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农村绿皮书

GREEN BOOK OF RURAL AREA

中国农村经济形势 分析与预测 (2014~2015)

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

ANALYSIS AND FORECAST ON CHINA'S
RURAL ECONOMY (2014-2015)



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本书作者

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摘 要

1. 本摘要概括了本书所描述的 2014 年中国农业农村经济发展的一些主要指标和变化, 以及对 2015 年中国农业农村经济形势的一些展望和预测。

2. 2014 年, 由农村各部门创造的国内生产总值 (以现价计) 的比重为 41.3%, 比 2013 年下降 0.6 个百分点。其中, 第一产业所占比重为 9.2%, 比 2013 年下降 0.2 个百分点; 农村第二产业所占比重为 19.1%, 比 2013 年下降 0.6 个百分点; 农村第三产业所占比重为 13.0%, 比 2013 年提高 0.2 个百分点。

3. 2014 年, 国内生产总值实际增长 7.4。在国内生产总值增长中, 农村部门贡献了 2.6 个百分点, 贡献率为 35.4%。在农村部门中, 第一产业贡献了 0.4 个百分点, 贡献率为 5.0%; 农村第二产业贡献了 1.4 个百分点, 贡献率为 19.5%; 农村第三产业贡献了 0.8 个百分点, 贡献率为 10.9%。

4. 2014 年, 农林牧渔业增加值达到 60151 亿元, 比 2013 年实际增长 4.2%。在农林牧渔业增加值中, 农业比重为 58.6%, 林业比重为 4.6%, 畜牧业比重为 23.3%, 渔业比重为 4.4%。农林牧渔业总体上保持稳定发展态势。

5. 2014 年, 东部、中部、西部和东北地区农林牧渔业现价总产值分别为 35686 亿元、26788 亿元、27602 亿元和 12159 亿元,



分别比 2013 年实际增长 3.4%、4.7%、4.8% 和 3.9%。

6. 2014 年，粮食种植面积 11274 万公顷，比 2013 年增加 78 万公顷，增长 0.7%；棉花种植面积 422 万公顷，下降 2.9%；油料种植面积 1408 万公顷，增长 0.4%；糖料种植面积 191 万公顷，下降 4.4%。国内棉花和糖料生产受到国际市场波动冲击不断显现。

7. 粮食连续第 11 年增产，再创历史新高。2014 年，粮食总产量 60710 万吨，比 2013 年增长 0.9%；棉花产量 616 万吨，减产 2.2%；油料产量 3517 万吨，与上年持平；糖料产量 13403 万吨，减产 2.5%。

8. 2014 年，粮食单产为 5385 公斤/公顷，比 2013 年提高 0.2%。播种面积增加是粮食增产贡献的最主要因素，2014 年播种面积增加对粮食增产贡献率超过 70%。

9. 多数畜产品继续保持增长态势。2014 年，肉类总产量 8707 万吨，比 2013 年增长 2.0%。其中，猪肉产量 5671 万吨，增长 3.2%；牛肉、羊肉产量分别为 689 万吨和 428 万吨，分别增长 2.4% 和 4.9%；禽肉产量 1751 万吨，下降 2.7%；禽蛋产量 2894 万吨，增长 0.6%；牛奶产量 3725 万吨，增长 5.5%；水产品产量 6450 万吨，增长 4.5%。

10. 2014 年，农产品进出口规模继续呈现出扩大的态势，但增速有所放缓，贸易逆差有所缩小。农产品进出口总额达到 1945 亿美元，比上年增长 4.2%，增速进一步回落 2 个百分点；农产品进口 1225.4 亿美元，增长 3.1%；农产品出口 719.6 亿美元，增长 6.1%；农产品国际贸易逆差 505.8 亿美元，下降 0.9%。

11. 2014 年，农产品生产者价格比 2013 年下降 0.2%，其中农

业产品生产者价格上涨 1.8%；林业产品生产者价格下降 0.6%；饲养动物及其产品生产者价格下降 2.9%；渔业产品生产者价格上涨 3.1%；粮食生产者价格上涨 2.6%；棉花（籽棉）生产者价格下降 12.9%；油料生产者价格下降 0.1%；糖料生产者价格下降 0.3%；生猪生产者价格下降 7.8%。粮食生产价格持续稳定上涨与粮食最低收购价和临时收储价政策等因素有关。

12. 2014 年，农业生产资料价格比 2013 年下降 0.9%。其中，化肥价格下降 5.8%，农用机油价格下降 1.8%，农业生产服务价格上涨 4.0%。

13. 2014 年，随着城镇化快速推进，乡村人口进一步减少到 6.2 亿人，占全国人口总量的 45.2%，相应的乡村就业人数减少到 3.8 亿人，在全国就业总人数中比重首次下降到 50% 以下，为 49.1%。

14. 2014 年，农村劳动力转移规模继续扩大，农民工总量扩大到 2.7 亿人，比上年增长 1.9%。农民工月均工资收入 2864 元，增长 9.8%，增速仍然较快，对农民增收贡献较大。

15. 农民收入增速依然相对较快。2014 年，农村居民人均可支配收入 10489 元，比上年实际增长 9.2%；农村居民人均纯收入为 9892 元，实际增长 9.2%。农村居民人均纯收入实际增速自 2004 年以来连续 11 年超过 6%，实现十一连快；自 2010 年以来连续 5 年实际增速超过国内生产总值实际增速和城镇居民人均可支配收入实际增速，实现五连快。其中，农村居民人均工资性收入 4152 元，增长 13.7%；经营净收入 4237 元，增长 7.7%；财产净收入 222 元，增长 14.1%；转移净收入 1877 元，增长 13.9%。



16. 2014 年农村居民人均可支配收入中，家庭经营净收入占 40.4%，比上年下降 1.3 个百分点；工资性收入占 39.6%，提高 0.9 个百分点；转移性净收入占 17.9%，提高 0.4 个百分点；财产性净收入占 2.1%，与上年持平。

17. 2014 年，中西部地区农村居民收入增速较快。其中，西部地区农村居民人均可支配收入增速最快，为 11.5%，比中部地区高 0.1 个百分点，比东部地区高 0.6 个百分点，比东北地区高 0.8 个百分点。

18. 2014 年，原口径的城镇居民人均可支配收入与农村居民人均可支配收入之比为 2.97:1；新口径的城镇居民人均可支配收入与农村居民人均纯收入之比为 2.92:1，连续第 5 年呈现出缩小态势，经过 12 年后再度回到 3:1 以内的区间。

19. 2014 年，农村居民人均生活消费支出 8383 元，比上年实际增长 10.0%，比城镇居民人均消费支出实际增速高出 4.2 个百分点。农村居民人均生活消费支出中，食品烟酒 2814 元，比上年名义增长 10.2%；衣着支出 510 元，增长 12.5%；居住支出 1763 元，增长 11.6%；家庭设备及用品支出 506 元，增长 11.3%；交通通信支出 1013 元，增长 15.7%；教育文化娱乐支出 860 元，增长 13.9%；医疗保健支出 754 元，增长 12.8%。

20. 2014 年城乡居民消费水平差距缩小，消费差距比由 2013 年的 2.72:1 下降到 2.38:1。

21. 农业生态系统质量得到提升，农业环境问题的关注度持续提高。2014 年底，国家级生态农业示范县 100 余个，省级生态农业示范县 500 多个，生态农业示范点 2000 多处。



22. 新型农业生产经营主体不断涌现。2014 年末平均种植规模 200 亩的家庭农场约 90 万家, 农民合作社约 129 万家, 农业龙头企业超过 12 万家。

23. 预测 2015 年第一产业增加值约为 6 万亿元, 实际增长 4% 左右; 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下降到 9% 以下。第一产业增加值对国民经济增长的贡献微乎其微, 但农业在经济社会中的基础地位仍然突出, 农业的多功能性要求更高。

24. 预测 2015 年粮食总产量约 6.1 亿吨, 增长 0.5% 左右; 棉花产量约 580 万吨, 下降 6% 左右; 油料产量约 3560 万吨, 增长 1% 左右; 糖料产量约 1.3 亿吨, 下降 3% 左右。

25. 预测 2015 年肉类总产量约 8900 万吨, 增长 2.2% 左右。其中, 猪肉产量约 5700 万吨, 增长 0.5%。

26. 预测 2015 年水产品产量约 6700 万吨, 增长 4% 左右。

27. 预测 2015 年农产品生产者价格同比下降 3% 左右。其中, 粮食生产者价格下降 1% 左右, 饲养动物产品及其制品生产者价格下降 3% 左右, 渔业产品生产者价格上涨 2% 左右。

28. 预测 2015 年食品消费价格同比下降 2% 左右。其中, 粮食消费价格下降 1% 左右; 油脂消费价格下降 5% 左右; 肉禽及其制品消费价格下降 3% 左右; 蔬菜消费价格下降 4% 左右; 水产品消费价格上涨 2% 左右。

29. 预测 2015 年农民人均纯收入约 1.1 万元, 新口径城镇居民人均可支配收入与农民人均纯收入差距进一步缩小到 2.9:1 以内。

Abstract

1. This abstract outlines some major indexes and changes of China's agriculture and rural economic development in 2014, and makes some forecasts about agriculture and rural economic situation in 2015.

2. In 2014, rural sectors produced 41.3 percent of China GDP (at current price, the same below), decreased by 0.6 percentage point from that of 2013. Of China's GDP, primary industry accounted for 9.2 percent, decreased by 0.2 percentage point from that of 2013; rural secondary industry accounted for 19.1 percent, decreased by 0.6 percentage point from that of 2013; rural tertiary industry accounted for 13.0 percent, increased by 0.2 percentage point.

3. In 2014, China's GDP increased by 7.4 percent in real term. The contribution of rural sectors to GDP growth was 2.6 percentage points and the share of the contribution of rural sectors to the increase of GDP was 5.0 percent. In the rural sectors, the contribution of primary industry to GDP growth was 0.4 percentage point and the share of the contribution of rural sectors to the increase of GDP was 5.0 percent. The contribution of rural secondary industry to GDP growth was 1.4 percentage points and the share of the contribution of rural sectors to the increase of GDP was 19.5 percent. The contribution of rural tertiary industry to GDP growth was 0.8 percentage point and the share of the contribution of rural sectors to the increase of GDP was 10.9 percent.

4. In 2014, Value added of agriculture, forestry, animal husbandry and fishery reached 6015.1 billion Yuan, increased by 4.2 percent in

real term from that of 2013. Of the value added of agriculture, forestry, animal husbandry and fishery, agriculture accounted for 58.6 percent, forestry accounted for 4.6 percent, animal husbandry accounted for 23.3 percent. Agriculture, forestry, animal husbandry and fishery have generally maintained a stable development trend.

5. In 2014, gross output value of agriculture, forestry, animal husbandry and fishery in the eastern, central, western and northeast region was 3568.6 billion Yuan, 2678.8 billion Yuan, 2760.2 billion Yuan and 1215.9 billion Yuan respectively, increased by 3.4 percent, 4.7 percent, 4.8 percent, and 3.9 percent respectively from that of the previous year.

6. In 2014, the sown area of grain crops was 112.74 million ha., increased by 0.78 million ha., or 0.7 percent from that of 2013; the sown area of cotton was 4.22 million ha., decreased by 2.9 percent; the sown area of oil – bearing crops was 14.08 million ha., increased by 0.4 percent; the sown area of sugar crops was 1.91 million ha., decreased by 4.4 percent. Production of domestic cotton and sugar crops were affected by the fluctuation of the international market.

7. In 2014, the total output of grain crops was 607.10 million tons, increased 0.9 percent from that of 2013; Output of cotton was 6.16 million tons, decreased by 2.2 percent; Output of oil – bearing crops was 35.17 million tons, essentially unchanged from the previous year. Output of sugar crops was 134.03 million tons, decreased by 2.5 percent.

8. In 2014, yield of grain per ha. was 5385 kg., increased by 0.2 percent from that of the previous year. The increasing sown area is the main factor of the grain increase production, the area sown contributed more than 70 percent to grain production.

9. Most animal products continue to increase. In 2014, total output of meat was 87.07 million tons, 1.8 percent higher than that of



2013. Output of pork was 56.71 million tons, increased by 3.2 percent; Output of beef and mutton was 6.89 and 4.28 million tons respectively, increased by 2.4 and 4.9 percent respectively; Output of poultry was 17.51 million tons, decreased by 2.7 percent; Output of poultry eggs was 28.94 million tons, increased by 0.6 percent; Output of cow milk was 37.25 million tons, increased by 5.5 percent; Output of aquatic product was 64.50 million tons, increased by 4.5 percent.

10. In 2014, the scale of imports and exports of agricultural product continue to expand, but the growth rate slowed, the trade deficit narrowed. In 2014, volume of agricultural product import and export totaled US MYM 71.96 billion, increased by 6.1 percent; trade deficit was US MYM 50.58 billion, decreased by 0.9 percent.

11. In 2014, the producer price of farm products went down by 0.2 percent over the previous year. Of which, the producer price of planting products went up by 1.8 percent; the producer price of forestry products went down by 0.6 percent; the producer price of animal husbandry products went down by 2.9 percent; the producer price of fishery products went up by 3.1 percent; the producer price of oil-bearing crops went down by 0.1 percent; the producer price of sugar crops went down by 0.3 percent; the producer price of pig went down by 7.8 percent. The steady and increasing grain price was affected by the minimum grain purchase price and the temporary purchase price policy and other factors.

12. In 2014, prices of means of agricultural production went down by 0.9 percent over the previous year. Of which, the price of chemical fertilizer went down by 5.8 percent; the price of oil for machinery went down by 1.8 percent; the price of service for agricultural production went up by 4.0 percent.

13. In 2014, with the rapid advance of urbanization, rural population further reduced to 620 million, accounted for 45.2 percent

of the total population. Number of rural employed persons reduced to 380 million, accounted for 49.1 percent of total employment in the country, it was the first time down to below 50 percent.

14. In 2014, transfer scale of rural labor continued to expand, the total amount of migrant workers expanded to 270 million, increased by 1.9 percent over the previous year. The average monthly wage income of migrant workers was 2864 Yuan, increased by 9.8 percent, growth was still faster, and it had greater contribution to increasing farmers' income.

15. In 2014, the per capita disposable income of rural households 10489 Yuan, increased by 9.2 percent in real term. Per capita net income of rural household was 9892 Yuan, increased by 9.2 percent in real term; the growth rate of per capita net income of rural households was more than 6 percent for 11 consecutive years since 2004. The actual growth for five consecutive years since 2010 faster than real GDP growth and faster than per capita disposable income growth of urban household in real terms. of which, income from wages and salaries was 4152 Yuan, increased by 13.7 percent; net income from household operations was 4237 Yuan, increased by 7.7 percent; income from properties was 222 Yuan, increased by 14.1 percent; income from transfer was 1877 Yuan, increased by 13.9 percent.

16. In 2014, of per capita disposable income of rural households, net income from household operations accounted for 40.4 percent, decreased by 1.3 percentage point over the previous year; income from wages and salaries accounted for 39.6 percent, increased by 0.9 percentage point; income from transfers accounted for 17.9 percent, increased by 0.4 percentage point; income from properties accounted for 2.1 percent, essentially unchanged from the previous year.

17. In 2014, the per capita disposable income growth rate of rural households in central, western regions grew faster. The per capita



disposable income growth rate of rural households in western regions grew fastest, about 11.5 percent, was 0.1 percentage point higher than that was in central regions, was 0.6 percentage point higher than that was in eastern regions, was 0.8 percentage point higher than that was in northeastern regions.

18. In 2014, by the original statistical caliber, the ratio of per capita disposable income of urban households and per capita disposable income of rural households was 2.97:1; by the new statistical caliber, the ratio of per capita disposable income of urban households and per capita disposable income of rural households was 2.92:1, 2014 was the fifth year showing narrowing trend, after 12 years later, the ratio returned to 3:1.

19. In 2014, per capita consumption expenditure of rural households was 8383 Yuan, increased by 10.0 percent, was 4.2 percentage point higher than per capita consumption expenditure of urban households. Of per capita consumption expenditure of rural households, expenditure on food was 2814 Yuan, namely increased by 10.2 percent; expenditure on clothing was 510 Yuan, namely increased by 12.5 percent; expenditure on residence was 1763 Yuan, namely increased by 11.6 percent; expenditure on household facilities and articles was 506 Yuan, namely increased by 11.3 percent; expenditure on transports and communications was 1013 Yuan, namely increased by 15.7 percent; expenditure on education, culture and recreation was 860 Yuan, namely increased by 13.9 percent; expenditure on health care and medical service was 754 Yuan, namely increased by 12.8 percent.

20. In 2014, income gap between urban households and rural households reduced from 2.72:1 in 2013 to 2.38:1.

21. The quality of agricultural ecosystem was improved, the concern on agriculture environment problem continued to move up. In 2014, there were more than 100 state-level ecological agriculture demonstration

counties, more than 500 provincial ecological agriculture demonstration counties, more than 2000 ecological agriculture demonstration sites.

22. The reemerged new type of agricultural production and operation entities. In 2014; there were more than 900 thousand family farms, each had 200 acres planting scale, and there were more than 1290 thousand farmer cooperatives and more than 120 thousand agricultural leading enterprises.

23. It is estimated that the value added of primary industry will reach about 6000 billion Yuan in 2015; the actual growth rate will be about 4 percent. The proportion of the value added of primary industry in GDP will be below about 9 percent in 2015. The value added of primary industry will be very little contribution to national economic growth, but the foundation of agriculture in economic society will be still outstanding, agriculture will play more versatility.

24. It is estimated that the total output of grain crops will be about 610 million tons in 2015; the total output of cotton will be 5.8 million tons, decrease by 6 percent; The total output of cotton will be 5.8 million tons, decrease by 6 percent; the total output of oil – bearing crops will be 35.6 million tons, increase by about 1 percent; the total output of sugar crops will be 130 million tons, decrease by about 3 percent.

25. It is estimated that the total output of meats will be about 89 million tons in 2015, increase by about 2.2 percent; the total output of pork will be about 57 million tons, increase by about 0.5 percent.

26. It is estimated that the total output of aquatic products will be about 67 million tons in 2015, increase by about 4 percent.

27. It is estimated that the producer price of farm products will decrease by about 3 percent. Producer price of grain crops decrease by about 1 percent, producer price of animal husbandry products will decrease by about 3 percent, producer price of fishery products will



increase by about 2 percent.

28. It is estimated that the consumer price for food will decrease by about 2 percent in 2015. Consumer price for grain will decrease by about 1 percent; consumer price for oil and fat will decrease by about 5 percent; consumer price for meat, poultry and processed products will decrease by about 3 percent; consumer price for vegetables will decrease by about 4 percent; consumer price for aquatic products will increase by about 2 percent.

29. It is estimated that the per capita net income (new caliber) of rural households will be about 11000 Yuan in 2015, the income gap between urban households and rural households will be further reduced, narrowed to 2.9:1.