



ANNUAL REPORT ON ECONOMIC
AND TECHNOLOGICAL
DEVELOPMENT IN AGRICULTURE

农业经济 与科技发展研究

INSTITUTE OF AGRICULTURAL ECONOMICS AND
DEVELOPMENT CHINESE ACADEMY
OF AGRICULTURAL SCIENCES

中国农业科学院农业经济与发展研究所

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前 言

《农业经济与科技发展研究》是中国农业科学院农业经济与发展研究所学术研究年度报告选集，收录全所科研人员各年的部分科研成果，每年出版一期，形成学术报告系列，对总结科研工作、交流学术观点、提供政策咨询具有重要的作用。本文集为《农业经济与科技发展研究》的第 21 期，共收集 31 篇研究报告和论文。

2011 年，在中国农科院建设世界一流农业科研院所的战略目标指引下，研究所全面完成了年初预定的各项工作目标。基本科研业务费专项资金项目研究进展顺利，取得系列成果；农业经济与政策顾问团发挥重要指导作用，组织开展了多项实地调研，并有多篇调研报告及政策建议得到中央领导批示。在全体职工的共同努力下，研究所正逐步成为一个学科布局合理、人才结构优化、科研条件完善、竞争优势明显及社会影响力较大的“国际先进的农业经济与政策研究中心”、“全国农业经济与政策研究国际交流与合作中心”、“农业企业投资与管理咨询中心”和“高级农业政策分析人才培养基地”。

本文集收录的研究报告分为综合篇、种植业经济篇、畜牧业经济篇、资源环境经济篇以及其他共五部分，主要涉及龙头企业发展、城乡一体化发展、农村土地政策、户籍制度改革、主要粮食价格波

动、气候变化对粮食安全的影响、畜牧业发展、农业资源与生态环境、两岸农业合作、农村新贫困问题以及中外农业产业投入产出及农产品认证方面的经验借鉴等诸多领域，分析了它们的现状及存在的问题，并提出了有新意的观点和结论。

文集选编的论文或研究报告仅代表作者的观点和结论。欢迎读者就文中观点、结论和方法不吝指正。

编委会

2012年11月

Preface

Annual Report on Economic and Technological Development in Agriculture is a serial academic publication by the Institute of Agricultural Economics and Development (IAED), Chinese Academy of Agricultural Sciences (CAAS), which has been published on a yearly basis. This very collection plays an important role in the summing-up of IAED's annual scientific research progress, exchanging academic viewpoints and policy consultation. Here comes the 21th annual anthology, which contains 31 reports or articles written by the researchers of the IAED in 2011.

For the year of 2011, under the guidance of the CAAS's strategic goal of building world-class agricultural research institutes, IAED successfully accomplished all the work targets. All the programs funded by the core budget for research have been progressing smoothly with series of research fruits achieved. Agricultural Economic and Policy Advisory Group played an important directive role by carrying out investigations and surveys with a number of investigation reports and policy recommendations reviewed and commented by the central leadership. With joint efforts made by all the staff, IAED has been a relative rational discipline layout, optimized personnel structure and sound scientific conditions, which has substantially enhanced the IAED's competitiveness and brought about more pronounced social impacts out of its research work. As a result, IAED is becoming an "International Advanced

Research Center for Agricultural Economics and Policy”, a “National Center for International Cooperation and Exchange in Agricultural Economics and Policy Research”, a “Consulting Center for Agricultural Enterprise Investment and Management” and a “Training Base for Senior Agricultural Policy Analysts” .

These research reports consist of five parts including comprehensive chapter, farming economy, animal husbandry economy, resources and environment economy and others, which analyzed the current issues existing in China’s agricultural and rural development in areas such as leading enterprises, urban-rural integration, rural land system, reform of Hukou policy, grain price fluctuation, the impact of climate change on food security, animal husbandry development, agricultural resources and ecological environment, cross-strait agricultural cooperation, new rural poverty issues and the output and input of China and USA in agriculture sector as well as agro-product certification experience. These papers analyze the current situation, explore the problems and propose many creative ideas and conclusions.

The reports or articles only represent the author’s opinion and conclusion, comments concerning viewpoint, conclusion and methodology are warmly welcome.

Editorial Board

November, 2012

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Comprehensive Chapter

龙头企业发展的若干思考^{*}

Discussions on the Leading Enterprise Development in China

秦 富 钟 钰

Qin Fu Zhong Yu

摘要：当前，农业和农村经济发展正处在一个新的历史阶段，为进一步增强农业产业化龙头企业带动辐射功能，提升农业产业化发展水平，农业部等9部委近期又认定了一批农业产业化国家重点龙头企业。本文以此为基础分析了不同类型龙头企业运行情况，阐述了其在发展运行中面临的主要问题，并在总结有关经验及启示的基础上，提出企业合理布局、完善利益联结机制、强化政策落实和推进企业科技创新等政策建议。

Abstract: At present, it is a new historical stage for agriculture and rural economy development, in order to further enhance the driving function of leading enterprises in agricultural industrialization, improving the level development of agricultural industrialization, Ministry of Agriculture and the other eight ministries or committee identified another number of national leading enterprises. In this paper, we analyze the operation and management (O&M) of different type of the national leading enterprises, describes the main problems during the running process, and proposes policy recommendations basing on the summary of relevant experience, such as puts forward the rational distribution in enterprise, improves the mechanism of the benefit-linking, strengthens policy implement and promotes enterprise technological innovation.

* 本文得到农业部农村合作经济经营管理总站“第五批国家重点龙头企业认定”项目的资助，特此感谢。

当前,农业竞争不仅是单个产品的竞争,而是集生产、加工、销售、科技为一体的产业化竞争。发展农业产业化核心是龙头企业,龙头企业经济实力的强弱和带动能力的大小,决定着农业产业化经营的程度、规模和成效,关系农业增效、农民增收和农村稳定。因此,通过扶持龙头企业,增强其开拓市场、创新科技、带动农户的能力,实现分散农户经营与国内外大市场的有效衔接,对推进我国农业产业化经营,促进农业和农村经济结构战略性调整,提高农业整体规模效益,发挥着重要作用。2001年后,我国已相继资格认定了四批农业产业化国家重点龙头企业(简称“国家龙头企业”,同下文)。经过近些年发展,一批富有特色的龙头企业崭露头角,在实现农产品加工增值、带动农民进入市场方面发挥了积极作用。按照规定的标准和程序,2011年国家又认定了359家企业。本文在前期综合研究的基础上,进一步分析这些“国家龙头企业”运行情况,以为相关部门及时、准确采取应对措施提供参考。

一、不同类型“国家龙头企业”运行情况

(一) 不同类型企业规模对比分析

从企业资产总额看,糖料类、棉麻类和奶类企业平均资产总额比较高,分别是23.5亿元、11.8亿元和10.9亿元,这些经济作物(动物)类产品产业集聚程度非常高,主要集中在特定的几个省份,因此企业成长比较快,其平均资产规模较大。水产类龙头企业主要集中在东部沿海发达地区,这些地区经济基础好,带动其快速增长,平均资产总额7.1亿元;粮食类“国家龙头企业”平均资产总额7亿元;茶叶类“国家龙头企业”平均资产总额2.7亿元;果蔬菜类“国家龙头企业”平均资产总额2.7亿元;林特产品类“国家龙头企业”平均资产总额6.6亿元;畜禽类“国家龙头企业”平均资产总额3.1亿元;油料类“国家龙头企业”平均资产总额6.6亿元;种子类“国家龙头企业”平均资产总额3.9亿元。

(二) 不同类型企业带动农户对比

从带动农户数量指标看,粮食类“国家龙头企业”平均带动农户数8.15万户,茶叶类“国家龙头企业”平均带动农户数4.8万户,果蔬菜类“国家龙头企业”平均带动农户数3.1万户,林特产品类“国家龙头企业”平均带动农户数2.5万户,棉麻类“国家龙头企业”平均带动农户数1.6万户,奶类“国家龙头企业”平均带动农户数2.1万户,水产类“国家龙头企