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REEN BOOK OF CHINA'S RURAL ECONOMY

中国农村经济形势 分析与预测 (2007~2008)

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**RURAL ECONOMY OF CHINA
ANALYSIS AND FORECAST
(2007-2008)**

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)

2008版



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出 版 人 / 谢寿光
总 编 辑 / 邹东涛
出 版 者 / 社会科学文献出版社
地 址 / 北京市东城区先晓胡同 10 号
邮 政 编 码 / 100005
网 址 / <http://www.ssap.com.cn>
网站支持 / (010) 65269967
责任部门 / 皮书出版中心 (010) 85117872
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项目负责 / 邓泳红
责任编辑 / 丁 凡
责任校对 / 李 慧
责任印制 / 盖永东
品牌推广 / 蔡继辉

总 经 销 / 社会科学文献出版社发行部
(010) 65139961 65139963

经 销 / 各地书店
读者服务 / 市场部 (010) 65285539
排 版 / 北京中文天地文化艺术有限公司
印 刷 / 北京季蜂印刷有限公司

开 本 / 787 × 1092 毫米 1/16
印 张 / 18.25
字 数 / 250 千字
版 次 / 2008 年 4 月第 1 版
印 次 / 2008 年 4 月第 1 次印刷

书 号 / ISBN 978 - 7 - 5097 - 0130 - 0/F · 0056
定 价 / 49.00 元 (含光盘)

本书如有破损、缺页、装订错误,
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图书在版编目 (CIP) 数据

中国农村经济形势分析与预测 (2007 ~ 2008) / 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, 2008. 4



(农村经济绿皮书)

ISBN 978 - 7 - 5097 - 0130 - 0

I. 中... II. ①中... ②国... III. ①农村经济 - 分析 - 中国 - 2007 ②农村经济 - 经济预测 - 中国 - 2008 IV. F32

中国版本图书馆 CIP 数据核字 (2008) 第 044675 号

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中文摘要

1. 本摘要概括了本书所描述的 2007 年中国农业农村经济发展的一些主要指标和变化, 以及对 2008 年中国农业农村经济形势的一些展望和预测。

2. 2007 年, 在中国国内生产总值(以现价计)中, 农村各部门创造的比重为 45.5%, 比 2006 年下降 0.3 个百分点。其中, 第一产业所占比重为 11.7%, 与上年持平; 农村第二产业所占比重为 22.3%, 上升 0.1 个百分点; 农村第三产业比重为 11.5%, 下降 0.4 个百分点。

3. 2007 年, 国内生产总值增长 11.4%。在国内生产总值增长中, 农村部门贡献了 4.54 个百分点, 贡献份额为 39.8%, 比 2006 年下降 2.6 个百分点。在农村部门中, 第一产业贡献了 0.38 个百分点, 贡献份额为 3.3%, 比 2006 年下降 1.6 个百分点; 农村第二产业贡献了 3.4 个百分点, 贡献份额为 29.8%, 比 2006 年提高 0.4 个百分点; 农村第三产业贡献了 0.76 个百分点, 贡献份额为 6.7%, 比 2006 年下降 1.4 个百分点。

4. 2007 年, 第一产业增加值达到 28910 亿元(包括农林牧渔服务业增加值), 比 2006 年实际增长 3.7%。在第一产业增加值中, 农业比重为 56.1%, 比 2006 年下降 2 个百分点; 林业比重为 4.4%, 下降 0.1 个百分点; 畜牧业比重为 27.1%, 提高 2.9 个百分点; 渔业比重为 9.7%, 下降 0.4 个百分点。

5. 2007 年, 乡镇企业增加值 68000 亿元, 比 2006 年增长 14.1%。其中, 工业增加值 47800 亿元, 第三产业增加值 15000 亿元。2007 年, 乡镇企业营业收入 280000 亿元, 增长 14.1%; 利润总额 17000 亿元, 增长 14.6%; 上缴税金 7200 亿元, 增长 14.7%。



6. 2007年,在以增加值计算的农村产业结构中,第一产业比重为29.8%,比2006年提高0.2个百分点;第二产业比重为55.0%,提高0.2个百分点;第三产业比重为15.2%,下降0.4个百分点。

7. 2007年,县及县以下地区消费品零售总额为28799亿元,比2006年增长15.8%;占全社会消费品零售总额的比重为32.3%,比2006年下降0.2个百分点。

8. 2007年,粮食种植面积10553万公顷,比2006年增加70万公顷;棉花种植面积559万公顷,增加7万公顷;油料种植面积1094万公顷,减少60万公顷;糖料种植面积167万公顷,增加10万公顷。

9. 2007年,粮食总产量50150万吨,比2006年增长0.7%;棉花产量760万吨,增长1.3%;油料产量2461万吨,减少4.2%;糖料产量11110万吨,增长11.4%。

10. 2007年,按播种面积计算的单位面积产量,粮食达到4752公斤/公顷,比2006年提高31公斤,增长0.7%;棉花1360公斤/公顷,比上年略增;油料2250公斤/公顷,提高31公斤,增长1.4%;糖料66527公斤/公顷,提高5303公斤,增长8.7%。

11. 2007年,肉类总产量6800万吨,比2006年减少3.5%,其中猪肉减少9.2%,牛、羊肉分别增长6.1%和5.8%。2007年水产品产量4737万吨,增长3.3%。

12. 2007年,农产品生产价格比2006年上涨18.5%,其中种植业、林业、畜牧业和渔业产品生产价格分别上涨9.8%、4.4%、31.4%和8.1%。粮食生产价格上涨10.3%,油料生产价格上涨33.4%,棉花生产价格上涨9.6%,糖料生产价格与上年持平,蔬菜生产价格上涨6.9%,水果生产价格上涨1.3%,畜产品生产价格上涨31.4%,生猪生产价格上涨45.9%,奶产品生产价格上涨6.2%,家禽生产价格上涨17%,禽蛋生产价格上涨15.9%,渔业产品生产价格上涨8.1%。

13. 2007年,农业生产资料价格比2006年上涨7.7%。

14. 2007年,农户人均生产投入1580元,比上年增加198元。农户用



于农业的生产投入人均 1270 元,比 2006 年增加 177 元,增长 16.2%。其中:种植业投入人均 675 元,增加 76 元,增长 12.6%;林业投入人均 10 元,增加 0.3 元,增长 3.4%;牧业投入人均 540 元,增加 93 元,增长 20.7%;渔业投入人均 45 元,增加 8 元,增长 22.2%。

15. 2007 年,农户固定资产投资总额 5117 亿元,比上年增长 15.3%。

16. 2007 年,农户用于家庭第二、第三产业生产经营的投入人均 162 元,比上年增长 13 元,增长 9%;用于购置生产性固定资产支出人均 147 元,增加 8 元,增长 5.4%。

17. 2007 年,东、中、西部地区农村固定资产投资额分别为 13244.6 亿元、4155.7 亿元和 2424.8 亿元,分别比上年增长 15.3%、28.2% 和 27.7%。

18. 2007 年,农产品进出口贸易总额 775.7 亿美元,比 2006 年增长 23.1%;其中,农产品出口额 366 亿美元,比 2006 年增长 17.9%;农产品进口额 409.7 亿美元,比 2006 年增长 28.1%;农产品进出口贸易逆差由 2006 年的 9.6 亿美元扩大至 43.7 亿美元。

19. 2007 年,农民人均纯收入 4140 元,比 2006 年增加 553 元,实际增长 9.5%,增速比 2006 年提高 2.1 个百分点。农民人均纯收入中,家庭经营收入 2194 元,比 2006 年增加 263 元,增长 13.6%,其中第一产业生产经营人均纯收入 1745 元,增加 223 元,增长 14.7%。工资性收入人均 1596 元,增加 221 元,增长 16.1%;在工资性收入中,外出务工收入人均 651 元,增加 97 元,增长 17.5%。财产性收入人均 128 元,增加 28 元,增长 27.6%。转移性收入人均 222 元,增加 41 元,增长 23%。2007 年农民人均纯收入中,家庭经营收入占 53%,工资性收入占 38.6%,财产性收入占 3.1%,转移性收入占 5.4%。

20. 2007 年,东、中、西部地区农民人均纯收入分别为 5504.9 元、3896.9 元和 2908.8 元,分别比 2006 年增长 13.3%、17.0% 和 17.0%。中西部地区与东部地区农民收入差距缩小,西部地区与中部地区农民收入差距略微扩大。



21. 2007年,农村居民内部收入分配差距略有扩大,农民人均纯收入的基尼系数为0.3742。

22. 2007年,城乡居民收入差距略有扩大,收入差距比由2006年的3.28:1扩大到3.33:1。

23. 2007年,农村居民人均生活消费支出3224元,比2006年增加395元,实际增长8.1%。农村居民人均生活消费支出中,食品消费支出1389元,增长14.1%,恩格尔系数为43.1%,比2006年提高0.1个百分点;衣着支出193元,增长15.1%;居住支出574元,增长22.4%;家庭设备用品及服务支出149元,增长17.8%;交通及通讯支出328元,增长13.7%;文教娱乐支出306元,增长0.2%;医疗保健支出210元,增长9.8%。

24. 2007年,东、中、西部地区农村居民人均生活消费支出分别为4059.5元、2984.4元和2423.1元,分别比上年增长12.5%、15.2%和15.3%。

25. 预计2008年第一产业增加值超过3万亿元,占国内生产总值的比重为11%左右。

26. 预计2008年粮食总产量在5亿吨左右波动;油料总产量将恢复到2600万吨的水平。

27. 预计2008年肉类总产量将达到7800万吨。

28. 预计2008年农产品出口额增长速度将继续低于农产品进口额增长速度。农产品贸易逆差将继续明显扩大。

29. 预计2008年农产品生产价格上涨大约12%。

30. 预计2008年农民人均纯收入仍将保持较快增长,但增速将低于2007年。城乡居民收入差距继续扩大到3.36:1。

Abstract

1. This abstract outlines some major indexes and changes of China's agriculture and rural economic development in 2007, and makes some forecasts about agriculture and rural economic situation in 2008.

2. In 2007, rural sectors produced 45.5 percent of China's GDP (in current price, the same below), decreased by 0.3 point from that of 2006. Of China's GDP, agriculture accounted for 11.7 percent, kept at the same level; rural secondary industry for 22.3 percent, increased by 0.1 point; rural tertiary industry for 11.5 percent, decreased by 0.4 point.

3. In 2007, China's GDP increased by 11.4 percent in real term. Of the growth rate of GDP, rural sectors contributed to 4.54 points and accounted for 39.8 percent of the whole growth, decreased by 2.6 points from that of the previous year. In rural sectors, primary industry contributed to 0.38 point and accounted for 3.3 percent of GDP growth, decreased by 1.6 points from that of the previous year; rural secondary industry contributed to 3.4 points and accounted for 29.8 percent, increased by 0.4 point; rural tertiary industry contributed to 0.76 point and accounted for 6.7 percent, decreased by 1.4 points from that of 2006.

4. In 2007, value added of primary industry reached 2891 billion yuan (value added of service in farming, forestry, animal husbandry, and fishery is included), increased by 3.7 percent from that of 2006 in real term. Of the value added of primary industry, agriculture accounted for 56.1 percent, 2 points down from 2006; forestry accounted for 4.4 percent, 0.1 point below that of the previous year; animal husbandry accounted for 27.1 percent, 2.9 points up; and fishery accounted for 9.7 percent, 0.4 point down.

5. In 2007, value added of township and village enterprises (TVEs) reached 6800 billion yuan, increased by 14.1 percent. Of which, value added of industry



was 4780 billion yuan, value added of tertiary industry was 1500 billion yuan. In 2007, the sales income of TVEs was 28000 billion yuan, increased by 14.1 percent; the sum of profit was 1700 billion yuan, increased by 14.6 percent; the sum of taxes was 720 billion yuan, increased by 14.7 percent.

6. In 2007, of the value added of rural industries, the primary industry accounted for 29.8 percent, an increase of 0.2 point from 2006; the secondary industry accounted for 55.0 percent, an increase of 0.2 point; the tertiary industry accounted for 15.2 percent, a reduction of 0.4 point.

7. In 2007, retail sales of consumer goods at county level and areas below county were 2879.9 billion yuan, increased by 15.8 percent from 2006. It accounted for 32.3 percent of total retail sales of consumer goods, 0.2 point down from that of 2006.

8. In 2007, the area sown to grain was 105.53 million ha., increased by 0.7 million ha. from that of 2006; the area sown to cotton was 5.59 million ha., increased by 70 thousand ha; the area sown to oil-bearing crops was 10.94 million ha., decreased by 0.6 million ha.; the area sown to sugar crops was 1.67 million ha., increased by 0.1 million ha.

9. In 2007, output of grain was 501.5 million tons, increased by 0.7 percent from that of 2006; output of cotton was 7.60 million tons, increased by 1.3 percent; output of oil-bearing crops was 24.61 million tons, decreased by 4.2 percent; output of sugar crops was 111.10 million tons, increased by 11.4 percent.

10. In 2007, yield of grain reached 4752 kg. per ha., increased by 31 kg. or 0.7 percent from that of previous year; yield of cotton was 1360 kg. per ha., increased slightly; yield of oil-bearing crops was 2250 kg. per ha., increased by 31 kg. or 1.4 percent; yield of sugar crops was 66527 kg. per ha., increased by 5303 kg. or 8.7 percent.

11. In 2007, total output of meat was 68.0 million tons, 3.5 percent lower than that of 2006. Of which, pork decreased by 9.2 percent; beef and mutton increased by 6.1 and 5.8 percent respectively. Output of aquatic product was 47.37 million tons, increased by 3.3 percent.

12. In 2007, the producer price of agricultural products went up by 18.5



percent. Of which, the producer price of farming products, forestry products, livestock products, and fishery products went up by 9.8, 4.4, 31.4, and 8.1 percent respectively. The producer price of grain increased by 10.3 percent; the producer price of oil-bearing crops went up by 33.4 percent; the producer price of cotton went up by 9.6 percent; the producer price of sugar crops kept at the same level as that of 2006; the producer price of vegetables went up by 6.9 percent; the producer price of fruits went up by 1.3 percent; the producer price of livestock products went up by 31.4 percent; the producer price of pig went up by 45.9 percent; the producer price of milk products went up by 6.2 percent; the producer price of poultry went up by 17 percent; the producer price of eggs went up by 15.9 percent; and the producer price of aquatic products went up by 8.1 percent.

13. In 2007, price of agricultural means of production went up by 7.7 percent from that of 2006.

14. In 2007, per capita production input of farm households was 1580 yuan, increased by 198 yuan from that of the last year. Of which, the input in agriculture took up 1270 yuan, increased by 177 yuan or 16.2 percent. Of the input in agriculture, per capita input in farming took up 675 yuan, increased by 76 yuan or 12.6 percent; per capita input in forestry took up 10 yuan, increased by 0.3 yuan or 3.4 percent; per capita input in animal husbandry took up 540 yuan, increased by 93 yuan or 20.7 percent; per capita input in fishery took up 45 yuan, increased by 8 yuan or 22.2 percent.

15. In 2007, total investment in fixed assets by farm households was 511.7 billion yuan, increased by 15.3 percent from that of the previous year.

16. In 2007, per capita input by farm households in the secondary and tertiary industry of household operation was 162 yuan, increased by 13 yuan or 9 percent. Per capita expenditure by the farm households on productive fixed assets was 147 yuan, increased by 8 yuan or 5.4 percent.

17. In 2007, investment in fixed assets of rural area in the eastern, central and western region was 1324.46, 415.57 and 242.48 billion yuan, increased by 15.3, 28.2 and 27.7 percent respectively.

18. In 2007, the sum of import and export of agricultural products reached



77.57 billion US dollar, increased by 23.1 percent from that of the previous year. Of the sum of import and export of agricultural products, the sum of export of agricultural products was 36.6 billion US dollar, increased by 17.9 percent from the last year; the sum of import of agricultural products was 40.97 billion US dollar, increased by 28.1 percent. Adverse balance of agricultural products trade increased from 0.96 billion US dollar in the previous year to 4.37 billion US dollar.

19. In 2007, farmers' net income per capita was 4140 yuan, increased by 553 yuan or 9.5 percent in real term. This growth rate was 2.1 points higher than that of the last year. Of the farmers' net income per capita, income from household operations was 2194 yuan, increased by 263 yuan or 13.6 percent. Of the household operations income, income from primary industry was 1745 yuan, increased by 223 yuan or 14.7 percent. Per Capita income from wages and salaries was 1596 yuan, increased by 221 yuan or 16.1 percent. Of the wages and salaries income, per capita income from working outside of residence was 651 yuan, increased by 97 yuan or 17.5 percent. Per capita income from properties was 128 yuan, increased by 28 yuan or 27.6 percent; per capita income from transfers was 222 yuan, increased by 41 yuan or 23 percent. In 2007, income from household operations accounted for 53 percent of farmers' net income per capita; income from wages and salaries accounted for 38.6 percent; income from properties accounted for 3.1 percent; and income from transfers accounted for 5.4 percent.

20. In 2007, farmers' net income per capita in the eastern, central and western region was 5504.9, 3896.9, and 2908.8 yuan, increased by 13.3, 17.0 and 17.0 percent respectively. Income gap between the central and the eastern, between the western and the eastern region was reduced, but between the western and central region was enlarged slightly.

21. In 2007, income difference among farmers was enlarged slightly. The Gini coefficient of farmers' net income was 0.3742.

22. In 2007, income gap between urban residents and rural residents was enlarged slightly, from 3.28:1 in the previous year to 3.33:1.

23. In 2007, farmers' living expenditure per capita was 3224 yuan, increased by 395 yuan or 8.1 percent in real term from the previous year. Out of the total,



expenditure of food was 1389 yuan, increased by 14.1 percent, and the Engle coefficient was 43.1 percent, 0.1 point up from the previous year; expenditure of clothes was 193 yuan, increased by 15.1 percent; expenditure of residence was 574 yuan, increased by 22.4 percent; expenditure of household facilities and services was 149 yuan, increased by 17.8 percent; expenditure of transport and communication was 328 yuan, increased by 13.7 percent; expenditure of culture, education and recreation was 306 yuan, increased by 0.2 percent; expenditure of medicine and medical service was 210 yuan, increased by 9.8 percent.

24. In 2007, farmers' living expenditure per capita in the eastern, central and western region was 4059.5, 2984.4, and 2423.1 yuan, increased by 12.5, 15.2 and 15.3 percent respectively.

25. It is estimated the value added of primary industry will exceed 3000 billion yuan in 2008, account for about 11 percent of GDP.

26. It is estimated the total output of grain will be around 500 million tons; the total output of oil-bearing crops will be recovered to 26 million tons in 2008.

27. It is estimated the total output of meat will be 78 million tons in 2008.

28. It is estimated the growth rate of export of agricultural products will be lower than that of import, and the adverse balance of agricultural products trade will be enlarged obviously in 2008.

29. It is estimated the producer price of agricultural products will go up about 12 percent in 2008.

30. It is estimated the growth rate of farmers' net income per capita will increase, but will be lower than that of last year. The income gap between urban and rural residents will be enlarged in 2008.

前 言

《中国农村经济形势分析与预测》，简称《农村经济绿皮书》，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16年。《农村经济绿皮书》有两部分内容：一部分是对当年中国农业和农村经济运行情况和社会发展状况进行系统的分析和评价，对下一年中国农业和农村经济发展趋势进行预测，并提出相应的政策建议。另一部分是围绕一个特定的专题进行多维、深入、细致的分析和探讨。在两个机构的共同努力下，《农村经济绿皮书》所追求的视野宏观性，体系完整性，方法连续性，数据权威性，结论准确性，政策前瞻性的目标正在逐步得到实现，出版的成果也得到了越来越多人的认可。

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2007年，粮食总产量、第一产业增加值增长以及农民收入增长等农业和农村经济发展的重要指标的实际情况与我们2007年初的预测结果比较接近。

2007年，粮食产量50150万吨，增长0.7%。其中粮食种植面积增加的贡献率约95%，粮食单产增加的贡献率约5%。棉花产量760万吨，增长1.3%。油料产量2461万吨，减产4.2%。糖料产量11110万吨，增产11.4%。肉类总产量6800万吨，比上年减少3.5%。其中，猪肉减少9.2%，牛肉和羊肉产量分别增加6.1%和5.8%。水产品产量4737万吨，增长3.3%。农产品质量安全有所改善。农业部近期组织的第二次农产品



质量安全例行监测结果显示,全国有37个城市的蔬菜、畜禽产品及水产品总体抽检合格率保持在90%以上,蔬菜农药残留监测合格率为近年来最高,达94.3%。全国有2000多个县和8000多个重点乡镇建成了动物防疫检疫设施,防疫能力大大加强。

农村居民人均纯收入4140元,实际增长9.5%。食品价格上涨对农民增收产生了积极影响,但食品价格上涨主要为周期性波动,长期趋势不明显。周期性波动和长期趋势分别解释全年食品消费价格上涨的86.1%和8.4%,不可解释的只有5.5%。农村居民纯收入仍以家庭生产经营收入为主(53.0%),但份额比上年下降0.8个百分点;工资性收入、转移性收入和财产性收入的份额分别为38.6%、5.4%和3.1%,分别比上年提高0.2个百分点、0.3个百分点和0.3个百分点。农村居民人均纯收入的基尼系数为0.3742,比上年略微扩大。农村贫困人口和低收入人口继续减少。人均纯收入低于785元的绝对贫困人口从2148万人减少到1479万人,下降31.1%;人均纯收入在786~1067元的低收入人口从3550万人减少到2841万人,下降20.0%。

农村居民人均生活消费支出3224元,实际增长8.1%。其中,人均食品支出1389元,增长14.1%。衣着支出人均193元,增长15.1%。居住支出人均574元,增长22.4%。购买家庭设备用品及服务支出人均149元,增长17.8%。交通及通讯支出人均328元,增长13.7%。文教娱乐用品及服务支出人均306元,增长0.2%。医疗保健支出人均210元,增长9.8%。其他商品和服务支出人均74元,增长17.6%。

粮、棉、油、糖的土地生产率有不同幅度的增长,农业用水减少2.2%,农业资源利用效率有所提高;森林面积、水土流失治理面积和有效灌溉面积有不同幅度的增长,农业发展条件有所改善。

第一产业、第二产业和第三产业实现的增加值分别为28910亿元、121381亿元和96328亿元,农村创造的国内生产总值占整个国内生产总值的比重为45.5%,比上年减少了0.3个百分点。其中,第一产业所占份额为11.7%,与上年持平;农村第二产业所占份额为22.3%,比上年提高



0.1个百分点；农村第三产业所占份额为11.5%，比上年下降0.4个百分点。

东、中、西部地区农业总产值分别达到22428.2亿元、17019.8亿元和9292.6亿元，分别增长17.1%、20.3%和23.8%。由于西部和中部地区农业增长更快，它们占全国的份额分别上升了0.7和0.2个百分点，东部地区农业所占份额则下降了0.9个百分点。东、中、西部地区农民人均纯收入分别为5504.9元、3896.9元和2908.8元，分别增长13.3%、17.0%和17.0%；东、中、西部地区农民人均生活消费支出分别为4059.5元、2984.4元和2423.1元，分别增长12.5%、15.2%和15.3%；东、中、西部地区农村固定资产投资额分别为13244.6亿元、4155.7亿元和2424.8亿元，分别增长15.3%、28.2%和27.7%。由于西部和中部地区的农民人均纯收入、人均消费支出和农村固定资产投资增长得更快，与东部地区农民的收入差距、生活消费支出差距和农村固定资产投资的差距略有缩小。东、中、西部地区乡镇企业增加值分别增长19.2%、16.4%和16.2%，中西部地区与东部地区的差距进一步扩大。

2007年，中央财政对“三农”的总支出达到4318亿元，增长22.8%，为实现粮食连续增产和农民连续增收发挥了重要作用。全国农村全面建立最低生活保障制度，3452万农村居民纳入了保障的范围。农村新型合作医疗覆盖范围达到80%以上，参合农民7.3亿人。1.5亿名农村接受义务教育的中小学生免交学杂费，3800万名家庭经济困难学生得到免费教科书，780万名家庭经济困难的寄宿生得到生活费补助，切实减轻了农民负担。新建农村公路42.3万公里，乡镇通公路率达到98.5%，建制村通公路率达到88.2%。乡、村、户通电率分别达到98.6%、98.5%和98.4%。

二

这些年来一直在强调“三农”是重中之重，并不断地加大“多予”和“少取”的政策力度，有力地推动了农村的发展。然而，由此放松了对