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CHENGSHI SHUCAI CHANYE ZONGHE  
JINGZHENG LI YANJIU

# 城市蔬菜产业

## 综合竞争力研究

上海财经大学出版社

基本理论与实证分析回顾

城市蔬菜产业综合竞争力的因素分析

城市蔬菜产业综合竞争力的评价方法与评价体系

城市蔬菜产业竞争力提升的实证分析——以上海为例


城市蔬菜产品竞争力提升的实证分析——以上海为例

提升城市蔬菜产业综合竞争力的战略、对策与建议



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## 图书在版编目(CIP)数据

城市蔬菜产业综合竞争力研究/方志权著. —上海:上海财经大学出版社,2005.2

ISBN 7-81098-279-6/F·244

I. 城… II. 方… III. 城市-蔬菜业-市场竞争-研究-中国  
IV. F326.13

中国版本图书馆 CIP 数据核字(2004)第 120186 号

☐ 责任编辑 何苏湘

☐ 封面设计 周卫民

CHENGSHI SHUCAI CHANYE ZONGHE JINGZHENG LI YANJIU  
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上海财经大学出版社出版发行  
(上海市武东路 321 号乙 邮编 200434)

网 址: <http://www.sufep.com>

电子邮箱: [webmaster@sufep.com](mailto:webmaster@sufep.com)

全国新华书店经销

上海第二教育学院印刷厂印刷

上海远大印务有限公司装订

2005 年 2 月第 1 版 2005 年 2 月第 1 次印刷

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850mm×1168mm 1/32 10 印张 216 千字

印数: 0 001—1 300 定价: 23.00 元

# 序

方志权博士所著的《城市蔬菜产业综合竞争力研究》一书,是在其博士论文的基础上充实完成的一部学术著作,也是目前国内较系统、全面研究城市蔬菜产业竞争力的一部专著。

竞争力是经济全球化时代国家、产业、企业生存和发展的决定力量,也是经济学界研究的一个热点问题。然而,目前国内有关竞争力的理论研究相对于现实社会经济发展的需要还较落后,尤其是加入世界贸易组织后,我国农业直接参与国内外两个市场的竞争,更需要专家学者能系统地阐述有关农业竞争力的理论,解释农业竞争力的状况和影响因素,以指导我国农业经济的可持续发展。因此,这一著作的出版无疑在理论上和实践上都具有十分重要的意义。

《城市蔬菜产业综合竞争力研究》一书从两方面做了有益的探索:一方面全面阐述产业综合竞争力的理论依据;另一方面又通过实证,提出切合实际的提升中国城市蔬菜产业综合竞争力的对策建议。其目的是在认清我国大中城市蔬菜产业从数量型发展走向质量型发

展、从关税保护型发展走向自由开放型发展的形势,在国内、国际两种资源可利用优势,国内、国际两大潜在可开发市场的条件下,采取有力措施,使大中城市的蔬菜产业在国内种种机遇下发挥其应具有的行业竞争力,并提高在国际挑战环境下的国际竞争力。

该书的总体框架是以波特的产业国际竞争力等理论为基础,采用比较分析、因素分析、实证分析等方法,通过建立城市蔬菜产业综合竞争力的理论分析框架、评价体系和分析模型,围绕影响和决定城市蔬菜产业综合竞争力提升的因素,结合我国城市蔬菜产业和产品发展的实际,应用指标评价体系和分析模型对影响和决定我国大中城市蔬菜产品和产业竞争力的因素进行全面、系统、细致的计量分析和评价,进而提出我国城市蔬菜产业的发展战略和提升我国蔬菜产业竞争力的对策建议。

该书的特色具体表现在以下几个方面:第一,在研究角度与研究方法上有所创新。作者从中国大中城市的蔬菜产业、产品角度建立了竞争力测定模型和定性评价体系;并对全国大中城市以及近年来上海蔬菜产业竞争力水平进行了测评;从不同角度、不同层次系统分析了蔬菜产业综合竞争力不足的深刻原因,为农业、农产品竞争力的研究提供了一个基本理论工具。第二,在研究内容方面有所创新。作者采用定量与定性相结合的分析方法,对城市蔬菜产品、产业竞争力进行了比较系统、全面的实证研究,尤其是对上海蔬菜的价格和成本、

市场需求状况(包括上海与日本横滨市民蔬菜消费行为调查)的研究翔实丰富,具有一定的独特性和新颖性。第三,在提高蔬菜产业综合竞争力策略的选择上有所创新。作者以蔬菜产业发展“木桶”效应的“短板”接齐与“有所为有所不为”为原则,重点从合理配置城市各类生产要素出发,提出了“做强”“扬长”、“借板”“避短”,有选择性地提高城市蔬菜产业综合竞争力的策略。同时将实施“走出去”战略、现代工业企业理念、农产品身份证制度、产业链管理等新内容和新观点引用到提高城市蔬菜产业竞争力的研究上,提出的对策建议既有针对性,又具可操作性。

方志权博士长期从事蔬菜经济的管理与研究工作,在这方面具有较深的学术造诣,该书是他厚积薄发的一个结果。

正像比较优势和竞争优势理论在不断发展和完善一样,中国蔬菜产业及其他产业的综合竞争力研究也在不断深化之中,书中所涉及的研究内容也还有很多有待探讨之处。希望方志权博士的该项研究成果能引起农业经济学界对有关问题更深入的讨论,出更多更好的研究成果,为提升中国农业的竞争力做出新贡献。

**顾海英**

2004年12月于上海

## 摘 要

蔬菜产业是中国大中城市农业中的重要产业,在提供产品、创造价值、吸纳劳动力、增加农民收入等方面都具有不可替代的作用。改革开放以来,我国城市蔬菜产业发展迅速,市场竞争能力逐步增强。随着中国农产品市场供求关系从卖方市场转向买方市场,城市化进程加快引起的土地资源约束的加剧,城乡居民的恩格尔系数和食品收入弹性系数的下降,资本和技术替代劳动的趋势加快,以及我国“入世”所带来的国内外竞争,使城市蔬菜产业的发展显示出诸多不适应。这些不适应都在一定程度上影响和制约了城市蔬菜产业的发展和竞争力的不断提升。影响与决定城市蔬菜产业综合竞争力的原因究竟何在?在市场经济条件下,如何提升城市蔬菜产业的综合竞争力?对这些问题的研究,不仅具有理论意义而且具有重要的现实意义。

本书以波特的产业国际竞争力理论、消费者行为理论等为理论基础,以研究影响和决定蔬菜产业竞争力的因素为主线,结合中国城市蔬菜产品和产业发展的实际,采用比较分析、因素分析、实证分析、案例分析等方法。以上海为例,在全面调查与典型调查的对比分析、中国与国外现状和问题比较的基础上,通过SWOT分析,提出中国大中城市蔬菜产业综合竞争力提升的战

略与对策建议。本书分理论与实证两大部分,共七章。

首先,本书对与竞争力问题密切相关的经济学和管理学理论进行了梳理,并在大量阅读中、英、日文文献的基础上,对国际国内关于农业、农产品竞争力实证研究现状进行了综述,提出了蔬菜产业综合竞争力的定义,界定了相关概念,在此基础上提出了研究中国大中城市蔬菜产业综合竞争力的重要现实意义。

价格和效用是实现蔬菜产品竞争力的两条基本途径,而其核心在于消费者价值的创造。市场占有率和盈利能力是衡量和检验蔬菜市场竞争力的重要指标,其高低直接反映了竞争力的强弱。蔬菜产品竞争力的基本形态为价格竞争与非价格竞争。本书将蔬菜产品竞争力分为价格、质量、营销、多样化等四方面的竞争力。这四个方面是相辅相成的,各种竞争因素交替在竞争中占据主导性地位,着重培育和发展占主导地位的因素是蔬菜产品在特定市场上竞争致胜的关键。近年来,随着市民生活水平的提高,非价格竞争在蔬菜产品竞争中的重要性逐步上升,对此,无论从政府层面还是从操作层面都应予以重视。

蔬菜产业竞争力是一个城市(地区)蔬菜产业参与市场竞争时表现出的综合能力。本书以迈克尔·波特的产业国际竞争力的“国家钻石”为理论依据,将生产要素条件、市场需求状况、相关及辅助产业状况、产业经营主体作为决定和影响蔬菜产业竞争力的基础因素,把政府行为和机遇作为决定和影响蔬菜产业竞争力的辅助因素。

本书从蔬菜产品在特定市场上的市场份额和盈利能力等方面构建蔬菜产品市场竞争力的测评体系,通过对国际市场占有



率、显示比较优势指数、贸易竞争指数等指标进行国际比较研究。同时以波特的产业国际竞争力理论为理论基础,构建了中国大中城市蔬菜产业综合竞争力研究的经济分析框架,从深层次上剖析了各类因素对蔬菜产业竞争力的作用与影响。本书通过运用层次分析法、综合指数法和人工神经网络等方法,从基础竞争力、核心竞争力和辅助竞争力等三个层次对中国 12 个大中城市以及近年来上海的蔬菜产业竞争力水平及其变化情况进行了横向与纵向的评估和对比分析。

在上述研究的基础上,本书围绕价格、成本、质量、安全、营销、品牌等相关因素,对城市蔬菜产品的竞争力(以上海为例)进行了实证分析,揭示了上海蔬菜产品的成本地位、价格竞争力状况以及形成与变化的原因;通过翔实的数据与案例分析,评价了城市蔬菜产品价格与非价格竞争力方面的缺陷及其对产品竞争力的影响。

对城市蔬菜产业竞争力(以上海为例)的实证研究,则主要从生产要素条件、市场需求状况、相关及辅助产业状况、产业经营主体状况、政府行为与政策等五个方面进行,在系统比较分析的基础上,对城市蔬菜产业竞争力的深层决定因素作出了客观的评价,揭示了城市蔬菜产业发展的优势与劣势以及在农业结构中的地位与作用。本书认为,在 WTO 框架体系下,蔬菜产业的弱质性、市场的波动性、生产经营的外部性、基础设施的公共物品性,决定了在充分发挥市场机制作用的基础上,必须通过政府的宏观调控来克服其市场机制的失灵,保障市场机制有效运行。

最后,本书运用 SWOT 战略分析方法,对中国大中城市的蔬菜产业综合竞争力进行了分析,并相应提出了对策建议。研究认为,城市蔬菜产业的发展既有良好的机遇,又面临严峻的考验。因此必须根据大中城市都市农业功能定位,利用市场、科技、信息、地理等综合优势,有所为、有所不为,扬长避短,实现垂直分工和错位竞争,建设新的制高点,培育新的增长点,提升产业档次,加强产业链接程度,构建城市蔬菜产销发展新模式。

**关键词:**城市蔬菜产业,综合竞争力,指标体系,实证分析

# THEORETICAL AND PRAGMATIC RESEARCH ON IMPROVING COMPREHENSIVE COMPETITIVENESS OF URBAN VEGETABLE INDUSTRY

## ABSTRACT

Vegetable industry is one of the most important industries in urban agriculture of large or medium sized cities, for which is significant to products' promotion, value-making, employment and farmers' income-increasing. Since the reform, China's vegetable industry has kept a high developing speed, and its market competitiveness is gradually strengthened as well. Under the background that the supply and demand relations in agricultural products market has changed from seller's market to buyer's market, urbanization has made the land restriction even stricter, the Engel Coefficient and foods' income elasticity of citizens are decreasing, labor is replacing by capital and technology, and competition is getting fierce both home and abroad after China's entry of WTO, the development of vegetable industry has shown out some incommensurate problems. These problems affect and restrict the development of vegeta-

ble industry and the promotion of its competitiveness. What are factors which affect and decide the comprehensive competitiveness of urban vegetable industry? In market economy, how to promote the comprehensive competitiveness of urban vegetable industry? The research of these issues is of both theoretical and practical significance.

Based on the basic theories, such as the theory of industrial international competitiveness of Michael Porter, the theory of consumer's behaviors, the dissertation follows the clue that which are the factors affecting and deciding the competitiveness of vegetable industry. It takes into consideration the developing practice of vegetable products and industry in Chinese cities, and makes a positivist study of Shanghai. After the analysis of overall investigation, case studies, and domestic and overseas compare of current conditions and existing problems, the dissertation makes the SWOT analysis and presents the strategies and counter-measurements in promoting the comprehensive competitiveness of vegetable industry in large and medium sized cities, using the methods of compare analysis, factor analysis, pragmatic analysis and case study. The dissertation can be divided into two parts, namely theoretical part and positivist part. It has seven chapters.

After a lot of reading of literatures in Chinese, English and Japanese of the author, in this dissertation the relevant

theories of economics and management are brushed up in a new angle. It reviews theoretic and pragmatic researches on competitiveness of agriculture and agricultural products both Chinese and overseas. And it puts forwards the definition of comprehensive competitiveness of vegetable industry, and clarifies the related concepts, then points out the significance of the research on competitiveness of Chinese large and medium size cities' vegetable industry.

In this dissertation, it is believed that price and utility are the two basic embodiments of the competitiveness of vegetable products, while the core of which is the creation of consumer value. Market share and profit are important indicators when measuring marketing competitiveness of vegetable products. There are two basic forms of vegetable products' competition, price competition and non-price competition. While in the dissertation, the competitiveness of vegetable products is divided into price competitiveness, quality competitiveness, marketing competitiveness and diversification competitiveness. Since these four aspects are inter-related and lead the competition by turns, therefore fostering and developing the dominant aspect is the key for vegetable products to win the competition in certain market. In recent years, with the increasing of income level, non-price competition is becoming more important, therefore which should be given more attention both from gov-

ernmental level and managerial level.

Competitiveness of vegetable industry is the comprehensive ability shown by a city or area's vegetable industry in market competition. According to Michael Port's theories of international industrial competitiveness (National Diamond), the dissertation takes production factors, demand, conditions of related industry and the main bodies managing the industry as the basic factors deciding and affecting competitiveness of vegetable industry, and takes government behaviors as the assisting factor as well.

The dissertation establishes an evaluation system of the competitiveness of vegetable products from the aspects of market share and profit-making ability, and makes international comparative studies through the index of international market share, revealed comparative advantage and trade competition coefficient. Also in the dissertation, according to international industrial competitiveness of Port, the research framework of Chinese large or medium sized cities' comprehensive competitiveness of vegetable industries is build up and the functions and effects of all kinds of factors in competitiveness of vegetable industry are analyzed deeply. Using analytic hierarch process (AHP), multi-objective linear weighted averages method and artificial neural network methods, 12 Chinese cities' competitiveness of vegetable industry and that of Shanghai

of recent years are transversely and longitudinally evaluated and compared.

Based on the above research, the dissertation makes a pragmatic analysis of the competitiveness of the urban vegetable products (taking Shanghai as an example) from the aspects of price, cost, quality, security, marketing and brand. It describes competitiveness of cost and price, also analyzes the reasons of the changes of the factors. Based on the data and case studies, the dissertation also evaluates the price and non-price competitiveness, and points out the limitations and its influence to competitiveness of urban vegetable products.

The pragmatic research of urban vegetable industrial competitiveness (taking Shanghai as example) is conducted from the aspects of production factors, conditions of relevant industries, main bodies managing industry, government behaviors and related policies. After systematic and comparative analysis, the dissertation makes objective evaluation of the factors deciding the competitiveness of urban vegetable industry, and points out the advantages and disadvantages of urban vegetable industry and its position and function in agricultural structure. Under the framework of WTO, it is the weak nature of vegetable industry, the fluctuation of market, the externality of its production, the public goods' feature of infrastructure, which decides that government's macro-control aiming to overcome

the market failure and to ensure the effectiveness of market mechanism is a necessary supplement to the full play of market mechanism.

Finally, the dissertation analyzes the comprehensive competitiveness of vegetable industry of large and medium sized cities by SWOT, the strategic analysis method, and correspondingly puts forwards the countermeasures and suggestions. The dissertation points out that urban vegetable industry face both good opportunities and austere challenges. Therefore, according to the poisoning of urban agriculture in large and medium sized cities, their comprehensive advantages of market, technology, information and geography should be used fully, those “dos” and “don’ts” should be known clearly, advantages should be brought into play and disadvantages should be avoided, vertical specialization and differentiation competition should be realized, new growth point should be fostered, industrialization level should be increased, industrial chain should be smoothed and strengthened, and in all a new model of vegetable’s production and selling should be built up.

**KEY WORDS:** Urban Vegetable Industry, Comprehensive Competitiveness, Index System, Positivist Analysis





方志权，1966年1月生，上海奉贤人。上海交通大学管理学博士，高级经济师。现为上海市农业委员会政策法规处副处长，系中国散文诗学会理事、上海市科普作家协会理事、上海农学会理事。主要从事都市农业、蔬菜经济和农业竞争力等方面的研究。主持或主要执笔（参与）软课题30多项，获上海市决策咨询研究成果二等奖与三等奖、上海市科学技术进步三等奖、上海市青年优秀科技论文二等奖与三等奖等。

主要著作（合著）有：《中日蔬菜生产、流通、贸易比较研究》、《中日鲜活农产品流通体制比较研究》、《战后日本农村经济发展研究》、《创建都市农业》、《都市农业导论》、《都市农业概论》、《有机农业与有机蔬菜栽培》、《上海蔬菜概览》等20多部，在《中国农村经济》、《农业经济问题》等核心刊物发表文章100余篇。另有散文、诗歌、报告文学等文学作品散见于各地报纸杂志。