中国社会科学院创新工程学术出版项目

B

河南经济蓝皮书

BLUE BOOK OF HENAN'S ECONOMY

2015年 河南经济形势 分析与预测

主编/胡五岳 副主编/俞肖云 刘朝阳

ECONOMY OF HENAN ANALYSIS AND FORECAST (2015)





2015 年 河南经济形势分析与预测

ECONOMY OF HENAN ANALYSIS AND FORECAST (2015)

主编/胡五岳副主编/俞肖云 刘朝阳

图书在版编目(CIP)数据

2015年河南经济形势分析与预测/胡五岳主编. 一北京: 社会科学文献出版社, 2015. 2

(河南经济蓝皮书)

ISBN 978 -7 -5097 -7138 -9

I. ①2… Ⅱ. ①胡… Ⅲ. ①区域经济 - 经济分析 - 河南省 - 2014 ②区域经济 - 经济预测 - 河南省 - 2015 Ⅳ. ①F127. 61

中国版本图书馆 CIP 数据核字 (2015) 第 026743 号

河南经济蓝皮书

2015 年河南经济形势分析与预测

主 编/胡五岳

副 主 编/俞肖云 刘朝阳

出版人/谢寿光项目统筹/任文武

责任编辑/高启王颉

出 版/社会科学文献出版社·皮书出版分社(010)59367127 地址:北京市北三环中路甲29号院华龙大厦邮编:100029

网址: www. ssap. com. cn

发 行/市场营销中心(010)59367081 59367090 读者服务中心(010)59367028

印 装/三河市尚艺印装有限公司

规 格/开本: 787mm×1092mm 1/16 印张: 22 字数: 345千字

次 / 2015 年 2 月第 1 版 2015 年 2 月第 1 次印刷

书 号 / ISBN 978 -7 -5097 -7138 -9

定 价 / 69.00元

版

皮书序列号 / B - 2009 - 067

本书如有破损、缺页、装订错误, 请与本社读者服务中心联系更换

₩ 版权所有 翻印必究



权威・前沿・原创

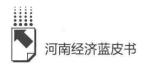
皮书系列为 "十二五"国家重点图书出版规划项目 本书依据河南省2014年最新年度统计数据,全方位分析全省经济运行态势,以数据翔实、资料丰富、客观权威为特征,突出科学性、实证性和前瞻性,服务于科学决策与科学发展。全书由河南省统计局主持编撰,内容由主报告、分析预测篇、专题研究篇三部分组成。

主报告为"2014~2015年河南经济形势分析与展望",由河南省统计局课题组撰写,全面分析2014年河南全省经济运行综合情况,科学预判2015年经济走势及发展的脉络轨迹,代表本书的基本观点。

主报告认为,2014年,面对复杂严峻的国内外形势,河南经济在新常态下平稳运行,主要指标增速虽有所回落,但仍高于全国平均水平,在全国的位次普遍前移。初步核算,2014年全省实现地区生产总值34939.38亿元,同比增长8.9%。结构调整和转型升级取得新进展,不断释放经济增长新动力;就业、收入与物价形势总体稳定,民生保障不断改善;经济增长的速度与结构、质量、效益等指标更趋协调,发展的科学性不断增强,经济社会发展保持了好的趋势、好的态势、好的气势。2015年,河南经济发展依然是挑战与机遇并存,在国际经济复苏不稳定、国内经济发展呈现新常态的背景下,保持全省经济平稳较快发展的困难依然较多,结构性矛盾与竞争力不强的问题仍待解决,但随着三大国家战略规划的扎实推进,稳增长、促改革、调结构、强支撑、控风险、惠民生等各项政策效应的不断显现,全省经济仍有望保持平稳运行态势。

分析预测篇重点分析了 2014 年河南省各产业各行业发展的新特点,特别 是产业集聚区建设发展和转型升级形势的新变化,结合国内外市场及政策环境 对这些方面影响的研判,预测 2015 年走势前景,给出发展思路和对策。

专题研究篇秉承专业精神和数据优势,依靠专家团队,着力分析河南省在 推进国家粮食生产核心区、中原经济区、郑州航空港经济综合实验区三大战略



实施进程中,加快中原崛起、河南振兴面临的机遇与挑战,突出省情区域特点,科学回应在新形势下河南经济发展战略问题;跟踪重大决策部署的实施效应,建言献策,发挥智库作用。

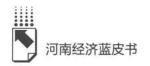
本书邀请了省内经济工作部门的专家学者,从河南财政、金融、对外贸易、扩大开放等各个领域分析介绍了2014年形势,科学探讨存在的问题及解决措施,展望2015年发展前景。为广大理论和实际工作者研究河南经济提供参考。

Abstract

In accordance with the up-to-date statistical data of Henan Province in 2014, this book comprehensively analyzes the economic operation situation of the whole province. With characteristics like full and accurate data, plentiful materials and objective authority, it highlights the scientificity, positivity and perspectiveness, serving for scientific decision and development. The whole book is compiled by the Statistics Department of Henan Province, and the content is composed of the main report, the analytical prediction section and the monographic study section.

The main report is the "Analysis and Outlook of the Economic Situation of Henan Province in 2014 and 2015", which is written by the research group of Statistics Department of Henan Province. It comprehensively analyzes the economic operation situation of Henan Province in 2014 and scientifically predicts the economic situation and the context path of development in 2015, representing the basic perspective in this book.

The main report holds that in 2014, faced with complex and rigorous domestic and foreign situations, the economy in Henan Province has been in steady operation in new normality. Although the growth of main indicators falls back slightly, it is still higher than the national average level, ranking in the front of the whole country. By initial estimation, the gross value of production of the whole province in 2014 is 3, 493, 938 million yuan with a year-on-year growth of 8.9%. The structural adjustment and transformation and upgrading have achieved new progress, continuously releasing new power for economic growth; the employment, income and price condition are generally stable, and ensurance of people's livelihood is under continuous improvement; the indicators related to speed and structure, quality and benefit of economic growth have become more coordinated. The scientificity of development is in continuous enhancement. The economic and social development remains in good trend, situation and vigor. In 2015, the challenge and opportunity for economic development of Henan Province is in coexistence. Under the premise



of unstability of international economic recovery and presence of "new normality" of domestic economic development, there are still many difficulties to keep the economy of the whole province in stable and fast development. It is urgent to solve the problems of structural contradictions and weak competitiveness; but with the solid implementation of three major national strategic plans, the policy effects of stable growth, promoting reform, adjusting structure, enhancing support, controlling risks and benefiting people's livelihood continue to show up. The economy of the whole province is expected to keep stable operation situation.

The analytical prediction section emphatically analyzes the new characteristics of the development of all walks of life in Henan Province in 2014, especially the construction and development of the industrial cluster district and new changes of the transformation and upgrading situation. Combining with study and judgment of the effect of foreign and domestic markets and policy environment on these aspects, it predicts the trend and prospective of 2015 and puts forward development ideas and strategies.

The monographic study section holds the professional spirit and advantages of data, by relying on team of experts, emphatically analyzes the opportunities and challenges in accelerating rise of Central Plains and revitalization of Henan Province during advancing the three major strategic implementation processes of National Food Production Core Zone, Central Plains Economic Zone and Zhengzhou Airport Economic Comprehensive Experimental Area. It highlights provincial circumstance and regional characteristics, scientifically responds to the strategic issues for economic development of Henan Province under new situation, discusses and explores the laws; it keeps track of the implementation effect of major policy decisions, offers advice and suggestions and plays the role of "think tank".

This book invites specialists and scholars in the economic departments of the province to give analyses on the situation of 2014 and scientifically explore the existing problems and solutions and look into the development prospect in 2015 from various fields including finance, banking, foreign trade and opening up etc. It provides reference for extensively theoretical and practical workers in studying the economy in Henan Province.

目 录



BI 主报告

...... 河南省统计局课题组 / 001

B.1 2014~2015年河南经济形势分析与展望

	一 经价运行基本情况		/ 002
	二 河南经济发展面临的机遇与挑战		/ 008
	三 积极适应新常态,保持经济持续健康较快	发展	/ 011
	IB Ⅱ 分析预测篇		
B.2	2014~2015年河南省农业经济形势分析与展望		
	陆 洁	乔西宏	李 丽/013
B.3	2014~2015 年河南省工业经济形势分析与展望		
	王世炎 方国根	王学青	张奕琳 / 023
1B.4	2014~2015 年河南省第三产业形势分析与展望		
	赵德友 王予荷 常伟杰	陈 哲	陈 琛/033
]B).5	2014~2015 年河南省产业集聚区发展分析与展望		
		冯文元	司景贤 / 043
1B.6	2014~2015 年河南省固定资产投资形势分析与展	望	
	司曼珈 刘俊华	邱 倩	徐良/054
1B.7	2014~2015 年河南省消费品市场形势分析与展望		
		孙 磊	周文瑞/064

B.8	2014~2015 年河南省对外贸易形	势分析与	可展望		
				付晓莉	付喜明 / 074
B.9	2014~2015 年河南省财政形势分	析与展望	ē		郭鸿勋 / 082
B. 10	2014~2015 年河南省金融业形	势分析与	展望		
			赵 波	帅 洪	徐红芬 / 093
B.11	2014~2015 年河南省交通运输)	业发展报	告		
		赵德友	王予荷	陈琛	常伟杰 / 101
B . 12	2014~2015 年河南省房地产开发	发业形势	分析与判	断	
		司曼珈	赵一放	秦洪娟	朱丽玲 / 110
B . 13	2014~2015 年河南省承接产业4	转移形势			
	分析与展望				武安华 / 120
B.14	2014~2015 年河南省节能减排	形势分析	与展望		
			常冬梅	陈向真	贾 梁/128
]B. 15	2014~2015 年河南省就业形势。	分析与展	望		
			孙斌育	刘晓峰	裴 斐/136
B . 16	2014~2015 年河南省居民消费	价格走势	分析		
		刘明宪	郑东涛	田少勇	王建国 / 147
	BⅢ 专	题研究	之篇		
]B. 17	"十二五"以来河南经济社会发	に展态势分	分析与		
	前景展望	*********		赵德友	王学青 / 155
]B. 18	以工业结构优化升级统筹推进分	七进制造	业大省建	设	
		王世炎	方国根	王学青	张奕琳 / 165
B. 19	河南电力消费与工业转型升级码	研究			
		冯文元	常冬梅	陈向真	杨 琳 / 174
1B. 20	中部六省服务业发展比较分析				
		俞肖云	罗勤礼	张喜峥	胡昶昶 / 183
l₿.21	河南服务业发展影响因素分析				
	赵德友	王予荷	常伟杰	陈 哲	陈 琛/195

郑州航空港经济综合实验区发展报告		
何 青 刘佐军 武政伟	张海涛 / 206	
关于申建中国 (郑州) 自由贸易试验区的构想		
贺金社	郝爱民 / 216	
河南省电子商务发展现状及对策研究		
	李 玉/227	
河南"三农"工作面临的形势及应对措施		
	薛作林 / 237	
河南高标准粮田建设研究 陆 洁 乔西宏	李 丽 / 246	
农民工市民化,政府的负担有多重		
——对12个县(市)农民工市民化成本的调研报告		
孙斌育 张曼平 王 静 孙花菊	马 召 / 258	
河南省农村土地流转状况调查研究		
	王一嫔 / 267	
河南现代市场体系建设状况探析 孙 磊	赵新池 / 273	
投资对河南经济发展的推动作用研究		
——基于金融危机以来河南投资规模与结构演变的思考		
	邱 倩	
徐 良 朱丽玲	高 彦/284	
河南钢铁行业结构调整升级方向研究		
王世炎 方国根 王学青	张奕琳 / 298	
河南省快递业发展情况调查报告		
	张旭建/308	
河南省石油和化学工业形势分析与展望		
苏 东	薄雪林 / 320	
河南省新闻出版业发展现状研究 张保进	畅 通/328	
	一班 大田	

皮书数据库阅读使用指南

CONTENTS



IB I General Reports

B. 1 Analysis and Outlook of the Economic Situation of Henan Province in 2014 and 2015

The Research Group of Statistics Department of Henan Province / 001

1. Basic Condition of Economic Operation / 002

2. Opportunities and Challenges Faced with the Economic Development of Henan / 008

3. Positively Adapting to New Normality and Keeping Healthy and Fast Economic Development / 011

IB II The Analytical Prediction Section

- B. 2 Analysis and Outlook of Agricultural Economy Situation of Henan Province in 2014 and 2015 Lu Jie, Qiao Xihong and Li Li / 013
- B. 3 Analysis and Outlook of Industrial Economy Situation of Henan Province in 2014 and 2015

Wang Shiyan, Fang Guogen, Wang Xueqing and Zhang Yilin / 023

B. 4 The Situation Analysis and Outlook of the Third Industry of Henan Province in 2014 and 2015

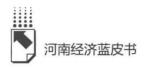
Zhao Deyou, Wang Yuhe, Chang Weijie, Chen Zhe and Chen Chen / 033



	Cluster District of Henan Province in 2014 and 2015		
	Feng Wenyuan, Si Jingxian / 043		
B. 6	Analysis and Outlook of Investment Situation of Fixed		
	Assets of Henan Province in 2014 and 2015		
	Si Manjia, Liu Junhua, Qiu Qian and Xu Liang / 054		
B. 7	Analysis and Outlook of the Consumer Market Situation of		
	Henan Province in 2014 and 2015 Sun Lei, Zhou Wenrui / 064		
B. 8	nalysis and Outlook of the Foreign Trade Situation of Henan		
	Province in 2014 and 2015 Fu Xiaoli, Fu Ximing / 074		
B. 9	Analysis and Outlook of Fiscal Situation of Henan Province		
	in 2014 and 2015 Guo Hongxun / 082		
B . 10	O Analysis and Outlook of Financial Industry Situation of Henan		
	Province in 2014 and 2015 Zhao Bo, Shuai Hong and Xu Hongfen / 093		
B. 11	The Report on Transportation Industry of Henan Province in		
	2014 and 2015 Zhao Deyou, Wang Yuhe, Chen Chen and Chang Weijie / 101		
JB. 12	Analysis and Estimation of the Real Estate Development		
	Situation of Henan Province in 2014 and 2015		
	Si Manjia, Zhao Yifang, Qin Hongjuan and Zhu Liling / 110		
B. 13	Analysis and Outlook of the Undertaking Industry Transfer		
	Situation of Henan Province in 2014 and 2015 Wu Anhua / 120		
B. 14	Analysis and Outlook of Energy-saving and Emission Reduction		
	Situation of Henan Province in 2014 and 2015		
	Chang Dongmei, Chen Xiangzhen and Jia Liang / 128		
IB. 15	Analysis and Outlook of Employment Situation of Henan		
	Province in 2014 and 2015 Sun Binyu, Liu Xiaofeng and Pei Fei / 136		
B . 16	Analysis on the Consumer Price Trend of Henan Province in 2014		
	and 2015 Liu Mingxian, Zheng Dongtao, Tian Shaoyong and Wang Jianguo / 147		

Analysis and Outlook of the Development of the Industrial

1B₁. 5



BIII Monographic Study Section

B₃. 17	Analysis and Prospect of the Economic and Social Development of			
	Henan since the "Twelfth	Five-Year"	Zhao Deyou, Wang Xueqing / 1	55

B. 18 Impelling the Construction of Big Province in Advanced Manufacturing Industry as a Whole with Optimization and Upgrading of the Industrial Structure

Wang Shiyan, Fang Guogen, Wang Xueqing and Zhang Yilin / 165

B. 19 Study on the Electricity Consumption and Industrial Transformation of Henan Province

Feng Wenyuan, Chang Dongmei, Chen Xiangzhen and Yang Lin / 174

B. 20 Comparison and Analysis of the Service Industry Development in the Six Provinces of Central China

Yu Xiaoyun, Luo Qinli, Zhang Xizheng and Hu Changchang / 183

B. 21 Analysis on the Influential Factors of the Service Industry
 Development in Henan

Zhao Deyou, Wang Yuhe, Chang Weijie, Chen Zhe and Chen Chen / 195

B. 22 Development Report of Zhengzhou Airport Economic Comprehensive Experimental Area

He Qing, Liu Zuojun, Wu Zhengwei and Zhang Haitao / 206

- B. 23 The Conception of Applying for Construction of China
 (Zhengzhou) Pilot Free Trade Zone
 He Jinshe, Hao Aimin / 216
- B. 24 The Current Situation and Countermeasure Study of E-commerce Development in Henan Province

Liu Mingxian, Zhu Huaian, Zhao Zuliang, Zhao Cuiqing and Li Yu / 227

B. 25 Situation and Countermeasures for the "Agriculture, Rural Area and Farmer" Work in Henan Xue Zuolin / 237

JB. 26	Construction Research of Grain field wi	th High Standard in
	Henan	Lu Jie, Qiao Xihong and Li Li / 246

B. 27 Investigation Report of Government Load with the Citizenization of Migrant Workers

Sun Binyu, Zhang Manping, Wang Jing, Sun Huaju and Ma Zhao/ 258

B. 28 The Investigation of the Current Situation of Rural Land Circulation in Henan Province

Liu Mingxian, Yang Guanjun, Liu Luxia and Wang Yipin / 267

- B. 29 Exploration and Analysis on the Construction of Modern
 Market System in Henan
 Sun Lei, Zhao Xinchi / 273
- B. 30 Study on the Propelling Role of Investment in the Economic Development of Henan

Yu Xiaoyun, Feng Jianzhong, Liu Junhua, Qiu Qian, Xu Liang,

Zhu Liling and Gao Yan / 284

B. 31 Study on the Orientation for Structural Adjustment and
 Upgrading of the Steel Industry in Henan

Wang Shiyan, Fang Guogen, Wang Xueqing and Zhang Yilin / 298

B. 32 Investigation Report of the Development of Express Delivery Industry in Henan Province

Liu Mingxian, Zhu Huaian, Zhao Zuliang and Zhang Xujian / 308

- B. 33 Analysis and Outlook of Petroleum and Chemical Industry
 Situation of Henan Province
 Su Dong, Bo Xuelin / 320
- B. 34 Study on the Development of News Publishing Industry in
 Henan Province Zhang Baojin, Chang Tong / 328

主 报 告



General Report

B . 1

2014~2015年河南经济 形势分析与展望

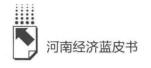
河南省统计局课题组*

摘 要:

要: 2014年,全省经济在新常态下平稳运行,呈现结构继续优化、质量有所提升、民生不断改善、增速进位前移的良好态势。初步核算,全省实现地区生产总值34939.38亿元,同比增长8.9%。第一产业增长4.1%,第二产业增长9.6%,第三产业^①增长9.4%。粮食产量实现"十一连增",总产量达到1154.46亿斤,连续四年超过1100亿斤。结构调整和转型升级取得新进展。虽然需求不足与结构性矛盾仍然并存,

^{*} 课题组组长: 胡五岳; 副组长: 刘明宪、俞肖云; 课题组成员: 朱启明、刘朝阳、李鑫、 张亚丽。

① 根据《国家统计局关于印发三次产业划分规定的通知》,将"农、林、牧、渔业"中的"农林牧渔服务业""采矿业"中的"开采辅助活动""制造业"中的"金属制品、机械和设备修理业"三个行业大类调入第三产业,所以2014年三次产业年度相关数据与历史年度及2014年季度数据不可比。



稳增长任务依然艰巨,但经济增长的基本面没有改变,支撑河南经济增长的积极因素正在不断积累,有助于全省经济保持平稳较快增长。

关键词: 河南 经济形势 河南经济 新常态

一 经济运行基本情况

(一)经济运行总体平稳,稳中有进

初步核算,2014年全省实现地区生产总值34939.38亿元,比上年增长8.9%,增速同比回落0.1个百分点,高于全国平均水平1.5个百分点,居全国第13位,比上年前移8位。其中,第一产业增加值4160.81亿元,增长4.1%;第二产业增加值17902.67亿元,增长9.6%;第三产业增加值12875.90亿元,增长9.4%。

1. 农业生产保持稳定

粮食产量实现"十一连增"。2014年,全省粮食总产量达到1154.46亿斤,连续四年超过1100亿斤,占全国总产量近一成,其中夏粮总产667.80亿斤,比上年增产20.76亿斤,仍居全国第一; 秋粮总产486.66亿斤,比上年减少9.04亿斤,夏增补秋减,全年比上年增产11.72亿斤,增长1.0%。畜牧业生产总体平稳。全省猪、牛、羊肉产量分别达到478.0万吨、82.1万吨和25.4万吨,分别增长5.3%、1.9%、2.6%;牛奶产量为332.0万吨,增长4.9%;禽肉、禽蛋产量分别为118.0万吨、404.0万吨,分别下降3.5%、1.5%。

2. 工业生产平稳增长,增速位次前移

2014年,全省规模以上工业增加值增长11.2%,增速同比回落0.6个百分点。受异常因素影响,8月增速偏低,9月之后增速小幅回升,全年工业增加值呈现小幅波动、总体平稳的增长态势(见图1)。工业增速高于全国平均水平2.9个百分点,居全国第7位,比上年前移8位;居中部六省第2位,前移1位。