

新疆

农产品加工业
产业组织研究

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新疆人民出版社

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程广斌 著

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图书在版编目(CIP)数据

新疆农产品加工业产业组织研究 / 程广斌著. — 乌鲁木齐: 新疆人民出版社, 2010.8

ISBN 978-7-228-13838-8

I. ①新… II. ①程… III. ①农产品加工—加工工业—产业组织—研究—新疆 IV. ①F326.5

中国版本图书馆 CIP 数据核字(2010)第 169270 号

责任编辑:徐晓琳

封面设计:雅 涵

出 版	新疆人民出版社
地 址	乌鲁木齐市解放南路 348 号
发 行	新疆人民出版社
电 话	0991-2813860(编辑部) 0991-3652362(发行部)
邮 编	830001
印 刷	乌鲁木齐大金马印务有限责任公司
开 本	880 × 1230 32 开
印 张	7.875
字 数	200 千字
版 次	2010 年 10 月第 1 版
印 次	2010 年 10 月第 1 次印刷
印 数	1-600 册
定 价	26.00 元

摘 要

大力发展农产品加工业是发达国家农业发展的成功经验,也是我国增强农业竞争力的必要途径。当前,农产品加工业发展滞后是制约新疆农业发展的主要障碍,而产业组织方面存在的诸多问题又是制约新疆农产品加工业发展的根本原因。从产业组织视角来研究新疆农产品加工业发展问题,探寻制约其发展的产业组织根源,并提出相应的政策建议,对于优化农产品加工业产业组织,提高农产品加工业整体绩效,增强新疆农业竞争力,为新疆社会主义新农村建设提供强有力的产业支撑,具有重要的现实意义。

产业组织理论是以特定产业内部企业之间的垄断与竞争关系为研究对象,以揭示产业组织活动的内在规律性、为相关决策者及政策制定者提供决策依据和政策建议为目标的一门应用性经济学科,垄断竞争理论是产业组织理论的核心内容,而 SCP 理论范式是产业组织研究的主流分析范式。本书以垄断竞争理论为基础,以 SCP 理论范式为基本分析框架,对新疆农副食品加工等五个主要农产品加工行业的市场结

摘

要

构、市场行为和市场绩效进行了较为深入的实证分析,全书共分为9章。

第1章 导论。在提出本书的研究背景、目的和意义后,对相关文献、研究对象及范围、研究方法与创新点以及研究框架进行了概要论述。

第2章 产业组织相关理论分析。对产业组织理论的相关概念和学科性质进行了界定,重点分析了产业组织理论的核心内容,即垄断竞争理论和SCP理论范式,这是本书研究的理论基础。

第3章 新疆农产品资源及加工业发展现状。对新疆区域概况、农产品资源状况、农产品加工业发展现状及存在的问题作了概况性描述。新疆是我国重要的粮食、棉花、畜产品等农产品生产基地。农产品加工业得到了前所未有的发展,但还存在诸多问题。

第4章 新疆农产品加工业的市场结构。从市场集中度、产品差别化、规模经济水平和进入退出壁垒等四个方面对新疆农产品加工行业的市场结构进行实证分析。新疆农产品加工业市场结构的基本特征是:市场集中度偏低,属于原子型或低集中寡占型的市场结构;产品差别化程度低;规模经济水平低,企业规模普遍小型化;行业的进入壁垒较低,而退出壁垒较高。

第5章 新疆农产品加工企业的市场行为。从价格行为、广告行为、科技创新行为和兼并重组行为等四个方面,采用统计描述与案例分析相结合的方法,实证分析了新疆农产品加工企业典型的市场行

为。新疆农产品加工业的市场行为还处于低级化状态,不能有效地运用现代市场竞争的价格或非价格手段,主要体现在:定价方式单一,定价权力较小,往往只能“随行就市”;企业在广告宣传和科技创新方面的投入明显不足;兼并重组行为获得一定发展,但受政府行政部门的干预过多。这种行为特征的成因在于企业目标多元化、市场结构的分散化和地区发展水平落后等三个方面。

第6章 新疆农产品加工业的市场绩效。从宏观与微观两个层面,分别从国民经济增长贡献率、资源配置效率、技术进步状况、劳动生产率和行业亏损情况等五个方面,对新疆农产品加工业的市场绩效状况进行实证分析。新疆农产品加工业当前的绩效水平较低,表现在:对国民经济贡献度低;行业利润率低,资源配置效率低下;技术进步状况落后,科技投入少,成果少;全员劳动生产率与全国平均水平相比存在较大差距;行业亏损严重,亏损面大。通过对结构、行为、绩效三者之间的关联性进行分析,结果表明,新疆农产品加工业的市场结构、市场行为和市场绩效之间存在较为显著的正相关关系,基本符合主流 SCP 范式的理论观点。

第7章 新疆农产品加工业竞争有效性的判断。在结构、行为、绩效实证分析的基础上,根据竞争有效性的衡量标准,判断新疆农产品加工业市场竞争的有效性。新疆农产品加工行业的市场竞争基本上处于低水平过度竞争状态。生产规模扩张与市场容量有限之间的矛盾、专业化分工与协作程度低、地方政府

的短期行为以及社会保障制度的不健全是造成这种局面的深层次原因。

第8章 新疆农产品加工产业组织优化:目标、思路及政策建议。大、中、小企业合理分工,以“企业共生网络”参与市场竞争是世界各国产业发展的必然趋势。当前新疆农产品加工业的竞争格局是:大企业过少,大、中、小企业之间缺乏合理的分工与协作。新疆农产品加工产业组织优化的目标是形成以促进有效竞争、提高产业竞争力为基本目标的适度集中的“寡头主导,大、中、小共生”的市场结构及竞争格局。新疆农产品加工业目前的竞争格局是在总量规模偏小、整体发展水平滞后的背景下的过度竞争,其产业组织优化要与整体规模扩张同时并举。据此,文章从促进产业组织优化和推动农产品加工业发展两个方面提出政策建议。

第9章 结论与展望。对研究的主要结论进行概括性的总结,并对本研究存在的不足及需要进一步研究的问题进行说明。

本书在分析中主要运用了实证分析方法、规范分析方法、案例分析方法和比较分析方法,创新点主要在于:(1)研究视角的转换。本书以产业组织理论为基础,运用SCP理论范式全面系统地分析了新疆农产品加工业的市场结构、市场行为和市场绩效,在研究视角上具有创新性;(2)完善了测度市场绩效的指标体系。本书在测度新疆农产品加工业的市场绩效过程中,综合运用了宏观与微观两个层面五个方面的指标,完善了测度市场绩效的指标体系;(3)深入探讨了

市场竞争的有效性问题。本书深入地探讨了市场竞争的有效性问题,对新疆农产品加工业市场竞争的有效性进行了评价与判断,并对其成因进行了深入分析,在此基础上提出的政策建议将更具有针对性;(4)提出“产业组织优化要与整体规模扩张同时并举”的观点。本书提出,新疆农产品加工产业组织优化要与整体规模扩张同时并举,整体规模扩大与产业组织优化是互为因果的关系。

Abstract

To develop the processing industry of agricultural products is not only the successful experience in the development of agriculture in developed countries, but also the means necessary to enhance the competitive power of agriculture in China. At present, the lag of processing of agricultural products is the main obstacle to agricultural development in Xinjiang, and the problems in the industrial organization are the deep-seated reasons that hinder the agricultural products processing in Xinjiang. With the industrial organization theory, this dissertation studies on the development of the agricultural product processing industry in Xinjiang, and grope for the restriction of industrial organization. Based on these, it puts forward some policy suggestions to optimize the industrial organization of the processing of agricultural products in Xinjiang. And these will be quite significant to enhance the performance of the processing of agricultural products, to boost up the competitive power of agriculture, and to offer strong industry support for the building a new socialist countryside in Xinjiang.

The theory of Industrial Organization is one applied

economics that study on the relationship of monopoly and competition between the corporations in a specific industry in order to reveal the intrinsic laws, and to provide policy recommendations for the decision – makers and the policy – makers. The theory of monopolistic competition is the core content of industrial organization theory, and SCP is the mainstream analysis paradigm in industrial organization theory. Based on the theory of monopolistic competition and with the SCP analysis paradigm, this dissertation makes an empirical analysis on the market structure, market conduct and market performance of five major industries of agricultural products processing including Food Processing, Food Manufacturing, Beverage Production, Textile Industry and Papermaking and Paper Products. This dissertation has eight chapters as follows:

Chapter 1: the introduction to the dissertation. After the research background, purpose and significance, it makes a general discussion about some related documentation, the objects and the scope to study, methods, innovation, as well as the framework of the dissertation.

Chapter 2: the analysis of the theory of industrial organization. It analyses the core contents of the theory of industrial organization, and they are the monopoly competition theory and SCP theoretical paradigm, which are the theory and method foundation of this dissertation.

Chapter 3: the market structure of the industry of agricultural product processing in Xinjiang. From market

concentration, differentiation of products, economies of scale and the barriers to entry and exit, it makes an empirical analysis on the market structure of the industry of agricultural product processing in Xinjiang. The basic features of the market structure of the agricultural product processing industry in Xinjiang include a low degree of market concentration, the low level of product differentiation, the low level of economies of scale, the low barriers to entry but the higher barriers to exit.

Chapter 4: the market conduct of the enterprises of agricultural products processing in Xinjiang. From the price, advertising, scientific and technological innovation, and mergers and reorganization, with the method of descriptive statistics and case analysis, it makes an empirical analysis on the typical market conducts of the agricultural products processing enterprises in Xinjiang. At present, the conducts of the agricultural products processing enterprises are still in the low - level state and they can not effectively use the modern market price and non - price competition means mainly reflected in single pricing method with little pricing rights, insufficient input in advertising and scientific and technological innovation, and excessive intervention in mergers and reorganization by the executive branch of government. Business goals, market structure and the level of regional development are the three major factors that influence the market conduct of the agricultural product processing enterprises

in Xinjiang.

Chapter 5: the market performance of the industry of agricultural products processing in Xinjiang. From a macro and micro level, and from five aspects of the contribution to the national economic growth rate, the efficiency of resource distribution, technological progress, labor productivity, and industry losses, it makes an empirical analysis on the market performance of the agricultural products processing industry in Xinjiang. At present, the performance of agricultural product processing industry in Xinjiang is bad that the contribution to the national economy is low, profit of industry is low with inefficient allocation of resources, technical progress is backward, there is a widening gap of all – personnel labor productivity between Xinjiang and the national average. Through the analysis on the relationship between the structure, behavior, performance, it shows that there is a significant positive correlation between the market structure, the market conduct and the market performance of the agricultural products processing industry in Xinjiang.

Chapter 6: the judgement of the competitive effectiveness of agricultural products processing industry in Xinjiang. Based on the empirical analysis of structure, behavior and performance, it makes the judgement of the effectiveness of market competition of agricultural products processing industry in Xinjiang. The industrial competitiveness in the market is basically at a low level state

of excessive competition. The contradiction between the expansion of the scale of production and market capacity limited, the short-term behavior of local governments, the low specialization and cooperation and the imperfect social security system are the deep-seated reasons.

Chapter 7: the objectives, ideas and policy recommendations to the industry organization optimization of the agricultural products processing industry in Xinjiang. To promote effective competition and improve the competitiveness of industries, the goal of optimization of industrial organization in Xinjiang is to form the market structure and competition pattern of “oligarchs-led, large, medium and small symbiotic”. The current excessive competition of agricultural product processing industry in Xinjiang is under the background of small scale and laggard economy, so it must expand the overall scale with the industry organizations simultaneously. Accordingly, the dissertation put forward some policy recommendations to optimize the industrial organization and to promote the development of the agricultural products processing industry in Xinjiang.

Chapter 8: the conclusion and prospect of the dissertation.

The dissertation analyzes the industrial organization of the agricultural products processing industry in Xinjiang with the methods of empirical analysis, normative analysis, case analysis and comparison analysis. There

are four main innovations of the dissertation: Firstly, it transform the research perspective. Secondly, it consumes the indexes system that measures the market performance. Thirdly, it probes into the validity of market competition. Fourthly, it puts forward that it must optimize the industrial organization of the agricultural products processing industry in Xinjiang with the overall expansion simultaneously.

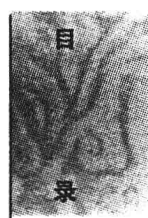
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