

CHINA’S 300 MILLION “PEASANT WORKERS”: POST-COVID TRENDS

ZHAO Litao

EAI Background Brief No. 1785

The National Bureau of Statistics’ annual survey reports on “peasant workers”—rural adults engaged in non-farm employment for at least six months a year—have uncovered profound and transformative trends that will significantly shape China’s social and economic landscape in the post-COVID era. This crucial labour force segment is nearing its growth limit, signalling a pivotal shift in development.

Peasant workers are increasingly working closer home, reducing inter-provincial migration and favouring central and western China over the traditionally dominant eastern regions. There is also a marked shift in employment from the manufacturing and construction sectors to the service sector. These changes have caused peasant workers’ income growth to lag behind the national average since the mid-2010s, undermining their economic stability.

With nearly 300 million peasant workers—40% of the national workforce—these trends carry profound implications for China’s economic and social fabric. The tapering off of this vast labour force may accelerate China’s transition to a higher productivity economy, fostering innovation and urbanisation. However, this transition faces the challenge of social dislocation and disruption. Strategic policy responses are essential, focusing on boosting income growth, facilitating urban integration, supporting ageing workers and promoting balanced regional development to ensure that peasant workers are not left behind in China’s evolving economic landscape.

(Click on the link to read the above in [Chinese](#), [French](#) and [Spanish](#))

Date of Publication: 12 September 2024

Chinese:

中国 3 亿“农民工”：后疫情趋势

国家统计局关于“农民工”（每年从事非农就业至少六个月的农村成年人）的年度调查报告揭示了深刻的变革性趋势，这些趋势将显著塑造后中国的社会经济格局。新冠时代。这一关键的劳动力部分正接近其增长极限，这标志着发展的关键转变。

农民工越来越多地在离家更近的地方工作，这减少了农民工人口的跨省流动，并有利于中国中部和西部地区，而不是传统上占主导地位的东部地区。就业也明显从制造业和建筑业转向服务业。这些变化导致 2010 年代中期以来农民工收入增长落后于全国平均水平，破坏了农民工的经济稳定。

由于中国有近 3 亿农民工（占全国劳动力的 40%），目前的趋势对中国的经济和社会结构产生了深远的影响。庞大劳动力的逐渐减少可能会加速中国向生产力更高的经济转型，促进创新和城市化。然而，这种转变面临着社会混乱和破坏的挑战。战略性政策应对至关重要，重点是促进收入增长、促进城市一体化、支持老龄化工人和促进区域平衡发展，以确保农民工在中国不断变化的经济格局中不被抛在后面。

French:

LES 300 MILLIONS DE « TRAVAILLEURS PAYSANS » DE LA CHINE: TENDANCES POST-COVID

Les rapports d'enquête annuels du Bureau national des statistiques sur les « travailleurs paysans » – des adultes ruraux engagés dans un emploi non agricole pendant au moins six mois par an – ont révélé des tendances profondes et transformatrices qui façonneront de manière significative le paysage économique et social de la Chine post-COVID. Ce segment crucial de la main-d'œuvre approche de sa limite de croissance, signalant un changement crucial en matière de développement.

Les travailleurs paysans travaillent de plus en plus près de chez eux, réduisant ainsi la migration interprovinciale et favorisant la Chine centrale et occidentale par rapport aux régions orientales traditionnellement dominantes. On observe également un déplacement marqué de l'emploi des secteurs manufacturier et de la construction vers le secteur des services. Ces changements ont entraîné une croissance des revenus des paysans restée inférieure à la moyenne nationale depuis le milieu des années 2010, compromettant leur stabilité économique.

Avec près de 300 millions de travailleurs paysans, soit 40 % de la main-d'œuvre nationale, ces tendances ont de profondes implications sur le tissu économique et social de la Chine.

La diminution de cette vaste main-d'œuvre pourrait accélérer la transition de la Chine vers une économie à plus forte productivité, favorisant l'innovation et l'urbanisation. Cependant, cette transition se heurte au défi de l'instabilité sociale. Des réponses politiques stratégiques sont essentielles, axées sur la hausse des revenus, la facilitation de l'intégration urbaine, le soutien aux travailleurs vieillissants et la promotion d'un développement régional équilibré afin de garantir que les travailleurs paysans ne soient pas laissés pour compte dans un paysage économique chinois en évolution.

Spanish:

**LOS 300 MILLONES DE “TRABAJADORES CAMPESINOS” DE CHINA:
TENDENCIAS POSTERIORES AL COVID**

Los informes de la encuesta anual de la Oficina Nacional de Estadísticas sobre los “trabajadores campesinos” (adultos rurales que trabajan en empleos no agrícolas durante al menos seis meses al año) han revelado tendencias profundas y transformadoras que moldearán significativamente el panorama social y económico de China en el período post-agrícola. Era COVID. Este segmento crucial de la fuerza laboral se está acercando a su límite de crecimiento, lo que indica un cambio fundamental en el desarrollo.

Los trabajadores campesinos trabajan cada vez más cerca de casa, lo que reduce la migración interprovincial y favorece a China central y occidental sobre las regiones orientales tradicionalmente dominantes. También hay un marcado cambio en el empleo de los sectores manufacturero y de la construcción al sector de servicios. Estos cambios han provocado que el crecimiento de los ingresos de los trabajadores campesinos esté por detrás del promedio nacional desde mediados de la década de 2010, socavando su estabilidad económica.

Con casi 300 millones de trabajadores campesinos (el 40% de la fuerza laboral nacional), estas tendencias tienen profundas implicaciones para el tejido económico y social de China. La reducción gradual de esta enorme fuerza laboral puede acelerar la transición de China hacia una economía de mayor productividad, fomentando la innovación y la urbanización. Sin embargo, esta transición enfrenta el desafío de la dislocación y la perturbación social. Las respuestas políticas estratégicas son esenciales, centrándose en impulsar el crecimiento de los ingresos, facilitar la integración urbana, apoyar a los trabajadores de edad avanzada y promover un desarrollo regional equilibrado para garantizar que los trabajadores campesinos no queden atrás en el cambiante panorama económico de China.

Executive Summary

1. China's "peasant workers", rural adults who are engaged in non-farm employment for at least six months annually, are nearing their population peak. The end of the Zero-COVID policy in late 2022 did not bring about a drastic rebound in peasant worker numbers, with only a 0.6% increase in 2023, reaching a total of 298 million.
2. An emerging trend shows peasant workers opting to work closer home, leading to increased within-provincial migration and a growing share of central and western provinces as destinations for peasant workers. This shift is driven by several factors, including factory closure/relocation in coastal areas, enhanced job opportunities in inland regions and the ageing of first-generation migrant workers.
3. There has been a notable shift in employment from the manufacturing and construction sectors to the service sector. The construction sector saw a significant decline in employment share, falling from 19.0% in 2021 to 15.4% in 2023, accelerated by regulatory crackdowns on real estate developers.
4. The income growth of peasant workers has been slower compared to the national average, partly due to locational and sectoral changes. This slower income growth has implications for rural-urban inequalities in household income, consumption and investment.
5. Despite increased identification with receiving cities and participation in community activities, peasant workers face significant barriers to urban integration, particularly by the decades-old *hukou* system. Efforts to increase urbanisation rates have not kept pace with migration trends in the past decade.
6. A growing concern is the ageing migrant workforce. Older workers, notably in physically demanding sectors like construction, face increased job insecurity due to local governments' dismissal orders to enhance work safety. Many are forced into the gig economy, competing with younger workers for jobs.

7. Due to their sheer size, the trends and challenges facing peasant workers have significant implications for the Chinese economy and society. The tapering off of this vast group is likely to accelerate China's transition to a higher productivity economy. Nonetheless, the exit or reduction of peasant workers may lead to problems such as social dislocation and/or under-supplied services.
8. As China moves towards innovation- and urbanisation-driven growth, a fundamental question is how labour rights can be safeguarded for peasant workers and how upward mobility opportunities can be created for them and their children.