
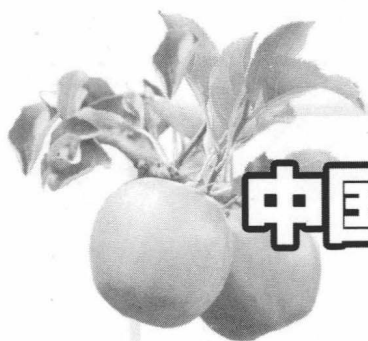


# 中国苹果产业 经济研究

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# 中国苹果产业经济研究

# 【 摘 要 】

苹果是世界上食用最广泛的水果品种，栽培遍及全球 80 多个国家和地区。中国具有悠久的苹果生产历史和得天独厚的地理、气候、人力资源和市场条件。1978 年以前由于受粮食短缺的影响，中国的苹果生产一直处于缓慢发展的状态。改革开放以来，随着粮食以及畜产品等主要农产品供需矛盾的逐步缓解，中国苹果产业出现了飞速发展的态势，苹果产量于 1992 年首次超过美国，并一直名列世界首位，在农业产业结构调整、增加农民收入及出口创汇等方面发挥了重要的战略作用。

本研究将苹果产业发展置于农业产业结构调整 and 食物结构调整的大背景中，根据苹果生产及其加工的需要，以产业理论、市场均衡理论、比较优势理论和国际贸易理论为基础，采用特尔斐调查法、比较分析法、实证分析法和规范分析法以及计量经济模型，从苹果生产供给、消费需求、市场流通、价格政策、加工、国际贸易及国际竞争力等方面进行综合研究，找出中国苹果产业生产、流通、消费以及国际贸易领域中存在的问题，并据此为促进中国苹果产业发展、提高国际竞争力提供战略选择和对策建议。

随着人民生活水平的不断提高以及国际和国内市场对水果需求的不断增加，苹果产业在农业中的地位也迅速提高。从 1978 年到 2001 年，中国苹果生产出现了两个快速增长

期、一个调整期。从2001年开始,中国苹果产销总体形势好转,苹果生产开始由数量型向质量效益型转变,栽培面积逐渐趋于合理,苹果生产进入产业化发展新阶段。随着苹果产量的快速增长以及居民食物结构的调整,苹果消费也出现快速增长的趋势,但城乡和地区差异十分明显。影响苹果的消费因素主要有人口数量、收入水平、销售价格、消费偏好、消费的可替代性、加工水平以及可获得性等。随着中国居民生活水平的提高,苹果的消费量在食物和水果消费中的比例仍然呈上升趋势。按照现有的苹果生产和需求趋势,根据模型分析,中国苹果生产将继续保持较高的年均增长速度,苹果产业发展的空间巨大。

在苹果生产规模达到一定水平后,苹果加工业的发展对整个苹果产业的发展具有决定性作用。中国苹果加工业虽经20多年的艰苦努力,建成了一批高水平的苹果汁加工厂,苹果酒生产也形成了一定的气候,具备了一定的苹果浓缩汁生产能力,但由于起步较晚、加工品种少、加工设备差以及技术力量弱等因素的影响,普遍存在开工不足的问题,加工规模很小,加工效益仍然很低。在加工产品销售方面,一方面由于国内企业缺乏有序竞争,致使中国苹果浓缩汁在国外的销售价格一跌再跌,国际贸易争端频繁;另一方面还存在包装不规范、贮藏条件差、保质期短、运输工具简单等制约因素,造成出口能力较弱。

中国苹果的流通体制经历了新中国成立初期的多渠道自由经营阶段及供销社为主体的计划管理阶段,发展为目前的多样化发展阶段。这种多样化体现为:一是流通渠道多样化,果品流通领域中迅速出现了国家、集体、个体并存;二是在大中城市建立起大批果品批发市场。为了维护自身利

益,不少农村地区还成立了果业协会,或采用“公司+农户”形式,同时也维护了市场秩序;三是发展横向经济联合,实行产销联营;四是加强综合服务,促进产供销现代化发展。中国苹果价格管理体制大体也经历了3个阶段。一是从新中国成立到1956年左右,果品价格在全国尚未实行统一的计划管理。二是主要果品的价格计划管理阶段(1956—1984年),价格管理的范围比购销管理的范围更宽,致使经营模式单一。三是从1984年起,苹果价格退出了计划管理,价格由购销双方协商议定,这种价格上的放活,对1984年以后的果品大幅度增产起到了决定性的作用。

最近几年,中国苹果国际贸易有了较快增长,但与生产相比,国际贸易仍然与世界第一生产大国的地位极不相称。存在苹果生产标准化水平低、苹果品质差、加工薄弱、缺乏品牌、销售组织不力、采后商品化处理程度和贮藏加工水平低等问题。利用国际市场占有率、进口依赖率、贸易竞争指数、显示出的竞争优势等指标研究表明,中国苹果的国际竞争优势有了很大的提高,但是提高的空间依然很大。与其他主要苹果生产国相比,中国苹果生产的竞争优势主要表现在:总量规模优势、生态资源优势、价格优势和区位优势,苹果是中国为数不多的具有明显国际竞争力的农产品。综合以上因素,迎接经济全球化带来的机遇和挑战,发展苹果产业必须充分发挥比较优势,全面提高产品质量,大力推动产品的营销和贸易,积极发展苹果产品加工业,把比较优势变为市场竞争优势,提高国际竞争力。具体的政策建议有:进行农业生产结构布局的战略性调整,促进苹果向优势区域集中;加快苹果流通设施建设,提高贮运能力;提高果农的组织化程度、建立行业协调机制;培育壮大龙头

企业，不断提高辐射带动作用；加强市场营销服务，提高社会化服务水平；采取合理的技术性贸易措施，促进苹果出口贸易；建立对农产品质量的无偿检验制度，启动农产品出口风险保险。



## [ Abstract ] .....

Apple is one of the most popular fruit in the world and widely produced in 80 countries and regions globally. China's apple industry plays a vital role in the country's national economy and agriculture. Since 1992, the apple production of China has surpassed that of the United States to become the top in the world. The past two decades have witnessed a fast development of China's apple industry and its remarkable role in the readjustment of agricultural structure, the increase of farmers' income and the earning of foreign exchange through export. The dissertation takes the readjustment of agricultural structure and food composition as the background for the development of apple industry to analyze the whole production chain of China's apple industry according to the requirement of apple production and processing. The study is based on theories as industry production, market balancing, comparative advantages and international trade, adopts methods of Delphi investigation, comparative analysis, positive analysis and normative analysis. With the purpose of tackling problems in production, marketing, consumption and international trade in China's apple industry. This dissertation puts elaborates some sug-

gestions on developing apple industry and enhance its competitive capability in the global market.

The study elaborated by this dissertation covers 6 areas in apple industry: (1) Production. As the leading country in the world in apple production, China has the advantages of planting history, favorable geographic and climate conditions, human resources and a potential market capacity. With the improvement of people's consumption level and the demand for fruits in both domestic and international market, the state of apple industry in agriculture is getting more and more important. Since China's adoption of the opening policy, the apple industry in China has experienced two fast growing periods and one adjustment phase in its development. Now the apple production bases in the Northwestern region and Bohai gulf region have become the largest production region for high quality apples in the world. (2) Consumption. The consumption of apple is closely relevant to factors such as population, income, price, preference, and substitute and processing. With the improvement of people's living standards, the apple consumption will generally have a rising tendency in food consuming, despite some up and down. According to the analysis model and the current apple supply and demand situation, the expected annual increase of China's apple production will be 4%, leaving a huge space for development. (3) Processing. Due to the late start of the processing industry, China's apple processing is still lagged behind its production. Inefficient and small scale

processing is widely existed because of the lack of fund and up-to-date technologies. Factors like poorly designed package, unfavorable storage condition and short shelf life lower the competitive capability of China's apple processing industry in export and earning benefits. (4) Circulation and Price Policy. The circulation system of China's apple industry has experienced different stages in the past half century. At present, the circulation system is a pluralistic one, with various circulating channels and fast development of fruit wholesale markets in big cities and fruit growers' associations in rural areas. The adoption of the "company plus growers" model has effectively guaranteed the healthy growing of the market. In addition, the combination of production and marketing and the improvement of comprehensive service for the market has further promoted the stepping forward of the apple industry to modernization. The apple price management system in China has walked a long way from a non government-guided system to a planned management system to a negotiated price system according to production and demand. The release of the management on apple price has played an essential role in the rapid increase of apple production after 1984. The current market economy requires an appropriate use of price policy to optimize the production of different apple varieties and seasonal distribution, hence to promote the cultivation of advantageous apple production areas. (5) Competitive capability in the international market. The international trade volume of China's ap-

ple industry does not correspond to its status as a leading apple producer. The main obstacles to apple export are low standardization of production, low quality of products, under-developed processing capability, lack of named brand, inefficient marketing, of stage of commercialized processing after harvest, bad storage conditions and so on. Being a traditional export product of China, the trend of apple export has showed a strong positive sign after China's accession into WTO. Therefore, it is an urgent task for China's apple industry to learn advanced experiences from developed countries and make progress to improve its own international competitive capability.

The leading conclusion of this dissertation is that apple is one of China's few agricultural products with obvious international competitive capability. Compared with other apple production countries, China has the advantages in production scale, rich ecological resources, price and location. According to international market ratio, import dependence ratio, trade competitive indicator and other figures demonstrated by the dissertation, the international competitive capability of China's apple industry has made remarkable progress and still has a huge developing space. In order to embrace the challenge and opportunity brought by the globalization, China's apple industry must take full use of its comparative advantages, improve the quality of its products, develop the processing industry and promote marketing and trade to equip itself with higher competitive capability in the

global market. To achieve these, China's should take positive measures such as implementing strategic readjustment of agricultural distribution for centralizing apple production to advantageous areas; accelerating breeding of high quality varieties; improving the storage condition and commercialization processing standards; encourage the cultivation of leading production and marketing corporations; adopting appropriate technical trade measures; enhancing marketing services; establishing free examination system for the quality control and initiating exporting insurance for agricultural products.

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**摘要**

**Abstract**

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