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黑龙江蓝皮书

BLUE BOOK OF HEILONGJIANG

黑龙江经济 发展报告 (2015)

主编/曲伟


副主编/王爱新 王刚 李小丽 笄志刚 马友君

ANNUAL REPORT ON ECONOMIC DEVELOPMENT
OF HEILONGJIANG (2015)



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摘 要

2014 年,黑龙江省认真贯彻党中央、国务院的决策部署,牢牢把握发展大势,全面深化改革,保持宏观政策的连续性和稳定性,创新宏观调控思路和方式,有针对性地进行预调微调,扎实做好各项工作,实现了经济社会持续稳步发展,全省的经济发展形势总体向好。

2014 年,黑龙江省农业发展势头良好,第一产业增加值继续呈现良好的增长态势;粮食总产量实现“十一连增”,达到 1248.4 亿斤(6242.2 万吨);绿色(有机)食品产业继续快速发展;农民收入增幅较大;畜牧业实现稳步发展。黑龙江省农业经济运行中存在的主要问题有:“粮食独大”结构不利于地方经济快速增长;畜牧业发展速度相对缓慢;粮食外运压力大;农业生产资料购买类、农产品销售类服务专业合作社发展不足。2015 年黑龙江省农业经济发展面临实施“两大平原”现代农业综合配套改革试验区、落实国务院关于近期支持东北振兴 35 条政策等重大机遇,预计全省粮食产量将稳中有进;农林牧渔业增加值将增幅较大;林业因“禁伐”政策出台,发展将加快转型;绿色农业将进入快速发展阶段;农业生态环境建设将会受到重点关注;农业固定资产投资将持续大幅增长。

2014 年,黑龙江省工业发展遇到了多年少有的困难。全省地区生产总值一季度增长 4.1%,二季度增长 4.8%,三季度增长 5.2%,预计全年增幅 2.2% 左右,虽然呈现逐季上升态势,但是全国排名依然靠后,其中工业增长大幅下滑是主要因素之一。2014 年前三季度,全省工业增加值低位增长,工业用电量和铁路货运量等先行指标小幅回升,预计全年工业经济效益欠佳,整体利税、利润水平均小幅回落,煤炭、石油等能源产业效益大幅度下降,冶金行业亏损问题严重,这些因素制约了全省工业经济的进一步增长。



2015 年全省工业能源产业既面临量价齐跌、成本上升更为严峻的挑战，也面临食品产业和战略性新兴产业加快发展的诸多机遇。2015 年将是优化结构、转变方式、稳中求进的重要一年。

2014 年，黑龙江省服务业继续保持平稳较快发展，成为拉动全省经济增长的主导力量。1~9 月，全省服务业实现增加值 4277.3 亿元，为同期历史最好水平，按可比价格计算，同比增长 8.8%，位居三次产业之首，增速高于地区生产总值 3.6 个百分点，高于第二产业 6.4 个百分点。服务业增速在东北三省继续保持领先，分别高于辽宁省、吉林省 0.1 个、1.5 个百分点，也高于全国平均水平 1.4 个百分点。服务业增加值占地区生产总值的比重继续提高，达到 47.6%，高于上年同期 2.9 个百分点，也分别高于辽宁省、吉林省 7.2 个、14.8 个百分点。服务业平稳较快发展对整体经济形成有力支撑，贡献率达到 77.9%，拉动全省经济增长 4 个百分点。

2014 年，黑龙江省在对外贸易下降的情况下，对俄贸易仍保持上升态势。2014 年 1~9 月，全省对外贸易下降，完成进出口总额 277.8 亿美元，同比下降 5.9%；出口额 116.2 亿美元，同比下降 9%；进口额 161.6 亿美元，同比下降 3.6%。在全省外贸形势极其严峻的情况下，对俄贸易仍保持上升态势。1~9 月，黑龙江省对俄进出口总值高达 173.7 亿美元，占进出口总值的 62.5%；其中，对俄出口额 62.28 亿美元，增长 36.4%；自俄进口额 111.42 亿美元，同比下降 1.8%；对俄的产品出口增长 10%。俄继续保持黑龙江省第一贸易伙伴地位。预计全省全年仍将是对外贸易止跌回稳、对俄贸易稳定增长的态势。2015 年全省对外贸易将明显回升，对俄贸易有望实现两位数增长。

2014 年，黑龙江省实施积极的就业政策取得实效，有望完成年度计划。截至三季度末，全省城镇新增就业人员 60.0 万人，完成年度计划的 100.0%；失业人员再就业 46.62 万人；就业困难人员再就业 20.68 万人；城镇登记失业人数 38.8 万人，城镇登记失业率稳定在 4.4%，控制在 4.6% 之内。此外，全省大力开发公益性岗位吸纳就业，截至 2014 年三季度末，全省公益性岗位新增 3.59 万人；灵活就业人员灵活就业 202.19 万人。在全

省经济增长没有达到预期增长幅度的情况下，全省就业、再就业工作取得如此成效是不易的。

2015 年是全面完成“十二五”规划的收官之年，是全面深化改革的关键之年，也是全面推进依法治国的开局之年，做好经济工作意义重大。黑龙江省将全面贯彻党的十八大，十八届三中、四中全会和中央经济工作会议精神，坚持稳中求进工作总基调，坚持落实五大规划、发展十大重点产业的战略，以提高经济发展质量和效益为中心，主动适应经济发展新常态，保持经济运行在合理区间，把转方式调结构放到更加重要的位置，狠抓改革攻坚，突出创新驱动，强化风险防控，加强民生保障，促进经济持续健康发展和社会和谐稳定。

Abstract

In 2014, Heilongjiang unswervingly sticks to the decisions of the CPC Central Committee and the State Council, focusing on the development orientation and deepening reform and opening up. The province reached a sustainable growth goal of ensuring a continuous and healthy economic growth as well as social harmony and stability by the ways of executing consistent and stable macroeconomic policies, innovating macro control strategies and methods, and carrying out timely policy fine-tuning. These provide favorable conditions for the economy to achieve a sustained and healthy development in the coming years.

The report points out, in 2014, Heilongjiang reached an expected growth in agriculture and the added value of primary industry. The province's grain output rose to 62.42 million tons. That figure marked a growth in grain output for the 11th year in a row (In China, the term "grain" refers to cereal, beans and potatoes, while "food" includes grain, edible vegetable oils, meat, poultry, and eggs, dairy and marine products.) Heilongjiang witnessed a significant and conservative growth in organic food and animal husbandry industry giving farmers an upper hand in household income. However, tough challenges and problems in agricultural economy were prominent such as food-dominant structure impeding local economic growth, the deepening slowdown in animal husbandry industry, the upward pressure on grain output and the underdevelopment of rural cooperative banks mechanism of agricultural products. The priorities set out for the next year ahead are as follows: Heilongjiang will launch more pilot programs, paving the way for the modern agriculture; Grain output is expected to be held up reasonable well and slightly stronger in 2015, though it has been stable this year; The province will carry out policy measures of providing some support to revitalizing the eastern China, and speed up efforts for forestry economic restructure caused by a ban on felling of trees; Added value of forestry, animal, husbandry and fishery industry are

expected to pick up in 2015; A fast-growing of green agriculture is also expected to drive up ecological environment for agriculture in the coming year.

The report points out, in 2014, Heilongjiang's industry encountered rare growth-related difficulties. First-quarter growth of the province's GDP was 4.1% , grew by 4.8% in the second quarter, and 5.2% in the third quarter. The combined GDP was expected to be around 2.2% , dragging down the state average. The steeper slowdown in industrial growth was an essential factor. For the first three quarters of 2014, coal, oil and other energy industries experienced a downturn, and benefits of those industries declined dramatically. Slowdown also brought metallurgical industry losses. Report points out, those factors conditioned the province's industrial economic growth, and therefore year-round industrial economy benefit was supposed to slightly decrease year-on-year, though the added value of the industry, industrial consumption, the volume of railway freight and other leading indicators showed a modest increase. In 2015, the province's factory sector and energy industry will face stronger challenges, while a robust growth of food industry and the emerging industries will bring a multitude of opportunities. 2015 is supposed to be a year of significant in terms of giving priorities to facilitating structural adjustment and industrial upgrades, and making economic progress while maintaining its stability.

The report points out, in 2014, the tertiary industry, or the service industry of Heilongjiang expanded in a stable and relatively fast pace, and was a leading indicator fueling the province's economic growth. In the January-September period, added value of service industry grew by 427.73 billion, accelerating to 8.8% year on year. The growth is higher than that of GDP by 3.6% , and that of the secondary industry by 6.4% , keeping ahead in northeast provinces, 0.1 percentage points higher than Liaoning, 1.5 percentage points higher than Jilin, and 1.4 percentage points higher than the state average. Added value of the tertiary industry in regional GDP hit 47.6% , 2.9 percentage points higher than the previous year, and 7.2 and 14.8 percentages higher than that of Liaoning and Jilin. The contribution to the combined GDP by the tertiary industry was 77.9% , forging a new advantage in the economy, and will be a new engine for boosting the province's economic growth.

In 2014, Heilongjiang-Russia bilateral trade kept a rising trend, though general import-export trade slid down. Import-export volume hit MYM27.78 billion,



dropped by 5.9% year on year, amongst that, export volume reached MYM11.62 billion, fallen by 9% year on year, while import volume decreased 3.6%, a narrow decline to MYM16.16 billion. However, 2014 was a year of bumper harvest for China-Russia trade. In the January-September period, the total import-export value reached as much as MYM17.37 billion, accounts for 69% in the total value, increased by 9.2% year on year. Export value hit around MYM2.2 billion, surged by 36.4%; while import value hit around MYM11 billion, slightly dropped by 1.8% year on year. Russia is a major strategic trade partnership with Heilongjiang. In 2015, the province's foreign trade will show an apparent resilience, and China-Russia trade is expected to hit double-digit growth in the coming year.

In 2014, preferential policies for employment did heavy lifting, and were expected to achieve the annual target. By the end of September, the province created 600,000 new jobs, fulfilling the job creation target for the entire year, providing jobs for 466,200 laid-off workers, and 206,800 people who have job-related difficulties. 388000 urban residents were registered as jobless, and the rate of unemployment was around 4.4%, within 4.6%. Heilongjiang executed the preferential policies for creating non-profit jobs for labors. By the end of the third quarter, 35900 non-profit jobs were created, and flexible working population reached 2.0219 million.

It is important to ensure the economy runs well in 2015, as it is the final year of China's 12th Five-year Plan (2011 - 2015) for economic and social development. 2015 is also a crucial year for deepening reforms, and the first year of promoting rule of law in an overall way. Heilongjiang will strengthen the sense of mission and responsibility, and deepen work to carry out the spirit of the Third and Fourth Plenary Session of the 18th CPC Central Committee and Central Economic Work Conference, insisting on long-term economic stability and prosperity, and developing ten major industries' strategies. Heilongjiang will actively adapt to the economic "new normal", keep economic growth within a reasonable range, and emphasize economic restructuring. To ensure continuous and healthy economic growth as well as social harmony and stability, Heilongjiang will work to make reform breakthroughs, pursue innovation-driven growth, and boost risk controls and guarantee people's livelihood.

序 言

时值 2014 年终岁尾之际，黑龙江省社会科学院主编的《黑龙江经济发展报告（2015）》已交付出版。《黑龙江经济发展报告（2015）》集合黑龙江省社会科学院乃至全省有关部门的经济问题研究专家和学者，对 2014 年的黑龙江经济发展运行情况进行了分析和研判，对 2015 年黑龙江经济发展进行了预测和展望。

2014 年，党中央、国务院团结带领全国各族人民贯彻落实上年中央经济工作会议决策部署，牢牢把握发展大势，全面深化改革，保持宏观政策的连续性和稳定性，创新宏观调控思路 and 方式，有针对性地进行预调微调，扎实做好各项工作，实现了经济社会持续稳步发展，全国的经济形势总体向好。

2014 年，黑龙江全省上下坚持稳中求进、改革创新，深入实施“五大规划”，加快发展十大产业，抓改革、促发展、惠民生，积极应对困难和挑战，城乡居民收入稳中有增，就业形势趋好，经济运行平稳。同时，也要清醒地看到，全省经济发展下行压力加大、增速放缓，主要原因是国家宏观经济环境变化的影响、长期积累的结构性矛盾凸显、民营经济阶段性发展差距较大和国有经济的支撑带动作用减弱，以及经济发展环境不优等。虽然全省经济发展形势面临很大压力，但也要看到稳中向好的积极因素。黑龙江省农业发展势头良好，消费市场平稳增长，城乡居民收入稳步提高，就业形势总体较好，全省对俄贸易同比增长。这充分说明，全省实体经济基础坚实，发展质量有所提升，还有一系列企稳向好的有利条件，只要我们坚定信心、保持定力、主动作为，黑龙江省经济就一定能够克服暂时困难，步入健康发展轨道。



2015年是全面完成“十二五”规划的收官之年，是全面深化改革的关键之年，也是全面推进依法治国的开局之年。面对发展中的难题和改革中的任务，黑龙江省政府将深入贯彻落实党的十八大精神，加大推进改革力度，全省人民也更加坚定信心，凝聚共识，统筹谋划，协同推进，进一步解放思想、解放和发展社会生产力、解放和增强社会活力，更加注重全省改革的系统性、整体性、协同性，不断增进全省人民福祉，坚决破除老工业基地旧有体制机制弊端，努力开拓经济社会持续健康发展的广阔前景。只有深化改革、完善市场秩序、提高竞争活力，才能充分发挥人民的智力优势，提升技术创新能力。在人才和技术的保障下，才能真正地转变经济发展方式、促进经济结构升级，解决经济的短期和长期均衡发展问题，实现黑龙江省经济的可持续、跨越式发展。

经济学研究是对经济发展思考的实践科学，政府对于经济发展的科学决策离不开专业的研究平台和载体。基于此，《黑龙江经济发展报告（2015）》从权威性、前沿性、原创性、时效性出发，从专家的视角，立足于学术的逻辑和实证的方法，针对黑龙江经济发展状况、难点问题进行分析和预测，代表了黑龙江省社会科学院乃至全省专家学者对经济发展的现实和未来的最高水平解读和分析，是国内外政界学界了解黑龙江经济发展的必备资料，是黑龙江省委、省政府在黑龙江发展战略谋划上的重要决策依据，已成为全省哲学社会科学界的知名学术品牌，具有十分重大的参考价值和现实意义。今后，在各界同仁的鼎力支持下，《黑龙江经济发展报告》系列皮书一定会不断与时俱进、推陈出新、续写华章，力争成为研判黑龙江省经济建设和经济发展的风向标，成为各级政府科学决策的重要参考，成为向全省人民汇报的报告书，为黑龙江省经济不断攻坚克难、实现可持续发展提供重要智力支持，做出应有的贡献！

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