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从数量时代到品质时代

中国城镇居民食品消费及其物流保障

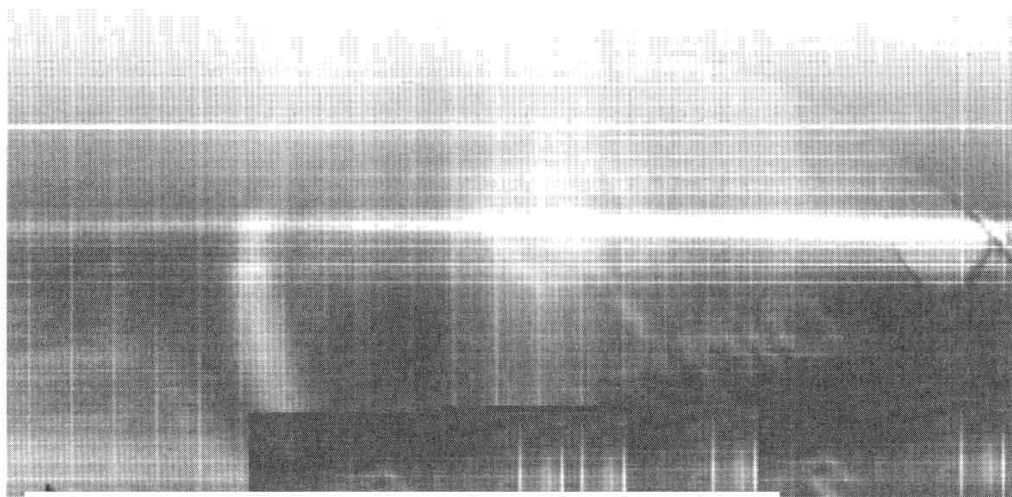
钱乃余 著

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序

“十二五”对中国来说,是全面建设小康社会的关键时期;是深化改革开放,加快转变经济发展方式的关键时期;是中国经济进一步融入世界经济的战略机遇时期。面对这一总的形势,中国物流业将进一步显现大发展、大调整、大变革的基本特点,发展、调整、变革将成为贯穿整个“十二五”的一条红线。

影响“十二五”中国物流发展的因素很多,其中一个重要的因素是提升消费对国民经济发展的拉动力。中国在世界上是消费推动比较低的国家,国民生产总值的增长过多地依靠投资和出口,特别是进入新世纪以来,情况更为严重。2001—2008年,投资的贡献率达到47.8%,而消费的贡献率下降到41.35%,这在世界上工业化时期的国家中也很少见。所以,“十二五”规划明确要大力提升消费对国民经济的拉动作用,真正使中国变成一个内需主导型国家。我认为,到2015年,消费的贡献率可以超过50%,接近60%。中国人均GDP将突破5000美元,进入5000美元至10000美元区间。根据商务部测算,中国的最终消费2015年将达到5万亿美元,成为全球第二大消费国,这必然对中国物流业的发展产生巨大的影响。

根据国家统计局统计,在2010年,中国城镇居民家庭恩格尔系数为35.7%,农村居民家庭恩格尔系数为41.7%。也就是说,在人们的日常开支中,维持人们生命的食品类消费比例在下降,但食品消费的重要性却在上升。食品消费中的质量要求、结构要求、安全要求大为提高。“民以食为天,食以安为先。”这促使食品的加工与流通业飞速发展。2010年食品加工业总产值突破5.5万亿人民币,比2009

年增长 13%，出现了供给能力迅速扩大、供给产品多样性增加等趋势。食品行业成为提高人民生活水平和增加国民收入的重要产业。

但是，我们不能不承认，中国的食品行业存在诸多问题。一方面，恶性食品安全事件，如“毒奶粉”、“瘦肉精”、“地沟油”、“彩色馒头”等案件频发。据统计，每年食物中毒报告数约为 24 万人。这些恶性的食品安全事件足以表明，诚信的缺失、道德的滑坡已到了何等严重的地步。另一方面，食品物流成本在食品总成本中占比较大。据中国物流信息中心对全国重点企业的调查，2009 年农副食品加工业物流成本费用率为 12.9%，比全部调查企业高 3.1 个百分点，按此推算，2009 年我国农副食品加工业物流成本为 7563.6 亿，而 2009 年日本农副食品加工业物流费用率为 9.12%，比中国低 3.78 个百分点。

最近国家出台了冷链物流专项规划，对农产品物流，特别是食品物流提出了更高的要求。为了保证食品安全，并大力减少农产品的损耗率，农产品、食品的冷链物流将有一个实质性的推进。到 2015 年，要完成全国冷链物流专项规划的目标难度的确很大，如果蔬、肉类、水产品冷链流通率分别达到 20%、30%、36% 以上，冷链运输率分别提高到 30%、50%、65% 左右，流通环节损耗率分别降到 15%、8%、10% 以下。为了实现这一目标，国家的投入将明显加大，既是物流企业的一个战略机遇，也是物流企业的一个历史责任。构建食品行业的现代物流平台，全面提升我国食品物流的品质，为消费者日益升级的食品消费需求提供安全的物流保障，这是当前我国食品物流业发展的基本宗旨。

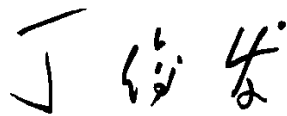
食品消费及安全是目前经济学研究领域的热点课题。对于食品物流、冷链物流与食品安全等问题，国内外学者从不同的角度做出了研究，得出了许多有见地的观点和建议。但目前仍缺乏对食品消费需求与物流发展的系统研究，对二者关系的研究仍停留在定性的认识层面，大都集中在现状及问题的分析、对策的制定等方面，定量分析明显不足。钱乃余同志的《从数量时代到品质时代：中国城镇居民

《食品消费及其物流保障》一书从食品物流角度探讨中国城镇居民食品消费问题,具有重要的理论意义与现实意义。

钱乃余同志在本专著中围绕城镇居民食品消费变化引起物流需求变动,物流发展进一步满足居民食品消费需求,特别是对食品消费质量的需求,进而实现协同发展这一中心命题展开研究。在对中国城镇居民食品消费与物流发展的历程进行梳理的基础上,概括分析中国城镇居民食品消费与物流发展现状,揭示影响和制约食品物流和食品消费水平的重要环节及主要问题,并预测居民食品消费需求的发展趋势。本书规范分析居民食品消费与食品物流保障之间的相关性,并对二者之间的关系进行实证检验,总结和反思存在的问题,进而提出基于提高城镇居民食品消费水平、保障和提升食品消费水平的相关对策建议。

我相信,《从数量时代到品质时代:中国城镇居民食品消费及其物流保障》的出版将为居民食品消费与食品物流保障的研究构建一个理论分析框架。该专著从学术界通常讨论的经济发展、收入水平提升之外的物流环节探寻居民食品消费水平变动的深层原因,引导人们从食品物流环节寻求食品消费水平提升的有效途径,这不仅能极大地深化人们对于居民食品消费问题的认识,也能为进一步拓展消费经济学研究的新方向做出积极的贡献。

路漫漫其修远兮,吾将上下而求索。学术探索之路是无止境的,希望钱乃余同志以及他的研究团队在今后的工作中对食品消费及安全与物流保障的理论与实践问题作进一步的深入研究,在攀登学术高峰的道路上勇往直前。



2011年7月26日

摘 要

食品消费是人类生存与发展的基本条件。我国现阶段,随着居民收入水平的提高,城镇居民的食品消费需求正在逐渐发生变化,不仅表现为消费数量的增加,更重要的是表现为食品消费质量、消费层次、消费观念及消费方式等的根本性改变。这就必然对食品品质保证、食品卫生保证、食品前置期保证提出更加严格的要求。根据相关研究成果,现代食品物流已成为食品卫生、品质、前置期的重要保证因素。因此,改善食品物流的管理水平、技术水平、物流效率是提升我国食品消费整体水平的关键。

食品物流作为一种专业性较强的行业物流,直接关系到食品的品质、安全及成本等。随着城镇居民对食品消费的安全卫生、营养健康及绿色环保意识的不断增强,食品物流业的发展日益引起人们的重视。然而,我国食品物流业的发展尚处于起步阶段,甚至被称之为“昂贵,耗损食品,无利可图,容易造成食物中毒”的行业。这种忽视食品物流业发展的现实状况,不仅脱离了城镇居民日益升级的食品消费需求,而且给食品安全造成了诸多隐患。令人欣慰的是,2009年国务院颁布了《物流业调整和振兴规划》,把物流业列为未来十大振兴行业之一,不仅强化了发展物流业的重要性、必要性和迫切性,而且为发展食品物流业提供了难得机遇。构建食品行业的现代物流平台,全面提升我国食品物流的品质,为消费者日益升级的食品消费需求提供安全的物流保障,这是当前我国食品物流业发展的基本宗旨。

居民对食品消费需求数量与质量的快速提升与变迁,食品消费

水平和消费结构的快速变化,对我国食品物流的发展提出了严峻的挑战,相关物流保障图景提示我们深入思考食品消费与物流发展的关系问题,促使我们探讨食品消费需求与食品物流保障互动关系的实质及其具体表现,透析其关联机制,探讨促进物流发展与提升居民食品消费水平的对策建议。这就成为本书研究的主题。

关于食品消费与食品物流的互动关系,学术界虽然已经进行了一定的研究,但就已有的研究成果看,尚存在诸多不足之处,这不仅表现为研究范式的单一性和研究视角的欠缺,更重要的是这些研究仍驻足在定性的认识层面,大都以零散的论文形式出现,尚未形成系统的研究成果。因此,研究居民食品消费需求及其物流保障之间的关系既是解决现实经济问题的需要,也是发展和深化消费经济、流通经济和运输经济等理论研究的需要,这使该选题的探讨兼具理论与实践两方面的意义。

本书围绕城镇居民食品消费变化引起物流需求变动,物流发展进一步满足居民食品消费需求,特别是对食品消费质量的需求,进而实现协同发展这一中心命题展开研究。其基本思路是:在对中国城镇居民食品消费需求与物流协同发展的历程进行梳理的基础上,重点分析居民食品消费质量需求与食品物流保障之间的关联机制,并对二者之间的关系进行实证检验:概括中国城镇居民食品消费现状并预测其发展趋势,分析城镇居民食品消费所引致的物流需求及我国食品物流业的不足之处;在现代物流对食品消费保障案例的分析基础上,总结与反思存在的问题,进而提出促进城镇居民食品消费及食品物流业发展的相关对策建议。

围绕写作的基本研究思路,本书从中国城镇居民食品消费与物流业协同发展的历史演变出发,重点阐释了城镇居民食品消费与物流发展之间的关联机制。

从理论上来说,城镇居民食品消费与食品物流发展之间存在着相互影响、相互制约的关系:食品消费需求是食品物流业发展的重要决定因素和物流业变迁的外在动因,而物流业的发展对城镇居民食

品消费结构具有引导作用,制约着城镇居民食品消费需求的实现程度和效益。

从计量角度来说,格兰杰因果检验的结果也证实了城镇居民食品消费与物流发展之间具有双向因果关系,验证了理论分析的结论;从定量分析的角度考察,本书构建了物流发展对城镇居民食品消费影响的 logistic 模型,一方面证实了物流业的发展是城镇居民食品消费增长的一个重要促进力量,另一方面发现物流业对于城镇居民食品消费质量提升的促进作用尚未充分发挥出来,发展物流业带动城镇居民食品消费水平提升将会收到显著效果。

基于城镇居民食品消费变迁升级与食品物流保障关系,是本书研究的重点,为此,本书运用偏离份额法分析了城镇居民食品消费的现状,认为当前中国城镇居民食品消费呈现总量稳步提升、结构显著优化的发展态势,营养型食品消费已初步形成,城镇居民食品消费仍有较大的发展空间,且进一步呈现多元化、个性化的发展趋势,食品消费的安全卫生意识、营养健康意识以及环保意识空前强烈,特别是新型的益于身体健康的绿色、环保食品、新型方便食品将逐步主宰食品市场,这必将为整个食品消费需求带来重要变革。与之相比,中国的食品物流业仍然处于起步阶段,在软硬件建设、物流技术、物流服务业态及物流服务效率等方面存在诸多不足之处,造成了食品物流过程中损耗严重,给食品产业的发展带来了重大损失,同时提高了居民食品消费的成本,而物流技术、软硬件条件的落后也限制了城镇居民对生鲜食品的消费。这正是中国城镇居民食品消费升级所面临的障碍之一,严重制约了城镇居民食品消费水平的提高。

在理论及实证分析的基础上,本书分析了现代物流业保障食品消费升级的案例,通过冷鲜肉冷链物流监管及促进肉品消费案例,支持了前文分析的结论。

在现阶段,以国务院颁布《物流业调整和振兴规划》为契机,促进城镇居民食品消费和食品物流业的协同发展,对于调整产业结构,提升城镇居民生活水平、扩大内需带动经济增长乃至促进社会主义和

谐社会构建都具有重要意义。

笔者以为,我国当前可以采取的对策包括:提高居民收入增长预期,切实提高居民食品消费能力和水平;以提高食品消费水平为中心组织食品物流;加强政策扶持力度,大力推进食品物流业发展;构建中国食品物流供应链发展战略;立足于冷链物流,确保物流环节食品质量和安全水平;发展农产品深加工,延长产业链条促进经济发展,等等。

本书创新之处包括:

第一,系统分析研究了居民食品消费升级与食品物流保障关系的理论与实践。关于居民食品消费升级与食品物流保障关系的研究,学术界已有一些零散的成果,但据文献搜索结果看,系统地以居民食品消费的变迁与食品物流发展关系的探讨,本书尚属首次尝试。本书针对中国城镇居民食品消费水平提升与食品物流发展的建议,不乏可操作性和推广性。

第二,阐释了城镇居民食品消费水平与物流发展之间的关联机制。由于多种因素的限制,当前学术界对于二者间关系仅有少量理论分析,缺少实证分析及定量分析。本书在对居民食品消费与物流发展之间的双向关系进行理论分析及实证检验的基础上,创新性地构建了物流发展对城镇居民食品消费影响的 logistic 模型,定量地分析物流业发展对食品消费的影响,而且据此提出我国物流业对于城镇居民食品消费质量提升的促进作用尚未充分发挥出来,构成本书的创新点之一。

第三,运用偏离份额法定量分析我国城镇居民食品消费的现状及发展趋势。目前对于居民食品消费水平的研究以经验分析为主,缺乏定量分析。本书运用偏离份额法定量分析我国城镇居民食品消费水平,透析其发展趋势,开辟了新的研究视角。

关键词: 城镇居民 食品消费 食品物流 协同发展 互动机制

Abstract

Consumption is an eternal theme of economic research, and food consumption is the basic requirement of people. The food consumption of Chinese urban residents is gradually changing with the income increasing at present. This is not only registering as the increase of consumption quantity, more importantly, fundamental changes should be taken place in the consumption quality, consumption levels, consumption concept, and consumption patterns. So it is certain to set higher requirements for food quality, food hygiene and food lead time. The core guarantee factors of food quality, food hygiene and food lead time is food logistics. So improve the management level, technical level and logistics efficiency of food logistics is the key factor to enhance the level of food consumption in China.

As a specialized logistic industry, food logistics is closely related to food quality, food safety, and food cost. But food logistics industry in China is still at the infancy stage, this is not only difficult to meet the escalating food consumption demand of urban residents, but also caused a lot of hidden dangers of food security. At the same time, the State Council promulgated *the restructuring and revitalization plan of logistics industry* in 2009; the problem of food logistics industry has showed in front of people again. Building a modern logistics platform for food industry,

improving the quality of food logistics and providing security logistics safeguard for escalating food demand is an important task for China's food logistics industry.

The rapid development in the quantity, quality and structure of household food consumption put severe challenge to China's food logistics and the logistics safeguard sparked the in-depth reflection on the relationship between food consumption and logistics. This prompted us to explore the manifestation of the correlation mechanism between food consumption and logistics, dialyses some associated mechanism, and explore suggestions to promoting logistics development and enhance food consumption level of urban residents. So it forms the theme of the paper.

Although academics have conducted some research in this field, there are still many shortcomings. This is not only manifested in the unitary of research paradigm and the lack of research perspective, more important is the studies have not formation systems research. Therefore, to study the food consumption and its logistics safeguard is not only the need for solving practical problems, but also the need for develop and intensify theoretical research of consumer economy, circulation economy and transportation economy. These provide both theoretical and practical significance to the discussion of this topic.

The paper study around the topic that the changes of food consumption bring about the development of logistics, and the development of logistics to further satisfy the food consumption especially it's quality demand of residents, so as to realize the joint development of food consumption and food logistics. The basic idea is: Focusing on the correlation mechanism between food consumption and food logistics based on the general analysis of the

joint development history of food consumption and logistics, then empirical tests the relationship between them; Generalize the present condition of food consumption of China urban residents and forecast their development trend, then analysis the logistics needs that cause by food consumption of urban residents and find out the shortcomings of Chinese food logistics; identifies problems on the basis of case analysis in order to recommend relevant countermeasures to promotion the joint development of food consumption and food logistics industry of Chinese urban residents.

Around the basic idea, based on the joint development trend of food consumption and logistics, the paper emphasize explains the correlation mechanism between food consumption and food logistics. In theory, there are complex relationships between them: Food consumption is an important decisive factor of food logistics industry, constitute the external motivation in logistics industry development. At the same time, the development of the logistics industry play a guiding role in the upgrading of urban residents' food consumption structure, which restricts the degree of realization and benefit of urban residents' food consumption. From the econometric perspective, the granger-causality test results also confirm the two-way causality between the food consumption of urban residents and the development of logistics, which verify the conclusions of the theoretical analysis. From the perspective of quantitative analysis, the paper constructed logistic model, and confirmed the development of the logistics industry is an important driving force in urban residents' food consumption growth, and found that the driving force has not been fully brought into play, develop logistics industry to stimulate food consumption of urban residents will receive a significant effect.

Based on the needs to study the development of food logistics that to come with the tide of food consumption level changes of urban residents, the paper using shift-share method to analyze the present condition of urban residents' food consumption, points out that the total number food consumption of Chinese urban residents is increasing rapidly, and the consumption structure of local residents is improving steadily. The nutritional food consumption pattern has taken shape. However, the food consumption of urban residents is still having a large development space; it will present diversity and personalized trends in the future. The safety awareness, nutrition awareness, health awareness and environmental awareness of food consumption will more and more attracted people's attention, and the new convenience food will gradually dominate the food market. This will bring an important reform to food consumption. But the food logistics industry of China is still at the infancy stage. In our country, food logistics industry exist a series of disadvantages in the software and hardware construction, logistics technology, logistics services format, logistics services efficiency and so on, which resulted serious loss in food logistics process, and brought great losses to the food industry development. This is also a barrier that lies in the way of Chinese urban residents' food consumption upgrade.

In the basis of theory and empirical analysis, the paper gives the case of modern logistics safeguard food consumption level. It supports the analysis results of the foregoing through the quality and safety control case of organic rabbit.

It could be concluded that the he lagging of China's modern logistics industry, especially the lagging of the food logistics industry seriously restrict the development of urban residents' food

consumption. Therefore, we must seize the opportunity that the promulgated of *the restructuring and revitalization plan of logistics industry*; promoting the joint development of urban residents' food consumption and logistics industry. It's very important to speed up China's industrial restructuring, promote the improvement of urban residents' living standards, expand domestic demand, and spur economic growth as well as to build a socialist harmonious society.

The author believe that nowadays what we could do is taking related measurements and proposition such as: Increasing income expectations to improve the ability and level of residents' food consumption; Strengthening policy support to promoting food logistics development; Developing food logistics around the center of enhance the level of food consumption; Constructing China's food logistics supply chain strategy; to ensure the quality and safety of the food consumption based on the food cold chain logistics; And we can also develop deep processing of agricultural products to extend the industrial chain and promote the economic development.

The innovation of this book may include:

The topic has highly actuality, forward-looking and countermeasures, it's an innovation too. There are some scattered results in the research of food consumption and its logistics safeguard, but there is no systematic theory and practice study on this topic. What's more, the suggestions of the paper are operable and replicable.

The book explains the correlation mechanism between food consumption and food logistics. Restrictions on many factors, there is only a small amount of theoretical analysis and lack empirical analysis on this area. In the basis of theory analysis and empirical analysis of the two-way causality between the food consumption of

urban residents and the development of logistics, this paper creatively constructed logistic model, quantitatively analyse the level that logistics industry impact on food consumption and find that the driving force has not been fully brought into play. This is one innovation of the paper.

The book applies the shift-share method to analyse the status and development trend of urban residents' food consumption. At present, the analysis on urban residents' food consumption level are all experience analysis and lack of quantitative analysis. This paper use shift-share method to quantitatively analyse urban residents' food consumption level, dialysis its development trend. It opens a new perspective.

Key words: Urban Residents; Food Consumption; Food Logistics; Joint Development; Correlation Mechanism

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