



农村绿皮书[®]

GREEN BOOK OF RURAL AREA

中国农村经济形势 分析与预测 (2012~2013)

ANALYSIS AND FORECAST ON CHINA'S RURAL
ECONOMY (2012-2013)

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

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

2013
版



中国农村经济形势分析与预测 (2012~2013)

ANALYSIS AND FORECAST ON CHINA'S RURAL ECONOMY
(2012-2013)

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



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

图书在版编目(CIP)数据

中国农村经济形势分析与预测. 2012~2013/中国社会科学院农村发展研究所, 国家统计局农村社会经济调查司著. —北京: 社会科学文献出版社, 2013. 4

(农村绿皮书)

ISBN 978-7-5097-4454-3

I. ①中… II. ①中… ②国… III. ①农村经济发展-分析-中国-2012~2013 ②农村经济发展-经济预测-中国-2012~2013 IV. ①F323

中国版本图书馆CIP数据核字(2013)第061398号

农村绿皮书

中国农村经济形势分析与预测(2012~2013)

著者 / 中国社会科学院农村发展研究所
国家统计局农村社会经济调查司

出版人 / 谢寿光

出版者 / 社会科学文献出版社

地址 / 北京市西城区北三环中路甲29号院3号楼华龙大厦

邮政编码 / 100029

责任部门 / 皮书出版中心 (010) 59367127

责任编辑 / 任文武

电子信箱 / pishubu@ssap.cn

责任校对 / 张成海

项目统筹 / 邓泳红

责任印制 / 岳阳

经销 / 社会科学文献出版社营销中心 (010) 59367081 59367089

读者服务 / 读者服务中心 (010) 59367028

印装 / 北京季蜂印刷有限公司

开本 / 787mm × 1092mm 1/16

印张 / 19.25

版次 / 2013年4月第1版

字数 / 268千字

印次 / 2013年4月第1次印刷

书号 / ISBN 978-7-5097-4454-3

定价 / 59.00元

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

本书作者

2012年农业农村经济形势	李国祥
2013年农业农村经济形势展望与预测	李国祥
农业、农村经济与国民经济	张元红
农业投入与产出	汪传敬
粮食生产持续增长的特点与存在的问题	黄加才 宋勇军
农产品市场供求与价格	胡冰川
农产品对外贸易发展及其特点	翁 鸣
农村居民收入与生活	唐 平
农村区域经济发展	孙腾蛟
农村生态环境与可持续发展	孙若梅
农垦经济形势分析与展望	彭剑良 李红梅
中国生态建设进展的评价	李 周
森林生态建设的进展与展望	包晓斌
草原生态建设的进展与展望	尹晓青
湿地生态建设的进展与展望	操建华
荒漠生态建设的进展与展望	杨维西
耕地生态建设的进展与展望	孙若梅

课题主持人

李 周 中国社会科学院农村发展研究所所长

张淑英 国家统计局农村社会经济调查司司长

杜志雄 中国社会科学院农村发展研究所副所长

黄秉信 国家统计局农村社会经济调查司副司长

全书由李周、朱钢统稿

摘 要

1. 本摘要概括了本书所描述的 2012 年中国农业农村经济发展的一些主要指标和变化, 以及对 2013 年中国农业农村经济形势的一些展望和预测。

2. 2012 年, 由农村各部门创造的国内生产总值(以现价计)的比重为 43.45%, 比 2011 年下降 0.34 个百分点。其中, 第一产业所占比重为 10.09%, 比 2011 年上升 0.05 个百分点; 农村第二产业所占比重为 20.91%, 比 2011 年下降 0.61 个百分点; 农村第三产业所占比重为 12.45%, 比 2011 年提高 0.22 个百分点。

3. 2012 年, 国内生产总值实际增长 7.8%。在国内生产总值增长中, 农村部门贡献了 3.05 个百分点, 贡献率为 39.05%, 比 2011 年提高 0.24 个百分点。在农村部门中, 第一产业贡献了 0.38 个百分点, 贡献率为 4.89%, 比 2011 年提高 0.78 个百分点; 农村第二产业贡献了 1.84 个百分点, 贡献率为 23.53%, 比 2011 年下降 2.32 个百分点; 农村第三产业贡献了 0.83 个百分点, 贡献率为 10.62%, 比 2011 年提高 1.77 个百分点。

4. 2012 年, 第一产业增加值达到 52377 亿元(包括农林牧渔服务业增加值), 比 2011 年实际增长 4.5%。在第一产业增加值中, 农业比重为 57.67%, 林业比重为 4.37%, 畜牧业比重为 25.10%, 渔业比重为 10.04%。

5. 2012 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 31591 亿元、23760 亿元、23598 亿元和 10517 亿元, 分别比 2011 年实际增长 4.0%、4.9%、6.0% 和 5.7%。

6. 2012 年, 粮食种植面积 11126.7 万公顷, 比 2011 年增加 69.4



万公顷，增长 0.6%；棉花种植面积 469.7 万公顷，下降 6.8%；油料种植面积 1397.5 万公顷，增长 0.9%；糖料种植面积 203.4 万公顷，增长 4.5%。

7. 2012 年，粮食总产量 58957 万吨，比 2011 年增长 3.2%；棉花产量 684 万吨，增长 3.8%；油料产量 3476 万吨，增长 5.1%；糖料产量 13493 万吨，增长 7.8%。

8. 2012 年，粮食单产为 5299 公斤/公顷，比 2011 年增长 2.6%；单产提高对粮食增产的贡献率达 80.5%。棉花单产达到 1455 公斤/公顷，增长 11.1%。

9. 2012 年，肉类总产量 8384 万吨，比 2011 年增长 5.4%，其中猪肉产量 5335 万吨，增长 5.6%；牛、羊肉产量分别为 662 万吨和 401 万吨，分别增长 2.3% 和 2.0%；禽肉产量 1823 万吨，增长 6.7%；牛奶产量 3744 万吨，增长 2.3%；禽蛋产量 2861 万吨，增长 1.8%；水产品产量 5906 万吨，增长 5.4%。

10. 2012 年，农产品生产价格比 2011 年上涨 2.7%，其中农业产品生产价格上涨 4.8%，林业产品生产价格上涨 1.2%，畜牧业产品生产价格下跌 0.3%，渔业产品生产价格上涨 6.2%。粮食生产价格上涨 4.8%，棉花生产价格下降 1.9%，油料生产价格上涨 5.2%，糖料生产价格上涨 5.0%；生猪生产价格下跌 4.1%。

11. 2012 年，农业生产资料价格比 2011 年上涨 5.6%，其中化肥价格上涨 6.6%，农用机油价格上涨 4.2%，农业生产服务价格上涨 8.3%。

12. 2012 年，全国平均每亩粮食生产投入费用为 343 元，比上年增长 6.7%。其中，物质投入费用为 252 元，比上年增长 5.8%；生产服务支出为 91 元，比上年增长 9.7%。在物质投入中，化肥费用为 139 元，增长 7.4%。在生产服务支出中，外雇机械作业费用为 76 元，比上年增长 10.8%。

13. 2012 年，农民人均纯收入 7917 元，比 2011 年增加 939 元，



实际增长 10.7%，增速比 2011 年下降 0.7 个百分点。农民人均纯收入中，家庭经营纯收入 3533 元，比 2011 年增加 311 元，增长 9.7%，其中第一产业纯收入人均 2722 元，增长 8.0%。工资性收入人均 3448 元，增加 484 元，增长 16.3%。财产性收入人均 249 元，增加 21 元，增长 9.0%。转移性收入人均 687 元，增加 123 元，增长 21.9%。

14. 2012 年农民人均纯收入中，家庭经营纯收入占 44.6%，工资性收入占 43.6%，财产性收入占 3.1%，转移性收入占 8.7%。

15. 2012 年，东部、中部、西部和东北地区农民人均纯收入分别为 10817 元、7435 元、6027 元和 8846 元，分别比 2011 年增长 12.9%、13.9%、14.9% 和 13.6%。

16. 2012 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 0.3867，比上年缩小 0.003。

17. 2012 年，城乡居民收入差距有所缩小，收入差距比由 2011 年的 3.13:1 下降到 3.10:1。

18. 2012 年，农村居民人均生活消费支出 5908 元，比 2011 年增加 687 元，实际增长 10.4%。农村居民人均生活消费支出中，食品消费支出 2324 元，增长 10.3%，恩格尔系数为 39.3%，比 2011 年下降 1.1 个百分点；衣着支出 396 元，增长 16.1%；居住支出 1086 元，增长 13.0%；家庭设备及用品支出 342 元，增长 10.6%；交通及通信支出 653 元，增长 19.3%；文教娱乐支出 445 元，增长 12.4%；医疗保健支出 514 元，增长 17.6%。

19. 2012 年，东部、中部、西部和东北地区农村居民人均生活消费支出分别为 7683 元、5469 元、4798 元和 5941 元，分别比 2011 年增长 12.1%、13.9%、14.9% 和 13.6%。

20. 预测 2013 年第一产业增加值约 5.8 万亿元，较 2012 年实际增长 4.5%；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约 10%。



21. 预测 2013 年粮食总产量可达到 5.94 亿吨，在不发生严重自然灾害情况下，也有可能超过 6 亿吨；油料产量增加到 3500 万吨，糖料产量增加到 1.36 亿吨，棉花产量下降到 600 万吨。

22. 预测 2013 年在不发生重大动物疫情情况下，肉类总产量将达到 8700 万吨，其中，猪肉产量约 5500 万吨，牛肉产量约 680 万吨，羊肉产量约 410 万吨，禽肉产量 2000 万吨，禽蛋产量约 2900 万吨，牛奶产量约 3850 万吨。

23. 预测 2013 年农产品生产价格上涨约 8%，其中种植业产品生产价格上涨约 10%，粮食生产价格上涨约 9%，林业产品生产价格上涨约 6%，畜牧业产品生产价格上涨约 5%，渔业产品生产价格上涨约 11%。

24. 预测 2013 年食品消费价格上涨 7%，其中，粮食消费价格上涨 8%，油脂消费价格上涨 6%，蔬菜消费价格上涨 10%，肉禽及其制品消费价格上涨 7%，水产品消费价格上涨 7%。

25. 预测 2013 年农业生产资料价格上涨约 8%。

26. 预测 2013 年农民人均纯收入将达到 9000 元，实际增长率能够达到 8%。城乡居民收入差距继续缩小。

Abstract

1. This abstract outlines some major indexes and changes of China's agriculture and rural economic development in 2012, and makes some forecasts about agriculture and rural economic situation in 2013.

2. In 2012, rural sectors produced 43.45 percent of China's GDP (at current price, the same below), decreased by 0.34 percentage point from that of 2011. Of China's GDP, primary industry accounted for 10.09 percent, increased by 0.05 percentage point from 2011; rural secondary industry accounted for 20.91 percent, decreased by 0.61 percentage point from that of 2011; rural tertiary industry accounted for 12.45 percent, increased by 0.22 percentage point.

3. In 2012, China's GDP increased by 7.8 percent in real term. The contribution of rural sectors to GDP growth was 3.05 percentage points and the share of the contribution of rural sectors to the increase of the GDP was 39.05 percent, increased by 0.24 percentage point from that of the previous year. The contribution of primary industry to GDP growth was 0.38 percentage point and the share of the contribution of primary industry to the increase of the GDP was 4.89 percent, increased by 0.78 percentage point. The contribution of rural secondary industry to GDP growth was 1.84 percentage points and the share of the contribution of rural secondary industry to the increase of the GDP was 23.53 percent, decreased by 2.32 percentage points. The contribution of rural tertiary industry to GDP growth was 0.83 percentage point and the share of the contribution of rural tertiary industry to the increase of the GDP was 10.62 percent, increased by 1.77 percentage points.

4. In 2012, value added of primary industry reached 5237.7 billion



Yuan (value added of service in farming, forestry, animal husbandry, and fishery is included), increased by 4.5 percent from that of 2011 in real term. Of the value added of primary industry, farming accounted for 57.67 percent, forestry accounted for 4.37 percent, animal husbandry accounted for 25.10 percent, fishery accounted for 10.04 percent.

5. In 2012, gross output value of farming, forestry, animal husbandry and fishery in the eastern, central, western and northeast region was 3159.1 billion Yuan, 2376.0 billion Yuan, 2359.8 billion Yuan and 1051.7 billion Yuan respectively, increased by 4.0 percent, 4.9 percent, 6.0 percent and 5.7 percent in real term respectively from that of the previous year.

6. In 2012, the sown area of grain crops was 111.267 million ha., increased by 0.694 million ha., or 0.6 percent from that of 2011; the sown area of cotton was 4.697 million ha., decreased by 6.8 percent; the sown area of oil-bearing crops was 13.975 million ha., increased by 0.9 percent; the sown area of sugar crops was 2.034 million ha., increased by 4.5 percent.

7. In 2012, the total output of grain crops was 589.57 million tons, increased by 3.2 percent from that of 2011; output of cotton was 6.84 million tons, increased by 3.8 percent; output of oil-bearing crops was 34.76 million tons, increased by 5.1 percent; output of sugar crops was 134.93 million tons, increased by 7.8 percent.

8. In 2012, yield of grains per ha. was 5299 kg., increased by 2.6 percent from that of the previous year; yield of cotton per ha. was 1455 kg., increased by 11.1 percent.

9. In 2012, total output of meats was 83.84 million tons, 5.4 percent higher than that of 2011. Of which, output of pork was 53.35 million tons, increased by 5.6 percent; output of beef and mutton was 6.62 and 4.01 million tons respectively, increased by 2.3 and 2.0 percent respectively; output of poultry was 18.23 million tons, increased by 6.7 percent. Output of cow milk was 37.44 million tons, increased by 2.3



percent. Output of poultry eggs was 28.61 million tons, increased by 1.8 percent. Output of aquatic product was 59.06 million tons, increased by 5.4 percent.

10. In 2012, the producer price of farm products went up by 2.7 percent from that of 2011. Of which, the producer price of planting products went up by 4.8 percent; the producer price of forestry products and fishery products went up by 1.2 percent and 6.2 percent respectively; the producer price of animal husbandry products went down by 0.3 percent. The producer price of grain crops increased by 4.8 percent; the producer price of cotton went down by 1.9 percent; the producer price of oil-bearing crops went up by 5.2 percent; the producer price of sugar crops went up by 5.0 percent. The producer price of pig went down by 4.1 percent.

11. In 2012, prices of means of agricultural production went up by 5.6 percent from that of 2011. Of which, the price of chemical fertilizer went up by 6.6 percent from that of 2011; the price of oil for farm machinery went up by 4.2 percent; the price of service for agricultural production went up by 8.3 percent.

12. In 2012, the costs of agricultural inputs for grain production were 343 Yuan per mu on average, increased by 6.7 percent. Of which, the costs of physical inputs were 252 Yuan, increased by 5.8 percent; the costs for production service were 91 Yuan, increased by 9.7 percent. Of the costs of physical inputs, the costs for chemical fertilizer were 139 Yuan, increased by 7.4 percent. Of the costs of production service, the costs for hiring agricultural machinery were 76 Yuan per mu, increased by 10.8 percent from that of previous year.

13. In 2012, per capita net income of rural households was 7917 Yuan, increased by 939 Yuan from that of the previous year or 10.7 percent in real term. This growth rate was 0.7 percentage point lower than that of the last year. Of which, per capita net income from household management was 3533 Yuan, increased by 311 Yuan or 9.7 percent. Of

the income from household management, per capita net income from primary industry was 2722 Yuan, increased by 8.0 percent. Per capita income from wages and salaries was 3448 Yuan, increased by 484 Yuan or 16.3 percent. Per capita income from properties was 249 Yuan, increased by 21 Yuan or 9.0 percent; Per capita income from transfers was 687 Yuan, increased by 123 Yuan or 21.9 percent.

14. In 2012, per capita net income from household management accounted for 44.6 percent of per capita net income of rural households, income from wages and salaries accounted for 43.6 percent, income from properties accounted for 3.1 percent, and income from transfers accounted for 8.7 percent.

15. In 2012, per capita net income of rural households in the eastern, central, western and northeast region was 10817 Yuan, 7435 Yuan, 6027 Yuan, and 8846 Yuan respectively, increased by 12.9 percent, 13.9 percent, 14.9 percent and 13.6 percent respectively.

16. In 2012, income difference among farmers narrowed slightly. The Gini coefficient of farmers' net income was 0.3867.

17. In 2012, income gap between urban residents and rural residents reduced from 3.13 : 1 in the previous year to 3.10 : 1.

18. In 2012, per capita consumption expenditure of rural households was 5908 Yuan, increased by 687 Yuan or 10.4 percent in real term from that of the previous year. Of the per capita consumption expenditure of rural households, expenditure of food was 2324 Yuan, increased by 10.3 percent, and the Engle coefficient was 39.3 percent, 1.1 percentage points down from the previous year; expenditure of clothes was 396 Yuan, increased by 16.1 percent; expenditure of residence was 1086 Yuan, increased by 13.0 percent; expenditure of household facilities and articles was 342 Yuan, increased by 10.6 percent; expenditure of transport and communications was 653 Yuan, increased by 19.3 percent; expenditure of culture, education and recreation was 445 Yuan, increased by 12.4 percent; expenditure of health care and medical service was 514 Yuan,



increased by 17.6 percent.

19. In 2012, per capita consumption expenditure of rural households in the eastern, central, western and northeast region was 7683 Yuan, 5469 Yuan, 4798 Yuan and 5941 Yuan respectively, increased by 12.1 percent, 13.9 percent, 14.9 percent and 13.6 percent respectively.

20. It is estimated that the value added of primary industry will reach about 5800 billion Yuan in 2013, increase by 4.5 percent in real term. The proportion of the value added of primary industry in GDP will be about 10 percent in 2013.

21. It is estimated that the total output of grain crops will be 594 million tons or may be above 600 million tons without serious natural disaster in 2013; the total output of oil-bearing crops increases to 35 million tons; the total output of sugar crops increases to 136 million tons; the total output of cotton decreases to 6 million tons.

22. It is estimated that the total output of meats will be 87 million tons without serious animal epidemics in 2013; the output of pork will be about 55 million tons, the output of beef will be about 6.8 million tons, the output of mutton will be about 4.1 million tons, the output of poultry will be about 20 million tons, the output of poultry eggs will be about 29 million tons, the output of cow milk will be about 38.5 million tons.

23. It is estimated that the producer price for farm products increases by about 8 percent in 2013; producer price for planting products increases by about 10 percent; producer price of grain crops increases by 9 percent; producer price for forestry products increases by about 6 percent; producer price for animal husbandry products increases by about 5 percent; producer price for fishery products increases by about 11 percent.

24. It is estimated that the consumer price for food increases by 7 percent in 2013; consumer price for grain increases by 8 percent; consumer price for oil or fat increases by 6 percent; consumer price for vegetables increases by 10 percent; consumer price for meat, poultry and processed products increases by 7 percent; consumer price for aquatic



products increases by 7 percent.

25. It is estimated that prices of means of agricultural production increases by about 8 percent in 2013.

26. It is estimated that the per capita net income of rural households will be above 9000 Yuan, and will increase by above 8 percent in real term in 2013. The income gap between urban residents and rural residents will be further reduced.

前 言

《中国农村经济形势分析与预测》（简称：农村绿皮书），是由中国社会科学院农村发展研究所和国家统计局农村社会经济调查司共同撰写的每年一卷的系列研究报告，这项工作已经持续地开展了21年。在双方的共同努力下，农村绿皮书的成果得到了越来越多的人的认可。农村绿皮书所追求的视野的宏观性、体系的完整性、方法的连续性、数据的权威性、预测的可靠性和结论的前瞻性的风格正在逐步形成。受到政府决策部门、农村经济理论和实际工作者以及国外相关学术研究机构的重视，引起了主要新闻媒体的关注，在国内外产生了较大的反响。

本年度的绿皮书主要有三个变化：应出版社的要求，在形式逻辑上将原来的章节结构改为专题结构；为了增强对新的一年“三农”发展态势的把握，把预测列为一个单独的专题；围绕农村生态建设设置了一批专题，对改革开放以来的农村生态建设进行了较为系统的梳理，以呼应党的十八大提出的建设美丽中国的新举措。课题组成员虽然在有限的时间内尽其所能，但疏漏和差误仍在所难免，尚望读者不吝赐教，使农村绿皮书越来越好。

本年度农村绿皮书由中国社会科学院农村发展研究所和国家统计局农村社会经济调查司共同完成，撰写工作由中国社会科学院农村发展研究所所长李周、国家统计局农村社会经济调查司司长张淑英、中国社会科学院农村发展研究所副所长杜志雄、国家统计局农村社会经济调查司副司长黄秉信共同主持，组织与协调工作由朱钢研究员、侯锐处长承担。

本书的顺利出版得到了社会科学文献出版社的大力支持与帮助，在此表示衷心的感谢。

李 周

2013年3月15日

目 录



前 言	001
G.1 2012 年农业农村经济形势	001
一 主要农产品生产	001
二 农产品进出口	007
三 农产品生产价格与食品消费价格	009
四 农业生产资料价格	014
五 农民收入	015
六 农业农村经济在国民经济中的地位	018
G.2 2013 年农业农村经济形势展望与预测	023
一 农业农村经济形势整体展望	023
二 农业农村经济主要指标预测	026
三 农村保供增收的主要对策思路	030
G.3 农业、农村经济与国民经济	034
一 农村产业对国内生产的贡献	035
二 农村投资与消费及其对国内经济增长的贡献	040
	001