



农村绿皮书®

REEN BOOK OF RURAL AREA

中国农村经济形势 分析与预测 (2013~2014)

ANALYSIS AND FORECAST ON CHINA'S
RURAL ECONOMY (2013-2014)

中国社会科学院农村发展研究所 / 著
国家统计局农村社会经济调查司



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摘 要

1. 本摘要概括了本书所描述的 2013 年中国农业农村经济发展的一些主要指标和变化,以及对 2014 年中国农业农村经济形势的一些展望和预测。

2. 2013 年,由农村各部门创造的国内生产总值(以现价计)的比重为 43.07%,比 2012 年下降 0.37 个百分点。其中,第一产业所占比重为 10.01%,比 2012 年下降 0.07 个百分点;农村第二产业所占比重为 20.22%,比 2012 年下降 0.69 个百分点;农村第三产业所占比重为 12.84%,比 2012 年提高 0.39 个百分点。

3. 2013 年,国内生产总值实际增长 7.7%。在国内生产总值增长中,农村部门贡献了 3.01 个百分点,贡献率为 39.14%,比 2012 年提高 0.12 个百分点。在农村部门中,第一产业贡献了 0.37 个百分点,贡献率为 4.85%,比 2012 年降低 0.78 个百分点;农村第二产业贡献了 1.64 个百分点,贡献率为 21.26%,比 2012 年下降 1.05 个百分点;农村第三产业贡献了 1 个百分点,贡献率为 13.03%,比 2012 年提高 1.94 个百分点。

4. 2013 年,第一产业增加值达到 56957 亿元(包括农林牧渔服务业增加值),比 2012 年实际增长 4.0%。在第一产业增加值中,农业比重为 58.2%,林业比重为 4.5%,畜牧业比重为 24.2%,渔业比重为 10.3%。第一产业或将进入新一轮周期性波动阶段。

5. 2013 年,东部、中部、西部和东北地区农林牧渔业现价总产值(包括农林牧渔服务业)分别为 34107 亿元、25436 亿元、



25792 亿元和 11654 亿元，分别比 2012 年实际增长 3.0%、4.1%、5.0% 和 4.3%。

6. 2013 年，粮食种植面积 11195 万公顷，比 2012 年增加 75 万公顷，增长 0.7%；棉花种植面积 435 万公顷，下降 7.2%；油料种植面积 1408 万公顷，增长 1.1%；糖料种植面积 199 万公顷，下降 1.7%。虽然大宗作物种植结构有所调整，但未引起市场波动。

7. 粮食连续第 10 年增产，再创历史新高。2013 年，粮食总产量 60194 万吨，比 2012 年增长 2.1%；棉花产量 631 万吨，减产 7.7%；油料产量 3531 万吨，增长 2.8%；糖料产量 13759 万吨，增长 2.0%。

8. 2013 年，粮食单产为 5377 公斤/公顷，比 2012 年增长 1.4%；单产提高对粮食增产的贡献率达 68%。玉米增产对粮食增产的贡献率达 98%。

9. 畜牧业生产增长，但增速回落。2013 年，肉类总产量 8536 万吨，比 2012 年增长 1.8%，增速比上年回落 3.6 个百分点。猪肉产量 5493 万吨，增长 2.8%；牛肉、羊肉产量分别为 673 万吨和 408 万吨，分别增长 1.7% 和 1.8%；禽肉产量 1798 万吨，下降 1.3%；牛奶产量 3531 万吨，下降 5.7%；禽蛋产量 2876 万吨，增长 0.5%；水产品产量 6172 万吨，增长 4.5%。

10. 2013 年，农产品进出口总额增速明显减缓，农业外向程度下降。农产品进出口总额 1866.9 亿美元，比上年增长 6.2%；农产品进口 1188.7 亿美元，增长 5.7%；农产品国际贸易逆差 510.4 亿美元，比上年增长 3.8%。2013 年，农产品进出口额与第一产业增加值的百分比为 20.0%，比上年下降约 1.1 个百分点。

11. 2013 年，农产品生产者价格比 2012 年上涨 3.2%，其中农业产品生产者价格上涨 4.3%，林业产品生产者价格下降 0.9%，畜牧业产品生产者价格上涨 2.4%，渔业产品生产者价格上涨

4.3%。粮食生产者价格上涨3.6%，棉花生产者价格上涨3.9%，油料生产者价格上涨2.4%，糖料生产者价格下降1.1%；生猪生产者价格下跌0.7%。粮食生产价格持续上涨与粮食最低收购价政策等有关。

12. 2013年，农业生产资料价格比2012年上涨1.4%，涨幅比上年同期回落4.2个百分点。其中化肥价格下降2.3%，农用机油价格上涨0.5%，农业生产服务价格上涨6.5%。

13. 2013年，全国平均每亩粮食生产投入费用为357元，比上年增长4.1%。其中，物质投入费用为257元，比上年增长2.0%；生产服务支出为100元，比上年增长9.9%。

14. 农民收入增速依然相对较快。2013年，农民人均纯收入8896元，比2012年增加979元，实际增长9.3%，增速比2012年下降1.4个百分点。农民人均纯收入中，家庭经营纯收入3793元，比2012年增加260元，增长7.4%，增速比2012年下降2.3个百分点；其中第一产业纯收入人均2828元，增长3.9%，增速比2012年下降4.1个百分点。工资性收入首次超过家庭经营纯收入，人均4025元，增加578元，增长16.8%，增速比2012年提高0.5个百分点。农民工资性收入对农民人均纯收入增幅的贡献率达到59%。财产性收入人均293元，增加44元，增长17.7%。转移性收入人均784元，增加98元，增长14.2%。

15. 2013年农民人均纯收入中，家庭经营纯收入占42.6%，工资性收入占45.3%，财产性收入占3.3%，转移性收入占8.8%。

16. 2013年，农村居民内部收入分配差距有所缩小，农民人均纯收入的基尼系数为0.3857，比上年缩小0.001。

17. 2013年，城乡居民收入差距有所缩小，收入差距比由2012年的3.10:1下降到3.03:1。

18. 2013年，农村居民人均生活消费支出6626元，比2012年



增加 718 元，实际增长 9.0%。农村居民人均生活消费支出中，食品消费支出 2495 元，增长 7.4%，恩格尔系数为 37.7%，比 2012 年下降 1.6 个百分点；衣着支出 438 元，增长 10.6%；居住支出 1234 元，增长 13.6%；家庭设备及用品支出 387 元，增长 13.3%；交通及通信支出 796 元，增长 21.9%；文教娱乐支出 486 元，增长 9.1%；医疗保健支出 614 元，增长 19.5%。

19. 2013 年城乡居民消费水平差距缩小，消费差距比由 2012 年的 2.82:1 下降到 2.72:1。

20. 预测 2014 年第一产业增加值约 6.2 万亿元，实际增长速度降到 4% 以下；按当年价格计算的第一产业增加值占国内生产总值的比重为 9.8%。第一产业增加值在国民经济中的比重将进入 10% 以下的时代。

21. 2014 年农村消费仍将保持较快增长，预测农村消费品零售额将达到 3.6 万亿元，名义增长大约 15%，在全社会消费品零售额中所占比重将升至 13.5% 以上。

22. 预测 2014 年农户固定资产投资将达到 1.2 万亿元，增长大约 14%。

23. 在满足我们假定的条件下，预测 2014 年粮食总产量可达到 6.1 亿吨左右；油料产量达到 3600 万吨；棉花和糖料减产，产量分别降到 600 万吨和 1.3 亿吨左右。

24. 2014 年肉类生产将继续保持扩大态势，猪牛羊肉等都将继续保持增长态势。预测 2014 年肉类总产量将达到 8800 万吨左右，猪牛羊肉产量达到 6700 万吨左右，猪肉产量达到 5600 万吨左右。

25. 预测 2014 年水产品产量将达到 6400 万吨左右。

26. 预测 2014 年农产品进出口规模约 2000 亿美元，同比增速下降到 5% 左右。农业对外依存度进一步下降。但是，粮油棉进口规模扩大，对国内农业生产冲击的风险可能会上升。



27. 预测 2014 年农产品生产价格同比涨幅扩大到 5% 左右，粮食生产价格同比上涨 2%，畜牧业产品生产价格同比涨幅将超过 8%。

28. 预测 2014 年食品消费价格同比上涨 4%，涨幅有所回落。粮食消费价格同比上涨 2%，油脂消费价格基本稳定，肉禽及其制品消费价格同比上涨 7%，蔬菜消费价格同比上涨 5%，水产品消费价格同比上涨 3%。

29. 预测 2014 年农民人均纯收入将增加到近万元，大约 9900 元，名义增长 11% 左右，实际增长 9% 左右。城乡居民收入差距继续缩小，城镇居民人均可支配收入与农民人均纯收入之比为 2.95:1。

Abstract

1. This abstract outlines some major indexes and changes of China's agriculture and rural economic development in 2013, and makes some forecasts about agriculture and rural economic situation in 2014.

2. In 2013, rural sectors produced 43.07 percent of China's GDP (at current price, the same below), decreased by 0.37 percentage point from that of 2012. Of China's GDP, primary industry accounted for 10.01 percent, decreased by 0.07 percentage point from that of 2012; rural secondary industry accounted for 20.22 percent, decreased by 0.69 percentage point from that of 2012; rural tertiary industry accounted for 12.84 percent, increased by 0.39 percentage point.

3. In 2013, China's GDP increased by 7.7 percent in real term. The contribution of rural sectors to GDP growth was 3.01 percentage points and the share of the contribution of rural sectors to the increase of the GDP was 39.14 percent, increased by 0.12 percentage point from that of the previous year. The contribution of primary industry to GDP growth was 0.37 percentage point and the share of the contribution of primary industry to the increase of the GDP was 4.85 percent, decreased by 0.78 percentage point. The contribution of rural secondary industry to GDP growth was 1.64 percentage points and the share of the contribution of rural secondary industry to the increase of the GDP was 21.26 percent, decreased by 1.05 percentage points. The contribution of rural tertiary industry to GDP growth was 1 percentage point and the share of the contribution of rural tertiary industry to the increase of the GDP was 13.03 percent, increased by 1.94 percentage points.

4. In 2013, value added of primary industry reached 5695.7 billion

Yuan (value added of service in farming, forestry, animal husbandry, and fishery is included), increased by 4 percent in real term from that of 2012. Of the value added of primary industry, farming accounted for 58.2 percent, forestry accounted for 4.5 percent, animal husbandry accounted for 24.2 percent, fishery accounted for 10.3 percent.

5. In 2013, gross output value of farming, forestry, animal husbandry and fishery in the eastern, central, western and northeast region was 3410.7 billion Yuan, 2543.6 billion Yuan, 2579.2 billion Yuan and 1165.4 billion Yuan respectively, increased by 3.0 percent, 4.1 percent, 5.0 percent and 4.3 percent in real term respectively from that of the previous year.

6. In 2013, the sown area of grain crops was 111.95 million ha., increased by 0.75 million ha., or 0.7 percent from that of 2012; the sown area of cotton was 4.35 million ha., decreased by 7.2 percent; the sown area of oil-bearing crops was 14.08 million ha., increased by 1.1 percent; the sown area of sugar crops was 1.99 million ha., decreased by 1.7 percent.

7. In 2013, the total output of grain crops was 601.94 million tons, increased by 2.1 percent from that of 2012; output of cotton was 6.31 million tons, decreased by 7.7 percent; output of oil-bearing crops was 35.31 million tons, increased by 2.8 percent; output of sugar crops was 137.59 million tons, increased by 2.0 percent.

8. In 2013, yield of grains per ha. was 5377 kg., increased by 1.4 percent from that of the previous year.

9. In 2013, total output of meats was 85.36 million tons, 1.8 percent higher than that of 2012, but the growth rate was 3.6 percentage points lower than that of last year. In 2013, output of pork was 54.93 million tons, increased by 2.8 percent; output of beef and mutton was 6.73 and 4.08 million tons respectively, increased by 1.7 and 1.8 percent respectively; output of poultry was 17.98 million tons, decreased by 1.3 percent. Output of cow milk was 35.31 million tons,



decreased by 5.7 percent. Output of poultry eggs was 28.76 million tons, increased by 0.5 percent. Output of aquatic product was 61.72 million tons, increased by 4.5 percent.

10. In 2013, volume of agricultural product import and export totaled US \$ 186.69 billion, increased by 6.2 percent over the previous year. The volume of agricultural product import was US \$ 118.87 billion, increased by 5.7 percent. The trade deficit of agricultural product totaled US \$ 51.04 billion, increased by 3.8 percent.

11. In 2013, the producer price of farm products went up by 3.2 percent over the previous year. Of which, the producer price of planting products went up by 4.3 percent; the producer price of forestry products went down by 0.9 percent; the producer price of animal husbandry products went up by 2.4 percent; the producer price of and fishery products went up by 4.3 percent. The producer price of grain crops increased by 3.6 percent; the producer price of cotton went up by 3.9 percent; the producer price of oil-bearing crops went up by 2.4 percent; the producer price of sugar crops went down by 1.1 percent. The producer price of pig went down by 0.7 percent.

12. In 2013, prices of means of agricultural production went up by 1.4 percent over the previous year. Of which, the price of chemical fertilizer went down by 2.3 percent; the price of oil for farm machinery went up by 0.5 percent; the price of service for agricultural production went up by 6.5 percent.

13. In 2013, the costs of inputs for grain production were 357 Yuan per mu on average, increased by 4.1 percent. Of which, the costs of physical inputs were 257 Yuan, increased by 2.0 percent; the costs for production service were 100 Yuan, increased by 9.9 percent.

14. In 2013, per capita net income of rural households was 8896 Yuan, increased by 979 Yuan over the previous year or 9.3 percent in real term. This growth rate was 1.4 percentage points lower than that of

the last year. Of which, per capita net income from household management was 3793 Yuan, increased by 260 Yuan or 7.4 percent. Of the income from household management, per capita net income from primary industry was 2828 Yuan, increased by 3.9 percent. Per capita income from wages and salaries was 4025 Yuan, increased by 578 Yuan or 16.8 percent. Per capita income from properties was 293 Yuan, increased by 44 Yuan or 17.7 percent; Per capita income from transfers was 784 Yuan, increased by 98 Yuan or 14.2 percent.

15. In 2013, per capita net income from household management accounted for 42.6 percent of per capita net income of rural households, income from wages and salaries accounted for 45.3 percent, income from properties accounted for 3.3 percent, and income from transfers accounted for 8.8 percent.

16. In 2013, income difference among farmers narrowed slightly. The Gini coefficient of farmers' net income was 0.3857.

17. In 2013, income gap between urban residents and rural residents reduced from 3.10:1 in the previous year to 3.03:1.

18. In 2013, per capita consumption expenditure of rural households was 6626 Yuan, increased by 718 Yuan or 9.0 percent in real term over the previous year. Of per capita consumption expenditure of rural households, expenditure of food was 2495 Yuan, increased by 7.4 percent, and the Engle coefficient was 37.7 percent, 1.6 percentage points down from the previous year; expenditure of clothes was 438 Yuan, increased by 10.6 percent; expenditure of residence was 1234 Yuan, increased by 13.6 percent; expenditure of household facilities and articles was 387 Yuan, increased by 13.3 percent; expenditure of transport and communications was 796 Yuan, increased by 21.9 percent; expenditure of culture, education and recreation was 486 Yuan, increased by 9.1 percent; expenditure of health care and medical service was 614 Yuan, increased by 19.5 percent.

19. In 2013, level of consumption between urban residents and



rural residents reduced from 2.82:1 in the previous year to 2.72:1.

20. It is estimated that the value added of primary industry will reach about 6200 billion Yuan in 2014, the actual growth rate will be below 4 percent. The proportion of the value added of primary industry in GDP will be 9.8 percent in 2014.

21. It is estimated that rural retail sales of consumer goods will reach 3600 billion Yuan in 2014, increases by about 15 percent.

22. It is estimated that farm households investment in fixed assets will reach 1200 billion Yuan in 2014, increases by about 14 percent.

23. It is estimated that the total output of grain crops will be about 610 million tons in 2014; the total output of oil-bearing crops increases to 36 million tons; the total output of cotton decreases to about 6 million tons; the total output of sugar crops decreases to about 130 million tons.

24. It is estimated that the total output of meats will be about 88 million tons in 2014; the total output of pork, beef and mutton will be about 67 million tons; the output of pork will be about 56 million tons.

25. It is estimated that the output of aquatic product will be about 64.0 million tons in 2014.

26. It is estimated that total volume of agricultural product import and export will be about US \$ 200 billion in 2014, and the growth rate will drop to around 5 percent.

27. It is estimated that the producer price for farm products increases by about 5 percent in 2014; producer price of grain crops increases by 2 percent; the growth rate of producer price for animal husbandry products will be over 8 percent.

28. It is estimated that the consumer price for food increases by 4 percent in 2014; consumer price for grain increases by 2 percent; consumer price for oil or fat will be basically stable; consumer price for meat, poultry and processed products increases by 7 percent; consumer price for vegetables increases by 5 percent; consumer price for aquatic

products increases by 3 percent.

29. It is estimated that the per capita net income of rural households will be about 9900 Yuan, and will increase by about 9 percent in real term in 2014. The income gap between urban residents and rural residents will be further reduced.