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吉林蓝皮书

BLUE BOOK OF JILIN

2015年
吉林经济社会形势
分析与预测

主编/马克

副主编/黄文艺

ANALYSIS AND FORECAST ON ECONOMY

AND SOCIETY OF JILIN (2015)



社会科学文献出版社
SOCIAL SCIENCES ACADEMIC PRESS (CHINA)

2015
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摘 要

2014 年是“十二五”发展规划承上启下的关键之年，但全国经济面临着诸多挑战，下行压力明显，吉林省经济运行保持合理区间并非易事。从国际上看，尽管出口形势大有好转，但影响经济发展的下行压力和困难依然不小，整体环境复杂多变，各国经济发展不平衡趋势明显。从国内看，2014 年以来，房地产市场持续调整累积效应有所增加，传统产业产能过剩挤出效应不断加大，新旧经济增长点接续不够，内需动力不足，改革措施充分见效还需一个过程，经济运行面临很大的不确定性。在外部环境严峻、区域竞争加剧、自身结构性矛盾突出的背景下，吉林省充分发挥老工业基地、全国商品粮基地、沿边近海地区、生态资源和科技的优势，坚持稳中求进的总基调，克服了异常复杂的不利因素，实现了经济总体运行平稳，主要指标继续保持合理可控区间，呈现“稳中有进”态势。

然而，当前吉林省经济增速已经换挡，由过去多年的高于全国 3 个百分点以上回落到目前的低于全国平均水平，呈现中低速、小波动态势。全年经济运行下滑趋势还在继续，主要指标大部分低于上年同期，低于全国平均水平，经济运行中存在一系列矛盾和问题。一是企业生产经营困难。企业资金紧缺，获利空间进一步缩小，工业品出厂价格持续下滑，而工业库存增长不断加快。二是产业结构刚性。经济增长具有明显的路径依赖特征，汽车制造业对经济增长的贡献接近 1/3，工业利润的增长也主要依靠汽车和医药两大行业，服务业发展滞后的现象仍没有根本改观。三是财政收支增长放缓。全省累计完成公共预算全口径财政收入，以及地方级财政收支同比增幅均在 6% 左右。四是居民收入差距扩大。城镇居民收入与全国平均水平的差距不断拉大，城镇单位就业人员平均工资居全国后列。



在这样的背景下，吉林省社会科学院组织院内学术带头人及中青年学术骨干深入调研，围绕当前吉林省经济社会发展中出现的重点、难点及热点问题潜心研究，努力为吉林省的发展提供有价值的参考意见及建议，完成并出版了《2015年吉林经济社会形势分析与预测》。全书共分总报告、发展战略篇、经济专题篇、社会专题篇四部分，约40万字。总报告对吉林省经济、社会发展形势进行了全面分析，在综合考虑境内外经济环境的前提下，对吉林省未来经济发展的趋势进行了展望。发展战略篇，主要研究了吉林省“十二五”时期在科技、文化、生态、法治等方面取得的成就和存在的问题，并对“十三五”时期的发展提出了战略构想和对策建议。经济专题篇，主要研究吉林省经济改革和经济发展中的重大问题，主要包括工业、汽车产业、农业现代化、生产性服务业、房地产业，以及居民消费等问题。社会专题篇，主要探讨吉林省社会管理和社会发展中各个领域及各个层面的重要问题，包括城市户籍管理、农民工培训、医疗保险改革、对外开放的法律问题等。

“吉林蓝皮书”以独到的视角审时度势，科学分析探讨吉林省的发展，提出了具有参考价值和借鉴意义的意见和建议。目前，“吉林蓝皮书”已是政界和学术界了解吉林省经济发展的重要资料，是吉林省委、省政府重要的决策依据，已成为吉林省社科界知名的学术品牌。今后，我们会继续推陈出新、续写华章，为吉林省经济的发展、老工业基地的振兴做出重大贡献！

Abstract

2014 is the crucial year for the development of the 12th five-year plan, while the national economy faced with many challenges, pressure on the downward trend was evident. It is not an easy work for Jilin Province to maintain a reasonable economic operation. From an international prospective, despite the improved export level, the effect of the downward pressure and the difficulties faced in the economic development are not minor, economic development are clearly unbalanced for all countries in this complex and changing environment. From a domestic perspective, since 2014, the continuous adjustments made to the real-estate market have shown cumulative effect, overcapacity of traditional industry has increased the crowding out effect, continued growth is not enough within new or old economy level, domestic demand is inadequate, for a more effective result, the process of reform measure needs to go through a cycle, as the economy is facing greater uncertainty. With the background of self-contradiction, increased regional competition and harsh external environment, Jilin Province followed the general tone of making progress, overcome complex negative factors, the important indexes maintain at a reasonable level and the economy achieved "a stabilized and accelerated development", through giving full play to its advantages of old industrial base, national commodity grain base, offshore areas, ecological resources, as well as science and technology.

However, the current economic growth in Jilin province have shifted, which is now lower than the national average level, dropping from a more than 3% growth of the national average in a past years, showed trend of low growth speed and small fluctuation. The national economy continues to decline, with most of the major indexes lower than the same time last year as well as national average. There is a series of contradictions and problems in economic operation. First, enterprises are experiencing difficulties in production and business operation. As the



shortage of funds, the profit margins of the enterprises further shrank and the inventory storage continuously accelerated due to the rising factory gate prices. Second, the industrial structure rigidity. Economic growth showed clear dependency on path. Automobile industry has contributed nearly 1/3 to the economic growth. Industrial growth mainly relies on two major industries, automobile and pharmaceutical. The development of service industry still lags behind as it has not fundamentally changed. Third, slowdown in financial revenue and expenditure. The year-on-year growth for the provincial overall fiscal revenue of public budget and local financial revenue and expenditure were all about 6%. Fourth, residential income gap enlarged. The income gap between urban residential and the national average is widening, the average urban employment income fall behind the national average level.

Under such context, the academic leaders and outstanding academic backbone youth in Jilin Academy of Social Sciences published the 2015 Jilin Blue Book by conducting in-depth investigation, researching into the key areas, difficulties and hot issues of current economic and social development with great concentration, and made an effort to provide valuable reference, comments and suggestion for the development of Jilin province. The book is divided into 4 parts, “General Report”, “Development Strategy”, “Economic Subjects” and “Social Subjects”, some 40 thousand words. The general report provides comprehensive analysis on economic and social development situations of Jilin province. However, the national economy still faced many challenges, with the considerations of internal and external economic environment, the future economic development of Jilin is prospected. The second part mainly reports the achievements and issues surrounding science, technology, culture, ecology, and legislation during the 12th five-year plan, and also provides strategic suggestion for the development of the 13th five-year plan. The third part mainly covers the research of major issues in economic reform and development in Jilin, including industry, automotive industry, agricultural modernization, producer services, real estate and consumption issues. The fourth part focuses on the important issues of social management and development in all areas of Jilin Province at all levels, including urban household management, training of migrant workers, health

insurance reform, legal issues of opening-up, etc.

Jilin Blue Book adopts a wait-and-see attitude with unique perspective to scientifically analyze the development of Jilin Province, and puts forward some useful comments and suggestions. At present, Jilin Blue Book has been an important source for the political and academic circles to learn about the economic development in Jilin Province, and an important basis for decision making for Jilin provincial party committee and the provincial government. It has become a famous academic brand in Jilin social sciences circles. Henceforth, we will continue to develop new from the old and write splendid reports, make a significant contribution to the economic development of Jilin Province and the revitalization of the old industrial base.

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总 报 告



General Report

B. 1

2014 ~ 2015年吉林省 经济形势分析与预测

丁晓燕 徐卓顺*

摘 要: 当前,中国正处在经济增长速度换挡期、结构调整阵痛期、刺激政策消化期“三期叠加”阶段,经济发展步入新常态。在这一背景下,吉林省经济社会发展面临的形势异常严峻,压力空前巨大。面对经济新常态,吉林应认清大势、保持定力,摒弃旧思维,形成新思路、实施新举措。

关键词: 经济运行 “三期叠加” 吉林省

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2014 年以来,吉林省坚持稳中求进工作总基调,统筹稳增长、调结构、促改革、惠民生,经济运行总体平稳,呈现稳中向好态势,经济增速处于合理区间,先行指标有所回升,粮食生产成功抗御干旱再获丰收,发展质量稳步提升,重点改革不断深化,人民生活进一步改善。

一 2014年吉林省经济发展态势

2014 年初以来,在形势异常严峻、压力空前巨大、困难超乎想象的特殊情况下,吉林省充分发挥老工业基地、全国商品粮基地、沿边近海地区、生态资源和科技的优势,坚持稳中求进的总基调,克服了异常复杂的不利因素,实现了经济总体运行平稳,主要指标继续保持在合理可控区间,呈现“稳中有进”态势。

(一) 总体判断:经济运行态势趋稳,增幅居全国后列

全省经济运行总体态势良好,但增速低位小幅波动,形势不容乐观。据初步统计,吉林省 2014 年前三季度实现 GDP 总额 8449.09 亿元,全省第一、二、三产业分别完成增加值 697.14 亿元、4984.01 亿元和 2767.94 亿元,同比分别增长 4.5%、6.3% 和 7.3%,第三产业增速高于第一、二产业。GDP 增速按可比价格计算,同比增长 6.5%,比上半年降低了 0.3 个百分点,比上年同期下降了 2.5 个百分点,低于全国平均水平 0.9 个百分点,初步预计居全国第 27 位,分别高于辽宁和黑龙江 0.3 个和 1.3 个百分点(见图 1)。

(二) 经济运行特征

1. 三次产业平稳发展,增速有所回调

(1) 规模以上工业增速稳步回升。2014 年 9 月,全省规模以上工业增加值达到 4886.39 亿元,按可比价格计算,同比增长 6.5%,分别比一季度的 6.4% 和上半年的 5.9% 提高了 0.1 个和 0.6 个百分点,但比全国平均水平低了 2 个百分点,居全国第 25 位,比辽宁低 0.2 个百分点,比黑龙江高 4.1