



中国粮食市场 发展报告

李经谋 主编



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十年磨一剑 霜刃正初试

(代序) 李经谋



《中国粮食市场发展报告》第十卷已经付梓。十载春秋，白驹过隙，回溯这占我职业生涯四分之一的人生旅途时，不禁感慨系之，夜不能寐。

《中国粮食市场发展报告》（以下简称《报告》）始于新世纪粮食市场化前夕的2003年，被业界称之为“春天的报告”。作为新中国第一部全面系统的粮食市场报告，以实现“三个服务”，即为深化粮食流通体制改革服务、为粮食企业生产经营服务、为粮食市场规范发展服务为基本宗旨，弥补了社会主义市场经济研究领域的一项空白。《报告》得到众多高瞻远瞩的业内领导、学识渊博的专家学者、事业有成的企业精英的鼎力相助。他们匠心独具，纵横捭阖，全面解读国内外粮食市场，正确诠释粮食方针政策，准确预测市场供求形势，深入探索热点焦点问题，加之详实的统计资料、重要的论著索引、简明的大事纪要，被誉为透视中国粮食市场的重要“窗口”和“百科全书”，得到国内外广大读者的不虞之誉。而著名专家学者对每卷《报告》的精彩评述，更为点睛之笔，使《报告》声名远播。

作为粮食市场的忠实见证者，《报告》客观地

记录了十年来中国粮食市场化的蹒跚履痕，为人们留下不少超前的思维和闪光的篇章：粮食流通体制、粮食市场体系、粮食价格机制、粮食宏观调控、粮食企业改革、粮食安全保障等，无不直击我国粮食改革的热点、焦点和难点；供求关系的复杂纷繁、价格曲线的变幻无常、粮食市场的波谲云诡，无不映托出行业精英们的睿智和独到；“三农”利益的维护、粮食安全的可持续、粮食市场体系的构建，无不体现政策的筹谋和高远。《报告》从不同的角度，梳理出粮食市场演变的脉络，勾勒出粮食市场化改革的年轮，形成中国粮食市场发展的完整链条。《报告》还热情讴歌了中国经济异彩纷呈的光辉成就：“入世”非但未“引狼入室”而是“有凤来仪”，经济超常发展造就了新世纪经济“巨人”，世界粮食危机和金融危机反衬出中国制度的优越性，生产迭创“八连丰”为粮食安全奠定坚实基础……这是让每一个“粮食人”难以忘怀的光辉岁月。

继往开来，《报告》将如何面对未来的十年？“凡事预则立，不预则废”，按照“史圣”司马迁“兴必虑衰，安必思危”的辩思方式展望未来，结论是：十分严峻和不确定性大增。认真思忖，并非耸人听闻。

第一，险恶的国际政治经济环境。精彩的奥运盛会，难忘的太空行走，威武的亚丁湾护航，世界第一大美元债主，全球第二大经济体，成功应对世界金融危机等等，这些举世震惊的成就，被英国媒体称之为“在西方超越中国 500 年之后，这是一种惊人的转变”。真诚的赞誉、宿意的奉承似漫天大雪，让一向唯我独尊、领袖世界的西方政客始料不及和难以容忍。于是乎，在政治上散布“中国威胁论”，极尽挑拨离间之能事；在经济上高举保护主义大旗，对中国商品“围追堵截”；在军事上对主权国家穷兵黩武，以“敲山震虎”；美国则高调宣布“重返亚洲”，对中国形成重重包围。正可谓“木秀于林，风必摧之”，虽属流年不利，但在意料之中。我们虽然失去了“韬光养晦”的发展机遇期，但换来的是中华民族的伟大复兴，“失之东隅，收之桑榆”。对于一向不畏强御的中华儿女来说，“富贵不能淫，贫贱不能移，威武不能屈”是我们应对险恶国际情势的必然选择。

第二，复杂的国内经济形势。中国虽然成为世界第二大经济体，但同样囿于发展中大国所面临的诸多困惑。特别是欧债危机的蔓延，给低迷的世界经济雪上加霜，也使致力于经济结构调整、转变经济发展方式的中国，面临“两难”境地：一方面，出口放缓，制造业低迷，经济呈下滑态

势；另一方面，“通胀”压力仍然存在，为防“硬着陆”而放宽货币等政策的举措十分谨慎。加之群众的切身利益受到影响，扩大内需尚受诸多限制。

第三，堪忧的粮食安全前景。粮食安全主要包括数量安全和质量安全两个大的方面，二者贯穿于粮食生产、流通和消费的全过程。单从数量安全方面来讲，目前我国的粮食安全是有保证的。2002—2011年十年间，我国每年平均粮食总产量达50 181万吨，而粮食净进口为2561万吨（包括大豆），约占粮食总产量的5.9%，若扣除大豆，年度主要粮食品种处于紧平衡状态。但应该看到，这是建立在粮食生产“八连丰”基础之上的，老天还会如此慷慨眷顾中国吗？“日中则移，月满则亏，物盛则衰，天之常数也”，中国这句古代哲理名言不应该被忽视和淡忘。据国家发展和改革委员会预测，未来十年，中国粮食将面临五大问题：需求呈增长趋势，供需缺口将进一步扩大，到2020年，中国人口预计达15亿，年度需求达57 250万吨，若按95%的自给率计算，年度粮食综合生产能力平均要达到54 000万吨。加之土地资源恶化，淡水资源短缺，农田水利设施较薄弱，科技支撑能力也不够强，粮食比较效益长期偏低，保持粮食供需紧平衡的压力将会愈来愈大。据联合国粮农组织预测，未来十年世界粮食形势将愈益严峻：粮食供求将持续偏紧，粮食价格将继续上涨，粮食金融化已成不争之实，世界粮食危机将进一步加剧。可以想见，一旦我国粮食生产遭受较大自然灾害，脆弱的粮食紧平衡就会受到冲击，我国粮食安全的可持续发展就会经受严峻考验。

当然，目前我国的粮食流通是安全的，一个“供给稳定、储备充足、调控有力、运转高效”的保障体系正在形成。这得益于粮食生产的持续增长、粮食储备制度的不断完善、国家宏观调控机制的初步形成、现代粮食市场体系的基本确立。但也应该看到，建立在粮食紧平衡基础之上的流通安全，并未经受较大自然灾害和粮食短缺的严峻考验，粮食批发市场、期货市场、电子商务至今未有立法保障，深化粮食流通体制改革的目标亦非明晰，市场形成价格还未真正实现……要想解决粮食流通安全中的诸多隐患，远非一日之功，“路漫漫其修远兮，吾将上下而求索”。

不容忽视的是，当前粮食质量安全形势尤为严峻，特别是食品质量安全已经成为严重的社会问题。“还能吃什么”俨然已成“国问”，振聋发聩。据有关方面估计，我国约有10%以上的耕地、每年约有1 200万吨粮

食遭受重金属污染。而更为严重的质量安全问题，则出在加工环节，从粮油食品、到畜禽产品，从水产蔬果、到中西药材，天晓得哪种食品（药品）让人放心。要痛下决心，标本兼治，“明法制，去私恩，令必行，禁必止”，一定要让那些秽德彰闻的始作俑者和唯利是求的不法之徒，受到良心的谴责和法律的严惩。否则，积重难返，追悔莫及。

令人欣慰的是，虽然世界经济正处危险期，中国经济结构调整亦进入攻坚战，但国家在推进农业现代化、产业化，确保农业和粮食生产的稳定、可持续增长方面，正挥动如椽巨笔，续写粮食安全可持续发展的新篇章。2011 年中央 1 号文件强调水利，2012 年中央 1 号文件强调科技，正如中央财经领导小组办公室副主任、中央农村工作领导小组办公室主任、《报告》高级顾问陈锡文先生所言：这是农业政策体系这个“主体”生出的“两个翅膀”，如果“一体两翼”能够建成，有利于逐步提高农业发展和粮食安全水平。看来，对待未来十年的粮食安全形势，困难不可低估，信心更要满怀，多一些忧患意识，其实是一种智慧的表现。

未来十年，是中国经济发展极其关键的十年。既要面对复杂多变的国际政治经济形势，又要应对国内经济结构的革故鼎新，粮食市场也将面临诸多新的挑战，粮食安全可持续发展中的热点、焦点、难点问题，也会愈益突显。因此，《报告》应该进一步成为我们展示历史责任感的舞台：视野要更加广阔，内容要更加丰富，论点要更加前瞻，诠释要更加科学，预测要更加精准，资料要更加详实。同时，还要使《报告》成为粮食企业的经营指南、粮食理论的研究阵地和主管部门的决策参考。对《报告》所有编撰人员来讲，“士不可以不弘毅，任重而道远”。

“宝剑锋从磨砺出，梅花香自苦寒来”，十年探索，十年耕耘，十年坚守，十年辉煌。十年是一个圆满的里程，也是一个归零的轮回，“往者不可复兮，冀来今之可望”。只要天下粮人共勉之，专家学者共事之，编采人员共携之，“唯日孜孜，无敢逸豫”，我们将会共同见证《报告》的第二十卷、三十卷……也许到那时，我们中的不少人已然仙去，然而，天国之上有我们的眼睛，厚土之中有我们的血脉，植根于中华大地上的这朵粮界奇葩将璀璨永驻。

“After A Decade Of Grinding, The Glittering Sword Is In Trial Use”

(Preface)

Li Jingmou

Volume Ten of *Report on Development of China's Grain Market* is in the press now. A decade has passed in the twinkling of an eye. Looking back at this life journey of mine that accounts for one fourth of my career period, I could not help sighing with emotion and could not fall asleep at night.

Report on Development of China's Grain Market (Hereinafter referred to as Report) dates back to 2003 before the marketization of the grain industry, and has been called by the industry as “Report in Spring”. As the first comprehensive report on grain market development in New China, it has been committed to serving the deepening of grain logistics system reforms, serving the production and operations of grain enterprises and serving standard development of grain markets, and thus has filled up a gap in the field of research on the socialist market economy. It has gained strong support from many visionary industry leaders, learned experts and scholars and successful industry elites. With their unique and comprehensive interpretations of domestic and foreign grain markets, correct explanations of the guidelines and policies, precise forecasts of the market supply and demand, and deep explorations into hot and focal issues, as well as the detailed statistics, the index of important monographs and the concise summaries of great events, it has been honored as an important “window” and “encyclopaedia” to look into China's grain markets, and has gained great popularity among readers both at home and abroad. In addition, famous experts and

scholars' wonderful comments on each volume are a finishing touch to make it widely known.

As a loyal witness of the grain market, the *Report* has been objectively recording the staggering tracks of the marketization of the grain industry in China for the past 10 years, and leaving behind a lot of proactive thoughts and glittering writings: Grain logistics system, grain market system, grain pricing mechanism, macro – regulation on grain industry, reform of grain enterprises, food security, etc. , have been hot, focal and difficult issues on China's reforms of the grain industry; Complexity of relationship between supply and demand, fluctuation of price curves and turbulence of grain markets have been reflecting the wisdom and uniqueness of the industry elites; Protection of the interests of "agriculture, rural area and farmers", sustainability of food security and establishment of grain market systems have been embodying the good designing and farsightedness of the policies. The *Report* has been sorting out the veins of the grain market evolutions, sketching out the growth rings of the marketization reform of the grain industry, and producing a complete chain of China's grain market development. It has also been warmly praising the colorful and glorious achievements in China's economy: The "access into the WTO" has not "invited the wolf into the room", but has "invited the phoenix with grace to settle down"; The unusual economic development has created an economic "giant" in the new century; The world grain crisis and financial crisis has highlighted the superiority of China's systems; "Bumper harvests for 8 consecutive years" have set a solid foundation for China's food security ... The past decade is the splendid time each of the "grain people" will never forget.

How should the *Report* face the next decade to build on the past and prepare for the future? "No preparedness, no success". Looking forward to the future in the dialectical thinking way of Sima Qian, the "History Saint", which is "Consider declines while in prosperity and dangers while in peace", we have to come to the following conclusion: the situation is very severe and uncertain. If we think it over, it is no exaggeration.

First, the international political and economic environments are dangerous.

China's amazing achievements, such as the brilliant Olympic Games, the unforgettable space walk, the martial escort in the Gulf of Aden, the top dollar creditor and the second largest economy in the world, the successful response to the world financial crisis, etc., are commented by the British media as "a surprising change in 500 years since the West surpassed China". Sincere compliments and deliberate flatteries are everywhere, which are unexpected and intolerable to the western politicians who have been egoistic leaders of the world. Therefore, politically they are spreading the theory of "China Threat" so as to sow discord among countries; Economically, they are holding high the flag of protectionism to resist China's products; Militarily, they are resorting to military power against sovereign countries to "kill chickens to let the monkey see"; And the United States is announcing in a high tone that it is "returning back to Asia" to form tight encirclements against China. Just like the old saying goes, "if a tree grows highest in a forest, it is surely going to be destroyed by the wind". It is an unlucky year, but it is in our expectation. We have lost the opportunity to develop while "hiding our capacities and biding our time" in exchange for the great rejuvenation of the Chinese nation. "What is lost in the morning is gained in the evening". To the Chinese people who have been defying brute forces, "Neither riches nor honors can corrupt us; Neither poverty nor low conditions can make us swerve from principles; Neither threats nor forces can bend us" is the inevitable choice we should make to deal with the dangerous international situations.

Second, China's domestic economic situation is complicated. China has become the second largest economy in the world, but it is still faced with many troubles bothering major developing countries. Especially, the spread of the Euro debt crisis is worsening the already sluggish world economy, and putting China, which is committed to restructuring its economy and changing its ways of economic development, in a dilemma; on the one hand, its exports are slowing down, its manufacturing is flagging, and its economy is going down; On the other hand, the pressure of inflation is still in existence, so its steps to loosen its monetary policies to avoid "hard landing" are very cautious. In addition, the enlarging of the domestic demand is limited by many factors because of the

effects on the direct interests of the people.

Third, the outlook for China's food security is worrisome. Food security contains 2 parts, that is, quantity security and quality security, which run through the whole process of grain production, logistics and consumption. From the perspective of quantity security, China's current food security is guaranteed. During 2002 – 2011, China's annual grain production was 501.81 million tons, while its annual net grain import was 25.61 million tons (including soybean), accounting for 5.9% of its total production. If soybean is excluded, China's major grains have been in tight balance. But we should note that it was based on the "bumper harvests for 8 consecutive years". Will the Heaven continue to favor China so generously? We should never neglect and forget the famous ancient Chinese philosophical saying, "When the sun is in the middle, it begins to set. When the moon is at its full, it begins to wane. When things are best, they begin to decline. That is the rule of the Heaven." According to the forecasts of China's National Development and Reform Commission, in the next decade, China's grain industry would face 5 major problems: the demand would keep going up, and the gap between supply and demand would widen. By 2020, China's population is expected to reach 1.5 billion, and its annual grain demand would reach 572.5 million tons. If it is estimated at the self-sufficiency rate of 95%, its annual total grain production would have to reach 540 million tons. In addition, due to worsening of land resources, shortage of fresh water resources, poor agricultural water conservancy facilities and weak technological support capabilities, the comparative effectiveness of China's grain industry has been quite low for a long time, and the pressure on keeping tight balance between grain supply and demand would become bigger and bigger. According to the forecasts of the FAO of the U. N., the world food situation in the next decade would be more severe: grain supply would be continuously tight, grain prices would keep rising, grain financialization has been an undisputable fact, and the world grain crisis would further worsen. It is imaginable that if China's grain production suffers from major natural disasters, its weak and tight grain balance would be shocked, and its sustainable development of food security would have to face an

ordeal.

Of course, China's current grain logistics is secure, and a guaranteeing system of “stable supply, enough reserve, powerful regulation and effective operation” is taking shape. It has benefited from the continuous growth of grain production, constant perfection of grain reserve systems, initial formation of national macro – regulation mechanisms, and essential establishment of modern grain market systems. But we should also note that the logistics security based on tight grain balance has not experienced the ordeals of major natural disasters and grain shortages, there have been no legal guarantees on grain wholesale markets, future markets and electric commerce, the goal of deepening reforms of grain logistics systems is not very clear, the pricing by the market has not been truly realized ... There are too many potential dangers in grain logistics security for us to overcome overnight. “Although the road is endless and faraway, I still want to pursue the truth in the world.”

What we should not neglect is the fact that the current situation of grain quality security is very severe, and in particular food quality safety has become a serious social problem. “What else can we eat?” has become a “national question”, which stuns each of us. According to related estimates, every year in China about 10% of the farming land and about 12 million tons of grain are polluted by heavy metals. And the more serious quality safety problems appear in the processing link, involving grain and oil food, livestock products, aquatic products, vegetables, fruits, and Chinese and western medicinal materials. Only the Heaven knows which kind of food or drugs can be trusted. We must make up our mind resolutely to address both the symptoms and root causes of the problems, “set up rule of law, overcome private interests, enforce orders and forbid the illegal”, and bring those initiators of evil and lawless persons to condemnation of conscience and punishment of laws. Otherwise, “it would be too late for us to regret it when confirmed habits are too hard to get rid of.”

Comfortingly, while the world economy is in danger, China's economic restructuring is in its critical stage, and it is waving a great pen to continue writing a new chapter on sustainable development of food security to ensure the stable

and sustainable development of its agriculture and grain production. No. 1 Document of the CCP Central Committee in 2011 emphasizes agricultural water conservancy, and No. 1 Document of the CCP Central Committee in 2012 emphasizes agricultural science and technology. Just as Mr. Cheng Xiwen, the vice director of Office of Central Financial Leading Group, the director of Office of Central Rural Development Leading Group and the senior adviser of the *Report*, said, these documents are “2 wings” of the “main body”, the agricultural policy system. If “the main body and the 2 wings” are set up, it would go a long way towards enhancing the level of China’s agricultural development and food security step by step. As for China’s food security in the next decade, we should not underestimate difficulties, but we should be more confident. More awareness of potential dangers is in fact a display of wisdom.

The next decade is very critical for China’s economic development. China would have to not only deal with the complicated and changeable international political and economic situations, but also destroy the old and establish the new in restructuring its economy. Its grain markets would be faced with many new challenges, and the hot, focal and difficult problems would be more and more prominent in its sustainable development of food security. Thus, the *Report* should further be the stage where we show our sense of historical responsibility, with wider vision, richer contents, more proactive arguments, more scientific interpretations, more accurate forecasts, and more detailed information. In addition, it should also be the guide for operations of grain enterprises, the frontline for research of grain theories, and the reference for decision – making of competent departments. To all the staff members of the *Report*, “An educated gentleman cannot but be resolute and broad – minded, for he has taken up a heavy responsibility and a long way to go”.

“The sharp edge of a sword comes from grinding, and the fragrance of plum blossoms comes from hard coldness.” The past decade is one of exploration, cultivation, persistence and glory. A decade is both a perfect milestone and a cycle that restarts from zero. “We can not make the past time return, but we can look forward to the future.” If all the “grain people” encourage one another

er, if all the experts and scholars work together, if all the staff members cooperate with one another, if “we keep diligent and indefatigably everyday”, we are going to witness together the publishing of Volume Twenty and Volume Thirty of the *Report* ... By that time, many of us might have passed away, but there would be our eyes in the Heaven and our blood vessels in the thick soil, and this “rare and precious flower in the grain industry”, which takes its roots in China’s vast land, would remain beautiful forever.

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