

海丝港口港航贸发展报告

(浙江—东南亚篇)

Maritime Silk Road Port and Trade Development Report
(Zhejiang-Southeast Asia Section)



交通运输部水运科学研究院

China Waterborne Transport Research Institute

浙江省海港集团有限公司

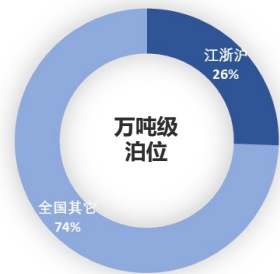
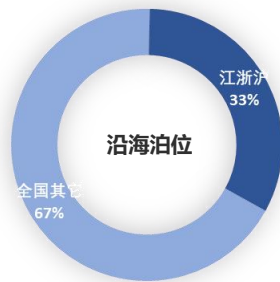
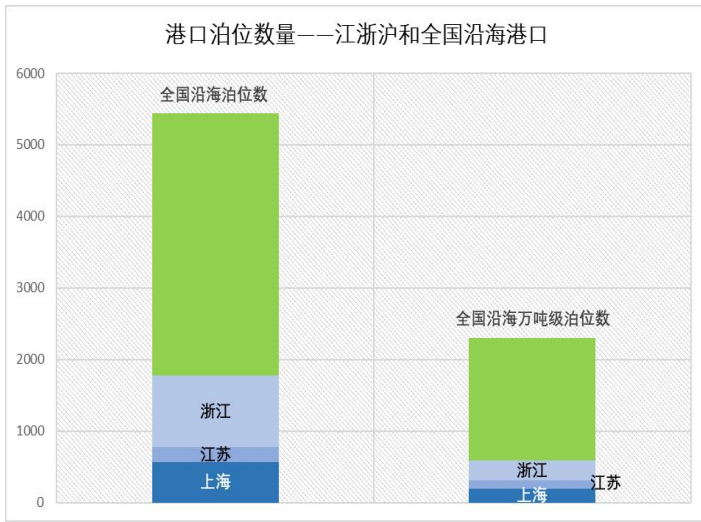
Zhejiang Provincial Seaport Investment & Operation
Group Co.,Ltd, viz. Ningbo Zhoushan Port Group
Co.,Ltd.

——2024.6——



港口泊位数量——江浙沪和全国沿海港口

Number of Port Berths - Jiangsu Zhejiang and Shanghai, and Nationwide Coastal Ports



- 长三角地区包括上海、江苏、浙江和安徽三省一市。长三角是一片高质量发展的热土——不到全国4%的土地面积，创造了全国近四分之一的经济总量。
- The Yangtze River Delta region includes Shanghai, Jiangsu, Zhejiang, and Anhui. The Yangtze River Delta is a hotbed of high-quality development—occupying less than 4% of the nation's land area, it generates nearly one-quarter of the country's total economic output.

拥有沿海泊位共1780个 a total of 1,780 coastal berths,
占**32.7%** accounting for 32.7%.

其中万吨级泊位587个 Among them, 587 berths of
占**25.5%** 10,000 DWT or above, accounting
for 25.5%



水路货运量 Waterway Freight Volume

上海市10.22亿吨, 增长6.82%, 占比11%

Shanghai: 1.022 billion tons, an increase of 6.82%, share of 11%

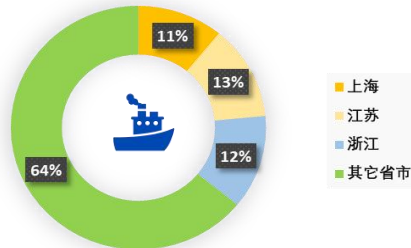
浙江省11.65亿吨, 增长5.72%, 占比12%

Zhejiang Province: 1.165 billion tons, an increase of 5.72%, share of 12%

江苏省11.76亿吨, 增长7.66%, 占比13%

Jiangsu Province: 1.176 billion tons, an increase of 7.66%, share of 13%

2023年全国水路货物运输量 (亿吨)



港口货物吞吐量 Cargo Throughput

上海市8.36亿吨, 增长14.9%, 占比5%

Shanghai: 836 million tons, growth of 14.9%, share of 5%

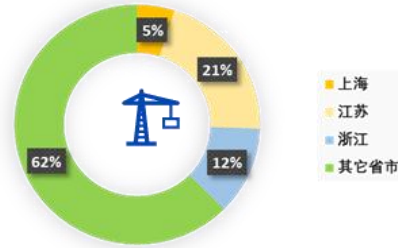
浙江省20.25亿吨, 增长5.5%, 占比12%

Zhejiang: 2.025 billion tons, growth of 5.5%, share of 12%

江苏省35.11亿吨, 增长8.3%, 占比21%

Jiangsu: 3.511 billion tons, growth of 8.3%, share of 21%

2023年全国港口货物吞吐量 (亿吨)



港口集装箱吞吐量 Container Throughput

上海市4916万TEU, 增长3.92%, 占比16%

Shanghai: 49.16 million TEU, an increase of 3.92%, share of 16%

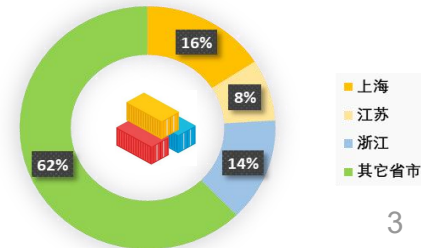
浙江省4252万TEU, 增长7.9%, 占比14%

Zhejiang: 42.52 million TEU, an increase of 7.9%, share of 14%

江苏省2545万TEU, 增长6.3%, 占比8%

Jiangsu: 25.45 million TEU, an increase of 6.3%, share of 8%

2023年全国港口集装箱吞吐量 (万标箱)





联合国贸发会

集装箱港口连通度指数排名

UNCTAD Container Port Connectivity Index Ranking

上海港全球第一名

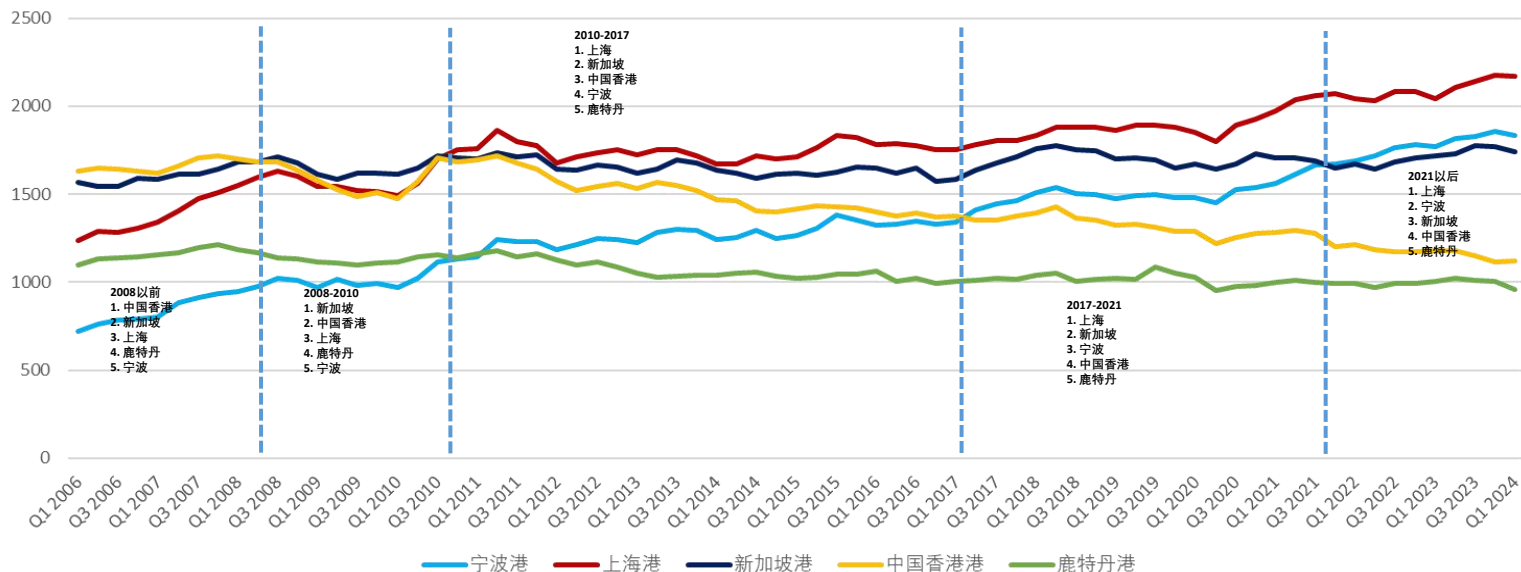
Shanghai Port: 1st place globally

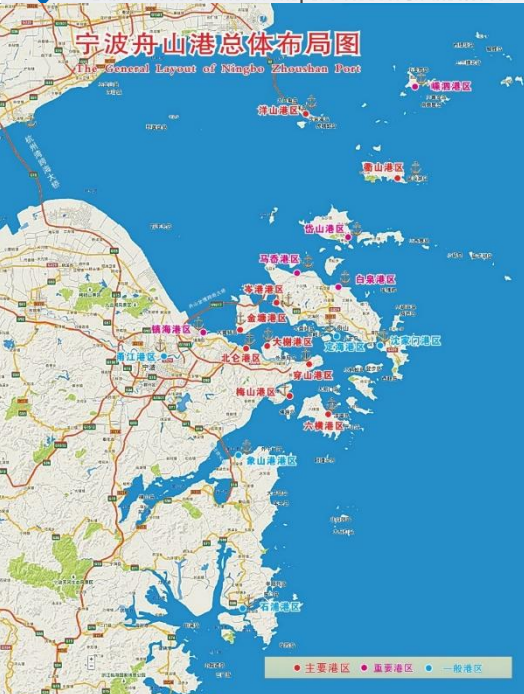
宁波舟山港第二名

Ningbo-Zhoushan Port: 2nd place globally



世界主要集装箱港口连通度排名变化 2006-2024



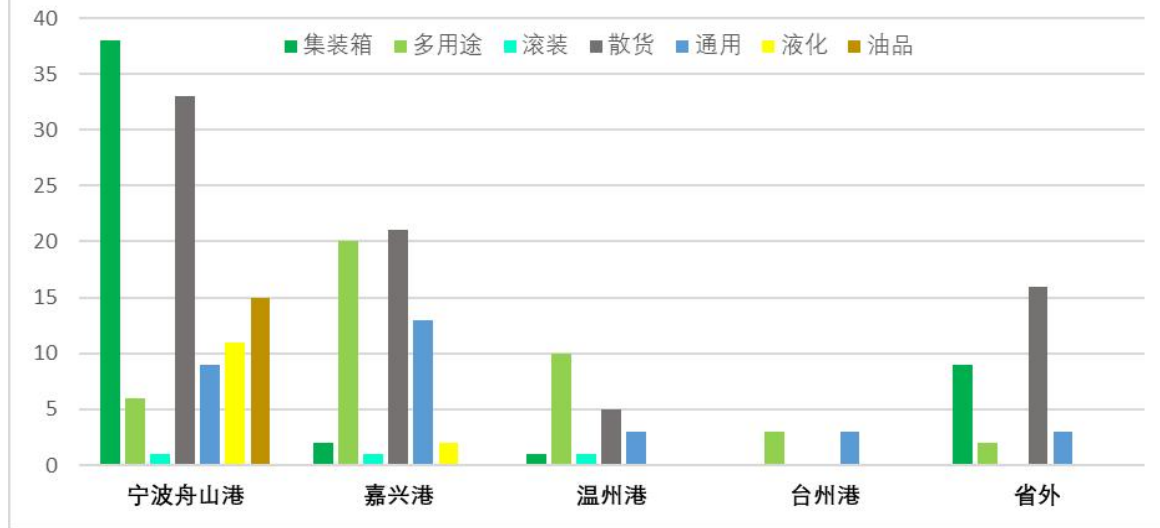


浙江省海港集团 Zhejiang Seaport Group

泊位总数268个
Total number of berths: 268
生产性泊位228个
Productive berths: 228
非生产性泊位40个
Non-productive berths: 40

宁波舟山港是全球唯一拥有双“千万箱级”单体集装箱码头的港口
Ningbo-Zhoushan Port is the only port in the world with two "10 million TEU" single container terminals.

浙江海港集团泊位数量和功能分布 (2023年底)





堆场面积：共1199.7（万平方米）

Yard Area: Total 11.997 million square meters

集装箱堆场 —— 837.8

Container yard: 8.378 million square meters

散货堆场 —— 299.3

Bulk cargo yard: 2.993 million square meters

件杂货堆场 —— 52.9

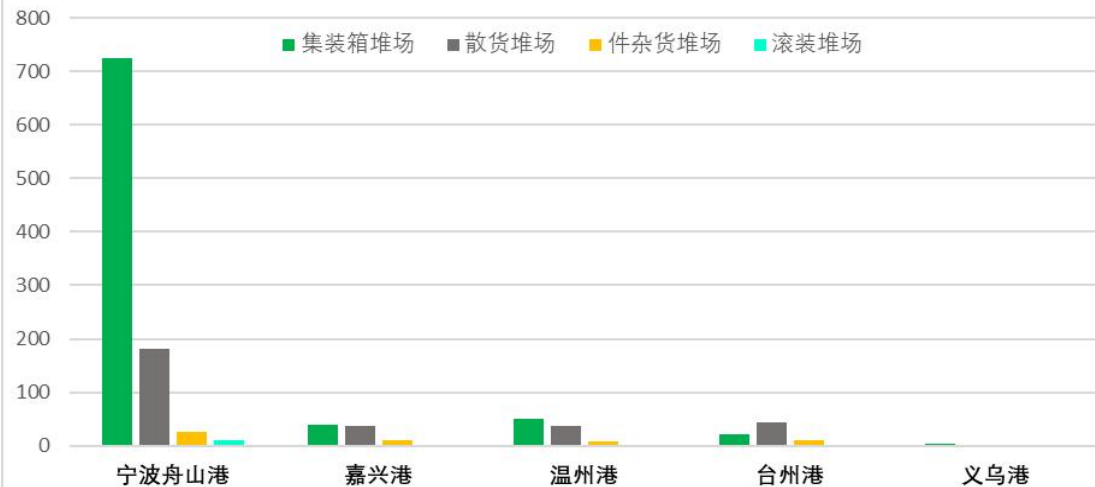
General cargo yard: 0.529 million square meters

滚装堆场 —— 9.8

Ro-Ro yard: 0.098 million square meters

浙江海港集团堆场面积和功能分布（2023年底）

万平方米





多式联运全方位拓展

Comprehensive Expansion of Multimodal Transportation

海铁联运: 2023年, 宁波舟山港拥有海铁联运班列25条, 业务辐射全国16个省、65个地级市

Sea-Rail Intermodal Transport: In 2023, Ningbo-Zhoushan Port operated 25 sea-rail intermodal train routes, covering 16 provinces and 65 prefecture-level cities nationwide.

江海联运: 宁波远洋投入运力超1万标箱, 业务覆盖南京、镇江、张家港、太仓、江阴、重庆等多个沿江港口

River-Sea Intermodal Transport: Ningbo Ocean Shipping has deployed a capacity of over 10,000 TEUs, with services covering multiple ports along the Yangtze River, including Nanjing, Zhenjiang, Zhangjiagang, Taicang, Jiangyin, and Chongqing.

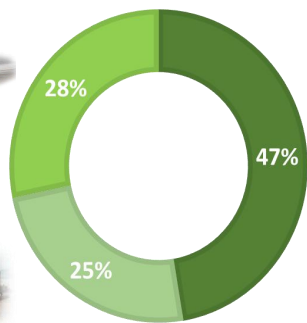
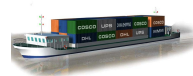
海河联运: 海河航线近30条, 打造包含嘉兴七星、海宁尖山、桐乡宇石、湖州德清、湖州长兴、杭州下沙、富阳东洲等内河码头至嘉兴乍浦的外贸精品航线共计7条

Sea-River Intermodal Transport: There are nearly 30 sea-river routes, including 7 premium foreign trade routes from inland river ports to Zhapu in Jiaxing, featuring Jiaxing Qixing, Haining Jianshan, Tongxiang Yushi, Deqing in Huzhou, Changxing in Huzhou, Xiasha in Hangzhou, and Dongzhou in Fuyang.

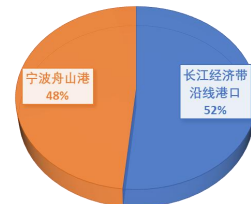
中欧班列: 以“义新欧”为统一品牌, 31条运营线路辐射“一带一路”国家50多个、城市160多个

China-Europe Railway Express: Under the unified brand "Yixin'ou," 31 operational routes reach over 50 countries and more than 160 cities along the Belt and Road Initiative.

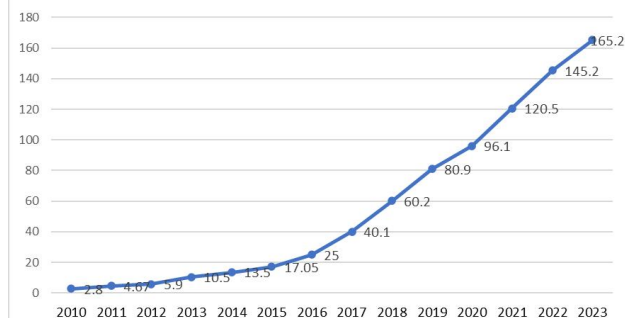
多式联运	2023年吞吐量 (万标箱)	占比	同比增长 (%)
海铁联运	165.2	47%	13.8%
江海联运	85	25%	21.3%
海河联运	97.6	28%	25.8%



2023年宁波舟山港海铁联运量占长江经济带沿线港口比重



宁波舟山港历年集装箱海铁联运量





港口生态圈建设稳步推进

Steady Progress in Port Ecological Circle Construction

多种物流模式智能交互：基于“数据枢纽港”设计理念的物流数据交换中台打通了数据交换壁垒，构建起了数字物流链生态圈

Intelligent Interaction of Multiple Logistics Modes: Based on the design concept of "Data Hub Port," the logistics data exchange platform breaks down data exchange barriers, establishing a digital logistics chain ecosystem.

智能生产运营：构建了全省沿海港口统一的生产业务指挥平台，实现了“一体两翼多联”港口生产组织的全面统筹

Intelligent Production and Operations: A unified production and business command platform has been established for coastal ports across the province, achieving comprehensive coordination of "integrated, two wings, and multi-connected" port production organization.

智慧物流服务：以海港、陆港、空港、信息港“四港”联动发展，提供优质的数字供应链综合服务，提升物流效率、降低物流成本，科技赋能物流产业高质量发展

Smart Logistics Services: Through the coordinated development of seaports, land ports, air ports, and information ports, we provide high-quality digital supply chain integrated services, enhancing logistics efficiency, reducing logistics costs, and empowering the logistics industry with technology for high-quality development.

四港联动智慧物流云平台

四港联盟

四港公司



用户活跃度
43%



注册用户数
24,360

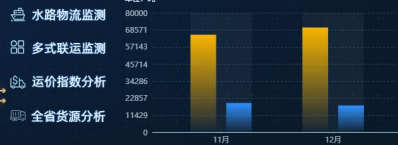
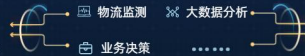


当前在线用户数
468

【一次查询、全程可视、一点接入、四港联通、一单到底、货畅其流】



物流监测与决策分析

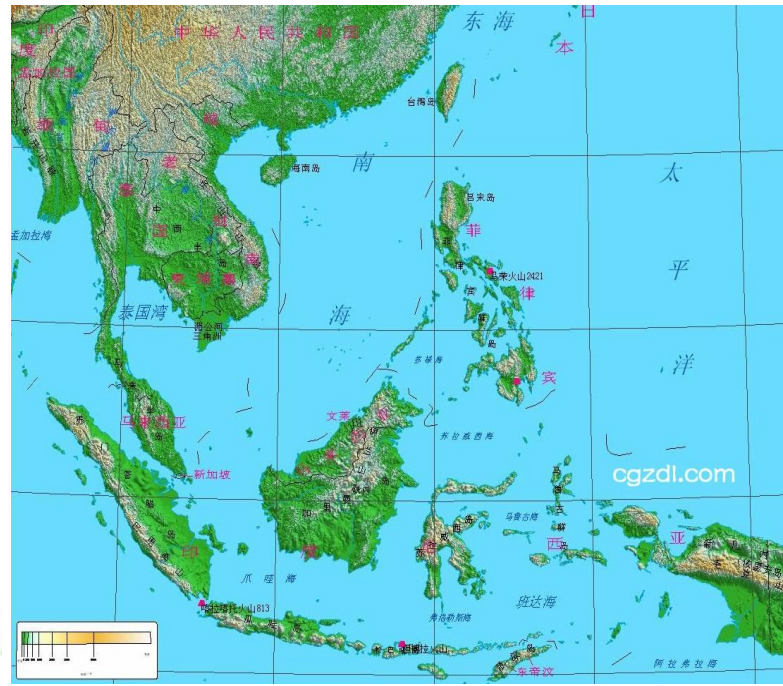




关于江浙沪与东南亚的贸易，分享以下几点：

Regarding trade between Jiangsu, Zhejiang, Shanghai, and Southeast Asia, here are a few points to share:

- **江浙沪与东盟间主要贸易货类** Main Trade Commodities Between Jiangsu, Zhejiang, Shanghai, and ASEAN
- **宁波舟山港出口东盟货源地分布** Distribution of Export Commodities from Ningbo-Zhoushan Port to ASEAN
- **宁波舟山港直接腹地出口东盟的物流通道分布** Distribution of Logistics Channels for Direct Export to ASEAN from the Hinterland of Ningbo-Zhoushan Port
- **江浙沪进口东盟特色货类及主要供应商** Characteristic Imported Goods from ASEAN and Main Suppliers in Jiangsu, Zhejiang, and Shanghai
- **江浙沪与东盟“新三样”贸易情况** Trade Situation of the "New Three Items" Between Jiangsu, Zhejiang, Shanghai, and ASEAN





江浙沪与东盟的主要贸易货类: The main trade commodities between Jiangsu, Zhejiang, Shanghai, and ASEAN are:

江浙沪出口东盟:

Exports from Jiangsu, Zhejiang, and Shanghai to ASEAN:

主要是工业制成品, 包括机电产品、纺织品、塑料橡胶制品、贱金属制品等

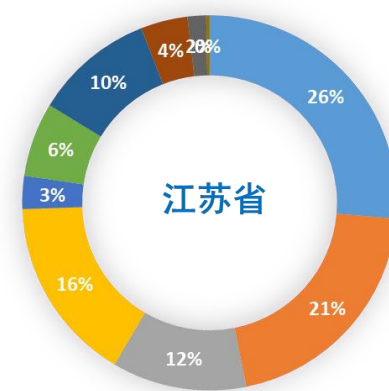
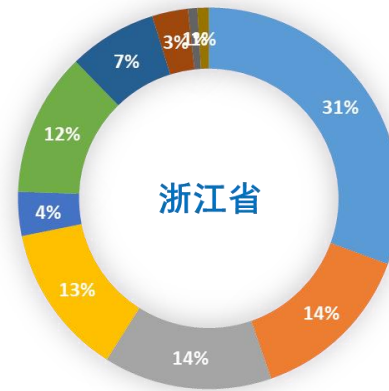
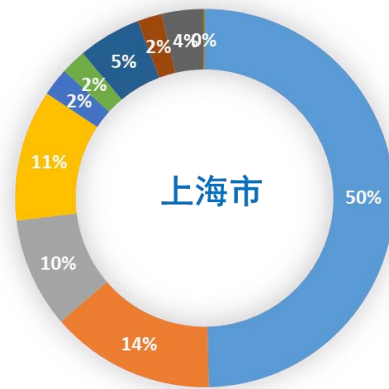
Mainly industrial manufactured goods, including machinery and electrical products, textiles, plastic and rubber products, and base metal products.

江浙沪自东盟进口:

Imports to Jiangsu, Zhejiang, and Shanghai from ASEAN:

食品类 (动植物产品) 是最大贸易货种, 其次是工业制成品和中间产品。

Food products (both animal and plant products) are the largest traded commodities, followed by industrial manufactured goods and intermediate products.



- 食品类 (动植物产品)
- 机电产品
- 纺织
- 塑料橡胶制品
- 家具玩具
- 服装鞋帽
- 贱金属及其制品
- 化工品
- 车辆、航空器、船舶及有关运输设备



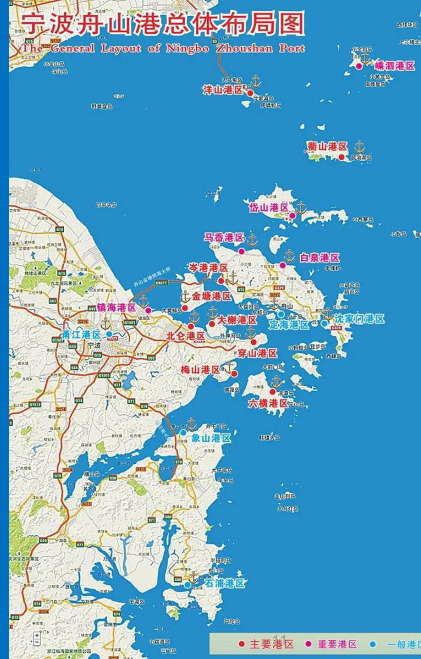
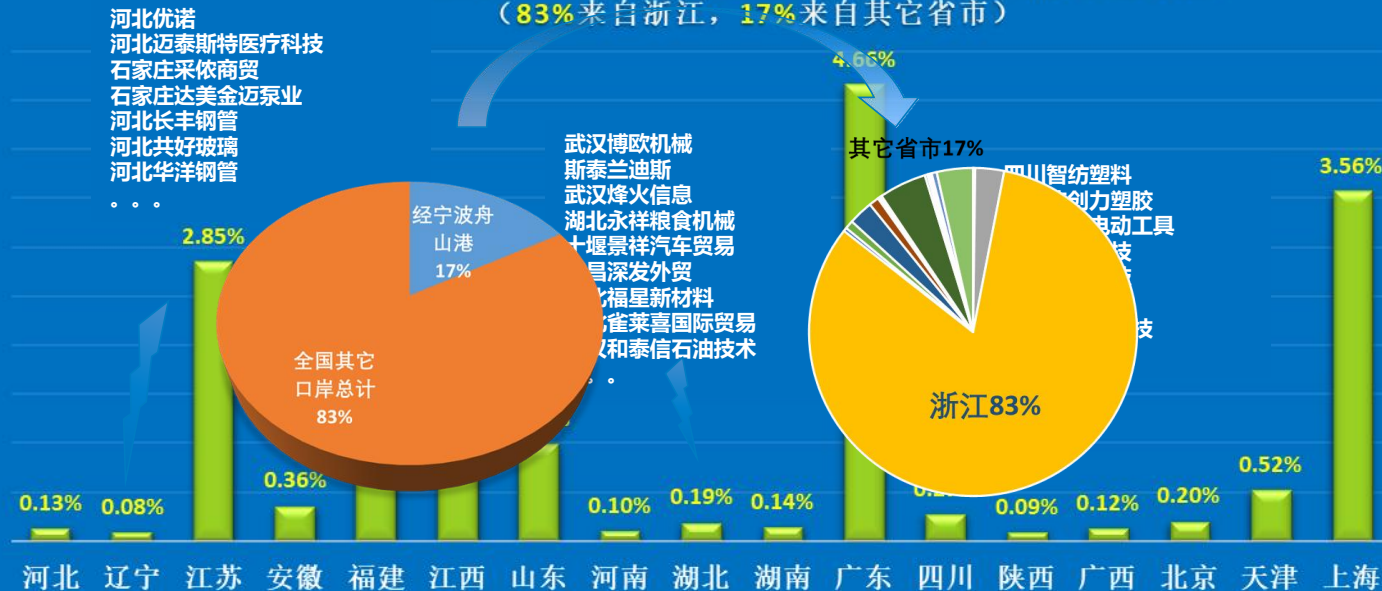
我国对东盟贸易，有17%选择宁波舟山港进出。

17% of China's trade with ASEAN chooses Ningbo-Zhoushan Port for imports and exports.

这部分17%经宁波舟山港的贸易量涉及我国18个省市。其中的83%来自浙江省，其余来自另外的17个省市。

Of this 17%, the trade volume passing through Ningbo-Zhoushan Port involves 18 provinces and municipalities in China. Among them, 83% originates from Zhejiang Province, while the remaining 17% comes from the other 17 provinces and municipalities.

2023年我国对东盟贸易——经由宁波舟山港出口货量的货源地分布 (83%来自浙江, 17%来自其它省市)





直接腹地物流通道选择 Direct Hinterland Logistics Channel Choices

1、浙江和江西是宁波舟山港的直接腹地。

Zhejiang and Jiangxi are the direct hinterlands of Ningbo-Zhoushan Port.

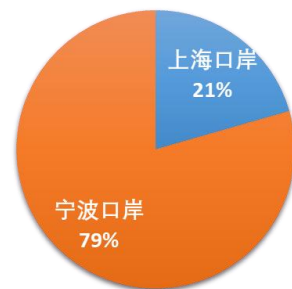
2、浙江出口东盟的货物选择上海港和宁波舟山港的比重分别为21%和79%。

For exports to ASEAN from Zhejiang, the proportion of goods choosing Shanghai Port and Ningbo-Zhoushan Port is 21% and 79%, respectively.

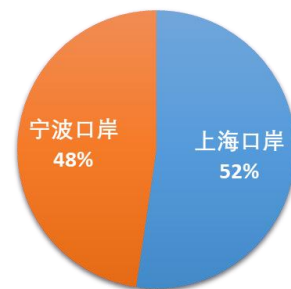
3、江西的这一比重为52%和48%。

For Jiangxi, this proportion is 52% and 48%.

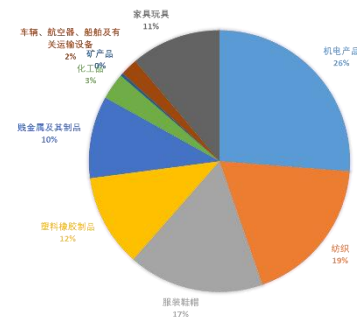
2023年浙江省出口东盟



2023年江西省出口东盟



2023年浙江省经上海口岸出口东盟的主要货类分布



以塑料橡胶制品为例：
浙江省选择上海港出口东盟的部分企业

序号	企业名称
1	杭州福应用材料股份有限公司
2	浙江祥技股份有限公司
3	宁波乐有限公司
4	浙江汽车配件有限公司
5	杭州配件有限公司



浙江省

Zhejiang Province

2023年出口东盟塑料橡胶 制品排名前十出口商分布

Distribution of the Top Ten
Exporters of Plastic and
Rubber Products to ASEAN
in 2023

- 1、杭州福斯特应用材料
- 2、宁波富佳实业
- 3、浙江永裕家居
- 4、浙江世纪豪门家居
- 5、浙江横店得邦进出口
- 6、宁波广博进出口
- 7、浙江露笑通得进出口
- 8、宁波卓捷进出口
- 9、宁波乐孚电子
- 10、义乌市逐胜贸易



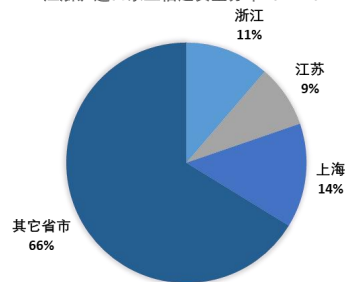


东南亚特色产品: Southeast Asian Specialty Products:

榴莲、初榨油/棕榈油、活鱼 (冰/鲜)
Durian, virgin oil/palm oil, live fish (chilled/fresh)

江浙沪进口贸易量在全国的比重分布和东盟地区的排名靠前的主要出口商
The proportion of import trade volume in Jiangsu, Zhejiang, and Shanghai relative to the national total and the leading exporters in ASEAN.

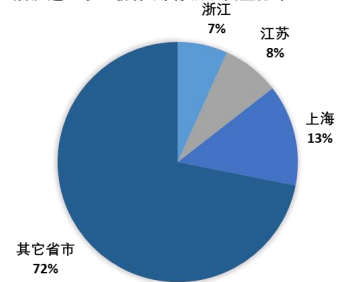
江浙沪进口东盟榴莲货量分布 (2023)



序号 榴莲产品东盟主要出口商

1	VAN HOA DEVELOPMENT INVESTMENT COMPANY LTD
2	AN KHANG COMPANY LTD
3	ENG SENG FOOD PRODUCTS
4	KIM SON INTERNATIONAL IMPORT EXPORT TRADING COMPANY LTD
5	HA ANH INTERNATIONAL COMPANY LTD

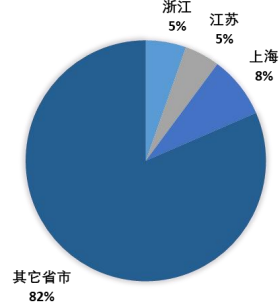
江浙沪进口东盟初榨油/棕榈油货量分布 (2023)



序号 初榨油/棕榈油东盟主要出口商

1	Apical Middle East FZCO
2	MULTIMAS NABATI ASAHAN
3	KARYA INDAH ALAM SEJAHTERA
4	AAA Oils&Fats Pte Ltd
5	CARGILL PALM PRODUCTS SDN BHD

江浙沪进口东盟活鱼 (冰/鲜) 货量分布 (2023)

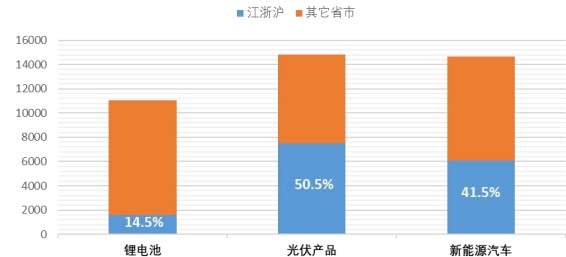


序号 活鱼 (冰/鲜) 东盟主要出口商

1	P&P FISH FACTORY THAILAND CO., LTD
2	PARADISE ICE&WATER CO LTD
3	QIAN HU FISH FARM TRADING
4	CV LEOPARD AQUATIC
5	TOH FISH CORPORATION

1、与全国相比 Compared to the national average

2023年全国和江浙沪新三样出口东盟情况



江浙沪的光伏产品占我国出口东盟贸易量一半左右，为50.5%；新能源汽车占比达41.5%；锂电池非江浙沪强势产业，占比只有14.5%。

photovoltaic products from Jiangsu, Zhejiang, and Shanghai account for about half of China's exports to ASEAN, at 50.5%; new energy vehicles account for 41.5%; however, lithium batteries, which are not a strong industry in Jiangsu, Zhejiang, and Shanghai, only account for 14.5%.

2、江浙沪相比

Comparison between Jiangsu, Zhejiang, and Shanghai:

浙江：锂电池领域领先，38%

Zhejiang: Leading in the field of lithium batteries, at 38%.

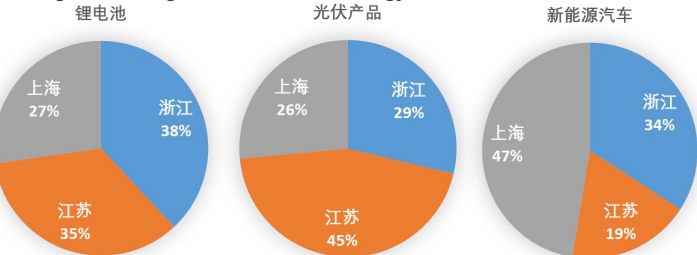
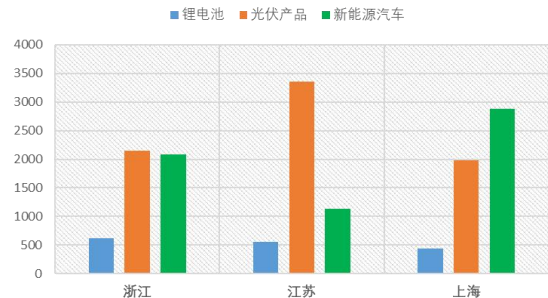
江苏：光伏产品领域领先，45%

Jiangsu: Leading in the field of photovoltaic products, at 45%.

上海：新能源汽车领域领先，47%

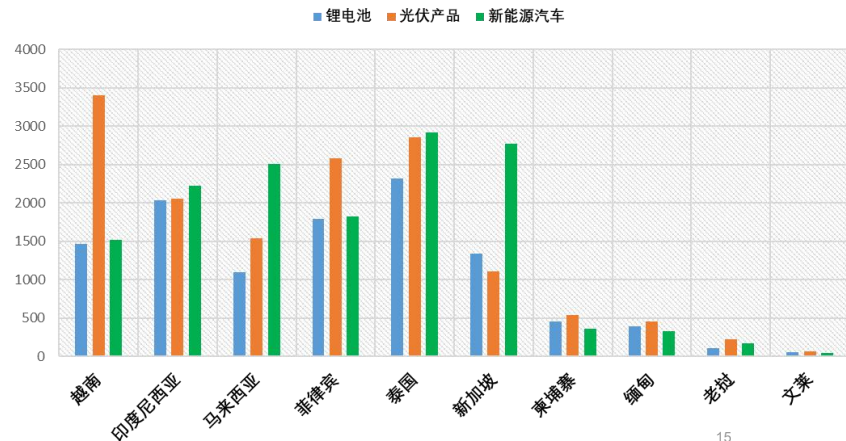
Shanghai: Leading in the field of new energy vehicles, at 47%.

江浙沪出口东盟新三样贸易订单量分布



江浙沪“新三样”与东盟贸易 The "New Three Items" Trade between Jiangsu, Zhejiang, and Shanghai and ASEAN

中国出口东盟主要国家新三样贸易订单量分布





感谢您的关注!

Thank you.

如有疑问，敬请联系：

卢成

电话：13910626092

交通运输部水运科学研究院

——2024.6——

