
2013-2014 世界商务

发 展 动 态

2013-2014 REPORT ON WORLD COMMERCIAL
DEVELOPMENT

上海市商务委员会 编著
上海科学技术情报研究所



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前言

2012 年以来全球经济仍在艰难地寻求复苏的路径，作为我国重要经济增长极的上海则进入全面落实创新驱动、转型发展战略，加快“四个中心”建设的关键时期。2013 年 9 月，中国（上海）自由贸易试验区的成立即是我国在加快政府职能转变、探索管理模式创新、促进贸易和投资便利化等方面所进行的重要探索。自由贸易试验区的实践将为上海商贸经济、对外开放和国际贸易中心战略的落实带来机遇、注入活力。

为了跟踪世界商务领域的新产业、新业态和新模式的发展动向，上海市商务委员会偕同上海科技情报所对世界商务发展态势进行了持续的研究，为政府决策、企业创新及上海商务发展起到了较好的信息服务作用。

本书秉承“研究国外、结合国内、针对上海”的原则，围绕上海商务发展热点和重点领域，对世界商务进行跟踪研究。整个研究主要分成三个板块：总论，重点商务领域动态研究以及专题研究。

总论为第一章，阐述了世界商务总体发展态势，对商务领域的重点行业的发展动态作了综述，并简要分析了世界商务发展的一些新趋势。

重点商务领域动态部分共分九章（第 2 ~ 10 章），包括国际贸易、传统商业批发零售贸易、电子商务、大宗商品贸易、现代物流、会展、专业服务、文化创意，以及外国直接投资等领域。各重点行业领域的

研究内容主要涉及产业总体发展态势、市场结构、新型贸易业态、新型商务模式、典型企业的竞争战略、产业新政等。

专题研究涉及4个方面的内容。首先，因应中国（上海）自由贸易试验区的建立，对世界自由贸易区及自由贸易园区的发展现状及其发展模式进行了研究。其次，研究了后金融危机时期的新贸易保护主义的动向，特别对贸易摩擦和贸易争端的典型案例进行了剖析。其三，鉴于总部经济所带来的效应日益显著，设专门章节研究了城市总部经济对商务发展的影响，并对改善商务环境，建设上海总部经济提出了相应的对策思考。其四，对现有的世界金融中心评价体系进行了综述，分析了主要国际金融中心的现状，并总结其发展经验。

在本项报告的撰写过程中，研究人员尽可能收集并参考国内外的最新文献，希望能客观全面地反映世界商务发展的新动向和新特点，但囿于作者的研究能力和学术水平，报告中一定存在疏漏和不足之处，欢迎各方专家、学者提出宝贵意见，以助于我们在后续的研究中能够得以改善和提高。

编者

2014年3月

Preface

The road to recovery for world economy remains bumpy since 2012. However, as one of the most important polar for Chinese economy, Shanghai has been implementing fully the strategy of “Driven by Innovation & Developing via Transition” and accelerating its construction of the “Four Centers”. In September 2013, the *China (Shanghai) Pilot Free Trade Zone* was established and will actively transform the functions of the government, ensuring the trade and investment facilitation in China. The practice in the *China (Shanghai) Pilot Free Trade Zone* will offer opportunities to Shanghai economic development and benefit implementing of the strategy of construction of international trade center in Shanghai.

In order to analyze new features and trends across all business sectors and provide implications for government decision-making and industrial development, Shanghai Municipal Commission of Commerce, together with Institute of Scientific and Technical Information of Shanghai, have continuously tracked and studied the dynamic status of world business development.

Following the general principles of “Study the overseas world, combined with domestic realities and targeted at Shanghai locality”, this annual “Report on World Commerce Development 2013 – 2014” keeps continuity of study contents with emphasis on trend study of major business fields and specialized research of hot issues. The whole report includes three sections, i. e. the general induction, the study of dynamic status of main industries in commerce, and some special topics about commerce.

In chapter one, the general status quo of world commerce is described, and the dynamic status of some commercial industries are also summarized. In addition, some new trends in world commerce are analyzed briefly.

The second section consists nine chapters, including international trade development, conventional commerce sectors (wholesale trade and retail trade), e-commerce, bulk commodities trade, modern logistics, exhibition, professional services, creative industry, and foreign direct investment (FDI). In each chapter, the author analyzes such issues as the general status quo of the topic industry, its market structure, the leading enterprises in the industry, emerging modes of business, industry policies, and so on.

In third section, four topics are discussed. First, free trade areas (FTAs) or free trade regions (FTRs) and their developing modes are analyzed. Second, as the evolution of neo-protectionism in international trade, more trade friction and disputes take place. Thus, some typical cases of trade friction and disputes are studied. Third, we discuss the impacts of the headquarter economy in a city on its commercial development. Forth, according to the current evaluating system of international financial center, we study the status quo of major international financial centers in the world, and summarize their experience which may be used for reference by Shanghai.

In the process of study, we have made the best of collecting the latest reference resources in the hope of establishing the full, objective landscape of commerce development throughout the world. However, constrained by our research capabilities and academic ranks, this publication is bound to have some oversights, errors and omissions. Hence, the authors look forward to sharing and discussing our work and our findings, and sincerely welcome your comments and suggestions.

Editors

March 2014

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