

经济绿皮书

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农村经济年度分析课题组著

中国社会科学出版社

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中国社会科学院农村发展研究所
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Synopsis

1. In 1993 China's rural economy continued make a big progress, but it met with some problems to be urgently resolved. The aim of this report is to make an objective description from every aspect as possible. the main points are to clear up, analyze and compare with what has happened, drawing experience and lesson in order to understand the past and observe the future. Only in the extreme necessary cases has this report made a limited prediction on the future.

2. This summary has excerpted the major changes of China's rural economy in 1993 and conclusions made by analyses from all the chapters. (The "Different Views, the Rural Economic Situation in 1993—94" before the Chapter 1 is not listed in this summary.) is known go all, to start to clear up, analyze and judge what has just happened is to risk a big danger, because the consequence and influence of change will appear after a long time. However, the hour effectiveness of opinion and view is also very important. Therefore, when the hour effectiveness of opinion and view is also very important. Therefore, when the hour effectiveness and correctness cannot be both gained, this annual report can only emphasize the former and leave the latter for our readers.

Agriculture

3. The sown area of crops in 1993 was 148 million hectares, reducing 1.28 million hectares less than that of 1992, 0.9 percent. Out of it the sown area of cereal crops was 110 million hectares, decreasing 0.48 million hectares than that of 1992, registering an decrease of 0.4 percent. Although for three years the sown area of economic plants had continuously increased, their sown area in 1993 decreased to 226.3 billion hectares, reducing 164 million hectares in comparison with that of 6.8 percent. The sown area of other crops with vegetable, melons and fruits as the previous year, a decrease of 6.8 percent. The sown area of other crops with vegetable, melons and fruits as the main was 1,501 hectares, increasing 0.84 million hectares more than that of 1992, expanding 5.9 percent. the proportions of cereal crop, economic plants and other crops which accounted for the total area of crops decreased from 74.5, 15.3 and 10.2 of 1992 to 74.2, 16.3 and 3.9 of 1993. At the same year the area used by the forestry continued to increase. In the whole year the afforestation was more than 5.5 million hectares. The voluntary treeplanting was 2.43 billion trees and the rate of forestry—cover increased. The area of aquatic breeding continued to increase and by the first half of 1993 it had reached 418 million hectares, increasing 0.14 million hectares than that of 1992.

4. The agricultural labor forces of 1993 were about 340 mil-

lion, being equal to or slightly less than that of 1992. At the end of 1993 the total agricultural mechanical power was 318 million Kw, increasing 4.8 percent more than that of the end of 1992. The total agricultural mechanical power per mu was 0.143 Kw, increasing 6.7 percent more than that of 1992. At the same year the peasants' total expenditure on means of production was about 135.5 billion yuan, only increasing 5.2 percent in comparison with that of the previous year. If the factor of price increase was deducted, the actual sales volume of production means decreased about 8 percent than that of 1992. The sales volume of major means of production such as chemical fertilizers and pesticides tended to decrease and that of seeds, fodders, fuels and power tended to increase.

5. The state financial expenditure on agriculture was over 43 billion yuan, increasing more than 7 percent (current price) in comparison with that of 1992. Out of it the expenditure on agricultural capital construction was about 13 billion yuan, increasing 16.4 percent more than that of 1992, but it negatively increased after deducting the price influence. The loans provided by the Agricultural Bank and Credit Cooperatives for agriculture and purchase of agricultural and side-line products (year's remaining sum or settling and transferring sum) were respectively 211.16 billion yuan and 248.008 billion yuan, increasing 19.1 percent and 12.5 percent in comparison with the same period.

6. In 1993 the total output value of agriculture was about 1002.7 billion yuan (current price), increasing more than 5 per-

cent in comparison with that of 1992 (fixed price, the same below). The planting increased 4.1 percent, the forestry 3.7 percent, animal husbandry 6.1 percent, side—line production 8.4 percent and fishing 11.6 percent. In comparison with that of 1992, except slight enhancemint of the growth rate of planting, the growth speed of other four industries decreased to different degrees increased. Especially the output of grain and oil reached to the highest level in history.

7. Generally speaking, the readjustment scale of agricultural production and marketing structure was big. The total production level of the whole year was one of rapid growth. The main characteristics are as follows: (1) The grain output of the northern region universally inceased and that of some southern regions decreased. (2) The supply and demand of agricultural products were balanced, and the agricultural products had a little surplus. However, the gap between cotton supply and demand was wide. (3) The agricultural internal production structure continued to be adjusted toward the reasonable direction and the market regulative role became obvious.

8. From the whole agricultural economic operation in 1993, the outstanding problems are as follows: (1) The growth of agricultural production was big, but the income increase of peasants was a bit. (2) The total output of agricultural products was rich, though the peasants' consumption was not raised greatly. (3) The peasants' deposit increased by a big margin, but the agricultural input decreased. (4) The rural market has further opened, but

the agricultural macro—control is not strong.

Rural Non—Agricultural Industry

9. In 1992 the number of people who engaged in rural non—agricultural production amounted to 109.50 million, increasing 6.24 million employees in comparison with that of 1991, up 6 percent. Among them the employment of the rural industry was 66.50 million, increasing 3.14 million in comparison with that of 1991, increasing 5 percent. The employment of rural building industry, transportation and commerce was 43 million, increasing 3.1 million in comparison with that of 1991, up 7.8 percent.

10. In 1993 the year—end remaining sum of loans by the Agricultural Bank and Credit Cooperatives for township enterprises (including one under the village, the same below) was 242.8 billion yuan, increasing 55.2 billion yuan in comparison with that of 1992, up 29.4 percent. It increased 8.3 billion yuan more than that of the same period of 1992. Out of it the year—end remaining sum of loans of township enterprises' fixed assets was 40.1 billion yuan, increasing 5.3 billion yuan more than that of the previous year. The year—end remaining sum of township enterprises' circulating capital loans was 202.7 billion yuan, increasing 49.9 billion yuan in comparison with that of the previous year. At the same year the original value of rural nonagricultural fixed assets was about 592.5 billion yuan, increasing 150 billion yuan more than that of 1992, up 34 percent. This increase

rate is than that of 1988 which registered 32.5 percent, and is the highest speed in the history of township enterprises development. (The above was accounted at the current price.)

11. In 1993 the total output value of rural non—agricultural production amounted to 2,721.2 billion yuan, increasing 67 percent. (If the price factor was deducted, the actual growth was about 45 percent, 8 percent higher than that of the previous year.) Out of it, 2098.3 billion yuan increasing 65 percent in comparison with that of the previous year (current price, the same below). The total output value of rural building industry was 2,777.9 billion yuan, increasing 77 percent in comparison with that of the previous year. The total output value of rural commerce and diet industry was 197.3 billion yuan, increasing 78 percent more than that of the previous year. (The absolute numbers of this paragraph were accounted at the current price. If the growth rate was not especially explained, they were accounted at the current price.) The income of rural non—agricultural industrial management and alls amounted to 2,600 billion yuan, up 26 percent more than that of the previous year, and this is basically same with the value growth.

12. The net output value of rural non—agricultural industry was about 817.4 billion yuan, up 65.7 percent in comparison with that of previous year, (current price, the same below. Out of it, the expenditure of wage was 250 billion yuan, increasing 47 percent more than that of the previors year. The tax payments given to the state was 95 billion yuan, up 51 percent higher than

that of the previous year, and the net profit of enterprises was 160 billion yuan, increasing 54 percent more than that of the previous year. The export and delivery value of township enterprises was 190 billion yuan, increasing 60 percent more than that of the previous year, accounting 45 percent for the total purchase value of foreign trade goods throughout the country.

13. The proportion of 1993 rural non-agricultural production made up more than 40 percent of the total output value of non-agricultural industry throughout the country, up 8 percent than that of the previous year. Out of it, the proportion of total output value of the whole country, up 7 percent than that of the previous year. At the same year the proportion of added amount of total output value of rural non-agricultural industry made up about 50 percent of the added one of total output value of non-agricultural industry of the whole country.

14. The growth speed of the rural non-agricultural industry was the highest level of history in 1993. From the whole, it has the following characteristics: (1) The scale of rural non-agricultural enterprises has been increasingly expanded and the rural enterprises whose output value is more than 100 billion yuan are over 400 in the whole country. (2) The enterprise reform has been gradually deepened. At present 10 percent of rural non-agricultural enterprises have carried out the stock system or stock cooperative one. The national groups are nearly 100. (3) The role of scientific and technological progress in the growth of rural non-agricultural industry has greatly enhanced. Accord-

ing to the calculation, the contribution toward the total output value made by the technological progress of rural non-agricultural production in the whole country outstripped 40 percent.

(4) The export-oriented economy continued to be an important growth point of the rural non-agricultural industry. The rural export-oriented enterprises amounted to more than 100,000.

(5) The regional differences between the rural non-agricultural industries tended to be slightly narrowed down. In 1993 the output value of rural non-agricultural industry in the central and western regions of China accounted 33 percent for the proportion of the whole country, increasing 1 percent in comparison with that of the previous year. (6) The development of rural non-agricultural industry combined with the construction of township small better.

15. In the high-speed growth of rural non-agricultural industry in 1993, the following problems cannot be ignored: (1) The employment capability of rural non-agricultural industry still decline. In addition to 1989 and 1990, the employment elasticity of the output value of rural non-agricultural industry in 1993 was at the lowest level after 1978. Its value was only 0.12, decreasing more than a half in comparison with 0.27 of 1992. (2) The development fund of rural non-agricultural industry, was seriously lacked. It is not idealistic that special loans in support of the central and western regions were carried out. (3) The management mechanism of rural non-agricultural industry tended to be weakened. (4) The entire quality of rural non-agricultural en-

terprises would be further enhanced, otherwise they would be in an unfavorable position amidst the domestic and international market competition in the future. (5) the degree of difficulty to coordinate the policy of rural non-agricultural enterprises and industry has been obviously increased.

Rural Industrial Structure and Regional Structure

16. The total social output value (current price) of 1993 was 3, 723. 9 billion yuan. Out of it, the proportion of total output value of agriculture made up 26. 9 percent (current price, the same below), decreasing 8. 9 percent in comparison with that of the previous year. The proportion of the total output value of rural industry was 56. 4 percent, up 6. 3 percent than that of the previous year. The total output value of rural building industry, transportation and commerce was 16. 7 percent, up 2. 6 percentage point in comparison with that of the previous year.

17. The proportion of agricultural labor force which accounted for the rural labor force in 1993 was 75. 6 percent, decreasing 2. 3 percent in comparison with that of the previous year. the proportion of rural industrial labor force was 14. 8 percent, up 1. 2 percent than that of the previous year. The proportion of labor force of rural building industry, transportation and commerce was 9. 6 percent, up 1. 1 percent than that of the previous year.

18. At the same year the total of deviation (absolute value) between the output value of rural industry and employed rate was 97. 4, up about 13 percent than that of the previous year. Having deducted 43. 1 of regular deviation value, the irregular de-

viation digree of China's rural industrial structure was 54.3 in 1993, up 12.7 percent than that of the previous year.

19. The main issues of structural readjustment of China's rural industry in 1993 were: (1) As for the agricultural interior the total output of cotton greatly decreased and the gap between the supply and demand obviously widened. (2) The degree of lopsided change in the entire rural industrial strcture continued to widen and the quality of the entire structure still decreased.

20. During the process of adjustment ot planting structure of 1993, the grain crops of the eastern region still kept on the trend of decrease and the outstanding problem there was that the cotton—sown atea decreased by a big margin. In comparison with the region, the grain—sown area of the central region decteaased bigger. The sown—areas of variety of crops in the western region of which some increased and other decreased were generally balanced.

21. In 1993 the regional features of the township enterprises highgrowth were: the growth speed of the eastern region was comparatively equal to the one of the central and western regions. The differences between these three big regions were obviously narrowed down in comparison with that of the previous year. The proportion of of the eastern and western region which made up of the added amounts of output value of the national township entetprises increased to certain degree and initially stopped the trend of constant expansion of regional differences.

22. In 1993 the characteristics of the regional distribution of

peasants' net income were. The growth speed of eastern region was obviously faster than that of central and western regions. The growth of net income of the broad masses of peasants in the central and western region was lower than the average level of the whole rural area. The peasants' income of some regions could slightly increase and even increased by a negative number. The gap of per capita income of peasants in the different regions was again widened.

Income, Market, Investment and Policy

23. In 1993 the peasant per capita net income was 921 yuan increasing 3.2 percent at the constant price in comparison with that of the previous year. In comparison with the growth rate of 5.9 percent of the previous year, the growth speed obviously decreased and did not match with the entire growth of rural economy. In comparison with the growth speed of living expense income of city and town inhabitants at the same year, 10.2 percent of growth (fixed price), the gap obviously widened from 2.9 percentage point of the previous year to 7 percentage point.

24. The income proportion of urban and rural inhabitants in 1993 (the urban income:100) was 39.4 : 100 and the rural income has been the lowest since 1978 and even 3 percent lower than that of 1978 (42.4 : 100).

25. In 1993 the total turn over of rural social commodities was 641.7 billion yuan up 2.6 percent than that of the previous year. Out of it, the turnover of agricultural production means was 135.6 billion yuan, decreasing 7.8 percent than that of the previ-

ous year . The turnover of rural consumer goods was 506.1 billion yuan up 5.8 percent than that of the previous year, and this was 506.1 billion yuan up 5.8 percent than that of the previous year, and this was 10.3 percentage point lower than 16.1 percent of growth of urban consumer goods. The gap obviously widened in comparison with that of the previous year. (Among the above numbers, the absolute numbers were counted at the current price and all the growth rates at fixed price.)

26. In 1993 the main characteristics of rural market changes were : (1) The market of rural consumer goods steadily increased at a low speed. (2) The market of agricultural production means narrowed . (3) The regional increase of rural markets was not balanced, the reverse ratio between the coastline and inland rural markets further widened. (4) The rural fairs and markets continued to be brisk and active and the market construction was greatly speeded up. (5) The price of rural market rapidly rose. Although the growth level was lower than the average level of the country and the urban average one, the speed of price rise was so quick.

27. The main reason of low growth of 1993 rural commodity market was :

(1) The growth of per capital income of peasants was slow and the price increase of rural production means was too high. (2) The distribution factors of fund output increased too much and some of them were not regular. (3) The peasant per capita non-commercial expenditure quickly increased. The commodity

(including means of production) quality on the rural market was poor and the quality supervision of big pieces of commodity and service after sales were not followed up. Fake and shoddy means of agricultural production ran rampant.

28. The total input of rural economic fund in 1993 was about 400 billion yuan and the fund used for agriculture was 113.6 billion. Among 400 billion yuan, the state financial and bank input was about 126.5 billion yuan (from it about 71.3 billion for agriculture), rural collective input about 157 billion yuan (from it about 25.7 billion yuan for agriculture) and individual input of peasants about 111 billion yuan (from it about 16.6 billion for agriculture). The outstanding problems of them are as following: (1) The situation in which the countryside lacked fund was still serious. (2) The sign to ignore agricultural investment was very obvious. (3) The fund was too much transferred into the rural non-agricultural industrial and urban sectors.

29. In 1993 the Central Government adopted a series of policy measures to support grain and cotton production and reduce peasants' burden. These measures are generally as following aspects, First is the policy of grain and cotton production and sales; Second is the policy of supply and sales of production means; third is the policy of payment for IOU; Fourth is the policy of reducing unreasonable burden of peasants.

30. As for the first policy, it has produced certain actual effects, but many problems still exist. The outstanding problem of them is that the price of means of agricultural production in-

creased and grain and cotton funds were not allocated to the required places. As for the second policy, the standard of price difference stipulated by the policy was low and the highest limit—price policy of agricultural means could be poorly operated and it was difficult to implement it. As for the third and fourth policies, their effects are obvious, but whether or not these policies would be carried out have to be watched.

Rural Economy and National Economy

31. The net out flow of rural funds through the financial and monetary channels was about 81.45 billion yuan in 1993. The net outflow through the monetary channel was 18.55 billion yuan and its proportion was 22.8 percent. The net outflow through the financial channel was 62.9 billion yuan and its proportion was 77.2 percent.

32. In 1993 the number of rural labor forces who worked in the cities and towns was 386.55 billion. The total income of the whole year was 140.06 billion yuan. The expenditures in cities and towns and on the way were 64.4 billion yuan and the income of money which was brought or remitted to the countryside was 76.66 billion yuan.

33. In 1993 the total amount of rural commodity which flowed into the cities was 2,227.77 billion yuan and the total amount of urban commodity which flowed into the countryside was 2,222.41 billion yuan.