


# 吉林省农产品加工业 发展研究

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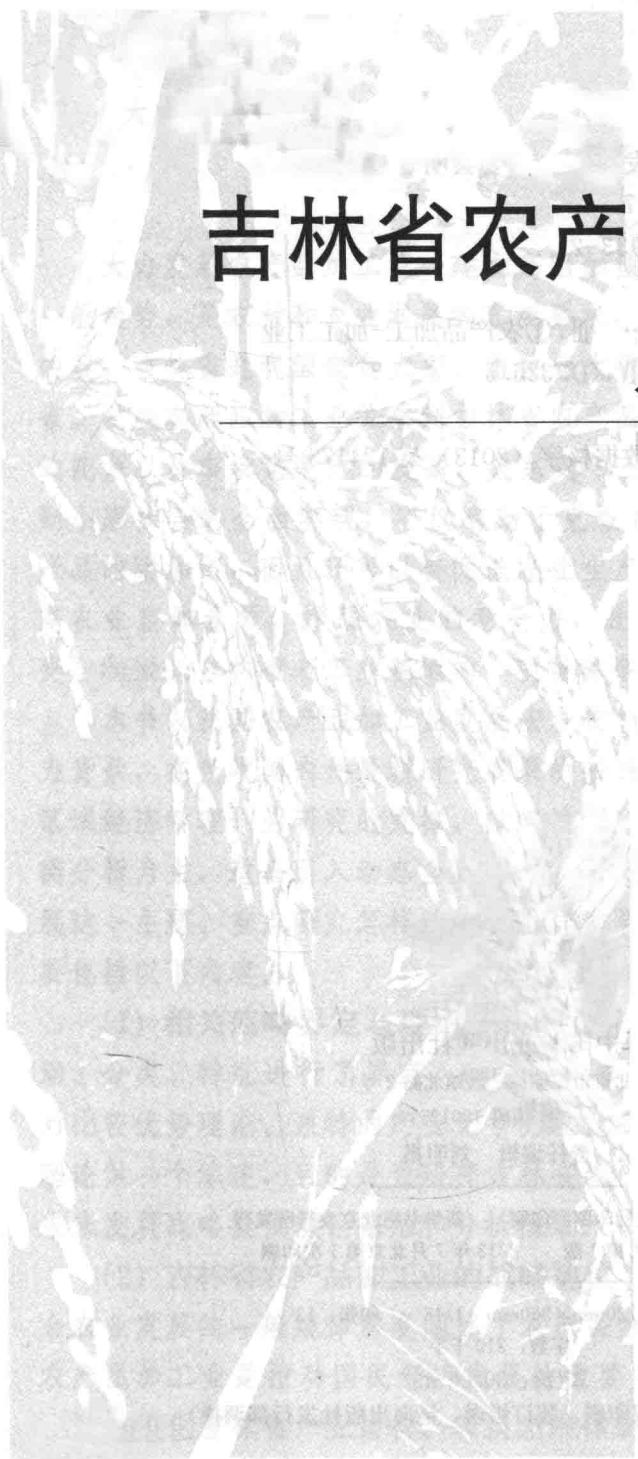
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# 吉林省农产品加工业 发展研究

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# 摘 要

大力发展农产品加工业，建立高附加值农业是现代农业发展的一般趋势，是农村和农业发展的客观要求，是区域经济发展的重要内容。吉林省是我国粮食大省、畜牧业大省，也是农产品加工业大省。发展农产品加工业关系到吉林省农产品市场应对国际市场冲击的能力以及市场竞争力的提高，关系到“三农”问题的解决，关系到小康社会的全面实现，不仅有助于克服农产品“卖难”，增加农产品的附加值，而且还可以有促进农业生产结构的调整，有助于提高农业整体素质，增强农业的竞争力，是实现农业“两个根本转变”和振兴吉林省老工业基地的一项重要举措。

本书以我国农产品加工业发展宏观支持和振兴东北老工业基地为背景，在吸收国内外最新研究成果的基础上，运用产业经济学与区域经济学理论为研究的支撑，以实地调研为基础，以静态局部均衡分析为主，适当引入动态全局方法，围绕吉林省农产品加工业发展这一主题，重点研究怎样认识与怎样发展农产品加工业问题。主要包括以下内容：

(1) **相关范畴界定与理论评析。**首先，对农产品加工业的内涵、分类、特征进行了界定，确定了本书研究的具体范围；其次，对比较优势理论、波特的产业竞争力理论和现代产业经济学的基本理论做一个综述，目的是为研究吉林省农产品加工业的竞争优势和未来发展战略提供理论基础和分析框架。

(2) **吉林省农产品加工业的战略地位。**从发展农产品加工业符合农业发展的一般规律角度阐述了农产品加工业发展的必然性；从农产品加工业是拉动国民经济发展的重要产业，对于解决“三农”问题、优化吉林省产业结构、转换经济体制具有重要意义角度阐述

了农产品加工业发展必要性；从农产品加工业市场需求和资源供给两方面阐述了吉林省农产品加工业发展的可行性。

(3) 吉林省农产品加工业发展现状及其评价。依托农业资源优势，吉林省农产品加工业有了长足的发展。总体上来看，基本上可以分为三个阶段，即改革开放前长期的传统粗加工阶段、改革开放至 20 世纪 90 年代初期的恢复和高速发展阶段、90 年代中后期的转型阶段。本书分析了吉林省农产品加工业发展的基本特征，总结了农产品加工业发展的基本规律。在与其他省份比较中，分析和评价了吉林省农产品加工业发展的绩效和发展中存在的问题，探讨了问题产生的原因，其中由产业政策失衡引起的技术进步与制度创新的滞后，是导致吉林省农产品加工业滞后的最主要原因。

(4) 吉林省农产品加工业主导产业选择。依据农产品加工业主导产业选择的理论和基准，结合市场需求潜力和吉林省资源优势，提出农副食品加工业和烟草制品业应成为吉林省农产品加工业发展的主导产业，畜产品加工业、玉米加工业和长白山生态食品加工业应为吉林省农产品加工业发展的重点。为此，明确了今后吉林省农产品加工业发展的方向和切入点。

(5) 吉林省农产品加工业区域布局优化。对农产品加工业区域布局的影响因素、布局原则、布局模式进行了分析。依据区位商和地区集中度，对吉林省农产品加工业区域布局现状进行了剖析。根据比较优势提出吉林省农产品加工业布局应实行中心突破、沿线延伸、网络开发模式。考虑原料分布和投资环境，应实施公司与生产工厂异地布局。公司布局在大城市的开发区，以便获得技术和市场信息；工厂布局在县域中心城镇，以便接近原料产地。以县域中心城镇为依托，建立以“产业聚集、资源整合、公共平台、政府支持”为主要特征的农产品加工产业园区或基地，带动县域中心城镇经济的发展。

(6) 吉林省农产品加工业产业化组织模式构建。在阐述农产品

加工业与农业的依存关系的基础上,对现行的农产品加工业产业化组织模式——纯粹的市场、“加工企业+农户”、“加工企业+中介组织+农户”和资产联结产权介入的效率进行理论与实证的对比分析,探讨了吉林省农产品加工业产业化组织模式的演变方向,阐述了整体提升农民组织化程度以及合理配置产业资源等方面的问题。对农户销售行为的影响因素进行 Logistic 模型分析,据此提出优化农户销售行为的合理性建议。

(7) **吉林省农产品加工业竞争力的提升。**分析了农产品加工企业内部环境,采用竞争力评价指标体系从横向对比角度对吉林省农产品加工业产业竞争力进行了评价,运用偏离—份额分析法从纵向动态角度对吉林省农产品加工业部门结构竞争力进行了探讨,利用波特五种力量模型从农产品加工业内部竞争因素角度对吉林省农副食品加工业的竞争力进行了剖析。采用 DEA 方法对吉林省农产品加工企业的效率问题进行实证分析,从不同层次、不同区域、不同产业三个角度对比分析了企业技术效率的差异,并验证技术装备水平、产能利用率等因素影响显著。进而得出提升吉林省农产品加工业竞争力的路径。

(8) **吉林省农产品加工业产业政策支持。**当前制约吉林省农产品加工业发展的因素很多,其中最主要的因素是吉林省还没有形成系统的、科学的农产品加工业产业政策,缺乏对农产品加工业实质性的引导和扶持。本书从财税支持政策、金融支持政策和技术政策向农产品加工业延伸的空间阐述支持农产品加工业发展的路径,并分别提出了完善吉林省现行的财税支持政策、金融支持政策和技术政策的相关建议。

**关键词:** 农产品加工; 主导产业; 区域布局; 产业组织; 产业政策; 吉林省

# Abstract

In modern agriculture, it is the general trend, as well as the objective request in developing countryside and agriculture, to develop processing industry of agricultural products and to set up high value-added agriculture. And it is the important content of regional economic development. Jilin Province is the main province of grain, animal husbandry and farming industries in China. Developing farming industry of Jilin Province concerns the farm products market's capability of facing the shock of international market and how to improve the competing power in Jilin Province. It also concerns the settlement of the problem about "agriculture, countryside and peasant" and the realization of the ideal society. Therefore farming industry contributes a lot not only to solving the problem that the agricultural products are difficult to sale and to increase the added value of agricultural products, but also to adjusting the structure of agricultural production effectively and improving the quality-oriented of the agriculture. Meanwhile, it can strengthen the competitiveness of agriculture in Jilin Province. So it is also an important measure to realize the two basic transitions of agriculture and to revitalize the industrial base in Northeast China.

The background of this book is the macro supporting of farming industry in China and revitalizing the industrial base in Northeast China. On the basis of absorbing the latest scientific payoffs at home and abroad, this book takes investigation as the foundation, uses industrial economic and region economic theory for research strut, adopts the static partial equilibrium analysis and introduces suitable dynamic method. Surrounding the theme of improving the competitiveness of farming industry in Jilin Province, it is the key point to solve the problem how to view and develop



farming industry in Jilin Province. This text includes the following main contents:

(1) Definition of related category and theory evaluation. Firstly, the paper defines the farming industry connotation, the classification as well as the characteristic, and determines concrete research scope. Secondly, it makes a summary about the comparison superiority theory, the industrial competitive power theory and the elementary theory of modern industrial economics to study the competitive advantage of farming industry in Jilin province and to provide the rationale base and the analysis frame for the future development strategy.

(2) Strategic position of farming industry in Jilin Province. Firstly, the book elaborates the inevitability of development of agricultural product processing industry according to the rule which expanding agricultural product processing industry conforms to the agricultural development. Secondly, it expands the necessity of development of agricultural product processing industry from the angle that the agricultural product processing industry is the important industry which draws the national economy development, solves a problem about “agriculture, countryside and peasant”, optimizes the industrial structure of Jilin Province, and transforms the economic system. Lastly, it elaborates the feasibility of development of agricultural product processing industry in Jilin Province from the two aspects of the demands of the market of agricultural product processing industry and the resources supply.

(3) Current development situation and appraisalment of the farming industry in Jilin Province. Relying on the advantage of agricultural resources, the farming industry has got considerable development in Jilin Province. On the whole, it can be divided into three stages such as slow developing stage before the reform and opening-up, recovery stage from the reform and opening-up to the earlier 1990s and new growth stage after the mid-1990s. It has analyzed the new essential feature of the growth

stage of farming industry in Jilin Province. It also concluded the basic law of the development of farming industry. By comparing with other provinces, this book has analyzed and appraised the performance of developing farming industry in Jilin Province and discovered and discussed the problems existing in the development. Among these, industrial policy out-of-balance lags technology progress and system innovation which is the main reason causing the farming industry of Jilin Province to lag behind.

(4) Choice of leadership industry of agricultural products processing industry in Jilin province. The book puts forward that the agricultural subsidiary food stuffs processing industry and the tobacco product industry should become the leadership industry of agricultural products processing industry in Jilin Province, according to the choice theory and the standard of agricultural products processing industry leadership industry, by uniting market demand potential and resources superiority of Jilin Province. The key point to development of agricultural product processing industry is livestock product processing industry, corn processing industry and Changbai Mountain ecology food processing industry in Jilin Province. Therefore, it charts the orientation and breakthrough point to development of agricultural products processing industry in Jilin province in the future.

(5) Region layout optimization of farming industry in Jilin Province. The book has carried on the analysis to the influence factor, the layout principle, and the layout pattern of region layout of farming industry. Based on the position business and the local concentration degree, it has analyzed the present situation of region layout of farming industry in Jilin Province. According to the theory of comparison superiority, it proposes the farming industry of Jilin Province should carry out the pattern of breaking from center, extending along the lines, exploiting in network. Considering raw material distribution and investment environment, it should make the layout different between company and factory. Company layout is in the development zone of big city in order to obtain the

technology and the market information, and factory layout is in center cities of county territory in order to approach places of origin of raw materials. It should establish the specialized area or the base of agricultural products processing industry, which depends on the center cities of county territory, and take “industrial gathers, resources conformity, public platform, government support” as the main characteristic in order to impetus the economy development in center cities of county territory.

(6) Construction of industrial production organization pattern of farming industry in Jilin Province. Based on the elaboration of relation between the agricultural products processing industry and the agriculture, this book carries on the contrast analysis to the present farming industry industrial production organization pattern—“company peasant household”, “company-intermediary-household” and the property joint property right involvement movement mechanism, discusses the evolution direction of industrial production organization pattern of farming industry in Jilin Province, and elaborates the problem of promoting the whole farmer organization degree as well as optimizing the allocation of resources and so on. by the Logistic model analysis the influencing factors of the sales practices of farmers and put forward reasonable suggestions to.

(7) Competitive power promotion of farming industry in Jilin Province. Firstly, it carries on the industrial competitive power analysis to the whole farming industry by using the competitive power appraisal target system from the crosswise contrast angle. Secondly, it takes utilization deviation-share analytic method from the longitudinal contrast angle to analyze the industry competitive power of farming industry of Jilin Province. Finally, it analyzes the competitive power situation of agricultural subsidiary foodstuffs processing industry from the angle of the interior competition factor of agricultural products processing profession by using the Porter's Five Forces Models. This book analyzes the efficiency of agricultural products processing enterprises by using the DEA method. It

compares and analyzes the differences in technical efficiency of enterprises from different levels, in different regions and different industries. Then, it verifies the technical equipment, capacity utilization and other factors significantly. It reaches the route of promoting competitive power of farming industry in Jilin Province.

(8) Agricultural products processing industry policy support in Jilin Province. Many factors restrict the development of agricultural products processing industry in Jilin Province. The most important factor is systematic and scientific industry policy about agricultural products processing has not formed in Jilin province. There is also lack of substantive guidance and support. This book states the route of agricultural product processing industry development from support policy of fiscal and tax, financial support policy and technology policy outspreading to the agricultural product processing industry. And then, it puts forward the fiscal and taxation support policy, financial support policy and technology policy recommendations.

**Key words:** Farming Processing; Leading Industry; Regional Layout; Industrial Organization; Industrial Policy; Jilin Province

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# 1 绪论

## 1.1 问题的提出

改革开放 30 多年来，我国的农业发展经历了 3 个阶段。第一阶段是 20 世纪 80 年代到 90 年代中期，主要是依靠制度的变迁和技术的进步，追求农产品的产量，满足居民温饱问题。第二阶段是 1998—2002 年，农产品总量基本平衡，丰年有余，出现结构性和区域性过剩，居民生活进入小康，开始重视农产品的质量。第三阶段是 2002 年以来，农民增收、农业增效成为主题，农业进入靠加工业带动提高其综合效益，实现农业向加工业转变的一个新的阶段。第三阶段主要标志是：主要农产品的生产方式已经由追求温饱的数量型扩张转变为服务于健康消费、文明消费的内涵型扩张，主要农产品的使用价值实现已经由直接走上餐桌的最终消费品转变为需要进一步加工为制成品才能使用的中间产品，农产品价值实现依赖于产业链的延伸、资源的综合利用。这表明发展农产品加工业成为农业进入新阶段的必然。

农产品加工使农业生产的内涵深化和外延扩大，就生产内容来讲，它是农业生产的继续和延伸，体现为农业生产资源由低效益产业向高效益产业配置，由低生产率向高生产率转移，从而拉长产业链。它作为生产的范畴，通过对农产品的初、深、精、细等不同层次的加工，可使农产品多次增值，各种资源得到综合利用。而作为农业产业化关键环节，农产品加工业的快速发展不仅为扩大农产品市场、推动农业和农村经济整体效益的提高发挥了重大作用，而且还会对国民经济的发展产生巨大的乘数效应。发展农产品加工业，可以延伸农业产业链，使农业摆脱仅提供原料和初级加工品的地位，成为一种“从田间到餐桌”的完整产业，提高农产品的附加值，降低农民纯粹从事农业生产的风险，有利于提高农业综合经济效益和增加农民收入；发展农产品加工业，可以发挥低廉的劳务成本，通过扩大农产品深加工，提高产品档次和质量，促进农产品出口，有利于提高农业的国际竞争力；发展农产品加工业，以农业产业化经营为基本途径，



吸纳农业剩余劳动力就业, 提高技术装备能力和水平, 有利于推进农业现代化。因此, 发展农产品加工业具有方向性、全局性、战略性的意义。

加快农产品加工业发展更是体现吉林省区域经济特色, 提高区域竞争力的要求。吉林省是全国著名的农业资源大省和重要商品粮生产基地, 具有自然资源、农业资源等资源优势, 拥有玉米加工、畜产品加工和特产品加工等产业优势, 享有振兴东北老工业基地和国家扶持农产品加工业的良好机遇, 但吉林省经济总量小, 经济结构以国有经济为主, 产业结构中第一产业比重大, 体制和结构矛盾突出。伴随着我国农业和农村经济发展进入新阶段, 特别是在我国加入 WTO 之后, 吉林省作为提供农产品的主要产区出现了传统优势农产品价格较低, 波动性大, 结构调整难、进入市场难、农民增收难, 农业经济效益难以提高, 县域经济缺乏活力等问题。如何化解体制与结构矛盾、农产品产销矛盾、增产与增收矛盾, 对吉林省这个农业资源大省是一个严峻的考验。在这种背景下, 合理的选择应是以建设现代农业为目标, 立足比较优势, 以丰裕的农业资源为基础, 大力发展农产品加工业。这不仅有利于解决日益突出的“三农”问题, 而且是振兴吉林省老工业基地、走新型工业化道路的战略选择, 是推进吉林省工业化、城市化, 实现农业现代化的战略重点, 是优化吉林省产业结构和转换经济体制的有效途径。

吉林省发展农产品加工业不但是必要的, 而且是可行的。作为国家重要的粮食生产省份, 吉林省具有丰富的农产品资源, 发展农产品加工业具有独特的资源优势。随着我国人民生活水平的不断提高和全面建设小康社会的推进, 农产品加工产品消费将逐步增加, 市场潜力巨大。尤其是吉林省地处世界三大黄金玉米带, 长期以来, 玉米产业一直是传统的优势产业, 种植面积占耕地面积的 50% 以上, 年产量占粮食总产量的 70% 以上, 玉米的常年产量在 1 700 万吨左右, 可为社会提供商品玉米 1 400 万~1 500 万吨。在现阶段, 玉米直接作为口粮消费的数量仅占 10% 左右, 大部分是作为畜牧业和加工业的原料。玉米与小麦、水稻相比, 它的优势在于加工利用。玉米是加工程度最高的粮食作物, 可加工的产品多达几十类 4 000 多个品种 (郭庆海, 2002), 玉米加工利润率至少 30%, 甚至 1~2 倍, 高科技可以使玉米增值 5~8 倍, 有的几十倍, 甚至上百倍, 最高氨