

中国物流发展报告

China Logistics Development Report

(2002)

中国物流与采购联合会

China Federation of Logistics & Purchasing

中国物资出版社

China Logistics Publishing House

2003.3

图书在版编目(CIP)数据

中国物流发展报告.2002/中国物流与采购联合会.——北京:中国物资出版社,2003.3

ISBN 7-5047-1838-6

I.中… II.中… III.物流—经济发展—研究报告—中国—2002
IV.F259.22

中国版本图书馆 CIP 数据核字(2003)第 015775 号

临时性广告经营许可证:京西工商广临字 200303028 号

责任编辑 衣薇 钱瑛 齐岩 陈孟勤

封面设计 何崇杭

责任印制 何崇杭

责任校对 孙会香

中国物资出版社出版发行

网址:<http://www.clph.com.cn>

社址:北京市西城区月坛北街 25 号

电话:(010)68392746 邮编:100834

全国新华书店经销

北京鑫正大印刷有限公司印刷

开本:787×1092mm 1/16 印张:23.5 彩插:16 字数:419 千字

2003 年 3 月第 1 版 2003 年 3 月第 1 次印刷

书号:ISBN7-5047-1838-6/F·0661

印数:0001—2000 册

定价:80.00 元

(图书出现印装质量问题,本社负责调换)

《中国物流发展报告》(2002)(红皮书)

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前 言

2002年,是我国加入WTO的第一年,也是中国物流取得重大进展的一年。中国物流与采购联合会作为全国性行业社团组织,我们和业内同仁一起亲眼目睹并亲身参与了其中的工作,有责任、有义务对本行业年度发展情况作出全面、客观的总结评价;为政府、企业和国内外投资者提供决策参考;为行业发展轨迹留下忠实的记录和严肃的思考。因此,我们从自身职能定位出发,继2001年首次推出“中国物流发展报告”之后,把这册《中国物流发展报告(2002)》(红皮书)奉献给大家,以期和所有关心、支持和参与物流工作的同仁一起回顾、总结与思考,给正在发展的中国物流事业以应有的推动。

中国物流发展的进程,与改革开放和现代化建设密不可分。“物流”概念自上个世纪70年代末引进我国以来,经历了近20年的研讨酝酿、启蒙尝试,到90年代后半期,在我国改革开放和现代化建设的强有力推动下,伴随着信息技术的迅猛发展和跨国公司的大举进入,现代物流开始在经济生活中推广应用,并引起了社会各界广泛关注。新世纪的第一年,以物流业发展进入“十五”规划,六部委出台首部关于加快物流发展的“若干意见”,首家全国性物流行业协会挂牌,《国家标准·物流术语》颁布实施,第一个物流示范基地建立和各地大力推动物流规划与建设等重大事件为标志,被称为中国物流发展的“起步年”。

2002年的中国物流在持续“升温”的基础上,呈现出新的发展态势:在对基本概念的“炒作”中,增加了理性的思考;在理论探索中,加大了实践操作的分量;政府、企业和行业社团组织都在寻找自己的角色定位,理论和实践层面都有实质性进展。不少专家指出:2002年,将以从“务虚”到“务实”的“转折年”,写入我国

物流发展的史册。本《报告》正是循着这样的思路,力求对发生在2002年的重大物流事件进行归纳总结和梳理分析。全书分为三大部分:第一部分“2002年中国物流发展综述”,对2002年中国物流发展的环境、主要成绩和特点做了介绍和评析,提出了本年度中国物流发展的主要问题与建议,并对2003年中国物流发展的趋势进行了展望。第二部分“2002年中国物流的新进展”,分别从“政府与物流”、“企业物流与物流企业”、“物流市场”、“物流基础设施建设和技术进步”、“城市与区域物流规划”、“采购与物流”、“加入WTO与物流”、“物流研究与科研”、“物流教育与培训”和“港台物流发展概况”等10个方面做了专题描述。第三部分是“附录”,收入了“2002年中国物流发展大事记”、“2002年行业物流发展概况”、“2002年物流调查(考察)课题研究报告选登”、“2002年物流信息化发展概况”、“2002年电子商务发展概况”和“2002年物流行业社团组织发展概况”等内容。“综述”“专题”和“附录”三个部分分别自成体系,又前后呼应,共同构成本报告的基本框架。

按年度编辑出版“中国物流发展报告”,是一件非常有意义的事情,也是一项艰苦细致的工作。联合会相关部门和中国物流信息中心的工作人员,清华大学、北方交通大学、北京物资学院和国家计委综合运输研究所的部分专家学者分别承担了编写工作,联合会研究室做了总撰,许多业界同仁为本书积极提供思路和相关资料,中国物资出版社提供了许多方便,部分重点物流企业给予支持,促使这件工作能够如期完成。在这里,我代表中国物流与采购联合会向所有参与本书编写和关心、支持本书出版的朋友们表示衷心的感谢!

现代物流在我国还是一个新兴的事物,物流产业也是一门新兴产业,要对其做出客观、准确、全面的描述和评价,确实不是一件容易的事情。再加上环境和条件所限,书中缺漏和错讹之处一定不少,特别是相关的图表和数据还不够充实,对一些问题的看法也仅是一家之言。因此,恳请读者朋友提出宝贵意见,以便在下年编撰时改进。

在本书编辑之际,十届人大一次会议和全国政协十届一次会议

隆重举行，我们国家全面建设小康社会的宏伟蓝图掀开了新的一页；本书出版之时，欣逢中国物流与采购联合会会员代表大会胜利召开，来自业界的各路精英成为首批读者。在这春回大地、万象更新的季节，让我们一起迎接中国物流业发展的春天。

陆 江

2003 年 3 月

（作者为：全国政协委员、中国物流与采购联合会会长）

Preface

The year of 2002 was not only the first year of China's entering into the WTO but also the year made significant progress on Chinese logistics. As the national industries social organization, China Federation of Logistics & Purchasing (CFLP) as well as other relevant organizations has enjoyed and participated in the tasks of logistics development. We have the obligation to summarize and evaluate the annual industries development in completely and externally. We should consult for the government, enterprises and investors from home and abroad and also keep the true records with the serious thinking of the logistics industries development track. After CFLP firstly published the China Logistics Development Report in 2001, we would like to offer the China Logistics Development Report in 2002 (Red Paper) so that all partners either concerning, supporting or drafting the Report could review, summarize and study with us for promoting the Chinese developing logistics career.

The development course of Chinese logistics is concerned with the reform and opening-up policy and modernization drive closely. The concept of logistics was introduced to China at the end of 1970s. After 20 years of the enlighten experiment and research till to the end of 1990s, acting with Chinese reform and opening-up policy, modernization strong drive, the booming development of information technology and multinational companies entering, modern logistics began to be popularized in all circles and applied in economy activities in China. The first year of new century was called the Initial-Step-Year of China logistics development with the great symbols such as the logistics development period of the Tenth Five-Year Program, the Several Suggestions on Speed up Logistics Development issued by six ministries and commissions, the first national logistics industries organization es-

tablished, the implement of National Standard Logistics Glossary, the first Logistic Leading Base established, logistics program and construction promoted in various regions, etc.

As the continuous booming of Chinese logistics in 2002, there were new developing situations. With a result of media hype on the concept of logistics, we had realized the rational speculation and practice operations. Government, enterprises and social industries organizations had been seeking the own position with the substantiality progress of theory and practice. Many experts pointed out that the year of 2002 was the Turn – Year from the discussing principle to the pragmatic matter and should be recorded in the history of China logistics development. The Report is right to follow this train of thought and has summarized the significant logistics events in 2002. The Report composes of three parts:

The first part is the General Description of China Logistics Development in 2002. We introduce and analyze the environments of Chinese logistics development, major achievements and characteristics. We put forward main problems and suggestions on China logistics development in 2002 and also prospect the development trend of China logistics in 2003. The second part is the New Progress of China Logistics Development with 10 Special Topics such as Government and Logistics, Enterprise's Logistics and Logistics Enterprises, Logistics Market, Logistics Infrastructures Construction and Technical Advancement, the Program of City and Regional Logistics, Procurement and Logistics, Entering into the WTO and Logistics, Logistics Study and Scientific Research, Logistics Education and Training, General Situation of China Logistics in Hong Kong and Taiwan. The third part is the Appendix including the Memorabilia of China Logistics Development in 2002, Survey of Logistics Development of Industries in 2002, Project Research Papers of Logistics Survey (Investigation) in 2002, Survey of Logistics Informationization Development, Survey of E-commerce Development in 2002, Survey of Social Organizations on Logistics Industry, etc. General Description, Special Topics and Appendix are individual systems but echoing and

composing the basic framework of the Report.

To Publish China Logistics Development Report annually is a very valuable, hardworking and meticulous work. The staffs from the relevant departments of CFLP and China Logistics Information Center as well as the experts from Tsinghua University, Northern Jiaotong University, Beijing Materials Institute and the Comprehensive Transportation Research Center of State Development Planning Commission wrote some parts of the Report. The Research Office of CFLP was charged with the general writing. Many colleagues positively offered ideas and data too. By the all supports including China Logistics Publishing House and some key logistics enterprises, the Report could be finished on schedule. On behalf of CFLP, I would like to express our sincerely thanks to all friends who concerned, supported and compiled the Report.

Modern logistics is the new developing things; logistics industry is the rising industry too. It is difficult to describe and evaluate them in the way of impersonality, accuracy and comprehensiveness. In addition to the limits of environments and situations, there are some gaps, omissions and mistakes especially in some relevant opinions, charts and data. So we deeply appreciate your valuable comments in order to improve it at the next time.

As the compiling of the Report, the 1st Session of 10th NPC and the 1st Session of 10th NPPCC are beginning ceremoniously with the Chinese grandness blueprint of overall constructing well-society turning to a new page. As the accomplishing of the Report, CFLP will successfully host the CFLP Congress. These CFLP members, elites from various places, will read it firstly. Spring returns to the good earth and everything looks fresh and gay. We should be together to welcome the spring season of China logistics industries development.

Lu Jiang

Member of CPPCC and Chairman of CFLP

March of 2003

目 录

前 言

第一部分 2002 年中国物流发展综述

一、中国现代物流发展的起点	(3)
二、2002 年中国物流发展的环境	(4)
三、2002 年中国物流发展的主要成绩和特点	(6)
四、2002 年中国物流发展评析	(14)
五、2002 年中国物流业存在的主要问题及政策建议	(16)
六、2003 年中国物流发展展望	(21)

第二部分 2002 年中国物流的新进展

第一章 政府与物流	(27)
一、中央领导同志对物流发展的论述	(27)
二、全国人大、政协对物流的关注	(28)
三、国务院及相关部门对物流发展的推动	(29)
四、地方政府的有关政策措施	(31)
五、政府推动作用简析	(33)
第二章 企业物流与物流企业	(35)
一、企业物流仍然是推动物流发展的主要力量	(35)
二、物流企业发展呈现新的态势	(40)
三、企业物流和物流企业不同程度地重组整合	(44)
第三章 2002 年中国物流市场	(45)
一、2002 年物流市场综述	(45)
二、2002 年物流市场主体结构变化	(48)
三、2002 年物流市场环境的发展	(51)

第四章 物流基础设施建设和技术进步	(55)
一、交通运输条件进一步改善	(55)
二、物流信息化建设的新进展	(62)
三、物流技术装备的引进开发与运用	(65)
第五章 城市与区域物流规划	(69)
一、长江三角洲地区物流规划情况	(69)
二、珠江三角洲及东南沿海地区物流规划情况	(74)
三、环渤海及东北地区物流规划情况	(76)
四、中西部地区物流规划情况	(79)
五、规划中存在的几个值得注意的问题	(83)
第六章 采购与物流	(84)
一、政府采购	(84)
二、企业采购	(90)
三、跨国采购	(96)
第七章 加入 WTO 与物流	(99)
一、加入 WTO 第一年对中国物流的影响	(100)
二、2002 年中国物流业的对外交往	(107)
第八章 物流理论与科研	(111)
一、中国物流理论研究的历史回顾	(111)
二、2002 年物流研究概况	(114)
三、中国物流理论研究的十大“热点”问题	(116)
四、2002 年物流科技工作进展情况	(117)
第九章 物流教育与培训	(121)
一、中国物流教育体系概述	(121)
二、启动物流人才教育工程	(122)
三、2002 年中国物流教育简况	(123)
四、2002 年中国物流教育存在问题及建议	(128)
第十章、港台物流发展概况	(130)
一、香港物流业发展概况	(130)
二、台湾物流业发展概况	(138)
三、启示与建议	(142)

第三部分 附 录

附录一	2002 年中国物流发展大事记	(147)
附录二	2002 年行业物流发展概况	(159)
附录三	2002 年物流调查(考察)课题研究报告选登	(184)
附录四	2002 年物流信息化发展概况	(269)
附录五	2002 年电子商务发展概况	(300)
附录六	2002 年物流行业社团组织发展概况	(342)
编 后 语		(353)

CONTENTS

Preface

Part One: General Description of China Logistics Development in 2002

- 1 The Beginning of China Modern Logistics Development (3)
- 2 Environments of Chinese Logistics Development in 2002 (4)
- 3 Key Achievements and Characteristics of Chinese Logistics Development in
2002 (6)
- 4 Evaluating and Analyzing of Chinese Logistics Development in 2002 ... (14)
- 5 Main Problems and Policy Advices on China Logistics Industries in
2002 (16)
- 6 Prospect of China Logistics Development in 2003 (21)

Part Two: New Progress of China Logistics Development in 2002

Chapter One: Government and Logistics (27)

- 1 Logistics Development Opinions from Central Government Leaders (27)
- 2 Logistics Attentions from NPC and NPPCC (28)
- 3 State Council and Relevant Departments Promoting Logistics
Development (29)
- 4 Policies and Measures form Local Governments (31)
- 5 Brief of Government Promoting Functions (33)

Chapter Two: Enterprise Logistics and Logistics Enterprises (35)

- 1 Enterprise Logistics is Still the Main Force of Promoting Logistics
Development (35)
- 2 New Situation of Logistic Enterprises Development (40)
- 3 Restructuring and Integration of Enterprise Logistics and Logistics
Enterprises (44)

Chapter Three: Logistics Market in 2002 (45)

- 1 General Situation of Logistics Market in 2002 (45)

2	Framework Transformation of the Main Body on Logistics Market in 2002	(48)
3	Environment Development of Logistics Market in 2002	(51)
Chapter Four: Logistics Infrastructures Construction and Technical Advancement		
		(55)
1	Improvements of Traffic and Transportation	(55)
2	New Progress of Logistics Informationization Construction	(62)
3	Introduction, Development and Application of the Logistics Technical Equipment	(65)
Chapter Five: the Program of Urban and Regional Logistics		
		(69)
1	Logistics Program in the Delta of Yangtse River	(69)
2	Logistics Program in the Delta of The Zhu Jiang River and Southeast Littoral	(74)
3	Logistics Program in the Bohai Sea of the Ring and Northeast Region	(76)
4	Logistic Program in the Central and West Regions	(79)
5	Remarkable Problems of the Program	(83)
Chapter Six: Procurement and Logistics		
		(84)
1	Public Procurement	(84)
2	Enterprise Procurement	(90)
3	Multinational Procurement	(96)
Chapter Seven: Entering into the WTO and Logistics		
		(99)
1	Impacts in the First Year of China's Entering into the WTO	(100)
2	Foreign Activities of China Logistics Industries in 2002	(107)
Chapter Eight: Logistics Study and Scientific Research		
		(111)
1	History Review of China Logistics Theory Study	(111)
2	Summery of Logistics Research in 2002	(114)
3	The 10 Hottest Topics on China Logistics Theory Study	(116)
4	Development of Logistics Scientific Research in 2002	(117)
Chapter Nine: Logistics Education and Training		
		(121)
1	Summary of China Education System on Logistics	(121)
2	Starting up the Education Project on Logistics Profession	(122)
3	Brief of China Logistics Profession Education in 2002	(123)

4 Problems and Suggestions on China Logistics Profession Education in 2002	(128)
Chapter Ten: General Situation of Logistics Development in Hong Kong and Taiwan	
1 General Situation of Logistics Development in Hong Kong	(130)
2 General Situation of Logistics Development in Taiwan	(138)
3 Inspires and Advices	(142)
 Part Three: Appendix	
Appendix One: Memorabilia of China Logistics Development in 2002	(147)
Appendix Two: Survey of Logistics Development of Industries in 2002	(159)
Appendix Three: Project Research Papers of Logistics Investigation in 2002	(184)
Appendix Four: Survey of Logistics Informationization Development	(269)
Appendix Five: Survey of E-commerce Development in 2002	(300)
Appendix Six: Survey of Social Organizations on Logistics Industries	(342)
 Postscript	 (353)

第一部分

2002 年中国物流 发展综述

在中国加入世界贸易组织的第一年,也就是 2002 年,中国物流的发展并没有因扩大开放而受到明显的冲击,也没有完全按照国外专家预测的那样物流外包和一体化服务出现明显的高速增长势头,中国的物流正在走一条自己的务实之路。正是这种务实,使我们对中国的物流发展充满了信心。

一、中国现代物流发展的起点

总结 2002 年中国的物流发展,就必须先回顾一下 2001 年的情况,因为这是国际资本首次关注中国物流业发展的一年。这一年,国际上最著名的两大咨询机构——麦肯锡公司和摩根·斯坦利公司先后发表了他们各自对于中国物流市场的研究报告。这两份报告典型地反映了当时在国际资本眼中的中国物流现状、问题和前景。他们的分析和预测为我们以后研究中国物流的发展趋势提供了一个有益的视角。

2001 年,也可以说是现代物流正式登上中国经济舞台的起点。最显著的标志是各级政府开始重视物流工作,国家经贸委等六个部委联合发出我国有史以来的第一份指导物流发展的文件《关于加快我国现代物流发展的若干意见》;投资商也开始关注这个领域,提出要“抢滩物流”的口号。物流从一个陌生的名词一下子成为一个时髦的词汇。各式普及性的培训班、研讨会连绵不绝,物流展会、论坛方兴未艾。但所有这些仍然掩盖不了这样一个事实:中国的物流现状是落后的,基础是薄弱的。最具代表性的几个数据是:物流总成本占国民生产总值的比重,美国是 10%左右,中国是 20%;中国限额以上工业企业流动资金的年周转次数不到 2 次,商业流动资金的年周转次数不到 3 次,而发达国家一般在 10 次以上。

关于中国物流的落后状况,上述两份报告都以不小的篇幅进行了分析和描述,总之是“处在初级阶段”。主要体现在以下几方面:一是基础设施落后。例如“大多数仓库设计水平低,主要采用手工操作。较低的天花板导致自动化机械不能使用,并常常毁坏商品。因为缺少湿度控制、冷藏储存和避免污染的商品分隔设施,大多数仓库不能满足特殊需要。”“中国有 270 万家公路运输企业,但是平均每家只拥有 1.43 辆运营车辆。”二是服务模式落后。在麦肯锡的报告中把落后的表现归结为五类问题,即①商品的损坏、丢失,铁路、公路运输中存在许多人工操作,在这一过程中会出现货物堆放错误,损坏或被盗。其实增加卡车集装箱容量是个简单的问题,但中国 60%的卡车是敞篷的。②传送和装卸时间缺乏灵活性。③运输过程缺少透明度,在货物到达最终目的地之前,制造