

Research on the Upgrading Path of Liquor Industry Chain Under the New Development Pattern of Double Cycle

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Abstract: Based on the background of China's new economic development and the new development pattern of domestic and international double cycle, this paper systematically sorts out the relevant liquor industries and Chinese literature on the formation of "new development pattern with domestic great cycle as the main body and the domestic and international double cycle promoting each other", and systematically analyzes the paths and countermeasures for promoting the liquor industry into the new development pattern of double cycle from the perspective of the industry chain of the liquor industry. Through the literature review and research, we can have a clear grasp of the development of the liquor industry, and provide a certain theoretical basis for the liquor industry to integrate into the new development pattern of double cycle and long-term sustainable development during the "14th Five-Year Plan" period and a long time in the future.

Keywords: Double cycle, New development pattern, Liquor industry, Industrial chain.

1. Introduction

In the context of the complex and volatile international situation, the ongoing trade war between China and the United States, and the COVID-19 epidemic, China's economic growth faces many challenges. In this new stage of development, China's economic development is still in an important period of strategic opportunities, although both opportunities and challenges have changed significantly. Since the reform and opening up, China's production supply capacity and consumer demand capacity have been greatly improved. By 2021, China's GDP was 114,366.97 billion yuan, an increase of more than 310 times compared with the initial period of China's reform and opening up. China's gross national income was 113,323.98 trillion yuan, an increase of more than 308 times over the initial period of reform and opening up. China has all the industrial categories listed in the United Nations Industrial Classification. In terms of production, China has the world's most complete industrial chain system and is already the world's largest manufacturing country. In terms of consumption, the total retail sales of consumer goods in 2021 will exceed 44 trillion yuan, the per capita disposable income of Chinese residents will be 35,128.1 yuan, and the per capita consumption expenditure of Chinese residents will be 24,100.1 yuan. Along with the rapid and steady development of our economy, the income level of the people is close to the high level, and the scale of domestic consumption market will continue to expand. In light of the actual conditions in our country, the CPC Central Committee has proposed to "speed up the building of a new development pattern with domestic cycle as the main body and domestic and international cycles promoting each other" (hereinafter referred to as the "double cycle" new development pattern). On October 29, 2020, the "Proposal of the CPC Central Committee for Formulating the 14th Five-Year Plan for

National Economic and Social Development and the 2003-2020 Long-term Goals" formally incorporated the "double cycle" new development pattern into it, indicating that the main direction of China's economic construction in the future is "double cycle". The new development strategy of "double cycle" is the latest strategic deployment made by the CPC Central Committee. It aims to smooth the two major domestic and international cycles and enhance the resilience of China's economic development. It is a major adjustment of China's economic development path and will have a profound impact on China's economic growth and the pattern of world economic development.

The rise of Chinese liquor industry has a history of more than five thousand years. In the long historical process, Chinese liquor has gone through the baptism of the long history, and gradually become known to the world. China is not only a major country of wine culture in the world, but also a major country of wine production and export. As shown in Figure 1 and 2, the total output of liquor produced by enterprises above designated size in China in 2020 will be 740.73 million liters. According to the data of China Customs, the export quantity of liquor in China in 2020 will be 14.246 million liters, the export amount will be 459.912 million dollars, and the import amount will be 11.427 million dollars. Chinese liquor is not only the carrier of Chinese culture inheritance, but also an important carrier of Chinese culture to the world. The decade from 2003 to 2012 can be called the "golden decade" for the development of China's liquor industry. During this period, the rapid growth of macro economy and the joint drive of government affairs, business and mass consumption, the development of liquor industry showed a rapid and stable trend. Since 2012, under the background of state restrictions on "three public consumption", "eight regulations" and "six bans", consumer demand and consumer groups have changed accordingly. Therefore, China's liquor industry has entered a stage of

continuous and deep adjustment [1]. In this context, the major liquor enterprises have adjusted their own development strategies, actively explored competitive advantage resources, and created quality products, in order to enhance the development power and competitiveness of enterprises. Since 2015, the liquor industry has been dominated by business consumption and personal consumption, and gradually tends to rational consumption. As a result, the liquor industry began to show a weak recovery since the trough. In 2017, the high-end liquor led by Maotai and Wuliangye began to meet the demand, and since then, the liquor industry ushered in an ice-breaking recovery. After the setbacks of Chinese liquor industry development today, it faces new historical challenges and opportunities. Under the background of drastic changes in domestic and international economic environment, the new development strategy of "double cycle" has been put forward. So for the liquor industry, how to achieve high-quality sustainable development under the background of the new development pattern of "double cycle"? From the current

literature, many scholars have studied all aspects of the liquor industry, but there are few studies on the level of the liquor industry

chain. The research on liquor industry mainly focuses on liquor development strategy, liquor industry cluster, brewing technology, local liquor and so on. There are relatively few theoretical analysis and empirical studies on the integration of the liquor industry into the new development pattern of "double cycle", especially the research on the development path and countermeasures of the liquor industry under the background of the new development pattern of "double cycle". Based on this, this paper makes a comprehensive analysis from the current situation of the development of the liquor industry, the national strategic background of the new development pattern of the "double cycle", the development path and countermeasures of the liquor industry, and puts forward a reference for the liquor blending into the new development pattern of the "double cycle" during the "14th Five-Year Plan".

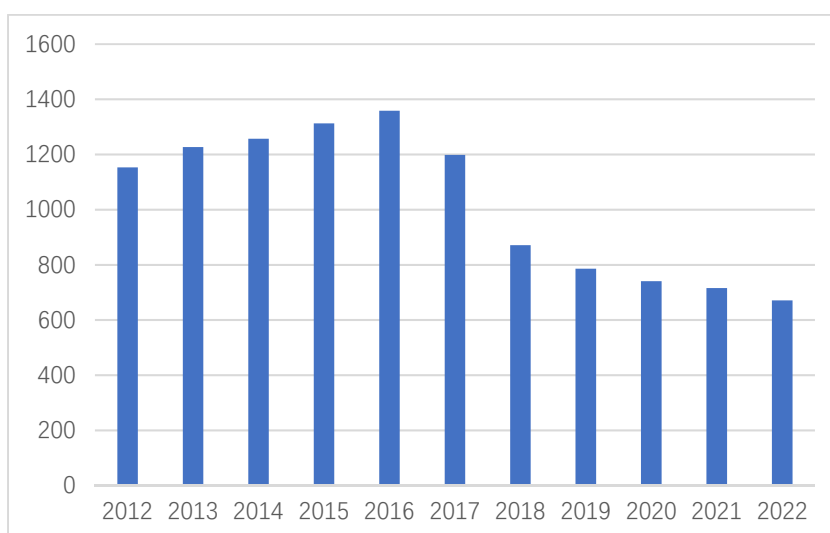


Figure 1. Chinese Liquor Production from 2012 to 2022-65 degrees (thousands of liters)
Source: Office for National Statistics

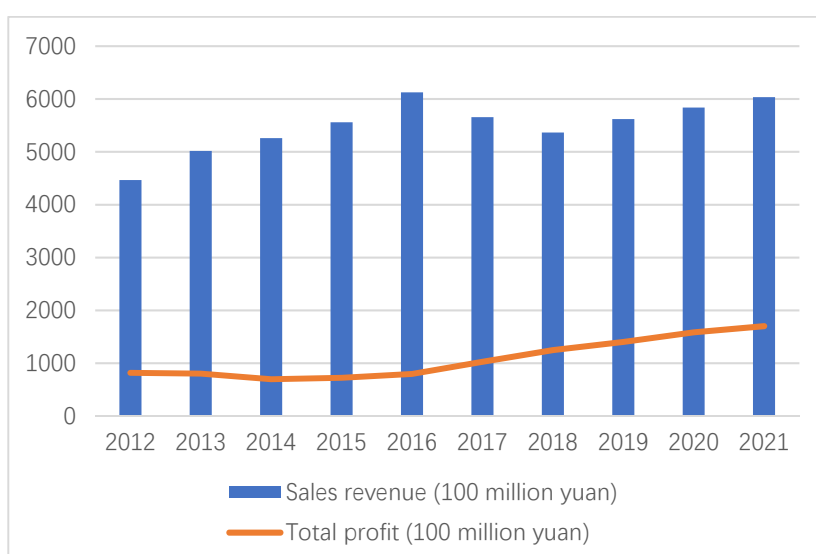


Figure 2. Total sales revenue and profit of Chinese liquor industry from 2012 to 2021
Source: Office for National Statistics

2. Research on the Connotation of The New Development Pattern of "Double Cycle"

At present, there is no unified definition of the connotation of the new development pattern of "double cycle" in the academic circle, but there have been a lot of literature to sort out and study its connotation, and mainly believe that first of all, the domestic great cycle is the foundation and core; Secondly, the international great cycle is the extension and complement of the domestic great cycle. Finally, the domestic and international great cycle of two-way linkage, the two are interrelated, dialectical unity. Some scholars interpret the new development pattern of "double cycle" from the dialectical relationship between the new development stage, concept and pattern.

Taking domestic large circulation as the main body is the core of the new development pattern of "double circulation". As a superpower with a population of 1.4 billion, China naturally has super-sized domestic demand market. Taking domestic demand market as our super rear market, constructing a complete domestic demand system, giving full play to the advantages of our super-large scale market and domestic demand potential, and promoting domestic market orderly circulation are the core contents of the new development of "double cycle". Export-oriented strategy and the "in and out" economic development strategy promote rapid economic growth in our country, but this kind of growth mode is unsustainable. Economic development strategy of our country should shift from export-oriented to domestic demand growth type [2]. Domestic demand is the main market of Chinese economic development. To promote household consumption and private investment by "firmly focusing on the strategic basis of expanding domestic demand"; Implementation of supply-side structural reform, make up the weak item in our country's industrial chain, and expand our advantageous industries [3]. Smooth domestic big circulation is the foundation and guarantee of international big circulation, which is the correction of our excessive reliance on international market and resources and on low-end industrial structure in the past, so as to enable our country to complete the independent choice and active prediction of transformation in strategic layout [4] in order to free our economy from dependence on high-end science and technology of developed countries as soon as possible. Enhance China's position in the global value chain division of labor system.

The international great cycle is the extension and complement of the domestic great cycle [5]. Today, with the continuous development of globalization, the world has become an image of a "global village", and only countries with large domestic circulation cannot achieve development. The past "isolation" has brought us heavy disasters, although it is no longer the past, but it has left profound pain and lessons, and the international circulation is inevitable in today's world. In the context of profound changes unseen in a century, China is still in the middle and low end of the global industrial chain. Although China's economy has developed rapidly since the reform and opening up, and its role in the global value chain has become increasingly critical, the current situation of weak industrial foundation and being subject to the control of core technologies is difficult to

change in the short term. Huang Qunhui and Ni Hongfu proposed that we should attach great importance to the improvement of industrial basic capacity and industrial chain level from the ideological height and from the "two overall situations", and provide reference opinions on this basis [6]. Tao Tao has analyzed the function position of our country in global industrial chain and supply chain as well as the opportunity of the transformation of global industrial chain. Our country should be integrated into international great circulation, increase opening-up, and upgrade the social total consumption level and class in order to promote domestic great circulation [7]. However, in the context of international instability caused by anti-globalization and US-led trade protectionism, as well as the sudden impact of the COVID-19 pandemic in 2020, global economic development is faced with a variety of severe tests and challenges. Therefore, on the basis of ensuring an unimpeded domestic cycle, we should actively integrate into the international cycle and make the international

cycle a complement to the domestic cycle. Promote sustainable and high-quality development of our economy.

Domestic and international double cycle. Under the background of economic globalization, the market of Chinese goods is not only the domestic market, but also the international market is an inseparable part. "Domestic circulation is the basis and premise for promoting the development of international circulation, and international circulation provides impetus and space for domestic great circulation" [8]. The super-large domestic market prompts our country to take the super-large domestic demand as the foundation and core of our economic development now and in the future. Domestic circulation creates conditions for expanding national commodity export, promotes international competition and cooperation, and promotes international circulation. The international cycle stimulates the vitality and competitiveness of the domestic cycle, provides worldwide resource factors, expands the scale of investment, and promotes the domestic cycle. Both domestic and international great cycle of two-way promotion, two-way linkage, indispensable.

3. Chinese Liquor Industry Enters A New Development Stage

(1) New stage of supply and demand: scientific and technological innovation, rich product supply, accelerating the release of domestic market, strong combination of supply and demand.

Chinese liquor industry has a long history, and its history dates back to five thousand years. Since ancient times, liquor industry has been an indispensable traditional national industry. Since the founding of new China, the development of Chinese liquor industry has experienced many tests. After the "golden decade", "deep adjustment" and "recovery" of the development of the liquor industry, under the background of the new development pattern of double cycle, the liquor industry faces new development opportunities, the structural adjustment of the supply side and the expansion of domestic demand, all of which provide a good market environment for the development of the liquor industry. Baijiu is no longer a state-restricted industry after it was removed from the restricted category of industries in the Guidance Catalogue of Industrial Structure Adjustment (2019 edition). In 2020, the

sales revenue of Chinese liquor enterprises above designated size reached 583.639 billion yuan, and the total profit reached 158.541 billion yuan, with year-on-year growth of 4.61% and 13.35% respectively. Although the impact of the novel coronavirus epidemic has reduced the liquor consumption market and blocked the consumption scene, the liquor industry is still in a progressive development in general.

With the continuous progress of science and technology, the liquor industry constantly develops new products through scientific and technological innovation to adapt to consumers' demand for liquor products, and lead consumers to drink moderately, rationally and healthily. With high-end liquor and low alcohol content for different consumers

(2) Double cycle new development pattern new stage: liquor industry ushered in new development

Since the new development pattern of double cycle was proposed in 2020, all industries in China have closely followed the pace of the development of The Times. After the tortuous development of "golden decade", "deep adjustment" and "recovery of growth", the liquor industry has ushered in a new economic development pattern. In 2017, Sichuan Province released the "13th

Five-Year Plan" Development Guide for Sichuan Liquor Industry, etc., to promote the development of Sichuan liquor industry; Henan Province issued the Opinions of Market Supervision Administration of Henan Province on Serving and Supporting High-quality Exhibition of Employment Transformation in Henan Province in 2019, emphasizing the transformation and development of liquor industry; Guizhou Province will release the "14th Five-Year" Industrial Development Plan in 2021; Shanxi Province launched measures such as "establishing city-owned state-owned liquor enterprises and supporting and encouraging private liquor enterprises to join or buy shares" in 2022 to help support the rapid development of the liquor industry. There is no doubt that the Chinese liquor industry has provided a good policy support for the development of Chinese liquor industry. The liquor industry is our country's traditional industry, and occupies an important position in the national economy. The state has always attached great importance to the liquor traditional industry. In particular, after the staged victory of Chinese protests and the normalization of epidemic prevention and control, the speed of economic development was accelerated. Under such background, the development of Chinese liquor industry also ushered in a new stage of development.

(3) Reform and reshaping: liquor industry chain and supply chain reform and reshaping

The high quality development of the liquor industry has accelerated the transformation of the liquor industry chain and supply chain, which is manifested as the extension of the industry chain, the exchange of industrial functions and the expansion of industrial boundaries, that is, the process of interpenetration and reorganization among industries, which is called industrial

integration. The development of liquor industry includes the first, second and third industries, which has strong geographical identification and obvious spatial agglomeration characteristics, and has the innate advantages of establishing stable integrated development [9]. Industrial integration forms mutual influence among the three industries, constantly extends the industrial chain and creates new business forms [10]. On the one hand, in the liquor industry, famous liquor enterprises and so on promote the cooperation with the

upstream to strengthen the grain production, technological innovation and research and development, original wine brewing production and other links related to the main body, and strengthen the mode innovation and market expansion with the downstream, so as to optimize the enterprise chain, adjust the supply and demand chain, improve the value chain; On the other hand, expanding industry boundaries, promoting horizontal cross-industry integration, giving rise to new business forms such as liquor travel and cultural travel [9], and realizing cost savings through internalization of transaction costs [11], promote the comprehensive and sustainable development of liquor industry.

4. The Problems Facing the Upgrading of Chinese Liquor Industry Chain Under the Double Cycle New Development Pattern

(1) The liquor industry chain is short and the innovation ability is insufficient

Although our country is liquor export a big country, but the degree of international liquor recognition to our country liquor is compared to other liquor, such as the wine, is not high, therefore the liquor industry promotes the international recognition from the industry chain Angle, the expansion of the international market has a very important influence to the liquor industry development. From the perspective of the domestic market, China is a country with 1.4 billion people and a huge domestic consumer market. Higher level of internal opening-up can improve the competitiveness of enterprises and promote the continuous innovation of the liquor industry in the development. At the same time, the super-large market can attract multinational companies from all over the world, siphon global resources, coupling the liquor industry chain, supply chain and innovation chain, and promote the modernization of the liquor industry chain.

(2) The toughness of the liquor industry chain is insufficient, and the synergy effect of the upper, middle and lower reaches of the liquor industry chain is insufficient

The liquor industry also presents many environmental problems in the development process of the extensive growth mode. Therefore, the state encourages and advocates traditional industries such as liquor to utilize modern high-tech technology and equipment, make full use of resources, improve product quality and production efficiency, realize the transformation and upgrading of traditional industries, and realize the healthy and sustainable development of the liquor industry [12]. The long-term and steady development of Chinese liquor industry must be green and intelligent [13]. The particularity of liquor industry is also manifested in its obvious resource, and its development cannot be separated from resource element endowment. Resources are limited. In a certain space, when the liquor industry occupies ecological resources to a certain extent, the development of the liquor industry will be constrained by natural resources [14-16]. In the process of development, the liquor industry must make full and efficient use of natural resources, improve the utilization rate of resources in the industrial ecosystem, and harmoniously coexist with nature.

(3) The added value of the industrial chain is not high, and the brand effect of enterprises needs to be improved

The liquor industry itself has certain special rules of development. The particularity of liquor industry is also reflected in its far-reaching influence by political policies.

After experiencing "golden decade", development stagnation and recovery, the problem of how to develop healthily and stably needs to be solved urgently. Under the background of the new development strategy of "double cycle", the liquor industry needs to upgrade its industry chain for its own reasons and the change of global political and economic environment, so as to realize the modernization of liquor industry chain. The sustainable development of liquor industry needs to advance and advance together with environmental resources.

5. Paths and Strategies for The Improvement of Liquor Industry Chain Level

Different from other industries, liquor industry has its own particularity due to its unique traditional culture, far-reaching influence from political policies, low level of standardized production, low degree of product innovation and fixed consumer groups. In the long development process of liquor industry, many problems have been exposed, such as the extensive growth in the early stage, serious excess capacity, structural deformity and slow growth. In particular, under the strategic background of "double cycle" new development pattern put forward in our country, the liquor industry needs to integrate its own characteristics into the "double cycle" new development pattern in order to realize long-term sustainable development. It is a process for liquor industry to integrate into the new development pattern of "double cycle", which is not accomplished overnight. It needs to be reformed from all aspects.

(1) Strengthen weak links, accelerate the research of core technologies in key links of the industrial chain, strengthen innovation, and improve the ability to control the industrial chain

Scientific and technological innovation. Science and technology is the primary productive force, the promotion of science and technology will certainly greatly improve labor productivity. Innovation is the primary driving force for development. Liquor industry as a traditional Chinese industry, standardized production level is lower. During the "golden decade" in the early stage of the industry development (before 2012), due to the prosperity of the industry brought by government and business consumption and the factors of high profit and low cost, all major enterprises took expanding production as the main way to increase their revenue, which not only led to serious overcapacity in the industry later, but also resulted in the lack of innovation ability in the liquor industry. Although the liquor industry has entered the deep adjustment period, its innovation ability has been greatly improved, but in the current new development situation, it is far from enough. If we want to take the road of sustainable development, we must strengthen the innovation of the liquor industry. Under the background of innovation vigorously advocated by the state, the liquor industry with a long history must have its own core technology as support on the road to long-term sustainable development. With the development of modern science and technology and information technology, it relies on technological innovation to carry out process optimization and innovation, which is the only way to the industry development [17]. Scientific and technological innovation can not only improve the production efficiency of enterprises, improve the quality of products, but also innovate the flavor

of liquor to meet the unique and novel taste of liquor pursued by modern people.

Institutional innovation. Under the background of supply-side structural reform, liquor industry should focus on "supply-side" reform and innovation on the basis of demand-oriented, which requires innovation in institutional supply. There are many problems in system innovation of Chinese liquor industry. For example, at present, most of China's large liquor enterprises are state-owned enterprises, which will lead to the lack of motivation for institutional innovation, unsound mechanism and lack of ability, etc. Therefore, appropriate institutional framework and effective motivation mechanism are needed to support the liquor industry to achieve a virtuous cycle of independent innovation, and institutional innovation is the guarantee for the innovation and growth path of China's liquor industry [18]. Listed liquor enterprises also need to rely on institutional innovation to achieve innovation-driven development [19].

Coupled trade, consumption and investment cycle, lay a firm foundation for the long-term development of liquor industry. Restricted by domestic market conditions, regional cultural differences and trade barriers, Chinese liquor export is mainly in the Asian market, but the attention and development degree of the European and American markets are not enough, and it is still in the cultivation stage. Therefore, it is necessary to explore the international market, adopt differentiation strategies according to the different export target countries, establish cooperative alliances, build and maintain sales channels, and the government should play its leading role and take diversified measures to help the liquor industry to better internationalization [20]. The development of liquor export industry is a systematic project, to improve the competitiveness of Chinese liquor industry from management, standards and other aspects, not only to be familiar with the relevant laws and regulations of foreign spirits, but also to start from the quality and safety of liquor comprehensive and in-depth research; At the same time, it is necessary to learn from advanced marketing experience [21]. In recent years, along with the steady and rapid development of Chinese economy, the per capita income level of Chinese residents also shows a steady growth trend. Income is the most important factor affecting people's consumption level. Our country has super large domestic market, under the new development pattern of "double cycle", expanding domestic demand, under the background of large domestic cycle mainly, grasping the domestic consumption market well, widening the international market of liquor industry. For high-end liquor, product attributes, income differentiation effect, wealth effect, brand culture and "Internet +" all drive the consumption of high-end liquor [22]. The government should provide better development space and environment for liquor enterprises, help small and medium-sized enterprises in liquor industry solve financing and tax problems, maintain market order and integrate resources [23].

(2) Strengthen the toughness of the industry chain of liquor industry and coordinate development

Combine "online" and "offline". At present, offline sales is still the most important way of liquor industry. Although there are liquor products in the field of e-commerce, they do not occupy a large market due to the particularity of liquor products, so strengthening online sales still needs to be combined with its own characteristics. In the rapid development of e-commerce today, we see the development of online economy is booming. Especially during the

COVID-19 pandemic, e-commerce has provided convenience for people to shop. Moreover, the popularity of live streaming of goods has undoubtedly boosted the development of e-commerce. Logistics technology is also with the development of e-commerce and continuous development, coupled with the continuous progress of science and technology, fully able to improve the proportion of liquor products online sales. Many wine companies try to find a new development model other than traditional sales [24], and Internet-based e-commerce has become a new sales model chosen by these wine companies. Computer technology has not only been applied in the production process of wine, greatly improving the quality and stability of wine, but also, under the support of "Internet +", a marketing method based on the Internet has been discovered [25]. In a word, the liquor industry should carry out its own reform with the change of times in the process of development. The distribution mode should not be limited to the traditional mode, but seek a new marketing mode on the basis of the traditional mode, and rely on modern network technology to create a world that belongs to the liquor industry.

Strengthen the industrial chain and build an industrial ecosystem. As a traditional industry, liquor industry has many problems in the process of rapid development, especially in the food quality and safety incidents, and is facing great challenges. Many small and medium-sized enterprises that exist around the industrial chain of large liquor enterprises have great deficiencies in improving product quality due to various reasons. It is urgent to adopt certain standards to promote the upstream and downstream of liquor industry chain to improve product quality. Therefore, it is necessary to further improve the standard supply level and structure, strengthen the implementation, supervision and evaluation of the liquor industry chain standard, and actively publicize and promote the liquor industry chain standard system [26]. In 2020, the activity of matching supply and demand between liquor enterprises and packaging enterprises will be carried out in Guizhou Province to promote the healthy and coordinated development of the whole industry chain of high-quality liquor in Guizhou province through strengthening the interconnection and communication between industries [27].

(3) Improve the added value level of liquor industry chain, enhance the added value of enterprise brands, and promote the upgrading of industry chain

High quality development of products. According to the report of the 19th CPC National Congress, "China's economy has shifted from a stage of high-speed growth to a stage of high-quality development". High quality development involves the development of Chinese economy and society. The development of liquor industry naturally should also take high quality development as its own development goal. At the same time, people's living standards continue to improve, the product quality requirements are increasingly high, only to meet the consumer's requirements for high quality products, wine enterprises can continue to develop, so high quality development should be the pursuit of every wine enterprises. For listed liquor companies, firstly, quality management should be strengthened, production and operation should be conducted in accordance with standards, quality control should be strictly controlled, and measurement and detection should be strictly controlled. Secondly, the positive role of regulatory constraints should be fully played by effectively mobilizing relevant enthusiasm [19]. The liquor industry is deeply influenced by policies. Facing the adjustment of

industrial policies, liquor enterprises should unswervingly improve product quality in the consumption structure [28]. Improving the supply quality of liquor products and their derivatives is the core key to optimizing its ecosystem [9].

Liquor enterprises should pay attention to their own brand awareness and product quality. Building brand advantage is the only way for every enterprise to seek long-term development. Facing the change of liquor industry structure, enterprises should pay more attention to brand culture and enhance value. In fact, in the liquor industry, brand advantage is more obvious. At present, liquor leading enterprises have better brand advantage, while regional brands can only survive in the cracks. The high-quality development of the liquor industry is faced with many technical difficulties, and the emergence of blockchain technology provides a solution to the technical difficulties faced by the liquor industry. The application of relevant functions of blockchain technology can promote the visualization and intellectualization of high-quality features at the liquor sales end, and also promote the integration and efficiency of the liquor supply chain system [29]. In the construction of liquor brand system in Guizhou province, it is necessary to promote the governance of "tragedy of the Commons", strengthen its system echelon construction, strengthen its brand connotation system construction, strengthen its brand element system construction, strengthen its brand support system construction, strengthen its brand marketing system construction, improve its brand system construction planning, and strengthen its intellectual property protection [30].

6. Conclusion

To sum up, in the period when China's economic development is facing new challenges and opportunities, under the strategic background of the "double cycle" new development pattern put forward in response to the problems of economic development, due to the particularity of the liquor industry itself, it is necessary to adjust and reform the development path of the liquor industry from all aspects, and strengthen the industry chain, supply chain and value chain of liquor. Build the liquor industry ecosystem, promote the liquor industry into the "double cycle" new development pattern, in order to achieve high-quality development and long-term sustainable development of the liquor industry.

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