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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)



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摘 要

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 and 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 instability 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.

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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: 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。