

2014 China Agricultural Outlook Conference

2014中国农业展望大会，北京，4月20-21日



农业补贴政策及展望

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汇报提纲

1. 中国农业补贴政策框架
2. 农业补贴政策面临的困境
3. 未来补贴政策展望



1. 中国农业补贴政策框架

1.1 现行农业补贴政策框架

框架：生产、流通/市场、收入、环保

- 2004年：以粮食直补为核心的补贴陆续出台
- 2004年-2014年：11个一号文件保证了各项政策的顺利实施
- 2006年：取消农业税



主要补贴措施列表

- **四补贴：种粮直补、农资补贴、良种补贴、农机补贴、储备补贴**
- 配方施肥补助、土壤有机质提升补助、柴油补贴
- 畜牧良种补贴、动物防疫补助、能繁母猪补贴
- 防灾减灾稳产增产技术补助、农作物虫害防控
- 草原生态保护补助奖励
- 渔业资源保护补助
- 农业保险保费补贴
- **最低收购价、临时收储、目标价格**



主要农业补贴支出（单位：亿元人民币）

	种粮直补	农资补贴	良种补贴	农机补贴	总量	占种植业产值比	占农业产值比
2004	116	—	29	1	146	0.80%	0.40%
2005	132	—	38	3	173	0.89%	0.44%
2006	142	120	40	6	308	1.44%	0.76%
2007	151	276	67	20	514	2.08%	1.05%
2008	151	716	121	40	1028	3.39%	1.64%
2009	151	795	199	130	1275	3.74%	1.91%
2010	151	835	204	155	1345	3.63%	1.93%
2011	151	860	220	175	1406	3.35%	1.73%
2012	151	1078	224	215	1668	3.55%	1.86%

资料来源：根据《中国农业年鉴》及《中国农业发展报告》整理。

历年最低收购价

	白小麦	红小麦	混合麦	早籼稻	中晚籼稻	粳稻
2004	-	-	-	1.40	1.44	1.50
2005	-	-	-	1.40	1.44	1.50
2006	1.44	1.38	1.38	1.40	1.44	1.50
2007	1.44	1.38	1.38	1.40	1.44	1.50
2008 一次	1.50	1.40	1.40	1.50	1.52	1.58
二次	1.54	1.44	1.44	1.54	1.58	1.64
2009	1.74	1.66	1.66	1.80	1.84	1.90
2010	1.80	1.72	1.72	1.86	1.94	2.10
2011	1.90	1.86	1.86	2.04	2.14	2.56
2012	2.04	2.04	2.04	2.40	2.50	2.80
2013	2.24	2.24	2.24	2.64	2.70	3.00
价格比*	1.56	1.62	1.62	1.89	1.88	2.00

注：价格比为2013年价格与初始年份的对比。

1.2 政策效果

■ 总体效果：很好

- 调动生产积极性：保持了粮食产量十连增

- 拓宽增收渠道：保证了农民收入十连快

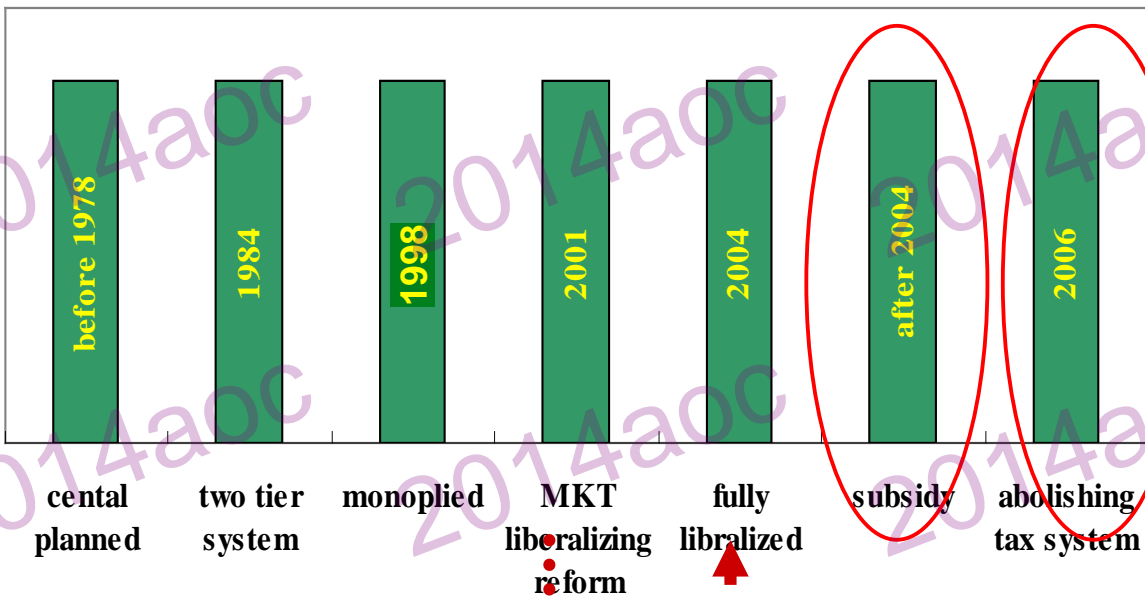
【2004-2011年四补贴占农民收入：0.7%→3%】

【2011年, 三项补贴占每亩收益的:22%】

■ 分项效果：差异



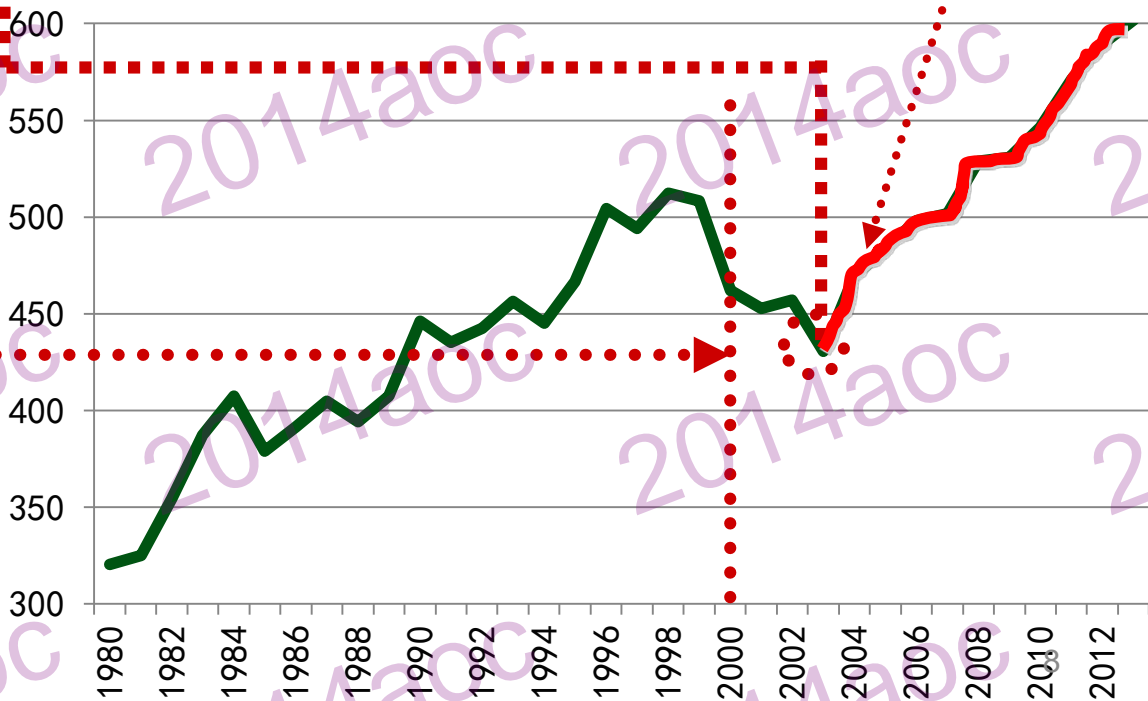
Grain MKT Reform of China



11 No.1 Documents

补贴政策
和效果

总体效果：显著



《粮食综合性收入补贴政策的作用路径》（2009）：

- **粮食播种面积**：显著正向关系。
- **粮食生产投资**：显著正面激励效应
 - 中等财富农户对补贴政策敏感性最强
 - 高财富水平农户的投资完全缺乏影响
 - 年轻农户对补贴政策的敏感性更强
 - 对生产性固定资产投资没有显著影响



■ **对时间分配：** 对户主非农劳动参与有显著负效应

- 对配偶非农劳动决策影响不显著

- 政策诱导了农户分配更多的劳动时间用于农业而抑制非农劳动

- 在农业内部工资低于非农工资情况下，政策对农户收入的负面效应将可能超过补贴水平



2 现行农业补贴政策的困境

2.1 农业面临的新形势

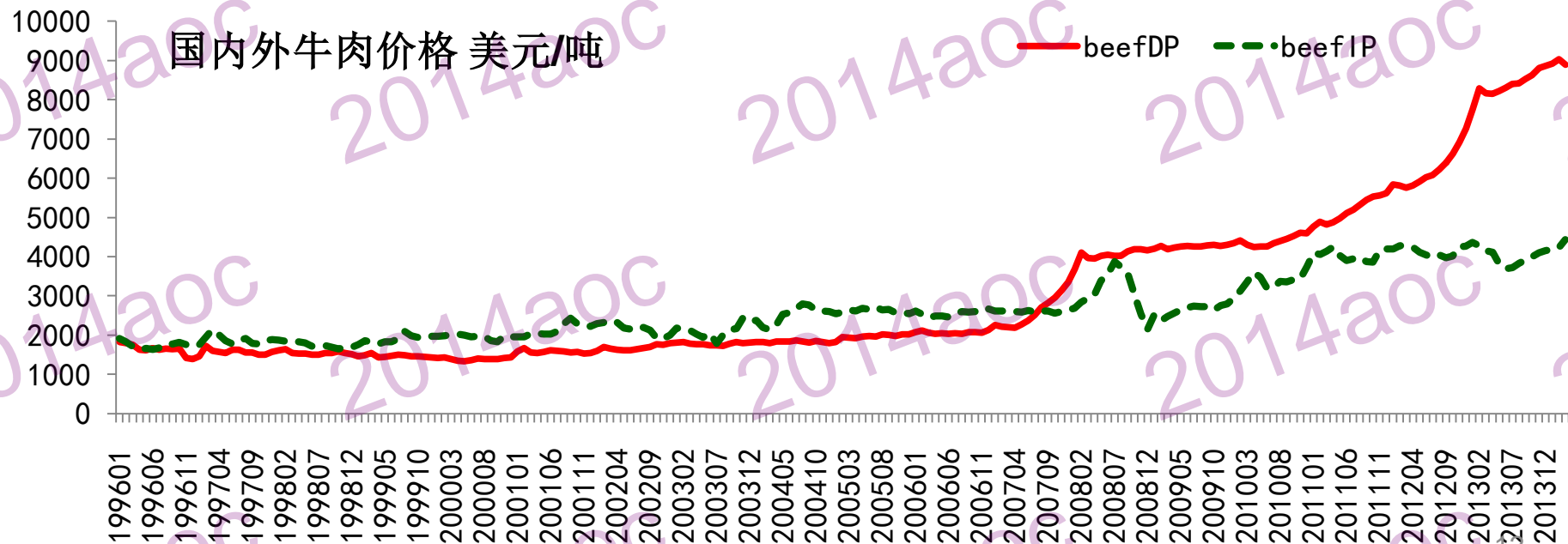
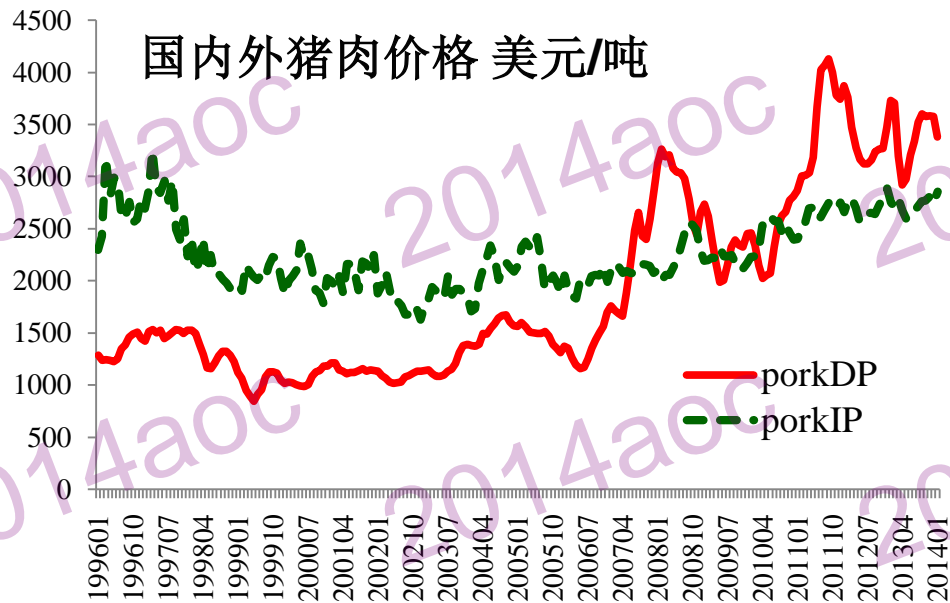
- 生产的约束性和风险性

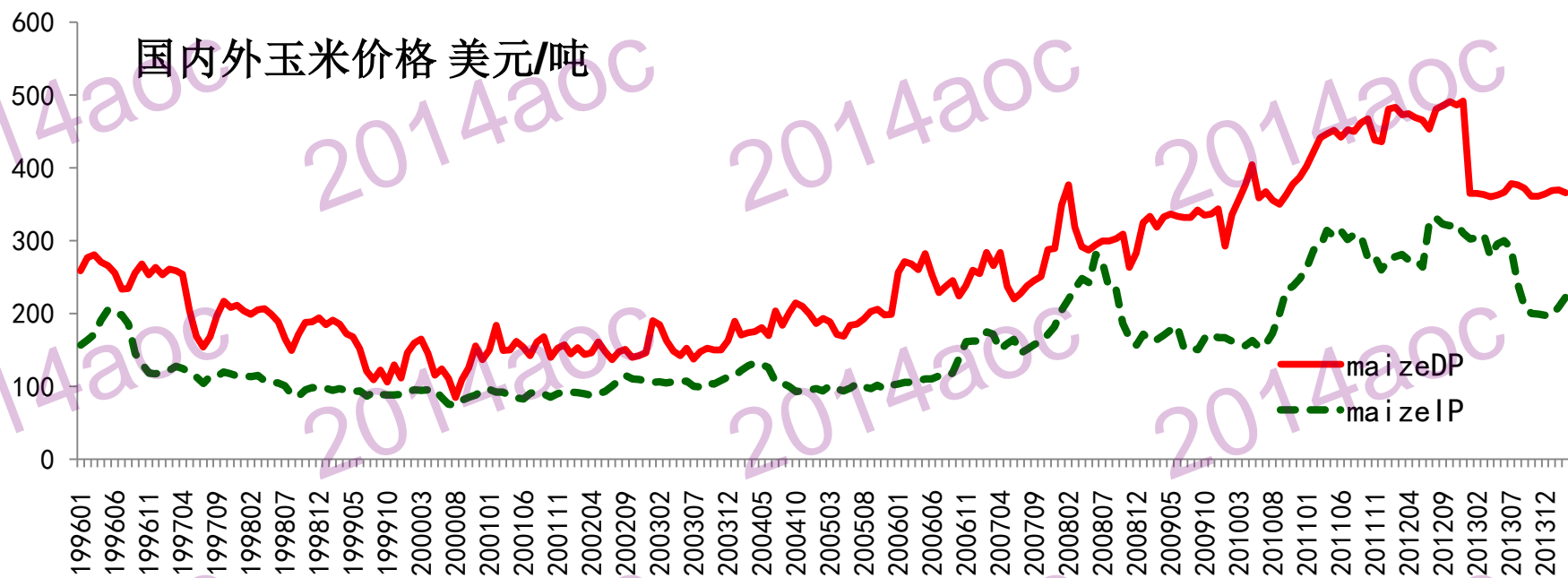
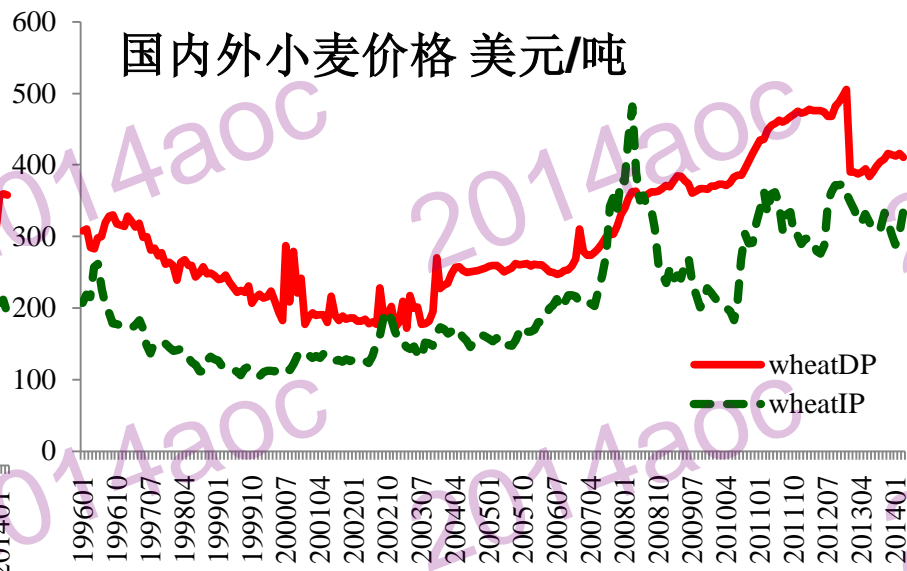
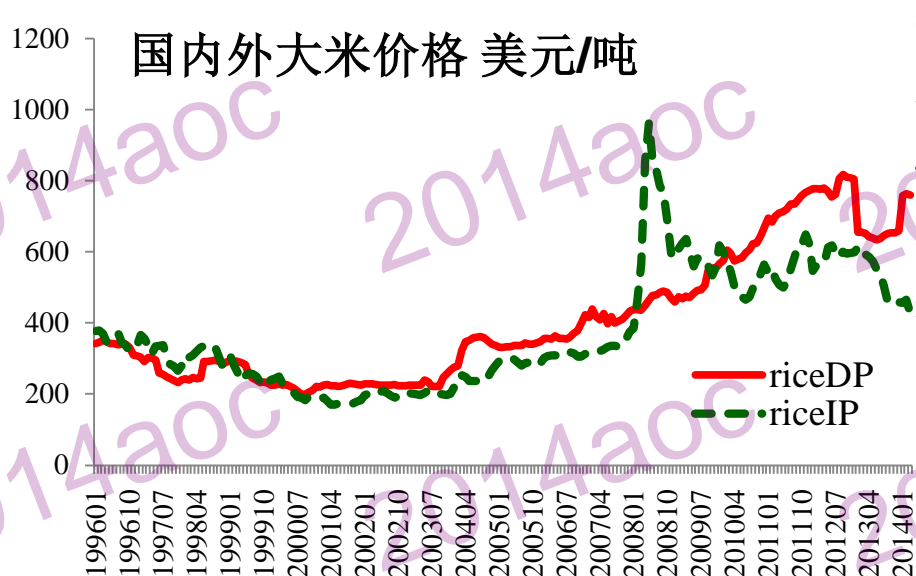
- 需求的刚性和不确定性

- 价格的波动性：多数农产品价格超过国际市场

- 进口的依赖性：多数农产品呈现净进口







2014年第一季度主要农产品平价价格

		价格（美元/吨）	国内/国际
牛肉	国内	8948.75	2.09
	国际	4282.00	
鸡肉	国内	2286.66	1.99
	国际	1150.00	
猪肉	国内	3161.08	1.11
	国际	2856.00	
小麦	国内	413.05	1.34
	国际	308.47	
大米	国内	760.08	1.69
	国际	450.67	
玉米	国内	368.15	1.76
	国际	209.55	
大豆	国内	767.07	1.44
	国际	532.97	



2 现行农业补贴政策的困境

2.2 农业补贴政策的困境：主要来自外部的压力

■ 四大补贴：缓慢前行

■ 最低收购价：步履维艰

■ 临时收储：必须改革

■ 目标价格：恐难凑效



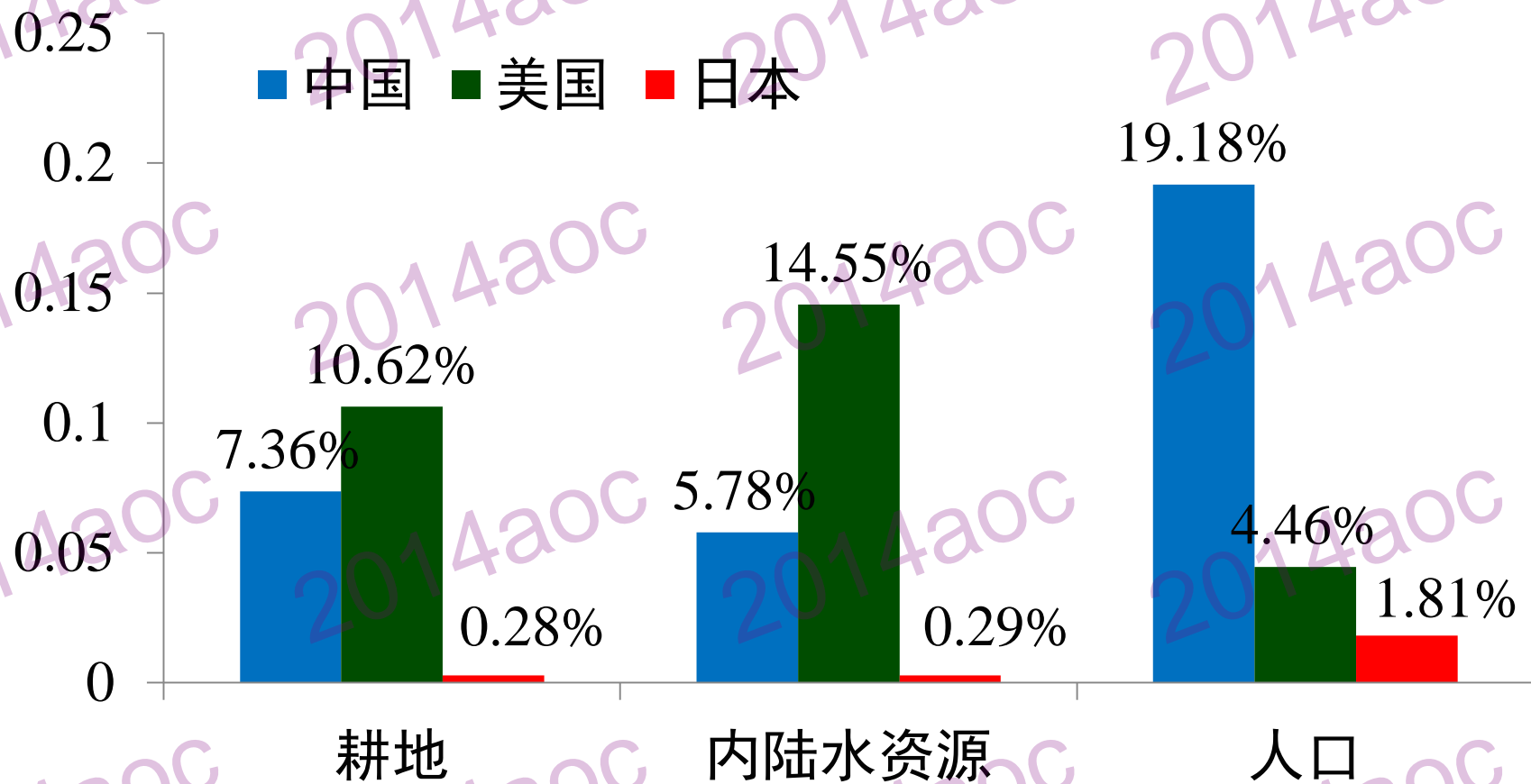
3. 未来补贴政策展望

3.1 政策设计的基本出发点

- 必须对农业继续支持、补贴
- 必须满足绿箱政策和微量允许要求，符合WTO规则
- 必须充分利用两种资源、两个市场

【中国的资源禀赋和经济社会需求是不协调的】





●资源禀赋：7.40%的全球耕地资源 + 5.78%的内陆水

●基本任务：养活19.18%的世界人口



3.2 主要政策改革

■ 四大补贴：继续实施，执行措施逐步规范

● 短期：大米、小麦、玉米

● 长期：确保大米和小麦，目标：主要是产量
考虑玉米，目标：农民收入，兼顾产量

● 改革：粮食直补、生产资料直补→收入型补贴
种子补贴→转向普惠性或并入收入型补贴
农机补贴→视农机化水平，逐步调整



3.2 主要政策改革

■ 最低收购价：步履维艰

- 确保水稻和小麦。继续实施，引导面积
- 灵活调整玉米。视WTO允许的补贴空间
- 密切监测补贴空间。8.5%的微量允许，单个品种和综合支持。



3.2 主要政策改革

■ 临时收储：必须改革

- 只保主产省，目标：产量和收入兼顾，优先考虑农民收入
- 棉花和大豆：已进行“目标价格”试点
- 糖料、油料作物：适当市场化调节



- **目标价格：**积极试点，有很多具体问题需解决
 - 政府补贴包袱减轻，农户和企业（包括国企）需储备过剩产品
 - 目标价格如何确定
 - 具体操作措施，如何补到分散的农户手中？农户申报？通过收购企业？
 - 最大问题：一些产品会突破微量允许空间



棉花目标价格分析

- 2013年棉花临时收储价20400元/吨（皮棉）。
- 2013年国际市场平均16000元。2014年1月进口棉中国主港到岸报价按1%关税计算为**14694**元/吨。
- 拟确定**19800**元的目标价格，每吨补贴约3800元。
- 如果照此从全国来看，远远超过8.5%的微量许可
- 近年来棉花价格见下图。



Figure 10.11. World and China cotton prices monthly, 2005-12



Source: Beijing Cotton Outlook, Cotlook Ltd. and the International Monetary Fund.

3.3 其他政策建议

- 总体原则

- 由流通向生产转移、由生产向收入过渡

- 未来取向

- 绿箱政策

- 强化保险补贴

- 强化风险管理工作

- 农业部强化风险管理机构和人员

- 积极设计各种风险管理工具

- 美国有关农场风险管理的借鉴



美国农业部

17 职能机构中，涉及市场营销和风险管理的：

- 风险管理局 (RMA)
- 农业营销服务局 (AMS)
- 经济研究局 (ERS)
- 农场服务局 (FSA)
- 农村发展局 (RD)
- 国家农业图书馆 (NAL)
- 国家农业统计局 (NASS)



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- ▶ Bulletins and Handbooks
- ▶ Crop Policies and Pilots
- ▶ Federal Crop Insurance Corp
- ▶ Field Offices
- ▶ Frequently Asked Questions
- ▶ Information Browser
- ▶ Laws and Regulations
- ▶ Livestock Policies
- ▶ Reinsurance Agreements



Tuesday, 7/16/2013

Risk Management Education and Outreach

African American producers from Arkansas and Mississippi attended free risk management training funded by RMA in 2012.

RMA Training Highlights

[What's New](#) | [Newsroom](#) | [USDA Blog](#)

Federal Crop Insurance Program Broadens Options for Organic Producers

Visit the RMA organics spotlight for more information. Fact Sheet. Secretary Vilsack's Vision.

Annual Forage Rainfall Index (RI)

Annual Forage Grid ID Locator, Decision Support, and Historical Indices Tool is now available.

Tobacco Warehouseman/Broker Sentenced

Restitution of over \$13 Million was also imposed.

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Welcome to Farm Risk Planning

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USDA's Risk Management Agency regulates and supervises the Federal crop insurance program. More farmers and ranchers participate in and have more at stake in the crop insurance program than any other USDA program. RMA also helps farmers and ranchers learn how to improve their risk management skills.

To explore your risk management options, please select any of the icons above to see a table of contents.

When you are done, we encourage you to fill in your [Risk Management Checklist](#), and complete your [SWOT Analysis](#).

After that, we hope you will take whatever action you feel necessary to better manage both your downside risks and your up-side opportunities.

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Policies

2015 | 2014 | 2013 | 2012 | 2011 | 2010 | Archive

Overview

Buying a crop insurance policy is a risk management tool available to agricultural producers. Producers should consider how a policy will work in conjunction with their other risk management strategies to insure the best possible outcome each crop year. Crop insurance agents and other agri-business specialists can assist producers in developing a good management plan.

RMA provides policies for more than 100 crops. Policies typically consist of general crop insurance provisions, specific crop provisions, policy endorsements and special provisions. See RMA's county crop program listings for information about crop policies available in specific counties and states.

Policies are available for most commodities; however, some policies are being tested as pilots or have not been expanded nationwide so are not available in all areas.

Insurance Plans provide different types of insurance coverage to specific commodities:

- **Actual Production History (APH)** policies insure producers against yield losses due to natural causes such as drought, excessive moisture, hail, wind, frost, insects, and disease. The producer selects the amount of average yield to insure; from 50-75 percent (in some areas to 85 percent). The producer also selects the percent of the predicted price to insure; between 55 and 100 percent of the crop price established annually by RMA. If the harvested plus any appraised production is less than the yield insured, the producer is paid an indemnity based on the difference. Indemnities are calculated by multiplying this difference by the insured percentage of the price selected when crop insurance was purchased and by the insured share.
- **Actual Revenue History (ARH)** plan of insurance has many parallels to the APH plan of insurance, with the primary difference being that instead of insuring historical yields, the plan insures historical revenues. The policy is structured as an endorsement to the Common Crop Insurance Policy Basic Provisions. It restates many of the APH yield procedures to reflect a revenue product. Each crop insured under ARH has unique crop provisions. Like current revenue coverage plans, the ARH pilot program protects growers against losses from low yields, low prices, low quality, or any combination of these events.
- **Adjusted Gross Revenue (AGR)** and **AGR-Lite** policies insure revenue of the entire farm rather than an individual crop by guaranteeing a percentage of average gross farm revenue, including a small amount of livestock revenue. The policies use information from a producer's Schedule F tax forms, and current year expected farm revenue, to calculate policy revenue guarantee.
- **Area Risk Protection Insurance (ARPI)** is an insurance plan that provides coverage based on the experience of an entire area, generally a county. ARPI replaces the Group Risk Plan (GRP) and the Group Risk Income Protection Plan (GRIP).
- **Commodity Exchange Price Provisions (CEPP)**



谢谢，请提宝贵意见！

中國農業大學