

全球供应链促进报告及指数矩阵

Global Supply Chain Promotion Report and Index Matrix



中国国际贸易促进委员会
CHINA COUNCIL FOR THE PROMOTION OF INTERNATIONAL TRADE

2025.7

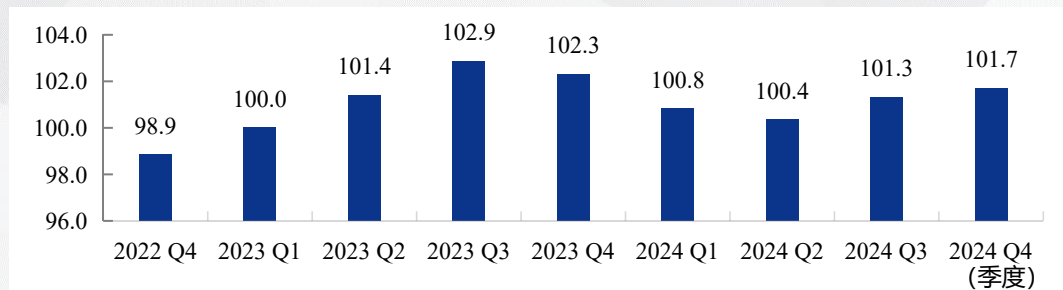
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2025版《全球供应链促进报告》

Global Supply Chain Promotion Report 2025

全球基础设施联通水平持续提高，全球南方基础设施建设提质增速。

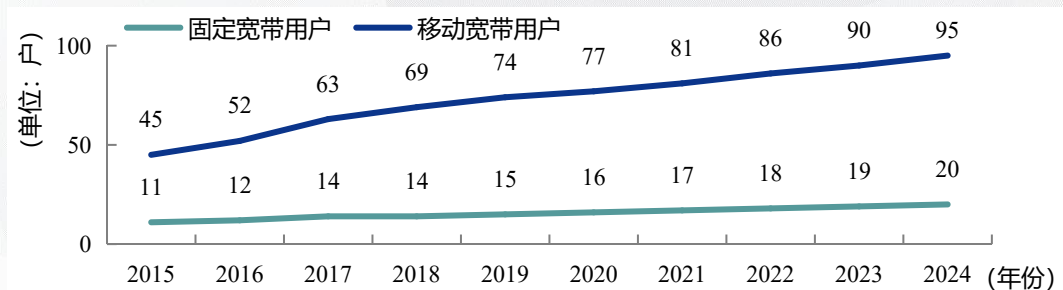
The level of global infrastructure connectivity has continued to improve, and the quality and growth of infrastructure construction in the Global South have been enhanced.



2022Q4-2024Q4全球班轮运输连通性指数

Global LSCI, 2022Q4-2024Q4

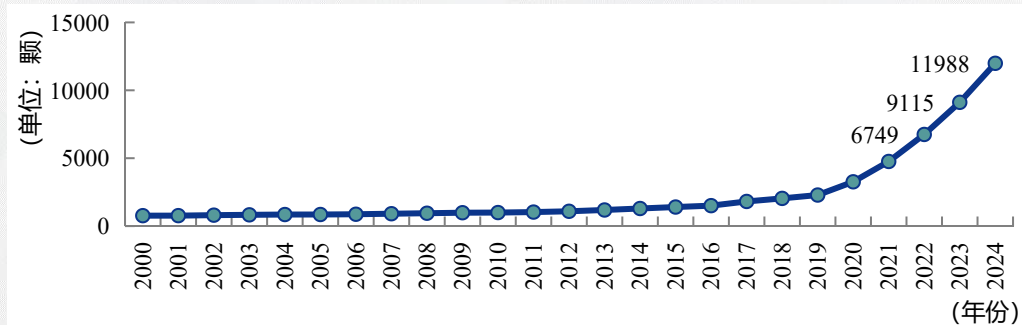
资料来源/Source: 联合国贸易和发展会议/UNCTAD



2015-2024年全球每100名居民中固定宽带用户与移动宽带用户订阅量

Fixed broadband subscriptions and mobile broadband subscriptions per 100 people worldwide (2015-2024)

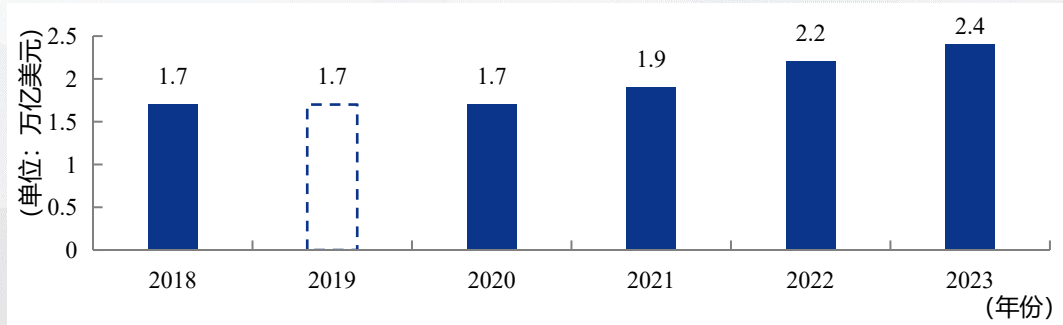
资料来源/Source: 国际电信联盟/ITU



2000-2024年全球在轨卫星数量

Numbers of global satellites in orbit by year, 2000-2024

资料来源/Source: Statista



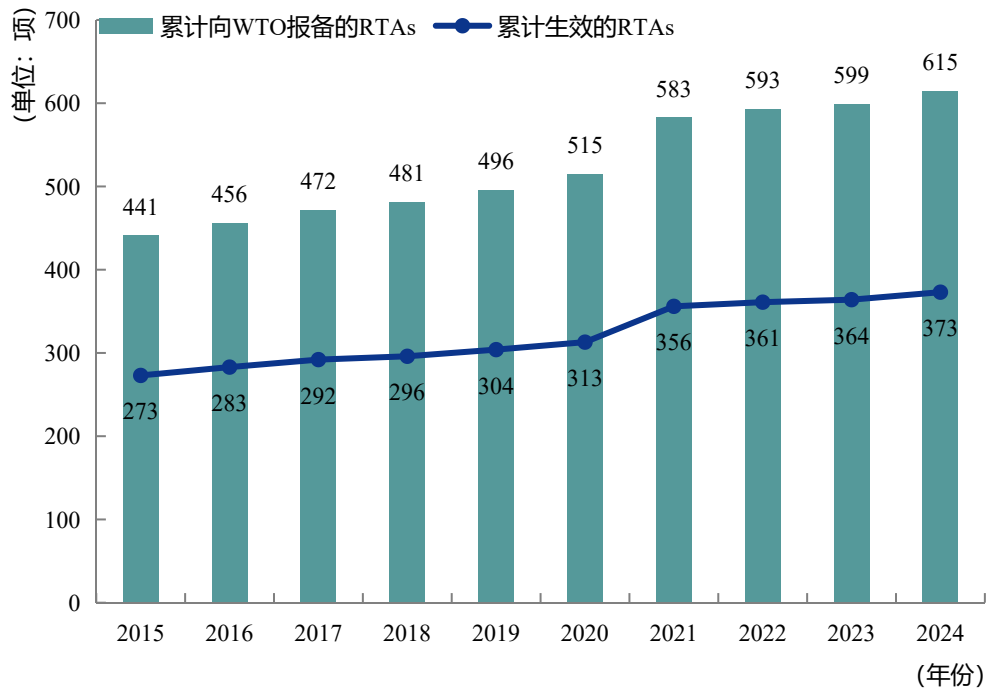
2018-2023年全球支付市场总收入

Gross revenue of the global payments market by year, 2018-2023

资料来源/Source: 麦肯锡《全球支付报告2024》/McKinsey's report *Global Payments in 2024*

国际经贸规则侧重全球供应链包容发展。

International economic and trade rules pay more attention to the inclusive development of global supply chains.



2015-2024年累计向WTO报备和生效的RTAs

RTAs that were notified to the WTO and entered into force, 2015-2024

资料来源/ Source: WTO秘书处/WTO Secretariat

2024年各经济体向WTO新报备的RTAs

New RTAs notified by economies to the WTO in 2024

序号/No.	协定名称/Name
1	土耳其-波黑自贸协定/Türkiye - Bosnia and Herzegovina FTA
2	吉尔吉斯斯坦-阿塞拜疆自贸协定/Kyrgyz Republic - Azerbaijan FTA
3	中国-尼加拉瓜自贸协定/China - Nicaragua FTA
4	中国-柬埔寨自贸协定/China - Cambodia FTA
5	土耳其-委内瑞拉自贸协定/Türkiye - Bolivarian Republic of Venezuela FTA
6	哈萨克斯坦-阿塞拜疆自贸协定/Kazakhstan - Azerbaijan FTA
7	哈萨克斯坦-塞尔维亚自贸协定/Kazakhstan - Serbia FTA
8	哈萨克斯坦-乌兹别克斯坦自贸协定/Kazakhstan - Uzbekistan FTA
9	欧盟-新西兰自贸协定/EU - New Zealand FTA
10	韩国-以色列自贸协定/Republic of Korea-Israel FTA
11	东盟服务贸易协定/ASEAN Trade in Services Agreement
12	加拿大-乌克兰自贸协定（更新版）/Canada - Ukraine FTA
13	中国-厄瓜多尔自贸协定/China - Ecuador FTA
14	中国-塞尔维亚自贸协定/China - Serbia FTA
15	欧洲自由贸易联盟-摩尔多瓦自由贸易协定/EFTA - The Republic of Moldova FTA
16	欧盟-肯尼亚自贸协定/EU - Kenya FTA
17	全面与进步跨太平洋伙伴关系协定（英国加入）/Comprehensive and Progressive Agreement for Trans-Pacific Partnership (joined by the UK)

资料来源/Source: WTO RTAs数据库/WTO RTA Database

□ 主要经济体注重提升自身的供应链韧性水平。

Major economies attach importance to improving the resilience of their own supply chains.



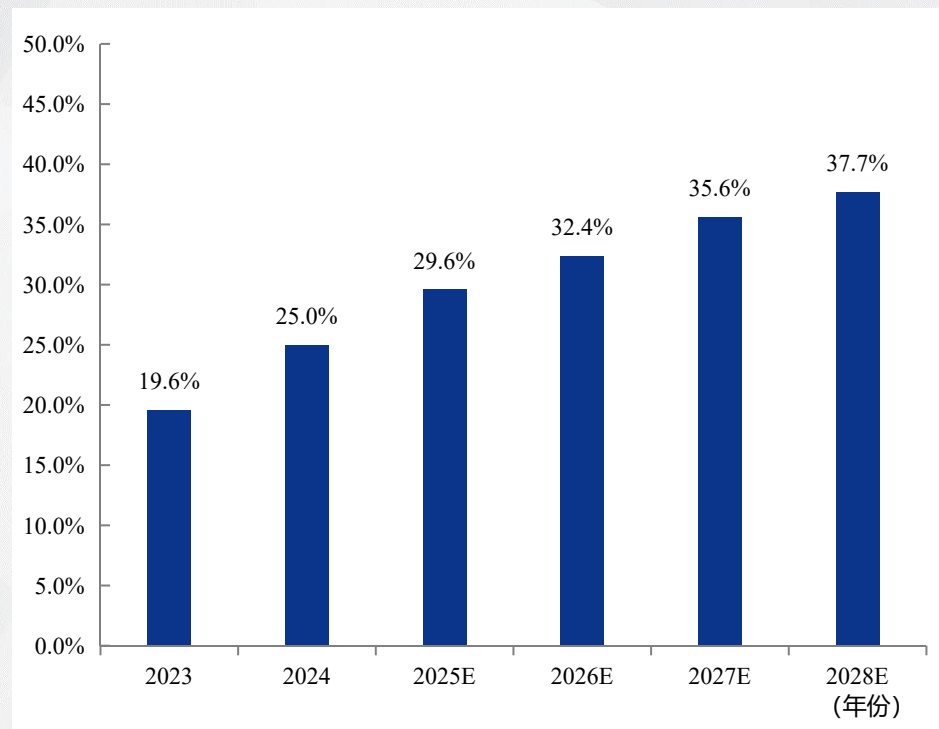
2024年主要经济体出台的部分供应链相关法律法规

Supply chain related laws and regulations issued by major economies in 2024

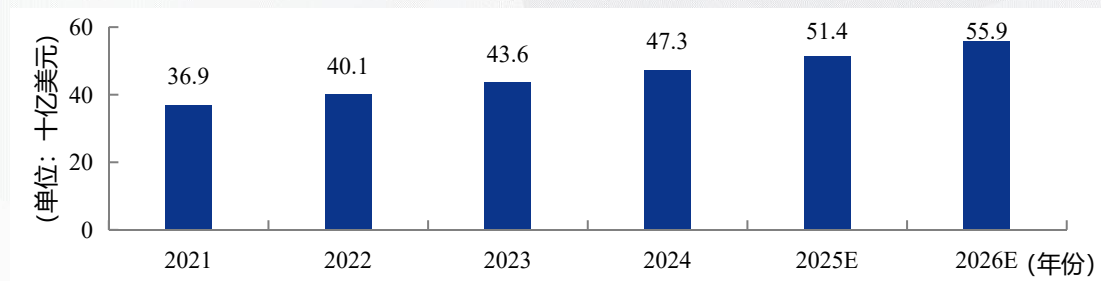
资料来源/ Source：白宫供应链韧性委员会/White House Council on Supply Chain Resilience、ERR-Lex、日本经济产业省/METI

□ 技术创新对全球供应链的驱动作用越发显著。

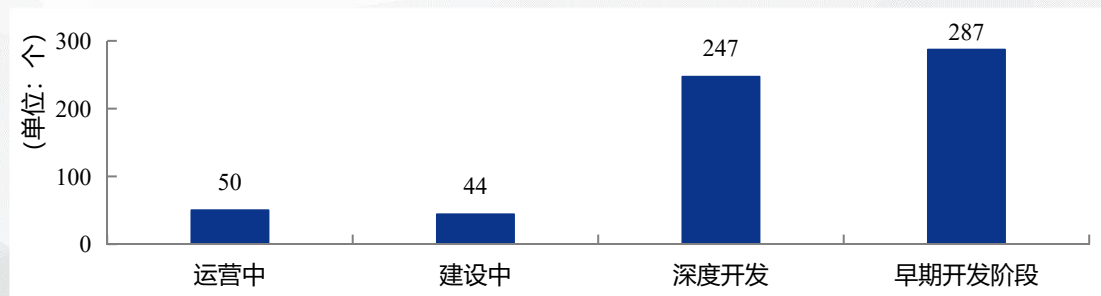
Technological innovation has played an increasingly significant role in driving the development of global supply chains.



全球生成式人工智能 (GenAI) 服务器市场规模占比
Share of GenAI servers in the global AI server market by year, 2023-2028
资料来源/Source: 国际数据公司/IDC



2021-2026年全球智能电网技术市场规模
Global smart grid market size by year, 2021-2026
资料来源/Source: Statista



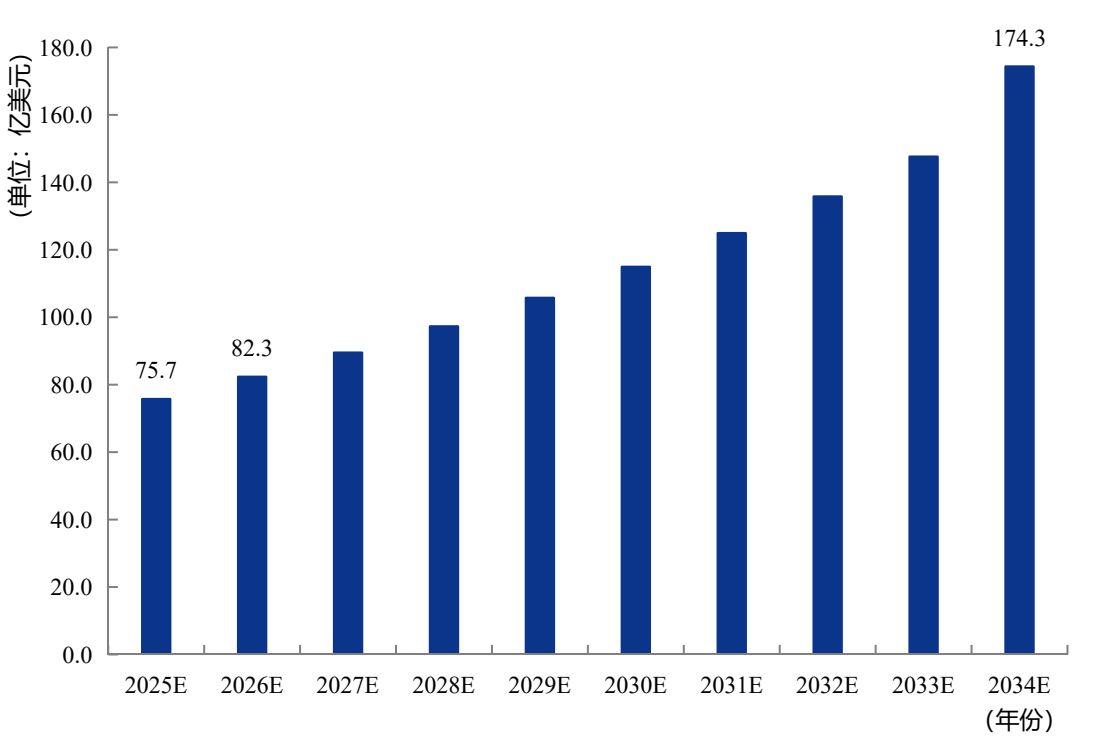
截至2024年7月全球开发和筹备中的碳捕集与封存项目
Number of CCS projects under development and preparation worldwide as of July 2024
资料来源/Source: 全球碳捕集与封存协会/GSSCI

全球金融服务普惠性提升。
The inclusivity of global financial services has increased.

2024财年世界银行资金承诺额、支付额和总担保额（单位：百万美元）
World Bank commitments, disbursements, and gross issuance in the fiscal year 2024
(Unit: USD million)

World Bank	IBRD	IDA	IFC	MIGA
承诺额 Commitments: 117492	承诺额 Commitments: 37568	承诺额 Commitments: 31195	承诺额 Commitments: 31654	总担保额 Gross issuance: 8204
支付额 Disbursements: 89000	支付额 Disbursements: 33450	支付额 Disbursements: 28247	支付额 Disbursements: 19147	

资料来源/Source: 世界银行/ World Bank



2025-2034年全球供应链金融市场规模预测
Forecasts for global supply chain finance market size by year, 2025-2034
资料来源/Source: Claight

中国持续提升基础设施互联互通水平、坚定不移推进高水平对外开放、积极推动全球供应链开放合作、因地制宜发展新质生产力、不断增强全球供应链金融服务效能。

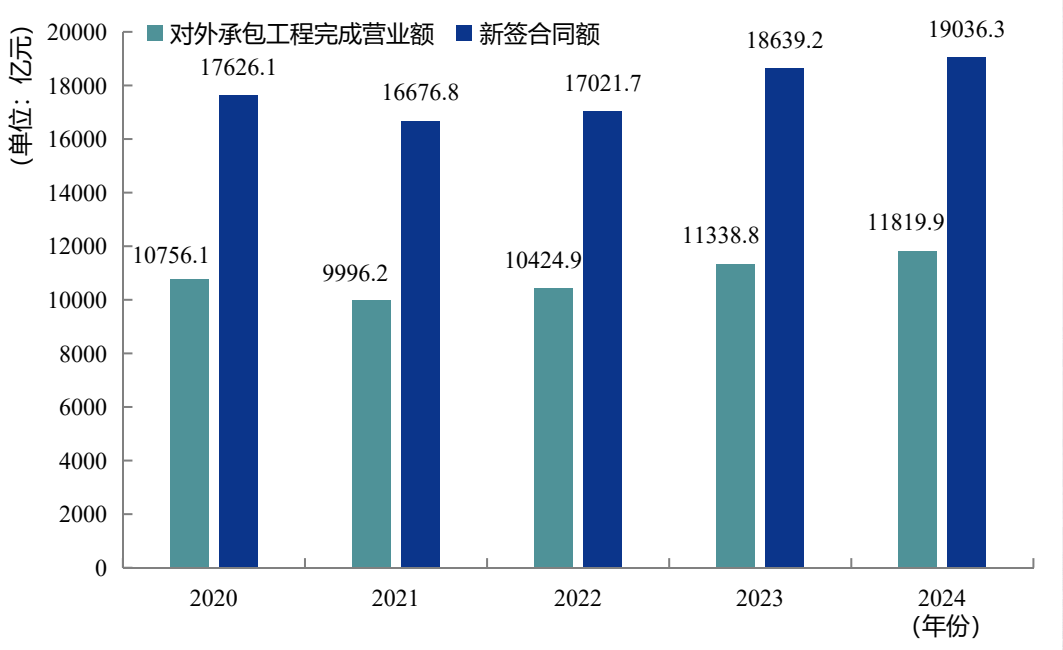
China continues to improve infrastructure connectivity, unswervingly promote high-standard opening up, actively advance the openness and cooperation of global supply chains, vigorously foster new quality productive forces according to local conditions, continuously enhance the efficiency of global supply chain financial services.

2024年以来中国生效的双边自贸协定

Bilateral FTAs between China and foreign countries that have come into effect since 2024

协定/FTAs	生效时间/Effective date
中国-尼加拉瓜自贸协定 China-Nicaragua FTA	2024年1月1日 January 1, 2024
中国-厄瓜多尔自贸协定 China-Ecuador FTA	2024年5月1日 May 1, 2024
中国-塞尔维亚自贸协定 China-Serbia FTA	2024年7月1日 July 1, 2024
中国与新加坡自由贸易协定4.0升级版 China-Singapore FTA 4.0	2024年12月31日 December 31, 2024
中国-马尔代夫自贸协定 China-Maldives FTA	2025年1月1日 January 1, 2025

资料来源/ Source：中国政府网/www.gov.cn.



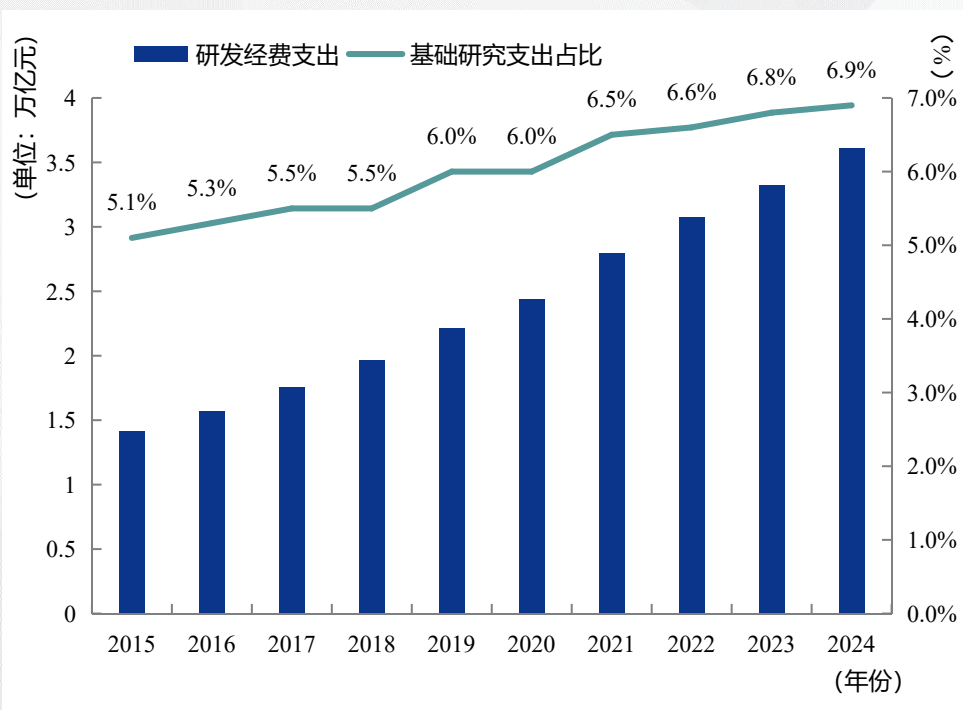
2020-2024 年中国对外承包工程营业额及新签合同额

China's business revenue from overseas contracted projects and value of newly signed contracts, 2020-2024

资料来源/ Source：中国商务部/China's Ministry of Commerce

中国推动全球供应链提质升级、补链延链、多元布局、效率提升，在不确定的世界里为全球供应链合作提供了最大确定性。

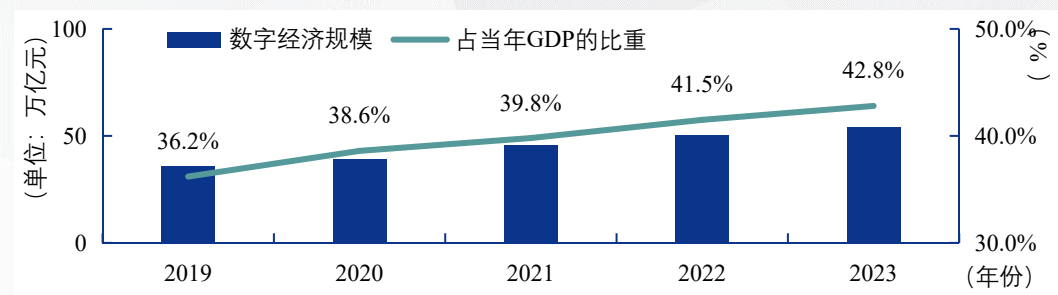
China continues to upgrade, replenish and extend global supply chains through diversified planning to improve the efficiency. Such practices have provided the greatest certainty for global supply chain cooperation in an uncertain world.



2015-2024 年中国 R&D 经费投入及基础研究投入占比

China's R&D investment expenditures and proportion of investment in basic research by year, 2015-2024

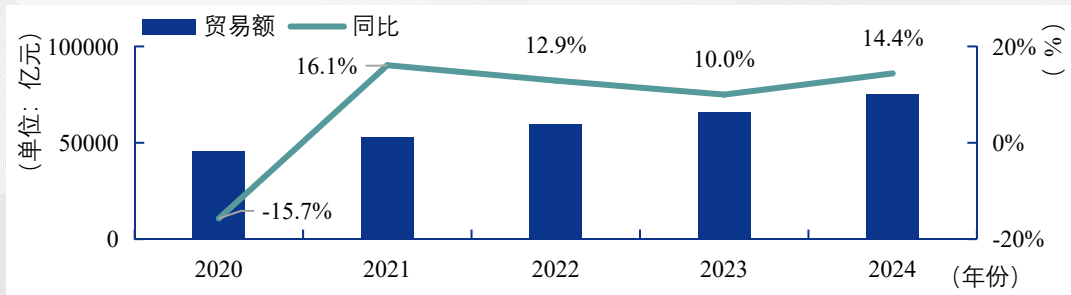
资料来源/ Source: 中国国家统计局/National Bureau of Statistics of China



2019-2023 年中国数字经济规模及其占GDP的比重

Scale of China's digital economy and its share in GDP by year, 2019-2023

资料来源/Source: 中国信息通信研究院/China Academy of Information and Communications Technology



2020-2024年中国服务贸易进出口总额及增速

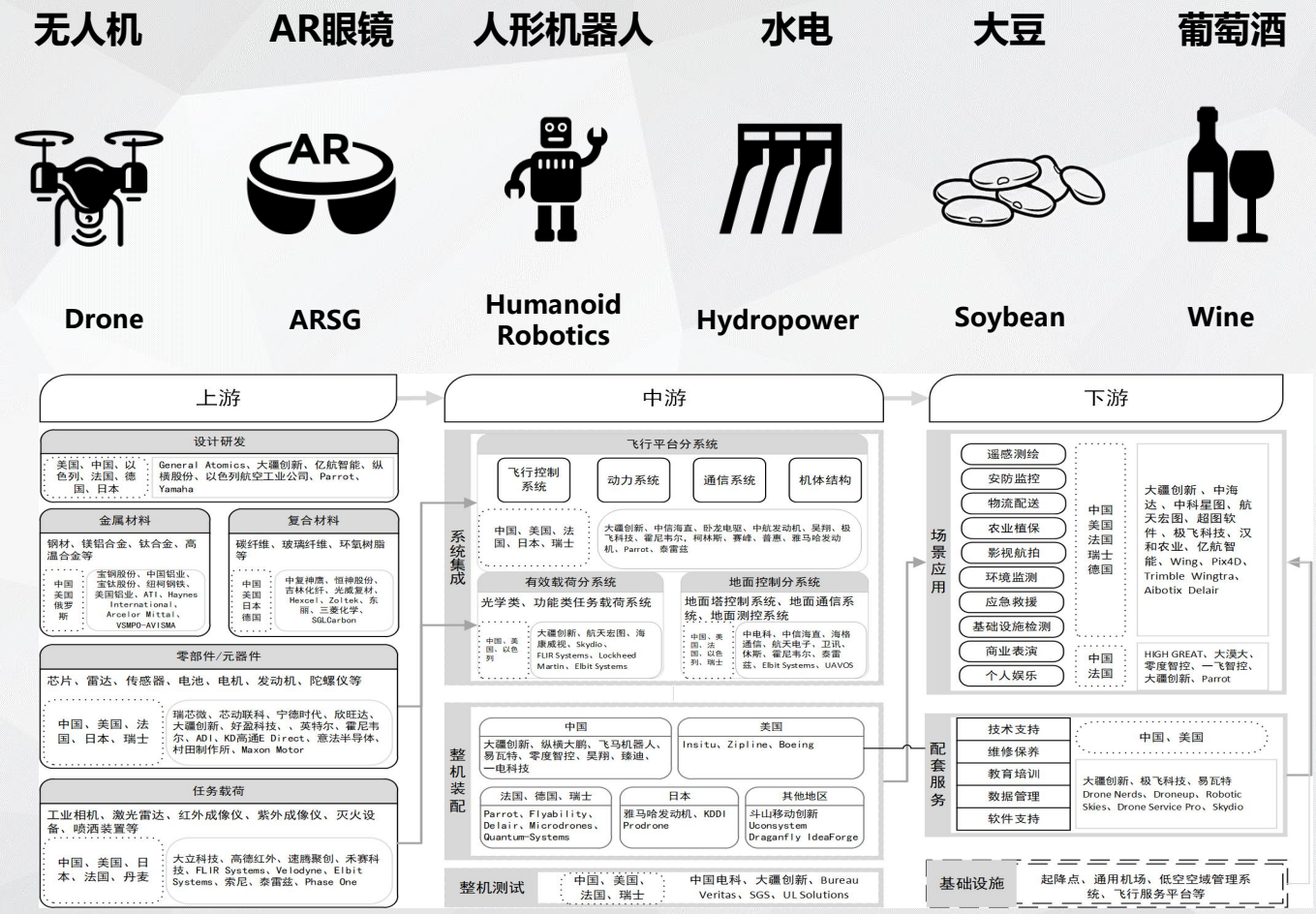
The volume and year-on-year growth rate of China's trade in services, 2020-2024

资料来源/Source: 中国商务部/China's Ministry of Commerce

绘制全球供应链图谱
Diagram global supply chain

绘制了无人机、AR眼镜、人形机器人、水电、大豆和葡萄酒6种产品的全球供应链图谱，清晰展示每条供应链的上中下游分布。

Draw six global supply chain diagrams around six kinds of representative products including drone, ARSG, humanoid robotics, hydropower, soybean, and wine, clearly showing the upstream, midstream and downstream distribution of each supply chain.



全球供应链图谱 (以无人机为例)
Global supply chain diagram (taking drone as an example)
资料来源/Source: 中国贸促会研究院整理/ Compiled by CCPIT Academy

02

全球供应链指数矩阵 Global Supply Chain Index Matrix

全球供应链指数矩阵构成, Composition of Global Supply Chain Index Matrix



全球首发

World Premiere

□ 今年, 我们以去年发布的全球供应链促进指数和全球供应链连接指数 (以下分别简称“促进指数”“连接指数”) 为起点, 进一步拓展全球供应链指数研究领域, 全新研发全球供应链创新指数和全球供应链韧性指数 (以下分别简称“创新指数”和“韧性指数”), 形成全球供应链指数矩阵 (以下简称“指数矩阵”)。

Based on the Global Supply Chain Promotion Index (GSCPI) and the Global Supply Chain Connectivity Index (GSCCI) published last year, we have further expanded the scope of global supply chain index research by developing the Global Supply Chain Innovation Index (GSCII) and the Global Supply Chain Resilience Index (GSCRI) to form Global Supply Chain Index Matrix (Index Matrix).

促进指数评估全球供应链的外部环境。

GSCPI assesses the external environment of the global supply chain.

连接指数衡量全球供应链的连接状态。

GSCCI measures the connectivity of the global supply chain.

创新指数呈现全球供应链的内驱动力。

GSCII represents the internal driving force of the global supply chain.

韧性指数反映全球供应链的内在质量。

GSCRI reflects the robustness of the global supply chain.



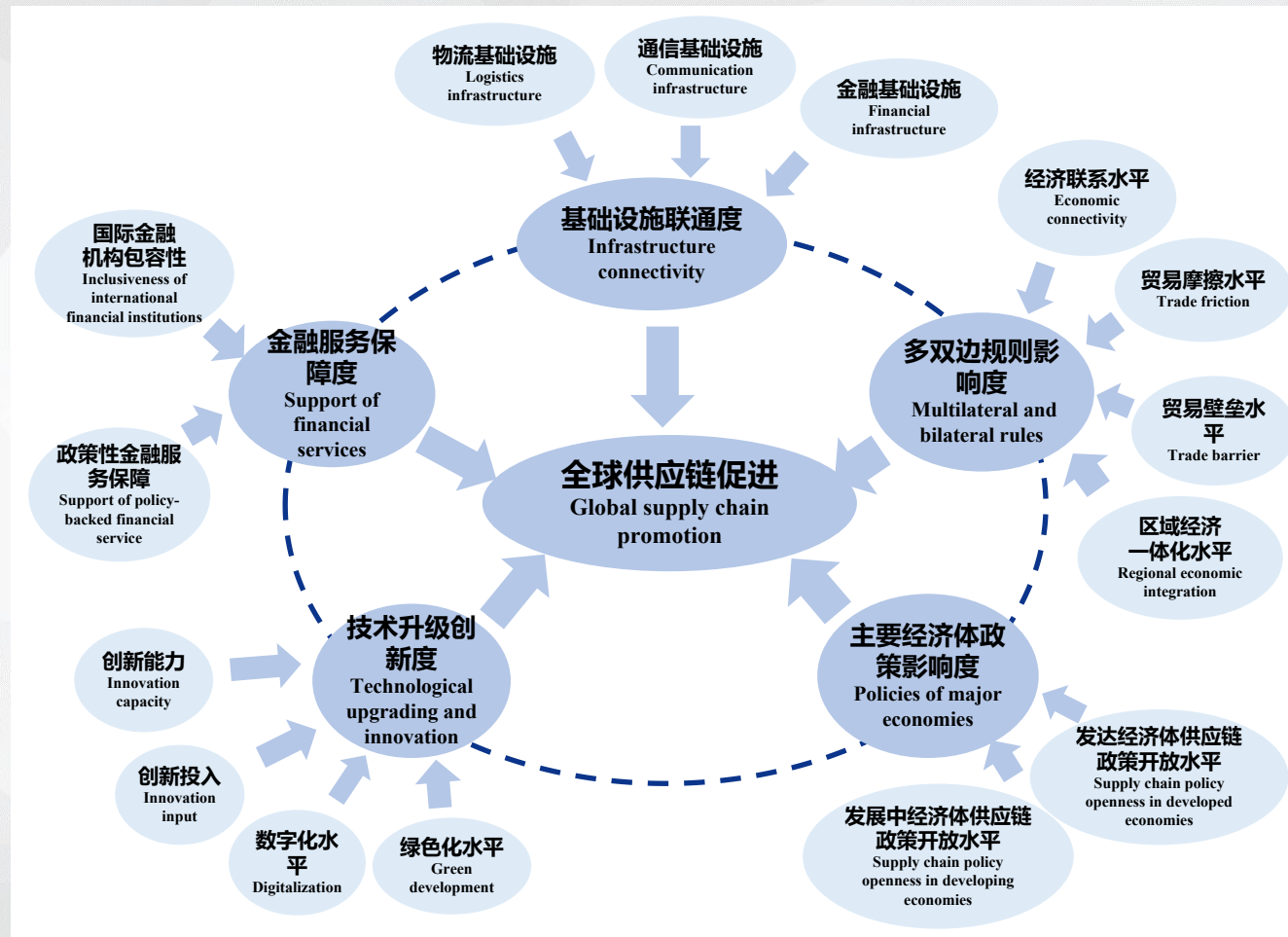
全球供应链指数矩阵逻辑架构

The logical framework of the Global Supply Chain Index Matrix
资料来源/Source: 中国贸促会研究院整理/ Compiled by CCPIT Academy

促进指数，GSCPI

□ 促进指数量化评估全球供应链发展环境，以我们2023年首创的全球供应链促进分析模型为基础开发设计，包括基础设施联通度、多双边规则影响度、主要经济体政策影响度、技术升级创新度和金融服务保障度5个一级指标。

GSCPI quantitatively evaluates the development environment for global supply chains. Based on the global supply chain promotion analysis model that we initiated in 2023, it consists of five primary indicators: infrastructure connectivity, multilateral and bilateral rules, policies of major economies, technological upgrading and innovation, and support of financial services.



促进指数指标构建框架图

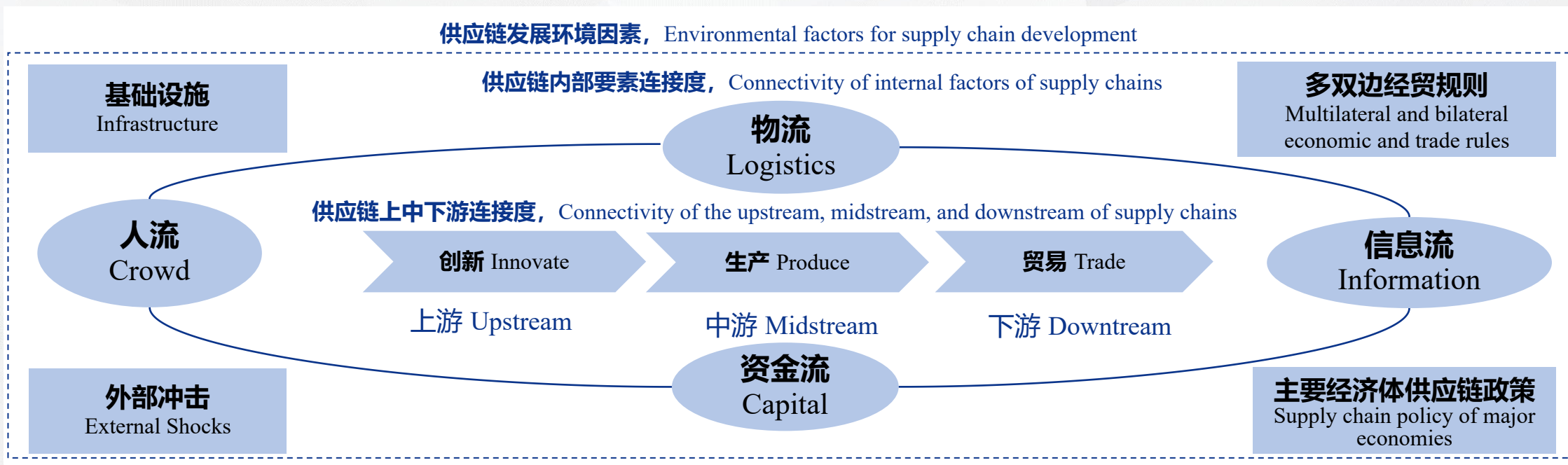
GSCPI Indicator Frame Diagram

资料来源/Source: 中国贸促会研究院整理/ Compiled by CCPIT Academy

连接指数，GSCCI

- 连接指数量化呈现全球供应链连接程度，指标设计全面考量全球供应链上中下游的连接逻辑、贯穿供应链全链条的内部要素、影响供应链连接的外部因素三个方面。

GSCCI quantitatively showcases the degree of global supply chain connectivity, and its index design comprehensively considers three aspects: the connection logic of the upstream, midstream and downstream of global supply chains, the internal factors that run through the entire supply chains, and the external factors that affect supply chain connectivity.



连接指数指标构建框架图

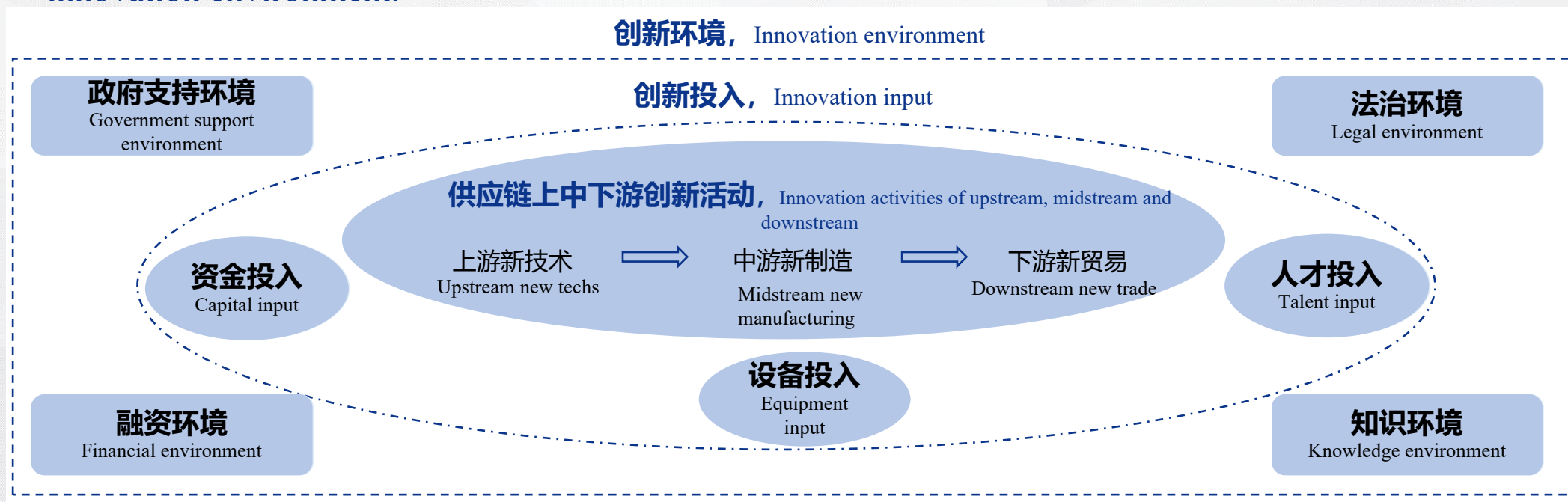
GSCCI Indicator Frame Diagram

资料来源/Source: 中国贸促会研究院整理/ Compiled by CCPIT Academy



- 创新指数全面衡量全球供应链内驱动力，涵盖供应链上中下游创新活动、创新投入、创新环境三个一级指标。

GSCII comprehensively measures the driving forces within global supply chains, covering three primary indicators: innovation activities of upstream, midstream and downstream , innovation input, and innovation environment.



创新指数指标构建框架图

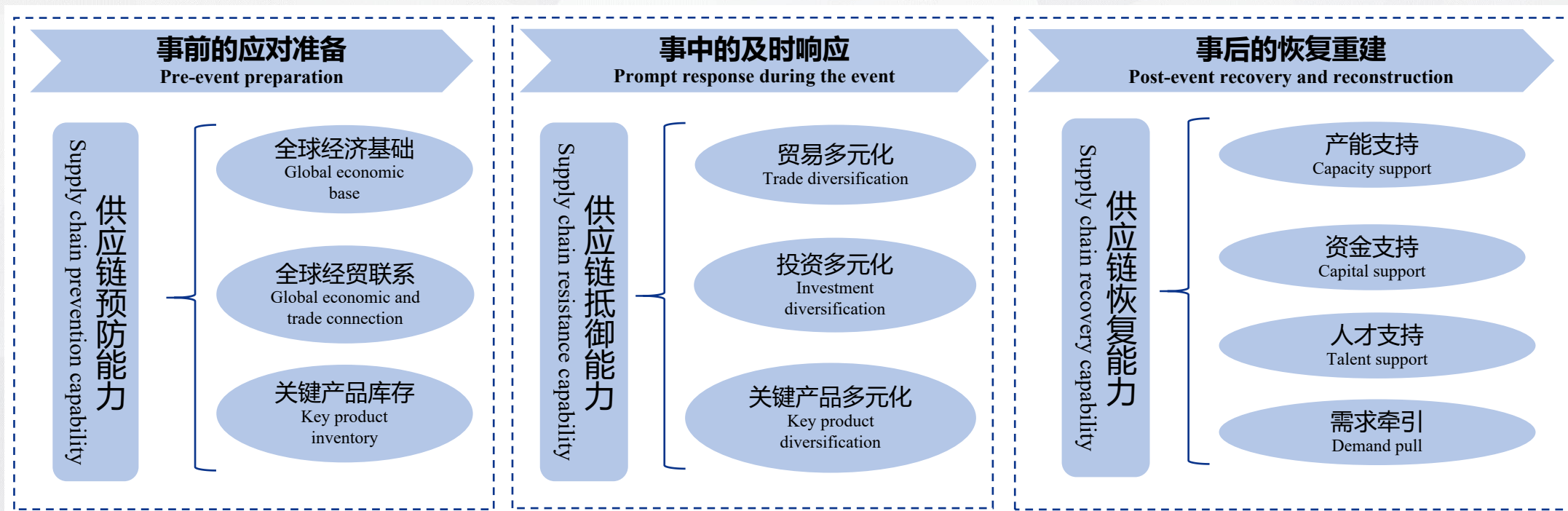
GSCII Indicator Frame Diagram

资料来源/Source: 中国贸促会研究院整理/ Compiled by CCPIT Academy



- 韧性指数科学反映全球供应链内在质量，从“事前预防-事中抵御-事后恢复”的时间维度出发，包括供应链预防能力、供应链抵御能力、供应链恢复能力三个一级指标。

GSCRI scientifically reflects the intrinsic quality of global supply chains. From the perspective of the temporal dimension of “ex-ante prevention, in-process resistance, and ex-post recovery”, it consists of three primary indicators: supply chain prevention capability, supply chain resistance capability, and supply chain recovery capability.



韧性指数指标构建框架图

GSCRI Indicator Frame Diagram

资料来源/Source: 中国贸促会研究院整理/ Compiled by CCPIT Academy

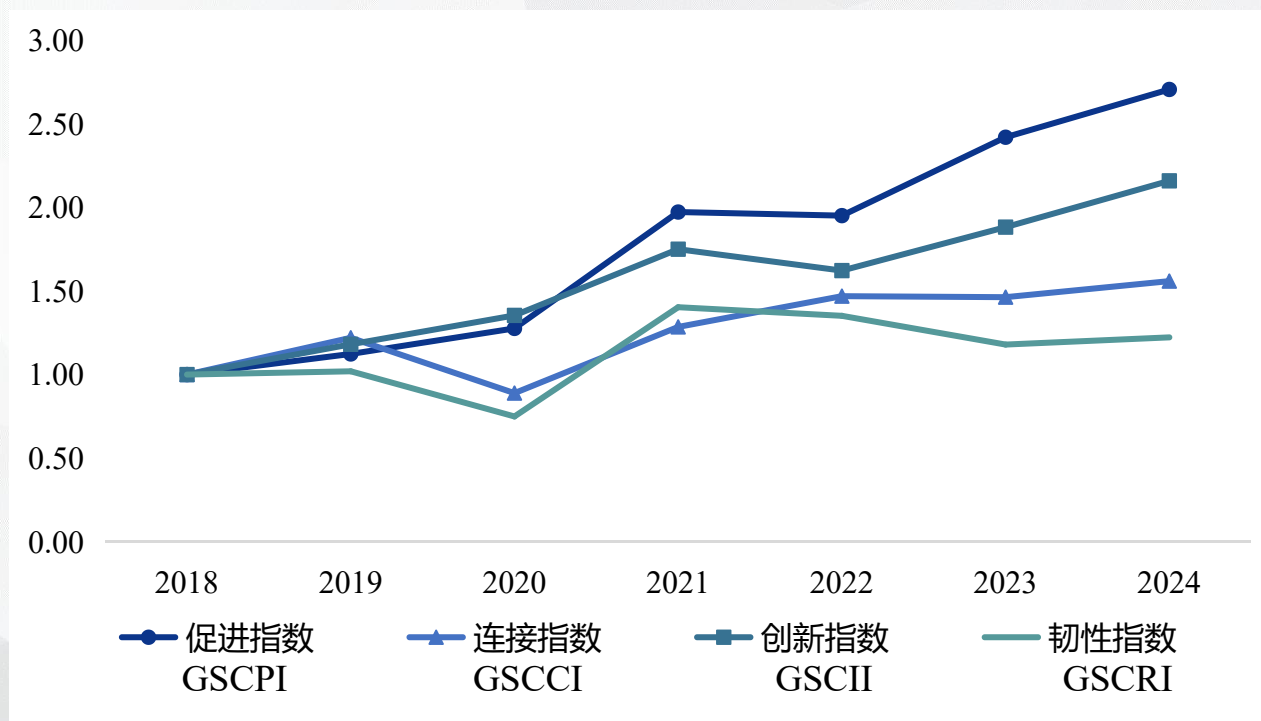
计算结果, Calculation Results

□ 为更加直观呈现2018-2024年全球供应链的变化趋势，指数矩阵以2018年为基期，并将基期值标准化为1。
In order to more intuitively display the trends of global supply chain changes from 2018 to 2024, the Index Matrix takes 2018 as the base period and set the basic value as 1.

2018-2024年，构成指数矩阵的四个指数值均有所提升。

The values of the four indices that make up the Index Matrix have all increased from 2018 to 2024.

- 促进指数增长至2.71。 GSCPI surged to 2.71.
- 连接指数增长至1.56。 GSCCI increased to 1.56.
- 创新指数增长至2.16。 GSCII increased to 2.16.
- 韧性指数增长至1.22。 GSCRI grew to 1.22.



2018-2024年四个指数走势折线图

Line chart of the trends of four indices from 2018 to 2024

资料来源/Source: 中国贸促会研究院整理/ Compiled by CCPIT Academy

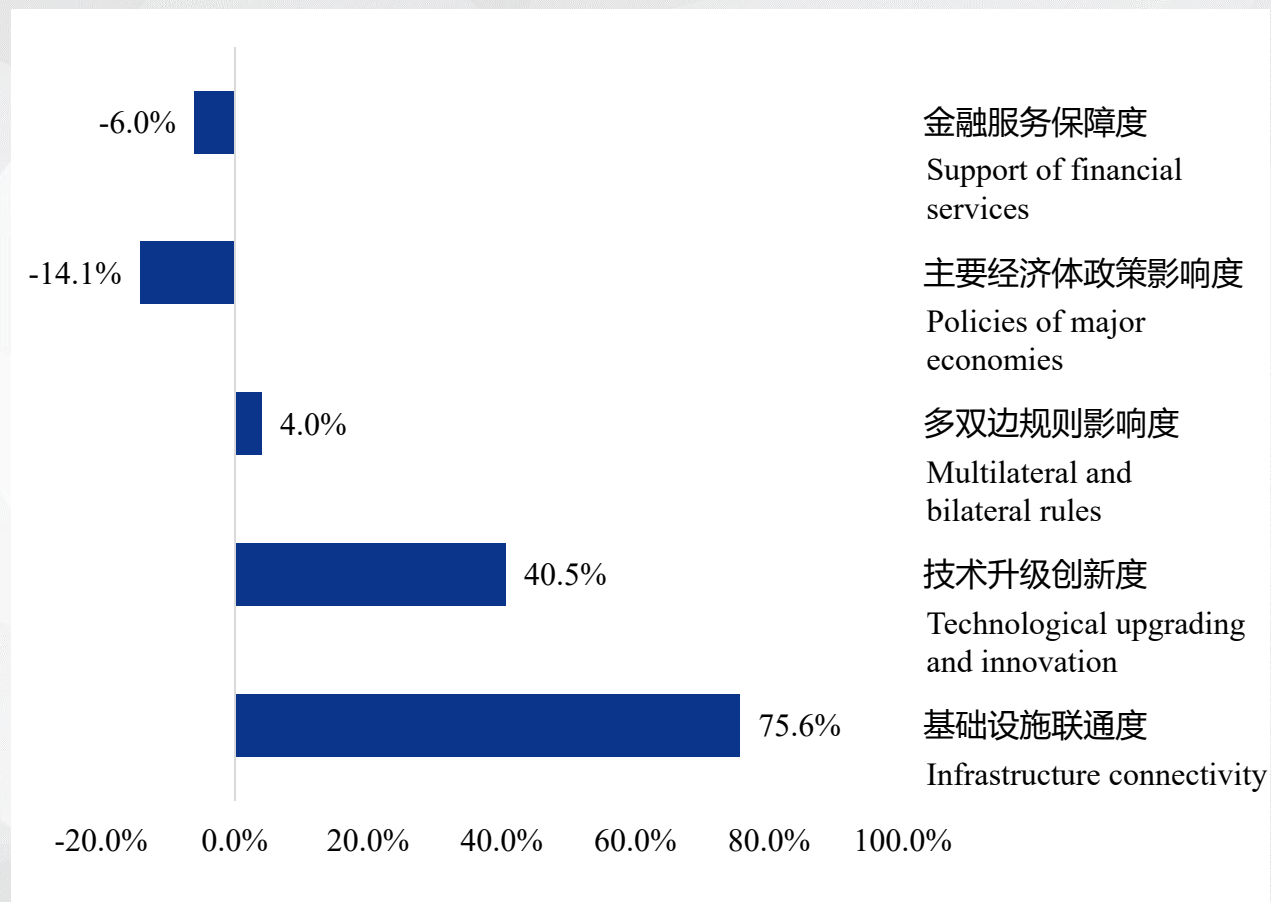
一级指标对促进指数作用分析, Role of Primary Indicators in GSCPI

□ 促进指数上升的主要原因在于:

The main drivers behind the increase of the GSCPI are :

- 基础设施联通度、技术升级创新度、多双边规则影响度指标对促进指数上升的拉动作用, 抵消了主要经济体政策影响度、金融服务保障度指标产生的拖累作用。

The positive contributions from infrastructure connectivity, technological upgrading and innovation and multilateral and bilateral rules have offset the negative impacts caused by indicators including policies of major economies and support of financial services.



各一级指标对促进指数上升的贡献率

Contribution of primary indicators to GSCPI

资料来源/Source: 中国贸促会研究院整理/ Compiled by CCPIT Academy

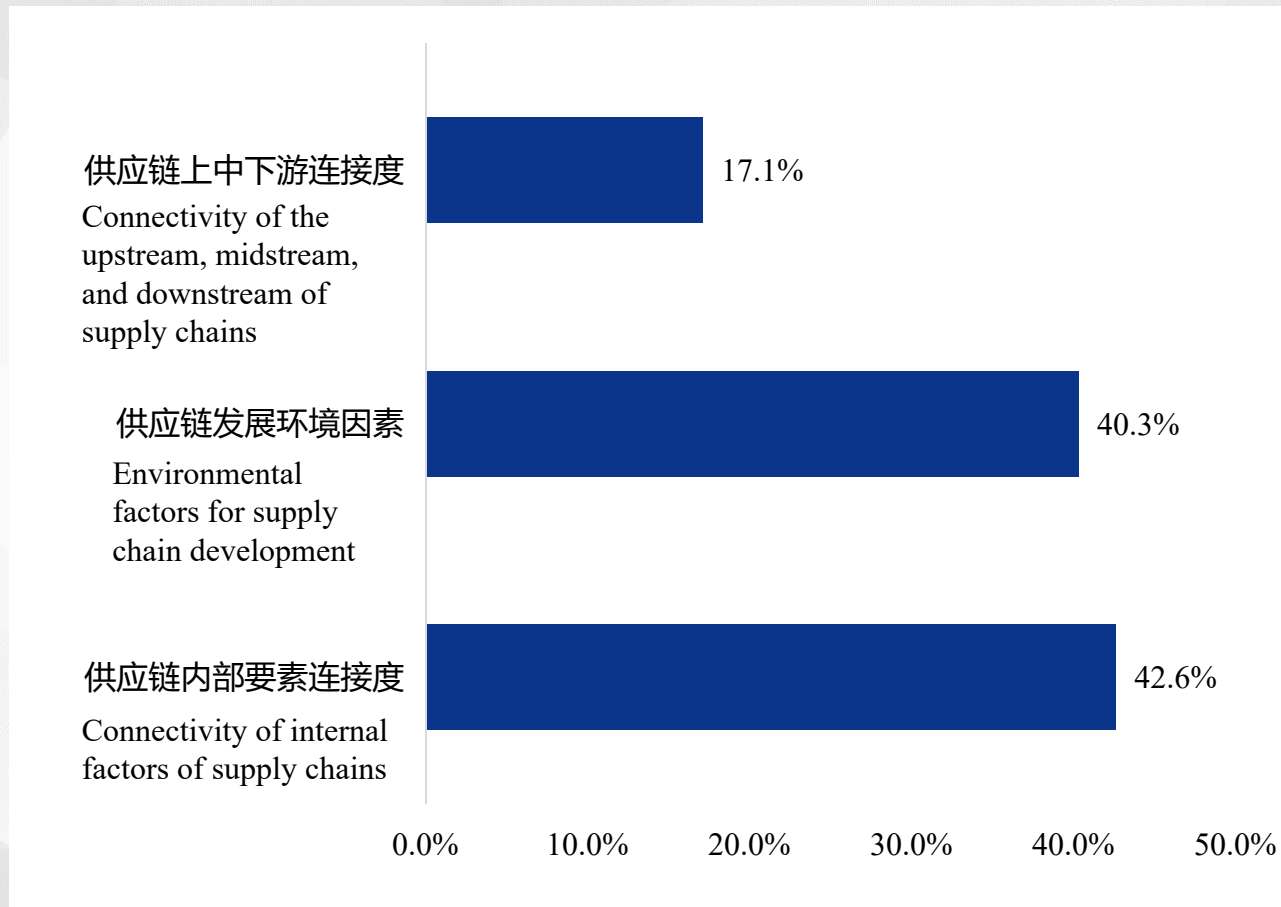
一级指标对连接指数作用分析, Role of Primary Indicators in GSCCI

□ 连接指数上升的主要原因在于:

The main drivers behind the increase of the GSCCI are :

- 供应链内部要素连接度、供应链发展环境因素、供应链上中下游连接度指标均对连接指数上升产生较大拉动作用。

All indicators, including connectivity of the upstream, midstream, and downstream of supply chains, connectivity of internal factors of supply chains and environmental factors for supply chain development, have significantly contributed to the increase of GSCCI.



各一级指标对连接指数上升的贡献率

Contribution of primary indicators to GSCCI

资料来源/Source: 中国贸促会研究院整理/ Compiled by CCPIT Academy

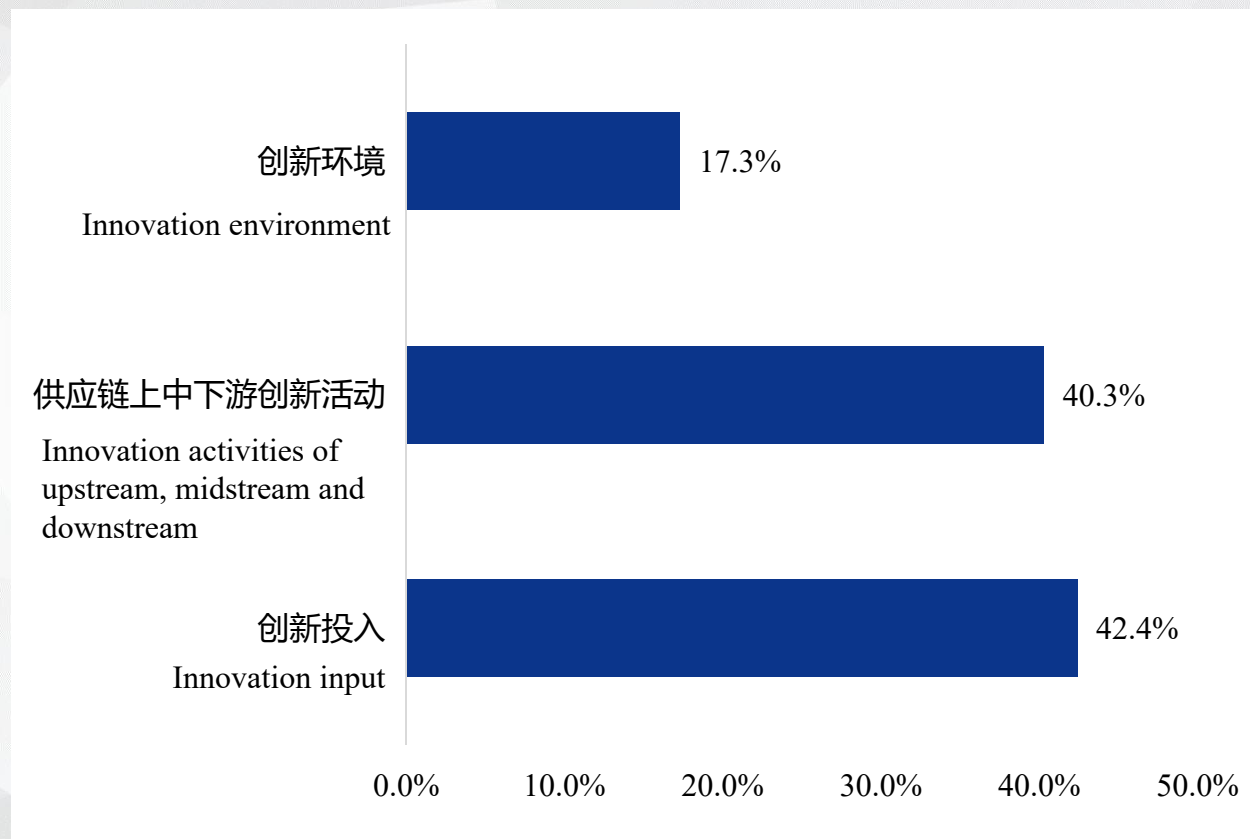
一级指标对创新指数作用分析, Role of Primary Indicators in GSCII

□ 创新指数上升的主要原因在于:

The main drivers behind the increase of the GSCII are :

- 创新投入、供应链上中下游创新活动、创新环境指标均对创新指数上升产生较大拉动作用。

All indicators, including innovation input, innovation activities of upstream, midstream and downstream, and innovation environment, have significantly contributed to the increase of GSCII.



各一级指标对创新指数上升的贡献率

Contribution of primary indicators to GSCII

资料来源/Source: 中国贸促会研究院整理/ Compiled by CCPIT Academy

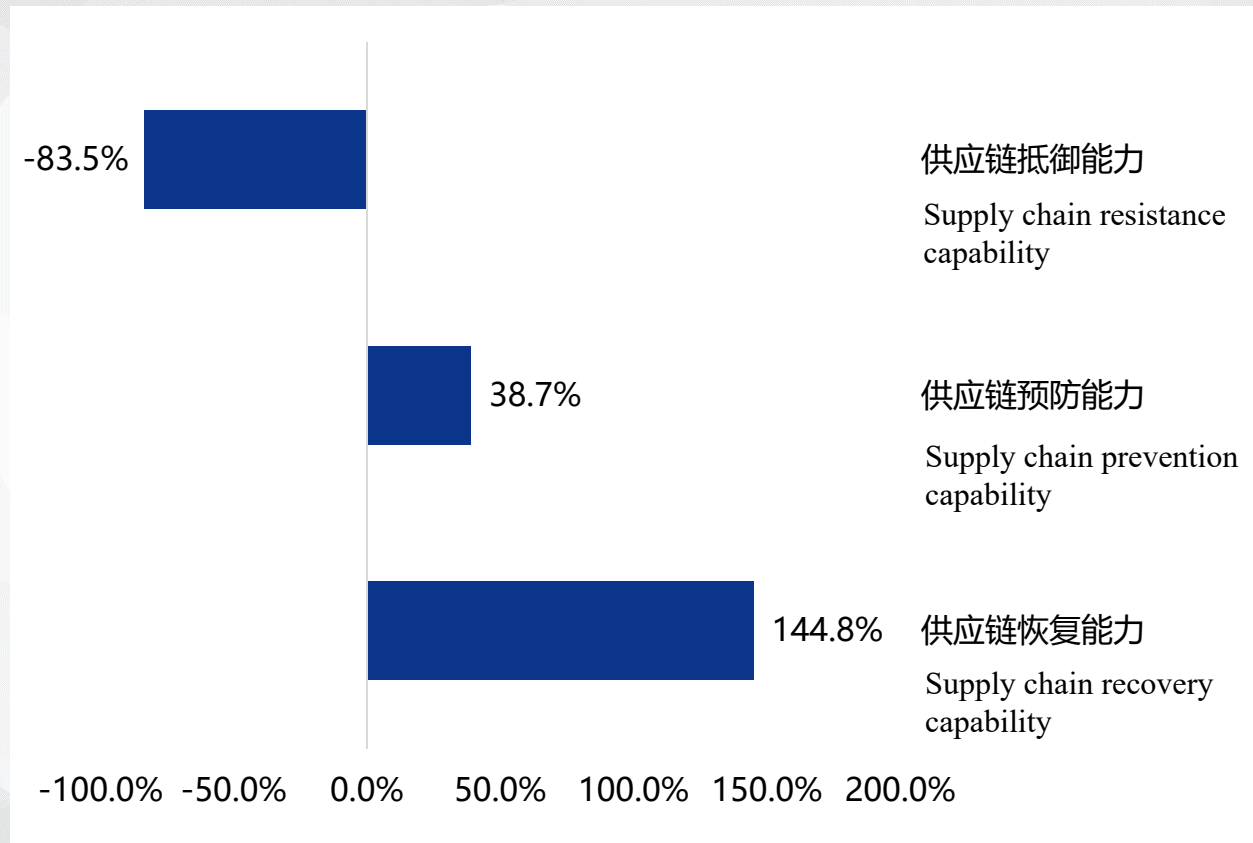
一级指标对韧性指数作用分析, Role of Primary Indicators in GSCRI

□ 韧性指数整体上升的主要原因在于:

The main drivers behind the increase of the GSCRI are :

- 供应链恢复能力、供应链预防能力指标对韧性指数上升的拉动作用, 抵消了供应链抵御能力指标产生的拖累作用。

The positive contribution of supply chain recovery capability and supply chain prevention capability offset the negative impact caused by supply chain resistance capability.



各一级指标对韧性指数上升的贡献率

Contribution of primary indicators to GSCRI

资料来源/Source: 中国贸促会研究院整理/ Compiled by CCPIT Academy

指数矩阵计算结果, Calculation Results of Index Matrix

□ 2018-2024年, 促进指数、连接指数、创新指数年均增速高于韧性指数。

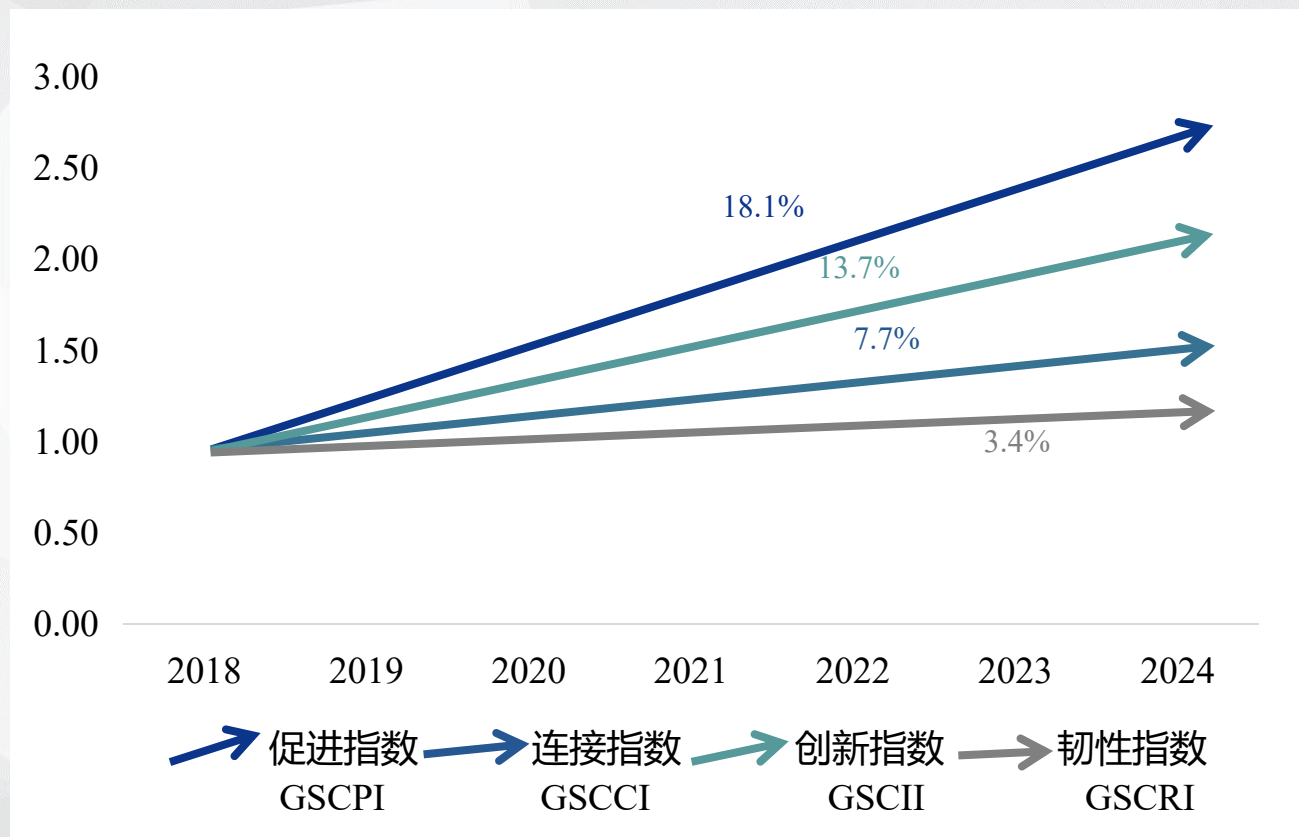
The average annual growth rates of GSCPI, GSCCI and GSCII were higher than that of GSCRI from 2018 to 2024.

➤ 促进指数、连接指数和创新指数的年均复合增长率分别达到18.1%、7.7%和13.7%。

The compound annual growth rates of GSCPI, GSCCI and GSCII reached 18.1%, 7.7% and 13.7%.

➤ 韧性指数年均复合增长率较低, 仅为3.4%。

The compound annual growth rate of GSCRI was only 3.4%.



2018-2024年四个指数复合增长率

CAGR of four indices from 2018 to 2024

资料来源/Source: 中国贸促会研究院整理/ Compiled by CCPIT Academy

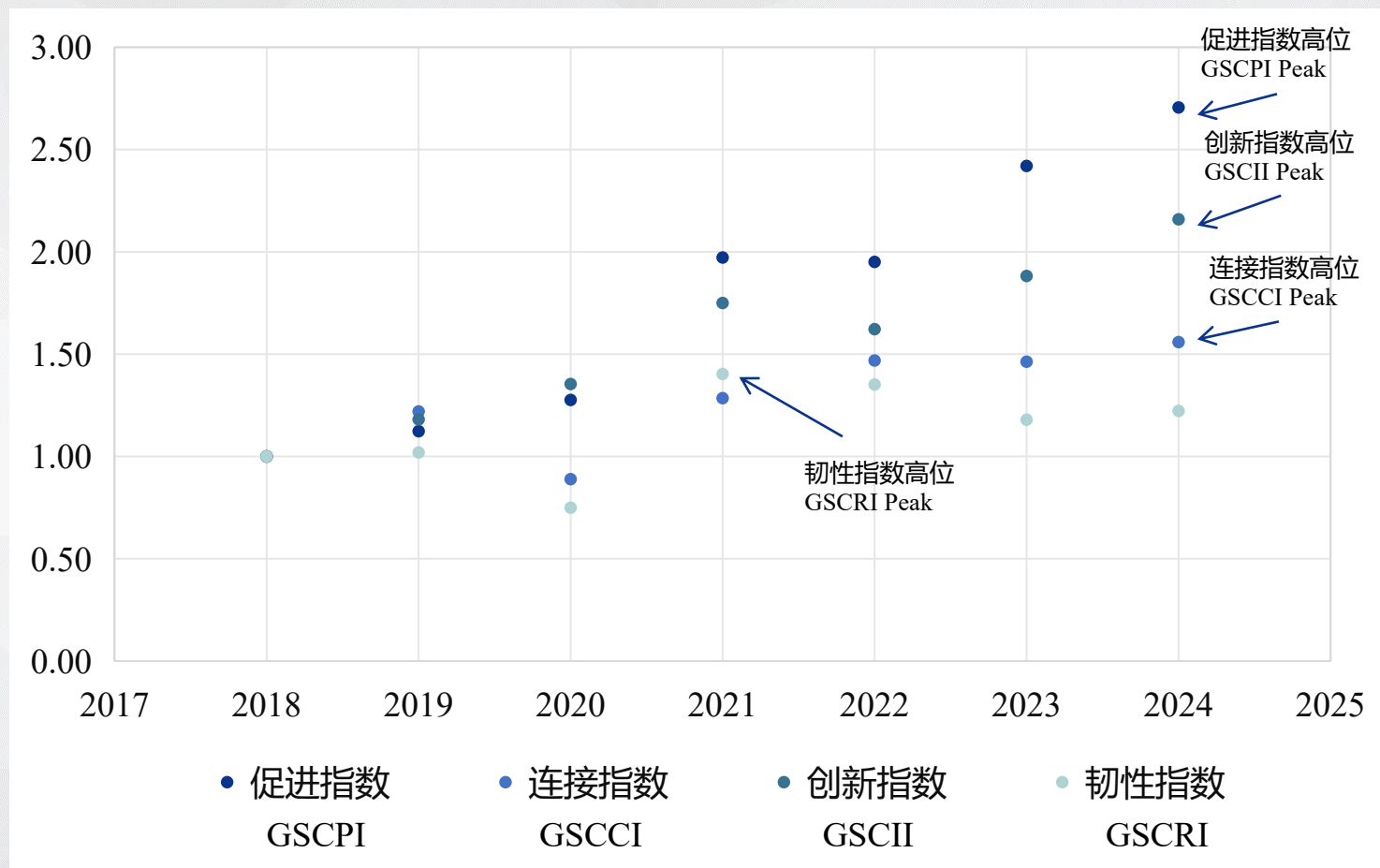
指数矩阵计算结果, Calculation Results of Index Matrix

□ 促进指数、连接指数、创新指数于2024年达到历史高位。

GSCPI, GSCCI and GSCII all hit historical highs in 2024.

➤ 韧性指数从2022年开始连续两年下降，虽在2024年有所回升，但仍未恢复至2021年的历史高位。

GSCRI had declined for two consecutive years since 2022, and although the index rebounded in 2024, it didn't recover to its highest point in 2021.



2018-2024年四个指数走势散点图

Scatter plot of the trends of four indices from 2018 to 2024

资料来源/Source: 中国贸促会研究院整理/ Compiled by CCPIT Academy



研究结论 Research Conclusion

01

全球供应链整体发展趋势向好。

The overall development of global supply chains maintains a promising trend.

02

全球供应链内在韧性仍然相对脆弱。

The inherent resilience of global supply chains remains relatively fragile.

03

全球供应链韧性水平的提升需要各方协同发力。

Improving the resilience of global supply chains requires concerted efforts by all parties.

03

对策建议 Suggestions

对策建议 Suggestions

我们提出如下五点建议，呼吁各方共同维护稳定畅通的全球供应链。

We put forward the following five suggestions, calling on all parties to jointly maintain stable and smooth operations of global supply chains.

我们建议 Suggestions

1. 打造高效联通的基础设施网络。

Build an efficient and interconnected infrastructure network.

2. 坚持开放包容的多双边规则。

Uphold the openness and inclusiveness of multilateral and bilateral rules.

3. 制定互利共赢的供应链政策。

Formulate mutually beneficial and win-win supply chain policies.

4. 营造更具活力的创新发展环境。

Create a more dynamic environment for innovative development.

5. 完善普惠安全的金融服务体系。

Improve the inclusive and secure financial service system.

欢迎各位专家学者、工商界朋友提出宝贵意见，开展交流合作。

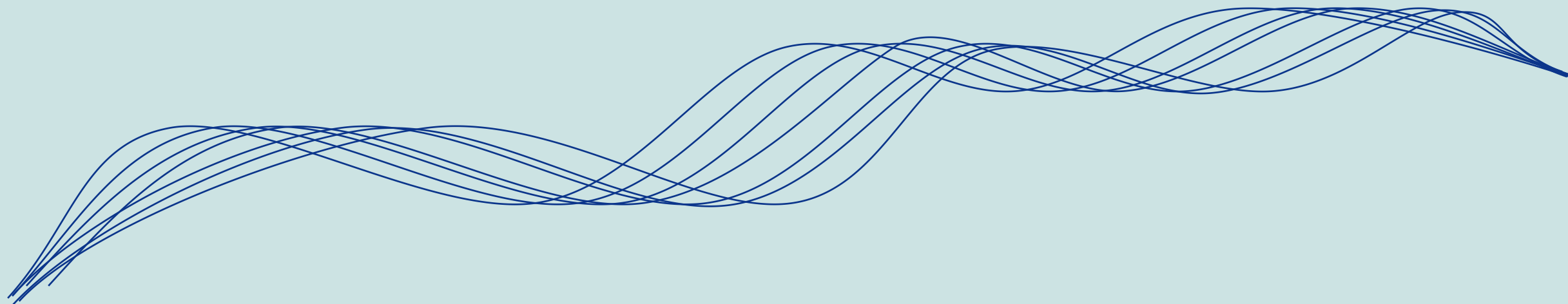
Welcome to put forward your valuable opinions and conduct cooperation with us.



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谢谢!

Thanks!