这种外商投资的效应成为一个重要问题。研究发现，外商直接投资对内资食品加工和制造业企业作用并不显著。

第五部分，分析了我国食品工业发展面临的机遇和挑战。

最后，基于前面的研究，提出了相应的政策建议，以供讨论。

Abstract

As China is such a populous and agricultural country, food industry is of vital importance to the national economy and living standards. In the past decades, the food industry has made big progress, with its comprehensive productivity improved drastically, as well as the people's nutritional level. Especially during the 11th five – year plan, rapid growth continues in China's food industry. For example, annual growth rate of the total value was about 24.7% and the total value of food industry approximated to RMB 6.1273 trillion, accounting for 8.8% of the total industrial value in 2010.

With the industrialization, rapid urbanization and economic globalization, the food industry is still facing many problems. For instance, the Competitiveness of food industry is not strong and the technical efficiency is not high enough. If these problems cannot be handled successfully, not only can people's increasing

demands for processed food not be satisfied, but also it is unfavorable for our food industry joining the international competition.

According to the standard classification in China, food industry includes the food processing industry, the food manufacturing industry, the beverage and the tobacco. Furthermore, in accordance with the SITC, 14 divided industries are included like meat products. Here different classification will be used in different places on the basis of the research. The book is divided into six parts, with the main themes of each part as follows:

Part one reviews the development of China's food industry, and focus on discussing the growth and spacial distribution of China's food industry, then will have an international comparison, which is aimed at providing background information. The results indicate that the food industry grew fairly quick and the level of industrial agglomeration is higher, yet compared to developed countries, there still exists a relatively great gap; Along with the country's strong economic growth, several key factors, including population, consumer's increasing disposable income and quickening life pace, have fueled the fast development of China's food industry.

Part two examines the changes of the competitiveness of China's food industry during the development of the industry.

Firstly, this part shows that China's food industry is less competitive within the market of other main countries in the world through analyzing the competitiveness of China's food industry based on the whole industrial level. Secondly, in accordance with the SITC, the analysis of competitiveness will also be conducted about the 14 divided industries. The results show that China's food industry, especially in labor - intensive divided industries, have comparative advantages which are disappearing slowly, meanwhile land - intensive industries haven't. Thirdly, on the basis of analysis above, the book uses the Constant Market Share Model (CMS) to analyze reasons why the competitiveness of divided food industries is varying. The study shows that exports of food industries are influenced more by the general growth and competent effect.

Part three uses Stochastic Frontier Production Model to analyze the technical efficiency of our four divided food industries. The analysis shows that the technical efficiency of food industry is increasing steadily, but still has obvious loss of technical efficiency. Among the eastern, central and western area, the technical efficiency of food industry is different more or less, but the variation is not that huge. There are several factors, including Engel Coefficient of urban or rural, tax rate, agricultural resource endowment, urbanization, FDI, food safety, influen-

cing the technical efficiency of food processing.

Part four evaluates the effects of FDI of food industry. With China's Reform and Opening up, more and more foreign direct investment go into China. The empirical research indicates that FDI has no significant effects on the domestic food processing industry and food manufacturing industry.

Part five analyzes opportunities and challenges faced by the development of China's food industry.

At last, based on the research above, some corresponding political suggestions are given for further discussion.

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