

转型发展期的 农业政策研究

A Study Agricultural Policy in the
Transition and Development Period

方 言 / Fang Yan 主编

◀ 粮食卷 ▶

VOLUME ONE:
Grain Production



中国经济出版社
CHINA ECONOMIC PUBLISHING HOUSE

转型发展期的 农业政策研究

A STUDY AGRICULTURAL POLICY IN
THE TRANSITION AND DEVELOPMENT PERIOD

方 言 / Fang Yan 主编

VOLUME ONE:
Grain Production

粮食卷

 中国经济出版社
CHINA ECONOMIC PUBLISHING HOUSE

北 京

图书在版编目 (CIP) 数据

转型发展期的农业政策研究. 粮食卷 / 方言主编.

北京: 中国经济出版社, 2017. 2

ISBN 978 - 7 - 5136 - 4425 - 9

I. ①转… II. ①方… III. ①农业政策—研究—中国 ②粮食—生产—农业政策—研究—中国
IV. ①F320

中国版本图书馆 CIP 数据核字 (2016) 第 250719 号

责任编辑 赵静宜 张玲玲

责任印制 巢新强

封面设计 华子图文

出版发行 中国经济出版社

印刷者 北京科信印刷有限公司

经销者 各地新华书店

开 本 710mm × 1000mm 1/16

印 张 44.75

字 数 801 千字

版 次 2017 年 2 月第 1 版

印 次 2017 年 2 月第 1 次

定 价 98.00 元 (套)

广告经营许可证 京西工商广字第 8179 号

中国经济出版社 网址 www.economyph.com 社址 北京市西城区百万庄北街 3 号 邮编 100037

本版图书如存在印装质量问题, 请与本社发行中心联系调换 (联系电话: 010-68330607)

版权所有 盗版必究 (举报电话: 010-68355416 010-68319282)

国家版权局反盗版举报中心 (举报电话: 12390) 服务热线: 010-88386794

编委会

顾 问：杜 鹰 危朝安 高鸿宾 张少春
矫 勇 王守荣 胡存智

主 编：方 言

副主编：许正斌 孙洪波

编 委：王智才 李远华 赵兴武 宗锦耀 张淑英
曾衍德 黄家玉 刘仁芙 王邦中

本卷研究人员

(以姓氏笔画为序)

丁建吾	王邦中	王春乙	王 衍	王艳华	方 言	尹昌斌
孔令才	邓庆海	史志国	丛佩娟	冯云飞	刘小勇	刘仁芙
刘海波	刘恒新	刘 艳	吕彤轩	吕厚荃	曲晓波	朱景全
许正斌	孙洪武	孙洪波	李 莉	李文娟	李志宏	李远华
李富根	李 睿	李树君	杜秀文	杜 原	吴玉和	吴传云
何 平	何 毅	宋建武	陈彦宾	陈绍充	张铁军	张景林
范金梅	周大杰	周应华	周奕梅	周锦秀	宗锦耀	赵永军
赵玉领	赵迪娜	邸文聚	侯全章	耿书海	姚春生	党立斌
高弋娟	高敏凤	曹晓红	黄家玉	韩 巍	储玉军	程 锋
廖西元	潘文博	霍治国				

数据组：张淑英 王明华 杨方廷 麻 珺

序

世纪之交,我国农业和农村发展面临着复杂的局面。一方面,农产品供给充裕,农业结构调整加快,农村改革不断深化;另一方面,粮食产量连年下滑,农民收入增速放缓,城乡发展严重失衡。农业农村发展处于爬坡过坎的关键时期。2003年,胡锦涛同志在中央农村工作会议上提出把解决好“三农问题”作为全党工作的重中之重,站在统筹城乡发展的战略高度,确立了工业反哺农业、城市支持农村的发展方略,提出了农村工作多予、少取、放活的方针,这是党中央在“三农”工作指导思想上的重大转变,开创了“三农”工作新局面。此后,党中央、国务院连续出台了十四个1号文件和一系列支持农业农村发展的政策性文件,农业农村发展进入了“黄金期”。国家对农业的支持调控体制发生重大变化,不断加大农业农民补贴力度,着力加强农业农村基础设施建设,全面加强生态环境保护修复,加快推进新型城镇化和新农村建设,积极推进农业农村体制改革和机制创新,粮食生产实现“十二连增”,农民增收实现“十二连快”,为国民经济的平稳较快发展提供了强有力的支撑。

在农业农村转型发展的这一时期,国家发展和改革委员会作为综合经济部门,承担了党中央、国务院交办的大量工作,包括规划编制、文件起草、政策协调等,其中农村经济司承担了繁重的任务。为了高质量地完成任务,国家发改委农村经济司承接每一项重点任务时,通常都要会同有关部委成立专题课题组开展前期研究,经年累月下来积累了一大批研究成果。这些研究成果几乎覆盖了农业农村发展的各个领域,从粮食、棉花、油料、糖料、生猪、牛羊肉、奶业等农产品生产,到农田基础设施、生产力布局、科技推广和创新、农业机械化和农机工业;从种植业、养殖业到牧区发展、海洋渔业;从农业资源环境到农

业可持续发展。在研究过程中,课题组认真贯彻落实党中央关于“三农”工作的路线方针政策,坚持改革开放、绿色生态、协调可持续发展理念,坚持理论与实证分析相结合,坚持深入基层,实地调研,掌握第一手资料,坚持定性与定量分析相结合,确保了研究成果的质量。这些研究成果为党中央、国务院决策提供了基础依据,也得到了有关方面的充分肯定和积极评价。

现在课题组的同志把这些凝聚多部委同志心血的研究成果编集成册,我以为是好的,也是应该做的。一是这些成果从不同侧面折射了这一时期我国农业政策演变的轨迹,以资后人来研究这一段历史;二来也可以为将来的农业农村政策研究者提供一个基础和路标,使政策研究更具连续性,这就是汇集编辑出版这套丛书的初衷吧。

随着我国经济发展进入新常态,农业农村发展又面临着新的形势。中央明确要求用发展的新理念、新思路破解“三农”新难题,把推进农业供给侧结构性改革作为农业农村工作的主线,培育农业农村发展新动能,提高农业综合效益和竞争力,还特别强调必须守住确保粮食生产能力不降低、农民增收势头不逆转、农村稳定不出问题三条底线。我们有理由相信,在实现全面小康社会攻坚时期,农业农村的改革一定能够取得新的伟大成就。“三农”的实践创新和理论创新永远在路上。衷心希望本套书的出版能够为有关部门、有关研究单位、涉农企业和广大“三农”工作者提供有益的借鉴和帮助。

全国政协民族和宗教委员会副主任

国务院参事

国家发展和改革委员会原副主任



2017年1月

Prologue

At the turn of the 21st century, agricultural and rural development of China was confronted with complicated situations. On the one hand, supplies of agricultural products were sufficient, and the structural adjustment of agriculture was speeding up and the rural reform continuously deepening. On the other hand, the grain output kept decreasing in successive years, the growth rate of farmers' income slowed down, and the imbalance between urban and rural development was serious. We were experiencing a bottleneck period in agricultural and rural development.

At China's Central Economic Conference in 2003, President Hu Jintao put forward that we must resolve issues related to agriculture, rural areas, and farmers as the top priority of the Party's work. From the strategic perspective of improving the balance between urban and rural development, the guiding principles of "industry nurturing agriculture" and "cities supporting countryside" were established, with the policy on rural work "giving more, taking less and loosening control". It was a major shift of the CPC Central Committee's guiding thoughts on issues of agriculture, rural areas, and farmers, creating a new pattern for the development of agriculture, rural areas and farmers. Since then, the CPC Central Committee and the State Council have released the annual "No 1 Central Document" for fourteen consecutive years and a series of policies to support agricultural and rural development, pushing agricultural and rural development into a golden period. There had been a major change of supporting and regulating mechanism on agriculture, with

steadily increased subsidies to strengthen agriculture and benefit farmers, enhanced agricultural and rural infrastructure, intensified protection and recovery of the ecosystem and the environment, accelerated progress in building new urbanization and “new socialist countryside”, and active promotion of structural reform and mechanism innovation. Food crop production has increased for twelve year in a row and the growth rate of farmers’ income has remained high for twelve consecutive years, providing strong support for steady and fairly rapid economic development.

In the transitional period of agricultural and rural development, the National Development and Reform Commission, as an economic department in charge of comprehensive economic management, has taken on a lot of work entrusted by the CPC Central Committee and the State Council, including planning compilation, document drafting, policy coordination and so on. The Rural Economy Division has undertaken a plenty of heavy work under the Commission. In order to fulfill the tasks in good quality, the Rural Economy Division usually set up a special research team to carry out studies jointly with other relevant state ministries while undertaking major tasks, thus has accumulated abundant research results. These research results have covered almost all fields of agriculture and rural development, from grain, cotton, oilseed, sugar crops, hog, beef, mutton and dairy farming, to primary farmland infrastructure construction, productivity distribution, extension and innovation of agricultural science and technology, agricultural mechanization and agricultural machinery, from crop farming and livestock farming to grassland pastoral development and marine fishery, from agricultural resources and environment to agricultural sustainable development. During the research process, the research teams seriously implemented the guidelines, principles, and policies on work related to agriculture, rural areas and farmers issued by the CPC Central Committee; followed the vision of reform and opening up, green, coordinated and sustainable development; practiced the combination of theoretical study and empirical analysis; insisted on visiting lower - level organizations and conducting investigation

to obtain first - hand information; practiced the combination of qualitative and quantitative analysis, ensuring the quality of the research results. These research results have provided the foundation and basis for the Central Party Committee and the State Council in terms of policy making, and have been positively appraised and fully endorsed by the relevant authorities.

Recently, members of the research teams compiled these research results into books as an embodiment of the painstaking efforts and hard work of many staff from different ministries and commissions. I believe it is meaningful and also necessary. First, these research results reflect the trajectory of the agricultural policy evolution during this period, and future researchers will be able to study this period of history. Second, it provided a foundation and direction for future researchers so as to make policy studies continuous. These are the original intentions of compiling and publishing this series of books.

As China's economic development has entered a new normal, agricultural and rural development is confronted with new conditions. It has been clearly stated by the Central Party Committee that we should follow the new vision and new approach of development to solve new problems related to agriculture, rural areas and farmers; take the supply - side reform in agriculture as the major task of agricultural and rural work; build up powerful new drivers for agricultural and rural development; increase agricultural comprehensive benefits and advance agricultural competitiveness, with a particular emphasis on maintaining food production capacity, ensuring sustained increases in rural incomes, and keeping rural areas harmonious and stable. We have reasons to believe that we can make great new achievements in terms of rural reform and development during the decisive phase in finishing building a moderately prosperous society in all respects. Innovation in practice and theory still has a long way to go. We sincerely hope that this series of books can offer beneficial reference and assistance for further studies conducted by relevant depart-

ments, research institutes, agriculture - related enterprises, and professionals who work on issues regarding agriculture, rural areas and farmers.

Du Ying

Deputy Director of the National Ethnic and Religious Committee of the CPPCC

State Council counsellors

Former Deputy Director of National Development and Reform Commission

Jan, 2017

前 言

2004年至2014年间,根据国务院领导的指示精神和农业发展新形势,我们会同有关部委专业司局和专家组成课题组,先后开展了粮食、棉花、油料、糖料、生猪、牛羊肉、奶业、家禽业、农业机械化和农机工业、牧区草原、海洋渔业、农业环境等方面的专项研究,完成了近百万字的研究报告。在这些研究成果的基础上,形成了《国务院关于促进奶业持续健康发展的意见》(国发〔2007〕31号)、《奶业整顿和振兴规划纲要》(国办发〔2008〕22号)、《全国新增1000亿斤粮食生产能力规划(2009—2020年)》(国办发〔2009〕47号)、《国务院关于促进农业机械化和农机工业又好又快发展的意见》(国发〔2010〕22号)、《国务院办公厅关于开展2011年全国粮食稳定增产行动的意见》(国办发〔2011〕13号)、《国务院关于促进牧区又好又快发展的若干意见》(国发〔2011〕17号)、《国务院关于促进海洋渔业持续健康发展的若干意见》(国发〔2013〕11号),以及经国务院批准,由国家发改委会同有关部门印发的《全国牛羊肉生产发展规划(2013—2020年)》《全国游牧民定居工程建设“十二五”规划》《农业环境突出问题治理总体规划》等十余个文件、规划。这些文件规划的颁布实施,为推动农业农村经济转型发展发挥了重要作用。

这些研究成果及文件、规划是相关部委同志共同努力的结果,是集体智慧的结晶,凝聚了全体参与者的心血。全国政协民族和宗教委员会副主任、国务院参事、时任国家发展和改革委员会副主任的杜鹰同志多次听取课题组汇报,进行指导;王春正、陈耀邦、白美清、高鸿宾等老领导以及刘巽浩、苏大学、魏昌林等老专家提出了中肯的意见;国家统计局农村经济社会调查司提供的全国县卡统计资料,为课题研究提供了重要的数据支持;中国航天二院系统仿真技术应用工程研究中心提供了技术支撑,承担了优化粮食生产布局数据处理工作,十多个部委的专业司局近百名同志参加了调研,付出了辛勤劳动。作为牵

头单位,国家发展改革委农村经济司的课题组成员做出了无私奉献,在完成日常工作的同时,承担了综合报告和文件的调研、起草、协调工作,放弃了2006年至2013年间所有公休日和节假日,确保了研究工作的时效性和质量。可以说,没有领导的支持,没有相关部委专业司局的配合,没有课题组全体同志的共同努力,就没有这些成果,在此一并表示感谢!

现在,我们选取了部分研究报告及文件分三卷出版。第一卷是粮食卷,系统总结了新中国成立以来我国粮食生产取得的成绩,分析了粮食供需面临的形势,在区域布局、增产潜力、科技保障、机械化保障、中低产田改造、水利保障、气象保障、耕地资源保障、仓储物流保障、环境影响等多个方面深入研究的基础上,提出了新增粮食生产能力的总体思路、技术路线、区域布局及分区任务、主要建设工程和保障措施。第二卷是其他农畜产品及农业机械化卷,对我国油料、糖料蔗、牛羊肉以及奶业的发展,农业机械化与农机工业取得的成绩和面临的形势进行了总结分析,提出了发展思路、目标任务和政策措施。第三卷是农业可持续发展卷,重点分析了牧区草原、海洋渔业、农业环境面临的形势和问题,提出了促进上述领域可持续发展的总体思路、目标任务和政策措施。

时至本书出版之日,课题组成员中有十余名同志已经退休或即将退休,个别同志已经去世,相当一批同志已经转换了工作岗位,希望本书成为共同参与者的历史见证。

由于这些研究涉及农业农村多个领域,时间跨度长,研究要求高,背景复杂,参与人员各不相同,研究报告存在较大差异,其观点也仅代表各课题组的认识和看法。因此,在书稿的撰写和编辑过程中,我们在力争体现当年研究背景、确保原作者观点不变的前提下,对各报告的结构、体例、文字等进行了修改,基本保持了报告的历史真实性和完整性。其中,方言、许正斌、孙洪波、周锦秀、李东、杨凌志、由淑敏、江开勇对书稿进行了初审,许正斌、孙洪波分别承担了海洋渔业和油料专题的修改及统稿,其余专题由方言负责。冯永军、万婷婷、王瑜承担了相关英文翻译工作。

由于时间仓促,疏漏在所难免,敬请大家批评指正。



2017年1月

Preface

From 2004 to 2014, according to the directives of the leaders of the State Council, our research group, consisting of relevant ministries, departments, bureaus and experts, have conducted research projects on grain, cotton, oil, sugar, pork, beef, lamb, dairy and poultry industries, as well as on agricultural mechanization and agricultural machinery industry, pasture areas and grasslands, marine fisheries, and agricultural environment. These researches have completed research results of about a million words. Based on the research, more than ten documents and plans are produced, including “The State Council’s Opinion on Promoting Sustainable and Healthy Development of Dairy Industry” (No.31【2007】 of the State Council), “Plan for Dairy Industry Reorganization and Revitalization”(No. 22【2008】 of the General Office of the State Council), “National Plan for an Extra 50 Million Metric Tons of Grain Production Capacity in China (2009 - 2020)” (No.47【2009】 of the General Office of the State Council), “The State Council’s Opinion on Promoting the Sound and Rapid Development of Agricultural Mechanization and Agricultural Machinery Industry” (No.22【2010】 of the State Council), “The General Office of the State Council’s Opinion on Conducting the Campaign for 2011 National Grain Steady Increase” (No.13【2011】 of the General Office of the State Council), “The State Council’s Opinion on Promoting Sound and Rapid Development of Pasture Areas” (No.17【2011】 of the State Council), and “The State Council’s Opinion on Promoting Sustainable and Healthy Development of Marine Fisheries” (No.11【2013】 of the State Council). There are also over ten documents and plans that are approved by the State Council and issued by the National Development

and Reform Commission and relevant departments. For instance, “The Plan for National Beef and Lamb Production and Development (2013 - 2020)”, “The 12th Five - Year Plan for National Nomad Settlement Construction”, “The General Plan for Governing Outstanding Issues of Agricultural Environment”. Planning, promulgation and implementation of these documents have played significant roles in ensuring transition and development of agriculture and rural economy.

The results of these studies including documents and planning are achieved by working together with colleagues from related ministries. It is the crystallization of collective wisdom and embodies the effort of all the participants. Mr. Du Ying, Deputy Director of the National Ethnic and Religious Committee of the CPPCC and State Council counsellors, who was the Deputy Director of the National Development and Reform Commission at that time, has many times attended the presentations of our research group and provided guidance. We have received pertinent comments from our old leaders: Wang Chunzheng, Chen Yaobang, Bai Meiqing and Gao Hongbin, as well as our old experts: Liu Xunhao, Su Daxue and Wei Changlin. The Division of Rural Social and Economics Research of the National Bureau of Statistics has provided us with statistics of all the counties, which are of great importance for our research. The System Simulation Technology Application Engineering Research Centre of the Second Academy of China Aerospace provides technical support, undertaking grain production layout optimization data processing task. There are about a hundred experts from professional divisions of more than ten ministries participating in and dedicating themselves to research fieldwork. The members of the research team of the Division of Agricultural Economics in the Development and Reform Commission as the initiating department, have made selfless dedication after their daily work. Giving up public and festival holidays in years 2006 to 2013, they undertook the task of fieldwork, drafting documents, and coordination, ensuring effectiveness and quality of the research tasks. We can say that it is impossible to have these research results if it is without

leaders' support, collaboration with relevant ministries and divisions, and joint effort of all the members in the research group. Here I have deep gratitude towards all of you!

Now we select some of the research reports and documents for publication with three volumes. The first volume is concerned with grain. It summarizes systematically China's achievements in grain production since the founding of new China, analysing the situation of grain supply and demand. It proposes general ideas of production capacity of newly increased grain, technical route, regional distribution and tasks, major construction projects and safeguards. These are on the basis of in-depth researches on topics of regional distribution, potential for yield increase, safeguards of science and technology, middle - low yield farmland reform, and safeguards of water conservancy, meteorology, arable land resources, warehouse logistics and environment. The second volume discusses about agricultural and livestock products and agricultural mechanization. It analyses and summarizes the development of Chinese oil, sugar, beef, lamb and dairy industries, and the achievements and confronting situation of agricultural mechanization and agricultural machinery industry. It proposes the development ideas, objectives and policy measures. The third volume concerns agricultural sustainable development. It focuses on confronting situation and problems of pasture areas, marine fisheries and agricultural environment, proposing general ideas of promoting sustainable development of these areas, objectives and policy measures.

By the time of publication of this book, more than ten members have retired or are about to retire, and even some have passed away. Many of them have changed positions. The book is the witness of the history of all the participants.

These research reports cover several agricultural and rural areas, with difference in research participants, complex research background, long span and high quality of

research; thus, these reports are different, which solely represent the ideas and views of each research team. So in the course of writing and editing, we have made amendments to the structure, style and text, striving to keep the originality of the research background, authors' views, and historical truthfulness and completeness of the reports. In this process, Fang Yan, Xu Zhengbin, Sun Hongbo, Zhou Jinxiu, Li Dong and Yang Lingzhi have conducted preliminary review of this manuscript. Xu Zhengbin and Sun Hongbo have respectively made editing and compilation of the topics of marine fishery and oil plants, and the other parts are in Fang Yan's charge. Feng Yongjun, Wan Tingting and Wang Yu undertake the task of English translation.

Due to time constraints, oversight is inevitable. We sincerely welcome criticism and correction.

Fang Yan

Jan. 2017