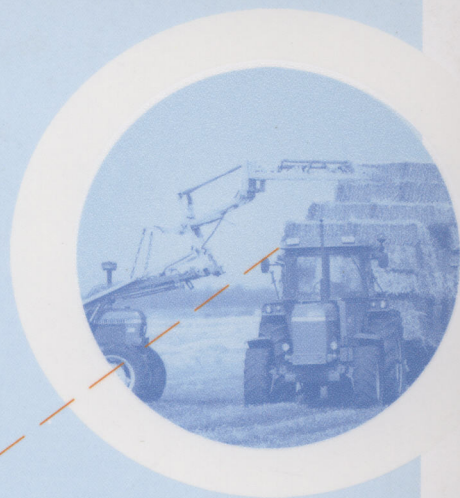# 中国农村居民消费水平与消费结构研究

The study on consumption level and consumption structure of Chinese rural residents

张书云 著

经济科学出版社
Economic Science Press

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摘 要

自 1978 年改革开放以来，我国国民经济获得了持续的高增长，经济结构发生了显著的变化，经济增长模式已从供给约束型转换为需求约束型，消费、投资和出口这三大需求因素已经成为影响我国经济稳定增长的关键。

然而，消费、投资和出口对中国经济增长的作用是不可等量齐观的。自 1990 年以来，外贸出口以年均 22% 的速度增长，对拉动我国经济增长做出了重要贡献。外贸出口为我国经济增长做出贡献的同时，也为我国经济发展带来了很大的不确定性。2007 年美国次贷危机所引发的全球金融危机的影响，欧洲、美国、日本这些我国产品主要出口地区，市场需求急剧下降，致使我国经济增长主要动力的出口，出现大幅下降。外贸出口的大幅下降，导致了我国 2008、2009 年经济增长率下滑，终止了我国经济连续五年的两位数增长，2008、2009 年 GDP 增长率分别为 9.0%、8.7%，这说明依靠扩大出口的经济增长是不能持久的，扩大国内需求才是保持我国经济增长的持久动力。

就内需的两个重要组成部分——消费和投资而言，消费的作用更重要。投资作为一种中间需求，本质上不过是消费的一种引致需求。长期来看，如果没有最终消费需求支撑，那么投资需求将成为无效投资，而无效投资是无法保证国民经济持续快速协调健康发展的，投资本身不可能成为经济增长的持久动力。

然而，近年来，我国最终消费率连年走低，数据表明，最终消费率的下降主要是由于居民消费率的下降。2008 年居民消费率降到 35.32%，已经降到改革开放 30 年来的最低点，与历史最高水平的 52.47% 相比，下降了 17.15 个百分点。2008 年我国居民消费率为 35.3%，美国为 70.1%，印度为 53.9%。与国际上的口径指标相比，目前我国居民消费率明显的偏低，不仅低于世界平均水平，也低于低收入国家的平均水平，与同样经济发展程度的印度相比也有很大差距。我国居民消费率如此之低在世界上实属罕见，这已引起我国中央政府的重视。温家宝总理在 2009 年政府工作报告指出："积极扩大国内需求特别是消费需求，增强内需对经济增长的拉动作用。扩大消费尤其是居民消费"。

数据表明，居民消费率低又主要是农村居民消费率低。2008 年农村居民的消费率下降到 8.87%，与历史最高水平 1983 年的 32.34% 相比，下降了 23.47 个百分点。与此相应，农村居民消费比重的大幅度下降，意味着其对国民经济增长

贡献率的下降。我国农村居民对国民经济增长贡献率最高为 1981 年的 46.36%，2008 年则下降为 7.53%。这表明，农村消费不足是造成我国当前有效需求不足的重要因素之一。农村是我国最大和最基础的市场，54.32% 的农业人口是我国最大的消费群体，农村市场是一个消费潜力巨大的市场。农村市场消费需求不足，影响了国民经济的良性循环。如何提高农村居民消费，启动农村消费市场，在当前全球金融危机的背景下，就成为人们关注的一个重要问题。

为了开拓我国农村市场，就需要了解现阶段我国农村居民消费水平及消费结构的现状及特点，分析影响农村居民消费的制约因素，寻找其实现的途径。基于此，本书选择中国农村居民的生活消费作为研究对象，应用消费经济学理论，借助计量经济学的工具和方法，采用规范分析和实证研究分析相结合，对我国农村居民的消费水平、消费结构及其影响因素进行了系统地分析研究，本书的研究结论为启动农村消费市场提供理论与政策依据。

本书在定性分析的基础上，通过建立计量经济模型实证分析了我国农村居民的消费水平及消费结构的特征及影响因素，得到如下的研究结论：

1. 关于我国农村居民消费水平的研究结论

（1）我国农村居民消费水平在波动中呈现上升趋势；农村居民恩格尔系数由 1978 年的 0.58 下降到 2008 年的 0.44，恩格尔系数下降表明我国农村居民生活消费达到小康水平，生活质量在不断提高。对我国各地区农村居民消费水平比较分析发现：改革开放以来，我国各地区农村居民生活消费水平不断提高，但各地区农村居民消费水平存在差距，而且差距明显扩大。

（2）通过建立面板数据模型，实证结论表明：我国农村居民工资性收入对消费水平的影响大于非工资性收入对消费水平的影响；国家政策因素、环境因素、地区因素对我国农村居民消费行为有显著影响。

（3）通过建立 VAR 模型，实证结论表明：城镇化发展促进了农村居民消费的增加，同时，农村居民消费的增加又促进了城镇化的发展，农村居民消费和城镇化发展是相互促进的关系。

（4）通过建立 VAR 模型，实证结论表明：我国政府支出对农村居民消费呈现挤入效应，政府支出的增加促进了农村居民消费的增加。

2. 关于我国农村居民消费结构的研究结论

（1）改革开放以来，我国农村居民消费结构呈现阶段性变化特征；生存型消费在消费支出中的比重呈现下降的趋势，而享受和发展型消费呈不断上升趋势；农村居民消费的商品化程度在不断提高。

（2）选取有代表性的年份分别建立 ELES 模型，研究结论表明：

• 农村居民在收入增加后，对食品、居住的消费倾向呈下降趋势，但同时食品、居住的边际消费倾向依然位居第一、第二。我国农村居民将新增收入用作

交通通讯消费支出的比例呈增长态势。

● 各类消费支出在不同的年份需求收入弹性不同，在所研究的年份内，交通通讯的需求收入弹性均大于1，这说明我国农村居民对交通通讯商品具有强烈的需求。

● 各类消费支出价格弹性均为负值，交通通讯商品消费需求的自价格弹性绝对值最大，说明农村居民对此类商品价格变动反应强烈，该种商品降价，可以较大幅度地提高其消费需求。

（3）通过建立分地区面板数据模型，得到的研究结论表明：不同地区农村居民各项消费支出的边际消费倾向表现出较大差异，收入低的西部地区农村居民新增加的收入，会更多地用于生活消费，而高收入的东部地区农村居民新增加的收入更多地用于储蓄和生产投资，中部地区农村居民介于西部与东部之间。

（4）通过采用收入分组数据建立面板数据模型，实证结论表明：

● 不同收入等级农村居民消费行为确实存在着显著差异，收入差异是影响我国农村居民消费结构的重要因素。从各消费项目的边际消费倾向看，收入水平的提高对低收入家庭消费总支出的拉动作用是最大的，而对高收入家庭消费总支出的拉动作用最小。

● 所有收入等级的农村居民家庭新增加收入时，首先考虑的都是增加居住消费，交通通讯消费支出是所有收入等级的农村居民家庭新增加收入时，增加的消费支出中排在第二位，仅次于居住。

（5）城镇化发展对我国农村居民消费结构有明显影响，但对各类消费支出的影响有所不同。AIDS 模型实证结论表明：城镇化率增加 1 个百分点，其他条件不变的情况下，将使农村居民家庭设备用品及服务、文教娱乐用品及服务、交通通讯消费的预算份额分别增加 0.0169、0.1084、0.1894，增加最多的是交通通讯消费，其次是文教娱乐用品及服务消费；城镇化率增加 1 个百分点，将使农村居民食品、衣着、居住、医疗保健消费有所减少。

（6）农村公共物品供给对我国农村居民消费结构有显著影响。面板数据模型实证结果表明：改善农村交通通讯基础设施、电力基础设施、医疗卫生基础设施和教育设施，都会对农村居民消费增长有明显的促进作用。其中农村电力基础设施对农村居民消费影响最大，其次是通讯基础设施，特别是移动通讯设施。

本书的创新之处：

（1）首次通过建立 VAR 模型和 AIDS 模型，分别实证分析了我国农村居民消费水平与城镇化发展之间的关系及城镇化发展对我国农村居民消费结构的影响。

（2）首次通过建立 VAR 模型和采用基础设施存量数据建立面板数据模型，实证分析了政府支出对我国农村居民消费水平的影响及政府公共物品供给对农村

居民消费结构的影响。

（3）本书克服了现有文献的不足，通过建立面板数据模型实证分析了工资性收入、非工资性收入、政策因素、环境因素、地区因素对我国农村居民消费水平的影响。

（4）各省份数据强化了消费结构的区域特点，而按收入等级划分的不同收入组数据通过在全国范围内统一指标、分总汇合，更适合将全国农村居民作为整体分析。本书利用2003～2008年各年按收入等级的抽样调查资料，建立面板数据模型分析了不同收入等级农村居民消费结构的差异。

关键词： 农村居民消费　农村居民收入　城镇化　政府支出

Abstract

Chinese national economy has sustained high growth and economic structure has changed significantly since the implementation of reform and opening-up policy in 1978. Chinese economic growth mode has transformed from supply constraint to demand constraint. Consumption, investment and export have become the keys to promoting a steady growth of China's economy.

However, the effects of consumption, investment and exports on China's economic growth should not be regarded as equal. Since 1990, China's exports have grown at an annual rate of 22% on average, which have made an important contribution to driving China's economic growth. At the same time, exports have brought great uncertainty to China's economic development. Under the influence of the global financial crisis triggered by the United States subprime mortgage crisis in 2007, the market demand dropped drastically from Europe, the United States and Japan, which are main export areas in China. This has resulted in China's exports, the main driver of China's economic growth, declining dramatically, leading to the decline of China's annual economic growth rate in 2008 and 2009, and having terminated the Chinese economy's double-digit growth rate which has sustained for five consecutive years. The annual GDP growth rates of 2008 and 2009 are 9.0% and 8.7%. These results indicate that relying on the expansion of export growth is not sustainable and only expanding domestic demand is the power to maintain China economic growth continually.

In terms of the two important components of domestic demand-consumption and investment, the role of consumption is much more important. As an intermediate demand, investment in essence is a result of consumer demand. In the long term, if there is no support of consumer demand, the investment demand will become insufficient investment. While ineffective investment cannot guarantee a sustainable, rapid, coordinated and healthy development of national economy, and investment itself cannot become a lasting power for economic growth.

However, in recent years, China's final consumption rate has fallen year after year. The data show that the decline in final consumption was mainly due to the decline

in consumption rate. China's consumption rate dropped to 35. 32 percent in 2008, which is the lowest in 30 years since 1978. Compared to the historical level of 52. 47%, the final consumption decreased 17. 15 percent. In 2008 the consumption rate in China, US, and India were 35. 3%, 70. 1%, and 53. 9% respectively. Compared to international indices, Chinese resident consumption rate is noticeably lower. It is not only below the world average, but also lower than the average level of low-income countries. Compared to India, which has the same level of economic development, there is still a big gap. Premier Wen Jiabao pointed out in 2009 Government Work Report: "actively boosting domestic demand, especially consumer demand, and strengthening the role of domestic demand in driving economic growth; expanding consumption, especially individual consumption"

The data show that the low resident consumption rate was mainly a result from the low consumption rate of rural residents. Compared to the record of level of 32. 34% in 1983, the consumption rate of rural residents has dropped to 8. 87 percent in 2008, a decrease of 23. 47 percent. Correspondingly, a significant decline in the consumption rate of rural residents means that its contribution to national economic growth rate declines. The record level of Chinese rural residents' contribution rate to national economic growth rate was 46. 36% in 1981, while the contribution rate fell to 7. 53% in 2008. This indicates that insufficient rural consumption is one of the important factors that result in insufficient effective demand in China. Rural areas are China's largest and most fundamental market. The rural area population is the largest consumer group, accounting for 54. 32 percent of the Chinese population. The rural areas are a huge potential consumer market in China. Insufficient consumer demand in rural markets affects is not conducive to a positive national economic cycle. How to improve the consumption of rural residents to start rural consumption market has become an important issue.

In order to open up China's rural market, we need to understand the current status and characteristics of rural residents' consumption level and consumption structure, analyze the constraints on rural residents' consumption, and find ways to open up China's rural market.

To achieve these objectives, this thesis selects rural residents' consumption as the research object, systematically analyzes Chinese rural residents' consumption level, consumption structure and their influencing factors. The research method combines normative analysis with empirical analysis, and applies consumer economics theories and Econometric tools and methods in the research. The results of this thesis provide theoretical and policy implications for opening up the rural consumer market.

Through building Econometric models, this thesis analyzes characteristics and factors of Chinese rural residents' consumption level and consumption structure based on qualitative analysis. The research conclusions are as follows:

1. Conclusions about the consumption level of rural residents

(1) The consumption level of rural residents has a upward trend although there is volatility. The Engel coefficient of rural residents was 0.58 in 1978 and dropped to 0.44 in 2008. The decrease in Engel coefficient of rural residents indicates that there is a comfortable level of living and the quality of life has been continuously improved for Chinese rural residents. The comparative analyses of consumption levels of rural residents in different areas show that: the consumption level of all rural residents has been continuously improved since 1978. However, there is gap among different areas and this gap has widened.

(2) The empirical results of the panel data model show that: The influence of wage income is greater than that of non-wage income on the consumption levels of rural residents. Government policies, environmental factors and regional factors have significant influence on rural consumer behaviour.

(3) The empirical findings of VAR models indicate that: the development of urbanization has enhanced the increase in the consumption of rural residents, which in turn has contributed to the development of urbanization. The relationship between rural residents' consumption and urbanization is mutually reinforcing.

(4) The empirical findings of VAR models show that: Chinese government expenditure has exhibited crowding-in effects on rural residents' consumption. The increase in government expenditure contributed to the increase in the consumption of rural residents.

2. Conclusions about consumption structure of China's rural residents

(1) Since the reform and opening-up, China's consumption structure of rural residents has exhibited phase variation. The ratio of survival consumption in consumer spending has a descending trend, while the enjoyment and development spending have a continuous ascending trend. The degree of commercialization in the consumption of rural residents has been improved continuously.

(2) The results of ELES models using a sample of representative years indicate that:

• The consumption of food, accommodation has exhibited downward trend after rural residents' income increased. But the marginal consumption propensities of food and accommodation are still ranked the first and second. The portion of newly increased in-

come spent on transportation and communications has exhibited an increasing trend.

● The Income elasticity of consumption varies in different years. The demand income elasticity of transportation and communication is greater than 1 during the sample period in this study. This shows that there is a strong demand for transportation and communication products from rural residents.

● All price elasticity of consumption is negative. The absolute value of the price elasticity of consumer demand for transport is the largest. It shows that rural residents are strongly sensitive to changes in the prices of these goods. A decrease in the prices of these goods will greatly increase rural residents' demand.

(3) Through the establishment of sub-regional panel data models, the research shows that: there is a big difference of marginal consume propensity of rural residents in different regions; the low-income rural residents in the western region spend most of the additional revenue in living consumption; the high-income rural residents in the eastern region spend more of the additional revenue in saving and productive investments; the spending model of rural residents in central region is between rural residents in the western and eastern.

(4) The empirical findings of panel data models established based on data which are grouped by income show that:

● There is a big difference among consumption behavior of rural residents with different income levels. Income difference is an important factor that affects the consumption structure of rural residents in China. In terms of marginal consumption trend of different consumption goods, the increase in income is the largest driving effect in the total consumption expenditures of low-income household, and is the smallest driving effect in the total consumption expenditures of high-income household.

● When their income is increased, all rural residents with different income levels consider increasing their residence consumption firstly, followed by transportation and communications consumption.

(5) The urbanization has significantly affected the consumption structure of rural residents. But it has different effect to different types of consumer spending. The empirical findings of AIDS models show that: if the urbanization rate increases 1 percentage and other conditions remain unchanged, the consumption budget share of household equipment & services, cultural education entertainment products & services, transportation & communications of rural residents increase 0. 0169, 0. 1084, 0. 1894 respectively; If the urbanization rate increases 1 percentage, the consumption of food, clothing, housing, health of rural residents decrease.

(6) There is a significant effect of rural public goods on consumption structure of rural residents in China. Through the empirical results of panel data models show that rural consumption growth is significantly promoted if there is an improvement of transport facilities communication facilities, electricity infrastructure, medical and health infrastructure and education facilities. Among these factors, the electricity infrastructure has the biggest effect, followed by the communications infrastructure, especially mobile communication facilities.

The innovation of this thesis:

(1) Through the establishment of VAR model and AIDS model, this thesis empirically analyzes the relationship between urbanization and consumption structure of rural residents and the effect of urbanization on consumption structure of rural residents.

(2) This is the first research using VAR model and panel data model with infrastructure stock data set. This thesis empirically analyzes the effect of government expenditure on the consumption level of rural residents and the effect of public goods on the consumption structure of rural residents.

(3) This thesis overcomes the weaknesses of existing literature and discusses how wage income, non-wage income, policy factors, environmental factors, and regional factors affect the rural household consumption levels through the panel data model.

(4) Using the data of every province reinforced the province's regional characteristics of the consumption structure. Moreover, pooling together the same indicators based on the different income group data classified by income is more suitable for the analysis of rural residents as a whole. This thesis overcomes the weaknesses of existing literature. According to a sample survey of annual income levels during 2003 – 2008, the panel data model is established to analyze the consumption structures among rural resident groups with different income levels.

Key words: *Consumption of rural residents, Income of rural residents, Urbanization, Government spending*

目 录

第 1 章　导　　言

1.1　研究背景及意义

自 1978 年改革开放以来，我国国民经济获得了持续的高增长，经济结构发生了显著的变化，经济增长模式已从供给约束型转换为需求约束型，消费、投资和出口这三大需求因素已经成为影响我国经济稳定增长的关键。

然而，消费、投资和出口对中国经济增长的作用是不可等量齐观的。自 1990 年以来，外贸出口以年均 22% 的速度增长，对拉动我国经济增长作出了重要贡献。尤其是 2001 年以来，受我国加入 WTO 和经济全球化的影响，我国出口额占 GDP 的比重呈持续上升趋势，由 2001 年的 20.2%，上升到 2007 年的 35.5%。我国的外贸依存度也由 2001 年的 38.7%，上升到 2007 年的 63.4%[1]。外贸依存度提高表明我国经济参与了经济全球化过程，外需成为我国经济增长的重要动力。问题在于，出口快速增长，多是建立在粗放型的数量扩张基础上；过分依赖国外市场为我国经济发展带来了很大的不确定性。第一，出口取决于贸易伙伴需求和世界经济景气状况，不确定性大，可控性差。2007 年美国次贷危机所引发的全球金融危机的影响，欧洲、美国、日本这些我国产品主要出口地区，市场需求急剧下降，致使我国经济增长主要动力的出口，出现大幅下降。出口对经济增长的贡献明显下降，2008 年出口对经济增长的贡献率仅为 9.2%，与 2007 年相比下降了 10.5 个百分点[2]。外贸出口的大幅下降，导致了我国 2008、2009 年经济增长率下滑，终止了我国经济连续五年的两位数增长，2008、2009 年 GDP 增长率分别为 9.0%、8.7%。第二，持续净出口正值导致频繁的国际贸易摩擦。第三，在产品技术水平缺乏竞争能力的情况下，以国内压低的资源价格与仅能糊口的劳动力价格，低价竞争实现出口，导致我国资源和财富流失。这些表明依靠扩大出口的经济增长是得不偿失的，是不能持久的。

2008 年下半年以来，受世界金融危机的影响，国内经济困难明显增加，根

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① ②　根据《中国统计年鉴》2009 年卷相关数据计算。

据形势发展变化，2008 年 11 月 5 日国务院常务会议确定了进一步扩大内需、促进经济增长的措施。

就内需的两个重要组成部分——消费和投资而言，消费的作用更重要。消费需求增长对经济增长的拉动作用可分为直接拉动和间接拉动。所谓直接拉动，即在现有生产能力界限之内，消费需求增长直接导致的消费品生产的增长。所谓间接拉动则是说，消费需求作为初始变量，通过拉动其他变量拉动经济增长。其具体过程是，消费需求增长扩展了市场空间，诱发厂商追加投资，拉动投资增长，投资增长又拉动经济增长。按照"加速原理"，消费需求的较小增长，会导致投资需求的较大增长，而要想使投资需求增长可持续，消费需求必须保持持续增长。

从消费与生产的相互转化和相互促进来看，消费需求能否带动供给，供给能否创造出消费需求，并顺利进入消费环节对国民经济健康平稳运行至关重要。如果消费率过低而投资率过高，会直接导致生产和消费的相互促进关系遭到破坏，带来产能过剩和经济增长停滞。从生产与消费的关系看，生产决定消费，消费也促进生产。消费不仅是经济运行的目的和结果，同时也是经济运行的前提和条件。经济运行实质上就是在消费或市场需求的不断驱动下向前发展。生产出来的产品一旦不能被消费，经济运行就会陷入停滞状态。

长期以来，我国投资增长速度明显高于 GDP 增长速度和消费增长速度。2000 年至 2008 年，按支出法当年价格计算的我国 GDP 年均增长速度为 15.2%，消费年均增长速度为 11.7%，而资本形成总额的年均增长速度为 18.3%。资本形成对经济增长的贡献率由 2000 年的 22.4% 急速增加到 2008 年的 45.1%。[①]

从表 1 - 1 可以看出，我国投资率由 2000 年的 35.3% 上升到 2008 年的 43.5%。根据世界银行数据，2000 年，世界平均为 23%，低收入国家为 21%，中等收入国家为 25%（其中，下中等收入国家为 27%，上中等收入国家为 23%），高收入国家为 22%。对投资率的国际比较表明，我国的投资率是明显偏高的。作为一种中间需求的投资，本质上不过是消费的一种引致需求。长期来看，如果没有最终消费需求支撑，那么投资需求将成为无效投资即"泡沫"，而无效投资是无法保证国民经济持续快速协调健康发展的，投资本身不可能成为经济增长的持久动力。温家宝总理在《2004 年政府工作报告》中指出："我国消费在国内生产总值中的比重偏低，不利于国内需求的稳定扩大，不利于国民经济持续较快增长和良性循环"。因此，我国要保持经济的持续、快速、健康增长，必须立足于国内消费市场的开拓。《十一五规划纲要》提出："要立足国内需求推动发展，把扩大国内需求特别是消费需求作为基本立足点，促进经济增长由主要

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① 根据《中国统计年鉴》2009 年卷相关数据计算。

表 1-1 　　　　　　　　　　　1978～2008 年中国投资率和消费率

年份	投资率（%）	最终消费率（%）	居民消费率（%）	城市居民消费率（%）	农村居民消费率（%）	政府消费率（%）
1978	38.2	62.1	48.79	18.49	30.30	13.31
1979	36.1	64.4	49.15	18.54	30.61	15.20
1980	34.8	65.5	50.76	20.04	30.72	14.73
1981	32.5	67.1	52.47	20.45	32.02	14.65
1982	31.9	66.5	51.93	19.95	31.98	14.52
1983	32.8	66.4	51.98	19.64	32.34	14.40
1984	34.2	65.8	50.82	19.42	31.40	15.00
1985	38.1	66	51.64	20.69	30.95	14.31
1986	37.5	64.9	50.46	21.34	29.11	14.46
1987	36.3	63.6	49.90	21.97	27.93	13.67
1988	37	63.9	51.13	24.01	27.12	12.81
1989	36.6	64.5	50.91	24.65	26.26	13.58
1990	34.9	62.5	48.85	24.64	24.20	13.64
1991	34.8	62.4	47.53	25.02	22.51	14.89
1992	36.6	62.4	47.16	26.00	21.16	15.25
1993	42.6	59.3	44.43	25.87	18.57	14.86
1994	40.5	58.2	43.50	25.83	17.67	14.73
1995	40.3	58.1	44.88	27.05	17.83	13.25
1996	38.8	59.2	45.79	27.03	18.75	13.43
1997	36.7	59	45.21	27.36	17.85	13.74
1998	36.2	59.6	45.34	28.61	16.72	14.28
1999	36.2	61.1	46.00	30.00	16.00	15.05
2000	35.3	62.3	46.44	31.10	15.34	15.86
2001	36.5	61.4	45.16	30.67	14.49	16.21
2002	37.9	59.6	43.68	30.16	13.52	15.89
2003	41	56.8	41.67	29.71	11.95	15.11
2004	43.2	54.3	39.83	28.88	10.95	14.47
2005	42.7	51.8	37.74	27.55	10.19	14.10
2006	42.6	49.9	36.31	26.79	9.52	13.59
2007	42.2	49	35.58	26.49	9.09	13.38
2008	43.5	48.6	35.32	26.46	8.87	13.27

注：资本形成率指资本形成总额占支出法国内生产总值的比重
最终消费率=（居民消费+政府消费）/GDP。
居民消费率=（城镇居民消费+农村居民消费）/GDP。
城镇居民消费率=城镇居民消费/GDP。
农村居民消费率=农村居民消费/GDP。
政府消费率=政府消费/GDP。
资料来源：根据《中国统计年鉴》2009 年卷数据计算。