

江苏现代服务业发展绿皮书

GREEN BOOK OF JIANGSU MORDERN SERVICE INDUSTRY

江苏商务 发展研究报告 2018

主 编 张为付



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第一章 江苏商务发展概况

2017年,江苏省总体经济运行稳中有升。通过供给侧的结构性改革,省内经济发展活力不断提升,经济发展的质量稳步提高。在此背景下,江苏省的商务发展也更上一层楼,和上一年相比,国内贸易增长速度较快,对外贸易额有较大的提升,电子商务发展态势稳健,利用外资状况保持平稳,对外投资规模有所下降,跨国经济合作保持稳定。除了规模变化之外,江苏各项商务活动还发生了诸多结构性的调整。接下来,依次对2017年上述各类商务活动的状况进行阐述。

一、国内贸易发展充满活力和变革,总体态势稳中有升

2017年,江苏省社会消费品零售总额达到了31737亿元,规模在全国排名第三,仅次于广东省和山东省,远远超过长三角地区的浙江(24308亿元)与上海(11830亿元)的社会消费品零售总额,在长三角地区的零售额中的比重达到46.8%,该比率较上一年略有上升。全省社会消费品零售总额占全国的比例达到8.7%,该比率比上一年的8.6%略有提升,表明江苏省商品流通大省的地位稳中有升。社会消费品零售总额比2016年上升了10.56%,增长速度较快,且速度与上一年基本持平。从横向对比的角度来讲,江苏省内部贸易增长率位居全国前列,在东部发达省份中,与浙江省并列第一。

(一) 商品交易保持一贯的快速增长的态势,省内地区差异较大

江苏省的国内贸易额不仅在全国占据举足轻重的地位,而且,多年来一直保持着稳定的快速增长的势头。2011—2017年,江苏省社会消费零售总额分别达到15988亿元、18331亿元、20878亿元、23458亿元、25877亿元、28707亿元和31737亿元,每年的增速都超过10%,平均的年增速为12.9%。商品零售额是经济运行的晴雨表,是代表国内贸易的活跃程度、人们物质生活水平和社会购买力的重要指标。从上述统计数字可以看出,江苏省作为东部地区的一个经济发达的大省,内部贸易规模巨大,且不断增长,在全国处于领先水平,表明江苏的内部贸易蓬勃兴旺,充满活力,商品流动处于健康的状态。然而,江苏省不同地区的贸易额差别显著,2017年苏南、苏中和苏北的社会消费零售总额分别是18316亿元、5621亿元和7800亿元,苏南地区零售总额占全省零售额的比例为58%,数额超过苏北和苏中地区之和。从市级范围来看,排在前五位的分别是南京、苏州、无锡、徐州和常州。

(二) 商品交易模式渐变,网络交易蓬勃发展

近年来,各类电子商务交易日益兴旺发达,江苏省商品交易的模式正逐步从传统的实体市场交易模式向网络交易模式转变,网络商品交易所占的比重不断增加。江苏省2017年实现电子商务交易额2.65万亿元,同比增长22.7%,网络零售交易额6893亿元,同比增长