

# GREEN SUPPLY CHAIN CHINA SURVEY

中国绿色供应链



in partnership with





## INTRODUCTION

Unveiled at the Copenhagen Summit on global climate change in December 2009, China's plans to reduce carbon emissions by up to 45% by 2020 are a telling sign of where the country is headed in terms of green initiatives. While we have seen a lot of hype around the topic of "green" in China, there is still considerable fuzziness about how much action is being taken. In order to gain a better understanding of the reality of green supply chain management in Greater China, the Global Supply Chain Council and the global B2B eCommerce solutions provider GXS teamed up to research the topic. Insights were not surprising and confirmed that green SCM (Supply Chain Management) awareness is high and is perceived as a competitive advantage for companies in China. Adoption of Green SCM practices is highest in areas where there is a correlation to efficiency and cost savings are lowest in areas where there is no direct cost or efficiency benefit. Overall, the results show that the market is shifting and having a green supply chain is becoming a top priority.

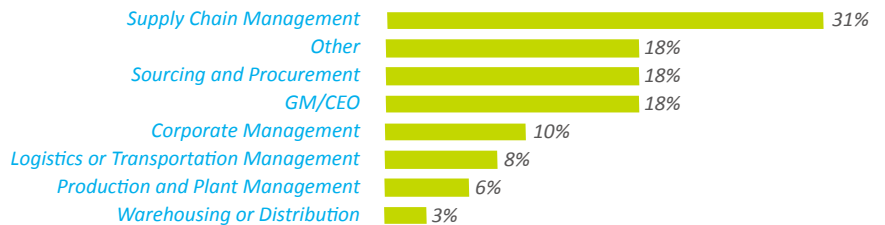
## METHODOLOGY

A total of 145 respondents took part in the Green Supply Chain in China Survey. Most are either Council members or part of the Council's Greater China community. The survey was open for a two month period starting in mid-September and concluding in mid-November. Questions were geared toward understanding current awareness, perceptions, practices and the future direction companies are taking towards green supply chain management in China.

## DEMOGRAPHICS

### JOB FUNCTIONS

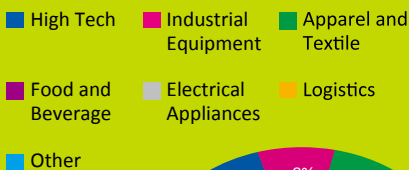
Not surprising given the Council's focus, most people answering the survey work in supply chain related areas and many are decision makers. Almost one third (31%) describe themselves as working in supply chain management, another 18% work in sourcing or procurement and a further 8% work in logistics or transportation management. Almost one in five (18%) survey respondents identified as GM's or CEO's while another 10% described themselves as having a corporate management role.

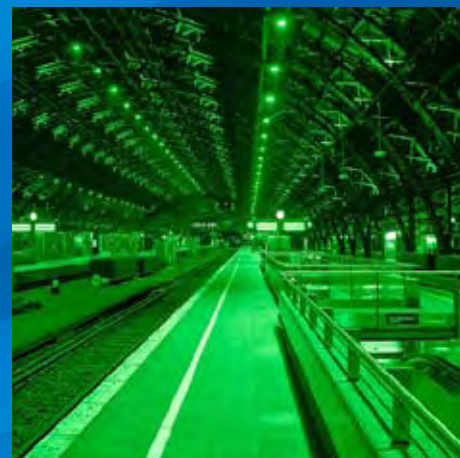


### INDUSTRY FOCUS

Respondents to the survey came from a variety of industry sectors, with the top six concentrated primarily in logistics (18%), electrical appliances (11%), food and beverage (9%), apparel and textile (9%), industrial equipment (8%), and high tech (6%).

### INDUSTRY FOCUS





## 引言

为了及时响应2009年12月哥本哈根峰会对全球气候变化的决议，中国计划在2020年将碳排放量减少45%，这是中国走向可持续发展的一大环保举措。虽然我们看到中国已有很多围绕“绿色主题”的宣传活动，但其中有多少是真正采取了切实的行动还有待考究。为了更好地了解中国绿色供应链管理的现状，Global Supply Chain Council和全球B2B电子商务解决方案供应商GXS将共同研究并探讨这一话题。

研究的结果大致在意料之中——目前中国企业对绿色供应链概念的意识逐渐加强，并已将其作为企业一大主要竞争优势。在那些急需提高效率 and 缩减成本的供应链环节中采用绿色供应链管理措施的普及度比那些暂无效率和成本压力的环节要高。总的来说，市场正在逐步转型，拥有一个绿色供应链管理体系已成为了当务之急。

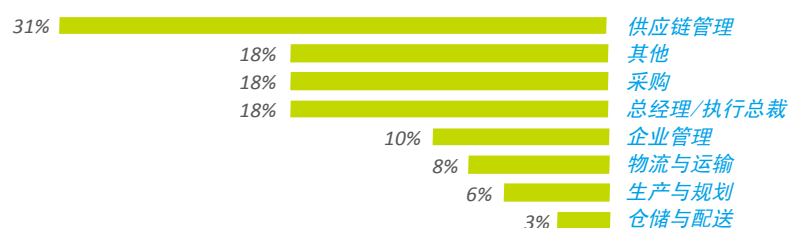
## 研究概述

共有145个受访者参加了绿色供应链在中国的调查。大部分是Council的成员，还有一部分是Council大中华区社团的成员。这项调查从9月中旬开始至11月中旬结束。调查问题包括对供应链的现状、观念、做法的理解，以及中国企业绿色供应链管理的未来发展方向。

## 受访者概述

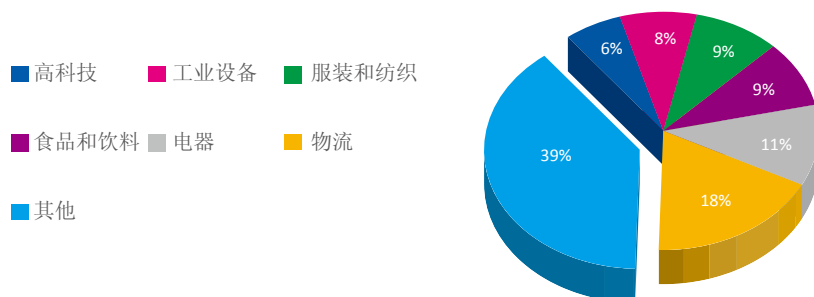
### 工作职能：

由于Council主要专注于供应链的发展，因此大多数受访者都是供应链相关领域的企业决策人。将近三分之一（31%）的受访者是专业从事供应链管理，另有18%的采购人员和8%的物流与运输管理人员。约有近五分之一（18%）的受访者是总经理或CEO，剩下的10%则是企业各部门的相关协调人员。



### 行业：

接受调查的受访者来自许多不同的行业，主要的六大行业是物流（18%）、电器（11%）、食品和饮料（9%）、服装和纺织（9%）、工业设备（8%）和高科技（6%）。



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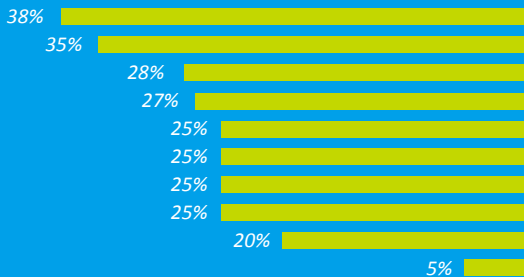


GREEN  
CHAIN  
WALK



## OVERVIEW

### KEY ENVIRONMENTAL ISSUES FACING COMPANIES IN CHINA



- Lack of awareness about environmental issues*
- Waste disposal*
- Conserving natural resources*
- Green consumer buying preferences*
- There are no government incentives to encourage positive environmental change*
- The cost of making the shift towards becoming a more green organization*
- Reducing the negative impact of business on society*
- Green house gas emissions*
- The challenge of complying with government regulations*
- Other*

38%

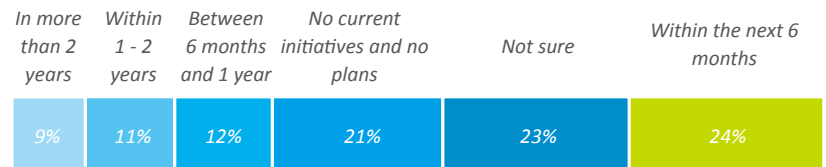
of companies feel that lack of awareness of environmental issues is the biggest issue facing companies in China

With China's rapid growth, it's no secret that softer concerns such as CSR (Corporate Social Responsibility) and green best practices were put on the back burner. As a result, there is a perception that companies need more information about environmental sustainability. According to the individuals surveyed, the most important issue facing companies in China is the lack of awareness about environmental issues (38%) followed closely by waste disposal (35%). Other issues such as conserving natural resources and green consumer buying preferences were also of some concern. The challenge of complying with government regulations came out as the least important issue, although it was still cited by one in five respondents as important.

Open ended responses raised additional pertinent issues. One being the need to ensure that the standards and protocols of retail customers in the U.S. market are clearly communicated in China with partner factories and their management. Other concerns included overproduction of goods, green packaging, green energy and complying with chemical and hazardous materials regulations such as the European REACH legislation.

The bright side to a lack of awareness about environmental issues is that it can easily be addressed through education. The general signs are optimistic that China is moving in this direction.

### TIMELINE FOR IMPLEMENTING GREEN INITIATIVES



Another positive indicator about Green supply chain management (SCM) in China is that close to one in four (24%) of the companies surveyed said they would be implementing green SCM initiatives in the next six months. Another third (32%) plan to implement green initiatives within the next six months to two years. Of some concern is the fact that more than one in five (21%) of companies have no initiatives planned and another one in five (23%) are not sure about their company's plans.

47%

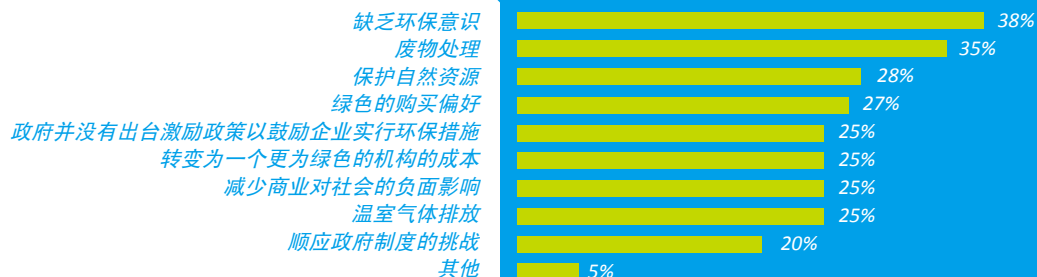
of companies have plans to implement Green SCM initiatives within 2 years.



## 概述

### 中国企业面临的主要环境问题

#### 中国企业面临的主要环境问题



随着中国发展的迅猛势头，企业社会责任和绿色管理实践等往往被管理者所忽略。因此有看法说企业应该更加关注环境可持续发展的信息。而根据我们的调查报告，中国企业面临的最大问题应该是缺乏环保问题的意识（38%），紧随其后的是废弃物的处理不当（35%）。其他诸如保护自然资源和绿色消费购买偏好等问题也受到一定的关注。虽然有五分之一的受访者认为企业要遵守政府法规也是环保面临的一大挑战，但这个因素的重要性并不如上述几大原因。

还有部分受访者在开放式的问题中加入了其他潜在的问题。其中有一条就指出在美国市场通用的零售客户标准规定和规范守则必须保证在中国的相关合作工厂和管理也必须彻底沟通和落实同样的举措。其他受访者们关注的问题还包括商品生产过剩、绿色包装、绿色能源，和如何遵守化学与危险材料生产相关法律法规（如欧洲REACH《化学品注册、评估、授权和限制制度》法规）。

缺乏环保意识这一问题积极的一面是可以通过宣传和教育得到有效的改善。中国企业在环保意识上的总体形势还是比较乐观的。

### 中国实施绿色供应链管理措施所需要的时间



关于中国绿色供应链管理的另一项积极指标显示，有将近四分之一（24%）的受访企业表示将在接下来的六个月对绿色供应链管理采取相关举措。约有32%则表示会在未来的半年至两年内有所行动。但令人担忧的是，仍有超过五分之一（21%）的企业并无任何相关计划，另有23%的企业对企业未来的规划并不清楚。

38%

的企业认为  
缺乏环保意识  
是中国企业  
当前面临的  
最大问题

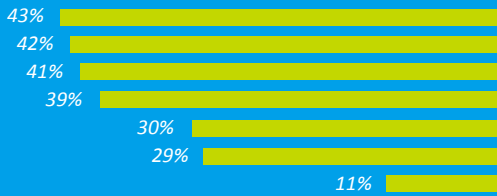
47%

的公司计划在两年内  
实施绿色供应链管理  
的相关举措



## GREEN INITIATIVES IN CHINA

### GREEN SOURCING & PROCUREMENT FOCUSED INITIATIVES



- Use electronic processes to create efficiencies*
- Employ green friendly design and product lifecycle management in sourcing strategy*
- Embed "sustainability" into supplier relationships*
- Work with suppliers on Green SCM guidelines*
- Audit suppliers for Green SCM compliance*
- Reduce use of paper in contracts*
- Other*

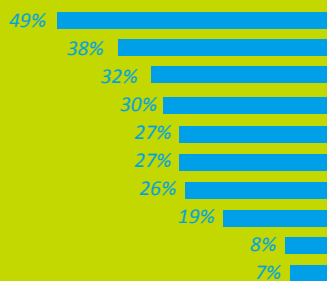
43%

of companies use electronic processes to create efficiencies in sourcing & procurement

Using electronic processes to create efficiencies in sourcing and procurement was the top initiative cited by close to half (43%) of the survey respondents. Other initiatives such as employing green friendly design and product lifecycle management and working with suppliers on sustainability and green SCM guidelines were almost equally planned and implemented initiatives. Training and development of internal staff and suppliers and clients were also cited as important initiatives.

Reducing paper in contracts and auditing suppliers were the least commonly implemented initiatives (both cited by less than a third of respondents). The indicators here are positive and suggest that as technology improves and supply chains become more efficient, green practices will become more prevalent.

### GREEN PRODUCTION & MANUFACTURING FOCUSED INITIATIVES



- Recycling programs for raw materials*
- Recycling programs for reusable component parts*
- Implementing ongoing assessment to measure and ensure Green SCM compliance*
- Improved labour management*
- Measuring your company's carbon footprint*
- Reducing CO2 in manufacturing processes*
- Including recycling in new product design*
- Increasing product robustness in product design*
- Applying carbon off-setting*
- Other*

Given that recycling is a concept that has had time and support to be successfully adopted by consumers and the broader society, even in China, it's not surprising that recycling initiatives are a priority for companies. Recycling programs for raw materials and for reusable component parts were the most common green production and manufacturing focused initiatives.

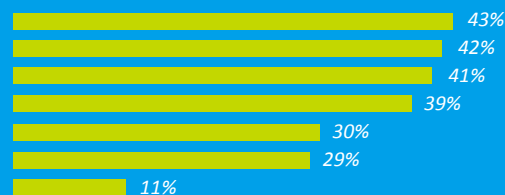
Applying carbon off-setting was a distant priority. Carbon offsetting is a relatively new and abstract concept which will take time to adopt. Other green production and manufacturing initiatives that companies are implementing include the introduction of "returnable and reusable" packaging, reducing the usage of solvent based chemicals and choosing compliant factory and supplier partners.

## 中国环保倡议行动

### 以绿色采购为重点的各项举措

使用电子程序以提高效率  
在采购策略中采用绿色环保设计和产品生命周期管理  
在供应商关系上坚持“可持续发展”  
与供应商一起按绿色供应链管理的准则共事  
审核供应商是否遵守绿色供应链的相关法律  
减少纸张合同的使用  
其他

#### 以绿色采购为重点的各项举措



调查中有将近一半（43%）的受访者表示使用电子化的采购管理是提高效率的首选方法。而其他诸如采用绿色环保设计、产品生命周期管理、以及保持与供应商的长期合作以促进绿色供应链管理也被列为可行的举措。此外，对企业员工的培训，积极维护并发展与供应商和客户的关系同样也被视为一大重要举措。

减少合约文件和调整与供应商间的合作方式以减少用纸则被列为最不重要的的举措（只有不到三分之一的受访者选择此项）。总的来说，统计数据还是较为积极的，显示了科技的进步与供应链的效率提高有着密不可分的联系，而更加环保的相关举措也会越来越普遍。

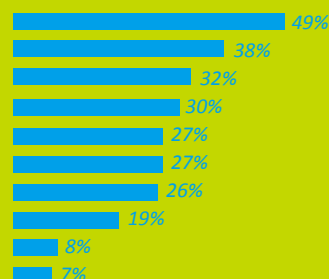
# 43%

的企业选择电子化的  
采购管理来提高效率

### 以绿色生产制造为重点的各项举措

原材料的回收计划  
对可重复使用的零部件实施回收  
定期评估，以落实和确保绿色供应链管理的各项举措  
改善劳动管理  
自行检测企业的碳足迹  
减少制造过程中的二氧化碳排放  
新产品的可回收设计  
在产品设计上提高产品耐用性  
实施碳补偿计划  
其他

#### 以绿色生产制造为重点的各项举措

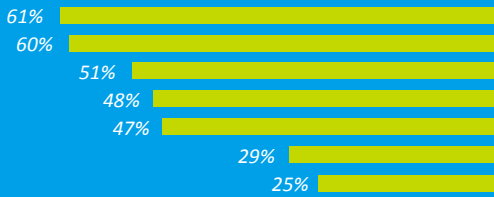


由于回收利用是一个需要消费者和广泛社会在特定时期内普遍支持和行动才能成功的概念，因此即便是在中国，落实回收行为往往是企业的当务之急。回收利用计划中，对原材料和可再次使用的零件的回收是最为常见的以绿色生产制造为重点的举措。

而碳补偿计划的实施似乎还有一段距离。碳补偿实际上是一个相对比较新且抽象的概念，需要一定的时间让人们接受和采用。其他企业普遍采用的绿色生产制造措施还包括推广“采用可回收和可重复使用的”包装，减少产品生产过程中溶解性化学物质的使用，并选择符合环保相关规定的工厂和供应商合作。



**GREEN WAREHOUSING & DISTRIBUTION FOCUSED INITIATIVES**

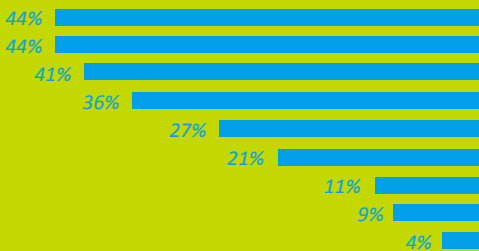


- Reducing inventory and handling of product*
- Using reusable containers/storage equipment*
- Implementing order consolidation (decreasing unused space on trucks)*
- Selection of recyclable packaging materials*
- Reduction in packaging materials*
- Optimizing location of distribution hubs*
- Reducing energy consumption through using solar panels and green roofing options*

Most companies seem to be quite advanced in the implementation of green warehousing and distribution initiatives, most likely because these initiatives often also mean added efficiency. Companies appear to be most ahead in green practices in their inventory reduction and product handling – 61% have already implemented initiatives; and their ability to consolidate orders – 51% have already implemented these initiatives; and usage of reusable containers and storage equipment – where 60% have already implemented these initiatives.

When it comes to reducing energy consumption through the use of solar panels or green roofing options, surprisingly 25% of companies have already adopted such initiatives. Similarly around 29% of companies report that they have already optimized the location of their distribution hubs. While these types of initiatives show direct cost and efficiency benefits, the up-front cost associated with them may be why more companies have not adopted them.

**GREEN TRANSPORTATION FOCUSED INITIATIVES**



- Reducing expedited shipping (reducing air freight)*
- Route optimization (reducing empty miles)*
- Increasing cube utilization*
- Reducing truck idle time*
- Switching to more fuel efficient modes like boat or rail*
- Contracting with providers/carriers that support green initiatives*
- Replacing diesel-powered trucks with alternative fuels*
- Migration to more aerodynamic trucks*
- Implementation of alternative power sources for refrigerated trailers*

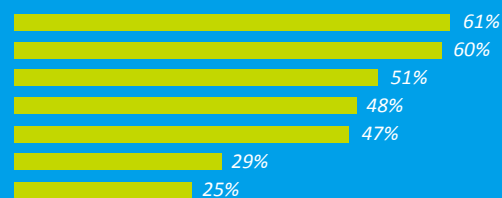
Companies in China are also fairly well advanced in the types of green transportation focused initiatives they have adopted. Similar to their production and warehousing initiatives, there is a crossover between implementation of green and levels of efficiency. Almost half of companies surveyed are already reducing expedited shipping and therefore air freight along with optimizing routing so as to reduce empty miles and increasing cube utilization to create efficiency. Adoption of more sophisticated green transportation measures which have less direct relation to efficiency and cost savings are not in wide practice. These more advanced green transportation measure such as using alternative power sources for refrigerated trailers, more aerodynamic trucks and more alternative fuel powered trucks are all adopted by 11% or less of companies.



## 以绿色仓储和配送为重点的举措

减少库存，精简产品处理过程  
使用可循环利用的容器和存储设备  
实施订单合并处理（提高卡车载货空间的利用率）  
选择可回收的包装材料  
减少包装材料的使用  
优化配送中心地理位置选择  
通过使用太阳能板和绿色屋顶等降低能源消耗

## 以绿色仓储和配送为重点的举措



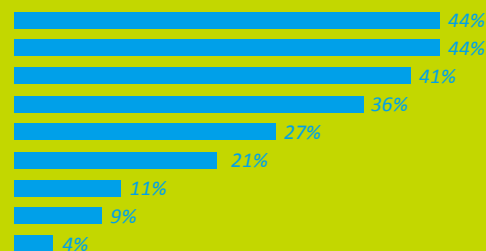
大多数企业在实施绿色仓储和配送上已有较为成熟及领先的操作体系，因为这些举措的实施能很大程度地提高效率。61%的受访企业在降低库存和精简产品操作程序上也表现得十分积极；51%的受访企业已经实施相关新措施以合并订单；60%的受访企业已经能落实使用可循环的容器和储存设备。

当谈到通过太阳能电池板或绿化屋顶降低能源消耗的做法时，令人意外的是有25%的受访企业已经采取了这种措施。同样还约有29%的企业表示他们已经优化了配送中心的地理位置。这些措施在应用时显然会带来直接的成本和效益优势，而前期投入的成本回报或许可以解释为何还有许多企业并未采用这种方案。

## 以绿色运输为重点的各项举措

减少货物快运（降低空运货运）  
优化运输路线（减少多余路程）  
增加立方利用率  
降低卡车的空载时间  
切换使用诸如货船和火车之类燃料利用率更高的交通工具  
与支持环保措施的供应商和运营商签订合作协议  
用合成或人造的代用燃料取代柴油作为发动燃料  
转换为空气动力卡车  
为冷冻拖车找到可替代的能量来源

## 以绿色运输为重点的各项举措

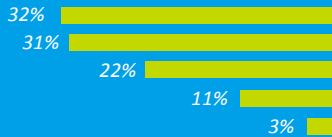


中国企业在绿色运输方面的各项举措也处于领先水平。与生产和制造过程中的环保措施类似，企业正逐渐向更加环保和提高效率的方向积极转型。几乎有一半的受访企业表示他们已经减少了快运的货运比例，同时优化了运输路线，减少多余路径，并提高每立方的利用率。

而那些更加先进复杂的绿色运输措施则由于未能显著提高效率及降低成本而尚未普及。这些更加先进的措施包括为冷冻卡车寻找替代能源和使用符合空气动力学的卡车；而只有约11%受访企业会采用替代柴油的动力燃料。

## WORKING TOGETHER TOWARDS GREEN SCM

### COLLABORATION WITH SUPPLIERS AND/OR CUSTOMERS ON GREEN EFFORTS

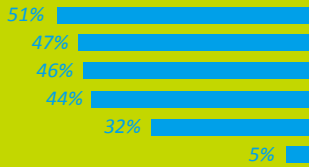


*Active discussions regarding collaborating to reduce impact on environment*  
*Not currently collaborating with extended supply chain*  
*Sharing sustainability policies*  
*Enforcing supplier specific mandates for change*  
*Other*

Supply chain is by nature a collaborative field, so it makes sense that creating green supply chains requires buy-in from all links in the chain. Working with suppliers was identified throughout the survey as a key issue to improving the awareness and practice of Green SCM in China. Specifically almost a third of the respondents reported having “active discussions” regarding collaborating on reducing environmental impact.

A third of the individuals surveyed are either sharing sustainability policies or enforcing supplier specific mandates for change. What should be of some concern is that almost a third (31%) of respondents are not currently collaborating with their extended supply chain. It seems without collaboration throughout the chain, the real impact of Green SCM will be negligible.

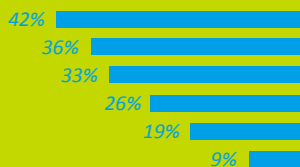
### USE OF ELECTRONIC TOOLS TO SUPPORT COMPANY-WIDE GREEN SCM INITIATIVES



*Logistics and materials management processes*  
*Information integration (forecast, order, ship notice, invoicing, status, etc.)*  
*Forecasting*  
*Collaboration with suppliers and customers*  
*Customs management*  
*Other*

E-tools to support green initiatives in companies are mostly used in logistics and materials management processes (51%), information integration (47%) and forecasting (46%) and are least likely to be used in customs management. What is telling here is that almost half of the companies surveyed are not using e-tools extensively across their company’s supply chain. This might present an opportunity for greater use and adoption of e-tools to support green SCM practices.

### CRITERIA FOR SELECTING A VENDOR TO SUPPORT YOUR GREEN INITIATIVES



*Committed to environmental protection*  
*Experience and capability of supply chain integration and automation*  
*Knowledgeable regarding global environmental initiatives*  
*Global footprint and local strength to support your supply chain integration and automation*  
*Robust infrastructure to provide network stability and continuity*  
*Other*

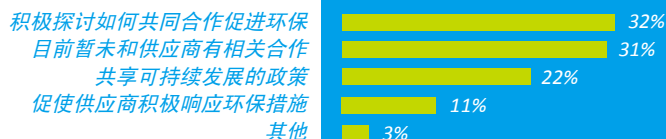
One of the top criteria for choosing a vendor to support green initiatives is that they are committed to environmental protection (42%). Experience in supply chain integration along with knowledge regarding global environmental initiatives (33%) is also rated as important criteria. Robust infrastructure and a global footprint were the lowest rated criteria for selecting vendors to support green initiatives. The implication here is that for vendor selection, know-how about technology is less essential than its commitment to environmental initiatives and experience in supply chain integration and automation.

32%  
of companies are having active discussions regarding collaborating to reduce impact on environment

49%  
of companies are not using e-tools extensively to support their supply chain operations – presenting an opportunity

## 共同合作走向绿色供应链管理

### 与供应商/客户共同合作为环保献力



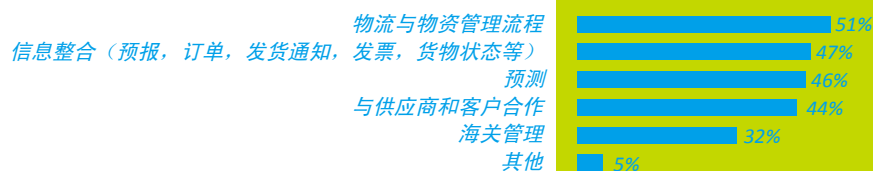
供应链本质上就是需要共同协作才能良性运作，因此想要创建绿色供应链就需要各个环节的支持。在整个调查中，与供应商合作被视为促进绿色供应链发展和中国企业环保意识的关键。具体来看有三分之一的受访者表示他们会与供应商和客户讨论有关合作降低对环境的影响的事宜。

有三分之一的受访者表示他们会和供应商共享可持续发展的政策或促使供应商积极响应相关环保措施。而值得关注的是有近三分之一（31%）的受访者目前并未和他们的供应商有任何合作计划。从整体上来说，如果在供应链中的各企业缺乏合作意识，那么绿色供应链的影响将是微不足道的。

### 与供应商/客户共同合作为环保献力

32%  
的受访企业  
会和供应商积极讨论  
减少对环境影响的  
有关合作事宜

### 使用电子工具来支持整个企业运作中的绿色供应链管理

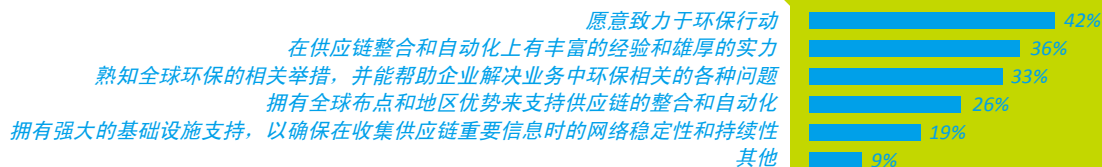


使用电子工具来支持绿色供应链管理的措施主要是用于以下几个方面——物流和物料管理流程（51%）、信息整合（47%）和预报（46%），而在海关管理方面的应用最少。需要强调的是，几乎有一半的受访企业并未在供应链中使用电子工具。这让未来企业使用电子工具来支持绿色供应链的实践带来了更多的潜力和机会。

### 使用电子工具来支持整个企业运作中的绿色供应链管理

49%  
受访企业  
几乎不使用电子工具  
来广泛地支持供应链的运作  
——这是一个潜在的  
市场机会

### 选择供应商来支持你的环保计划的考虑因素



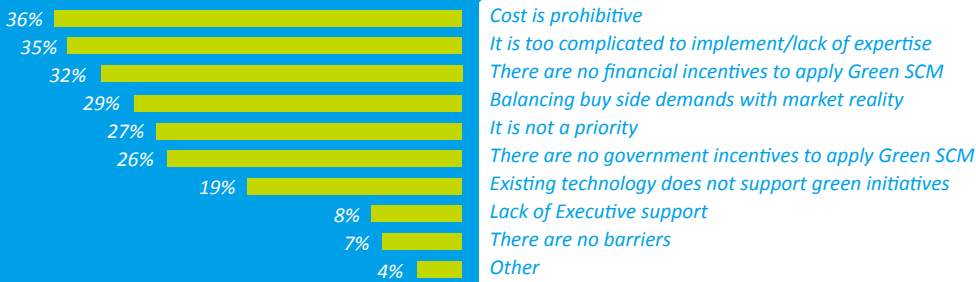
从数据中显示，选择供应商的一个最关键的因素在于他们是否愿意致力于环保行动（42%）。在供应链整合和自动化上有丰富的经验和雄厚的实力也被认为是一个至关重要的标准（33%）。而只有不到四分之一的受访企业认为拥有强大的基础设施支持，以确保在收集供应链重要信息时的网络稳定性和持续性也是选择供应商的标准之一。由此可知，供应商的环保意识和整合供应链的经验与技术 and 知识相比下还要重要得多。

### 选择供应商来支持你的环保计划的考虑因素



## THE PATH TO A GREENER SUPPLY CHAIN

### BARRIERS TO ADOPTING GREEN SCM PRACTICES



The biggest perceived barrier to adopting Green SCM practices is that it is cost prohibitive

Costs are ultimately a big factor in companies' strategies and practices in green supply chain management. The biggest perceived barrier (36% of respondents) to adopting Green SCM practices is that it is cost prohibitive, followed closely by it being too complicated to implement (35% of respondents). Almost a third of the companies surveyed (32%) felt that there were no financial incentives to justify adopting Green SCM. Lack of executive support was not felt to be a significant barrier. Insufficient technology was only perceived by one in five respondents as a barrier.

The message seems clear that if green SCM makes financial sense and is easy to implement, chances for adoption are much higher.

### INCENTIVES FOR IMPLEMENTING GREEN PRACTICES



Being perceived as a green company is obviously still very important to many companies. Brand building was listed as one of the top incentives (53% of companies) for implementing green practices, along with compliance with company goals on sustainability (53%) and increasing supply chain efficiency/reducing waste (52%).

Other incentives for implementing green practices include cost savings, efficiency and a perception that being green will bring a competitive advantage. On the positive side, very few companies felt that there is no motivation for applying green practices. Clearly, companies perceive significant value in implementing green practices.

## 通往绿色供应链的路途

### 实施绿色供应链管理过程中的阻碍

“成本”在企业的绿色供应链管理战略和实践中是最为关键和根本的因素。约有36%的受访企业认为贯彻绿色供应链管理的最大障碍在于成本过高，紧接着就是绿色供应链本身的复杂性和对经验的要求（35%）。约有三分之一的受访企业（32%）认为没有经济上的刺激政策是一大阻碍。缺乏管理阶层支持看来并不是企业认为的障碍，而只有近五分之一的受访企业认为技术条件不足也是阻碍之一。

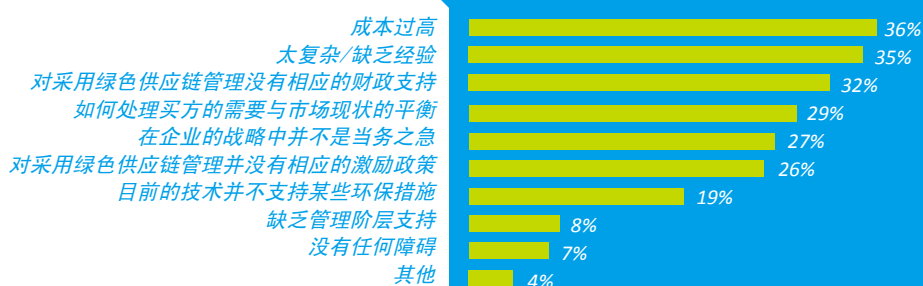
这个调查信息很清楚的显示，如果采用绿色供应链管理有较高的成本效益，并容易操作实践，实施起来的难度将会小很多。

### 中国企业实施绿色供应链管理措施的目的和动力

能以“绿色企业”来宣传和推广企业形象对许多企业来说非常重要。品牌建立（53%）可以说是实施绿色供应链的最大动机。紧接着就是遵守公司的可持续发展目标（53%）和提高供应链效率并减少浪费（52%）。

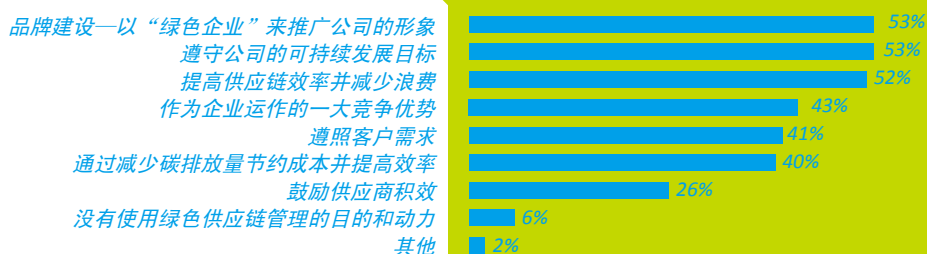
其他实施绿色供应链管理的动机还包括通过减少碳排放量节约成本并提高效率，以及期望该举措能成为企业一大竞争优势。乐观的看，很少企业认为他们没有任何采用绿色供应链管理的动机。显然，企业还是在环保行动中发现了许多商业价值。

### 实施绿色供应链管理过程中的阻碍



企业认为贯彻绿色供应链管理的最大障碍在于成本过高

### 中国企业实施绿色供应链管理措施的目的和动力



## HIGHLIGHTS

- Nearly half (47%) of companies have plans to implement green SCM initiatives within the next two years.
- 43% of companies use electronic processes to create efficiencies in sourcing & procurement
- Cost and complexity are perceived as the biggest barriers to implementing Green SCM, which highlights the need for cost effective and easy to implement solutions.
- Brand building is one of the top incentives for green SCM, highlighting the importance of public perception of how companies operate.
- Recycling of raw materials and component parts are the top green manufacturing and production focused initiatives
- Adoption of green practices is highest in those areas of the supply chain where there is a direct relation to cost savings and efficiency, for example in inventory reduction, recycling of raw materials or freight efficiency.
- Almost a third of respondents are not collaborating with their extended supply chain on green practices.
- 49% of companies are not using e-tools extensively to support their supply chain operations, suggesting an opportunity to explore greater usage of electronic tools to facilitate green practices among the other half.

There are many encouraging signs in the Green Supply Chain in China survey results. While wide adoption of Green SCM practices has not yet happened, there are positive indicators about the way that companies are maintaining their supply chain, including an intention of many companies to adopt green SCM practices in the near future. The strongest message of the survey seems to be that green SCM practices that have a direct correlation to cost savings and efficiency are most likely to be rapidly adopted. For example, the majority of companies are reducing packaging and adopting recycling practices in their supply chain given the correlation with cost savings. Brand building is still a strong incentive to go green and along with cost savings will likely drive ongoing initiatives. Another big factor in the green equation is government policy on green which is on the top agenda of Chinese policy makers and will be another strong driver of the green SCM push.

## 提要

- 接近一半（47%的公司）计划在未来两年内实施绿色供应链管理。
- 43%的企业选择电子化的采购管理来提高效率
- 成本过高和绿色供应链管理的复杂性是实施过程中的最大阻碍，也就是说降低成本和简化操作程序是至关重要的。
- 品牌建立是企业采用绿色供应链管理的最大动机，这是企业对待环保的价值观和企业经营理念的重要参考价值。
- 对原材料和零件的回收是在生产制造环节中最主要的环保措施。
- 在供应链各环节中，环保措施在那些需要节约成本提高效率的环节的普及度较高，如降低库存，原材料回收利用和提高货运效率。
- 几乎有三分之一的受访者表示目前并未和他们的供应商有任何合作计划。
- 49%的受访企业几乎不使用电子工具来广泛支持供应链的运作，也就是说还有一半的企业可以开发成为绿色供应链管理电子工具的用户。

在这次绿色供应链在中国的调查中，有许多令人振奋的结果。虽然绿色供应链管理尚未得到广泛的采用，但数据显示企业都在积极地维护他们的供应链，其中还有许多企业打算在不久的将来就采用绿色供应链管理的做法。调查还有力地证明了绿色供应链管理直接关系到企业的成本节约和效率提高，而在成本效率相关的环节，环保措施最有可能被采用。例如，许多企业都是因为要节约成本才在供应链中减少包装并积极回收利用原材料或零件。品牌建立依旧是企业愿意长期采用绿色供应链管理的最重要的出发点。此外，政府相关有利政策的公布与落实，将成为企业采用绿色供应链管理的又一强大推动力。

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