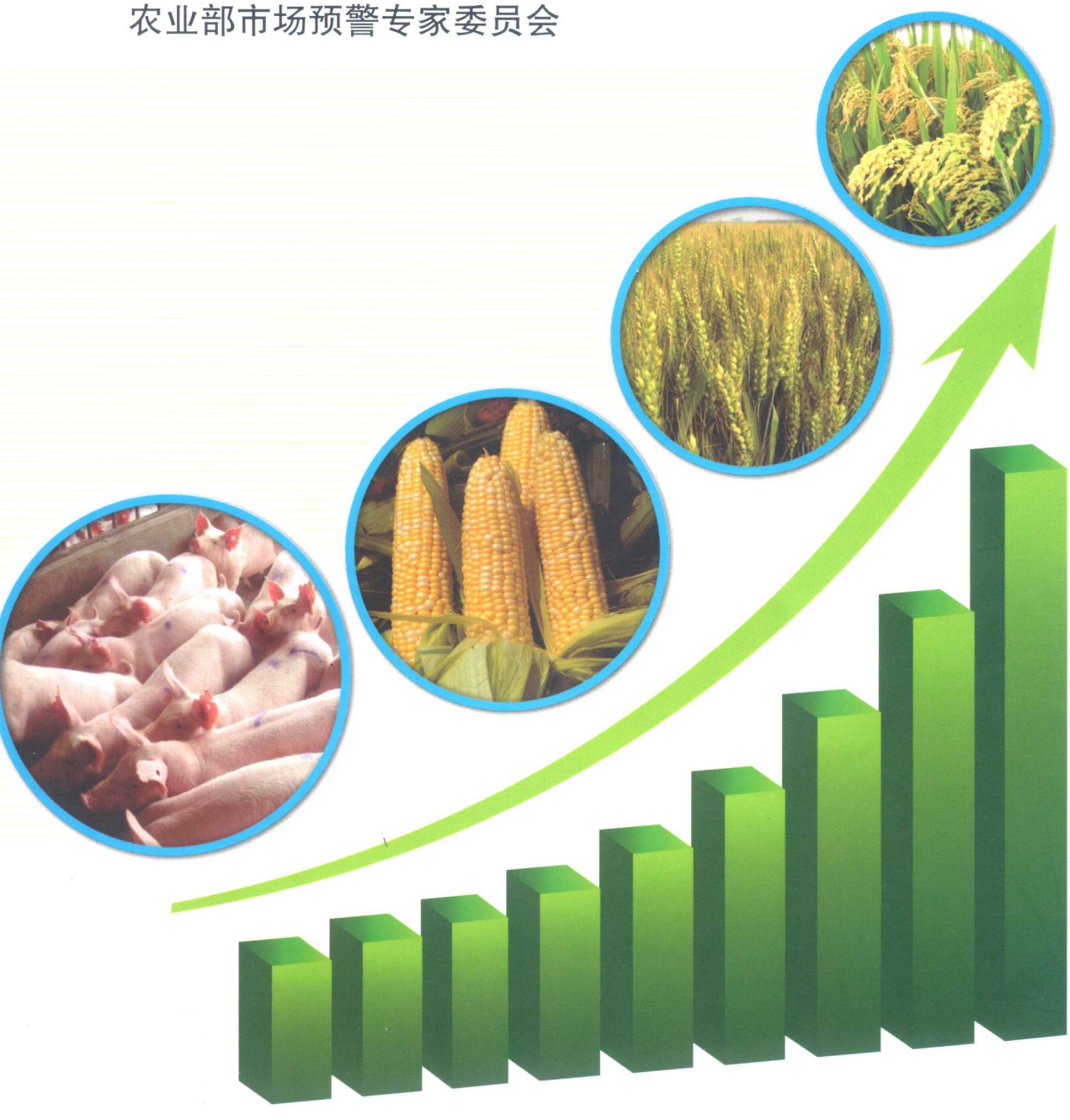
中国农业展望报告
(2015—2024)

农业部市场预警专家委员会



中国农业科学技术出版社

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图书在版编目（CIP）数据

中国农业展望报告：2015～2024／农业部市场预警专家委员会著. —北京：中国农业科学技术出版社，2015.4
ISBN 978-7-5116-2052-1

Ⅰ.①中… Ⅱ.①农… Ⅲ.①农业发展—经济发展趋势—研究报告—2015～2024 Ⅳ.①F323

中国版本图书馆 CIP 数据核字（2015）第 069882 号

责任编辑 徐 毅 张志花
责任校对 贾海霞

出 版 者 中国农业科学技术出版社
北京市中关村南大街 12 号 邮编：100081
电 话 （010）82106636（编辑室）（010）82109702（发行部）
（010）82109709（读者服务部）
传 真 （010）82106631
网 址 http://www.castp.cn
经 销 者 各地新华书店
印 刷 者 北京卡乐富印刷有限公司
开 本 889 mm×1 194 mm 1/16
印 张 12.25
字 数 250 千字
版 次 2015 年 4 月第 1 版 2015 年 4 月第 1 次印刷
定 价 180.00 元

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前　言

开展农业展望活动是市场经济条件下调控农产品市场运行的重要举措，是发达国家和国际组织的普遍做法。党的十八大明确提出“要使市场在资源配置中起决定性作用和更好发挥政府作用”。近年来，为适应市场经济发展需要、探索现代农业管理方式，我们不断加强农业展望相关研究和探索，由中国农业科学院农业信息研究所承办的“2013 年世界农业展望大会”和主办的“2014 年中国农业展望大会”，积累了成功经验，中国农业展望大会已经成为汇聚国内外信息资源，对外发出中国声音和提升国际话语权的重要平台。

发布农业展望报告是农业展望活动的核心内容。农业展望报告是专家和有关方面对未来农业发展形势的预测性研究报告，展望依据都是有关部门公开发布的数据，对未来形势的预测是基于模型运算和专家分析，也考虑了相关不确定因素。《中国农业展望报告（2015－2024）》的基本结论，是在一定宏观经济、农业政策、气候条件、科技进步、资源禀赋及国际市场变化等特定假设条件下，采用中国农业科学院农业信息研究所研制的中国农产品监测预警系统（China Agricultural Monitoring and Early Warning System，CAMES）做出的基线预测，基期数据主要来自于中国统计部门公开发布的统计数据和农业部门的农产品市场监测数据，也包括相关研究机构多年积累的实地调研数据。

农业部市场预警专家委员会对《中国农业展望报告（2015－2024）》基本结论进行了多次讨论，对于基线预测可能的风险开展了多种情景模拟，对展望结论可能的不确定性进行了客观表述。国家发展和改革委员会农经司、国家发展和改革委员会经贸司、商务部市场运行与消费促进司、国家粮食局调控司以及中国社会科学院农村发展研究所、上海交通大学、中国人民大学、对外经济贸易大学、中国农业大家、中国储备粮管理总公司、中国农业发展集团有限公司、农业部市场与经济信息司、发展计划司、种植业管理司、畜牧业司、渔业渔政管理局、农村经济研究中心、信息中心、农业贸易促进中心、中国农业科学院农业信息研究所、中国农业科学院农业经济发展研究所等单位相关专家担任农业部市场预警专家委员会委员，并在展望报告数据提供、展望结论讨论修正等方面作出了重要贡献。

2002 年以来，中国农业信息分析预警团队围绕主要农产品国内外市场形势，进

行了长达12年的潜心跟踪研究。《中国农业展望报告（2015-2024）》每章分报告都以农产品分析团队的研究为基础，凝聚了专家集体的智慧。本年度农业展望报告，第一章概述部分由市场分析师李干琼撰写；第二章谷物部分分别由稻米分析师彭超、张欢，小麦分析师曹慧、钟永玲，玉米分析师习银生、徐伟平撰写；第三章油料部分分别由大豆分析师徐雪高、殷瑞峰，油料分析师李淞淋、张雯丽撰写；第四章棉花部分由棉花分析师李想、翟雪玲撰写；第五章糖料部分由糖料分析师徐雪、马凯、马光霞撰写；第六章蔬菜部分由蔬菜分析师王盛威、李辉尚、孔繁涛撰写；第七章水果部分由水果分析师赵俊晔、武婕撰写；第八章肉类部分分别由猪肉分析师朱增勇、张学彪、聂凤英，禽肉分析师张莉、朱海波，牛羊肉分析师曲春红、司智陟撰写；第九章禽蛋部分由禽蛋分析师李哲敏、张超撰写；第十章奶制品部分由奶制品分析师董晓霞、王东杰撰写；第十一章水产品部分由水产品分析师刘景景、陈晨撰写；第十二章饲料部分由饲料分析师徐磊、张峭、陶莎撰写。

中国农业科学院农业信息研究所为本展望报告的编写提供了有力的技术支持。由许世卫研究员作为首席科学家领衔的中国农业监测预警创新团队为《中国农业展望报告（2015-2024）》提供了基本数据系统支撑和模型模拟预测支撑。李干琼、吴建寨、张玉梅、董晓霞、张永恩、李志强、徐磊、朱增勇、潘月红、任育锋、庄家煜、刘佳佳、李燕妮等团队成员为数据运算、报告审校做了大量具体而细致的工作，中国农业科学技术出版社在排版印刷方面付出了努力。

这次农业部市场预警专家委员会正式发布《中国农业展望报告（2015-2024）》，标志着中国农业展望活动上升到了新的阶段，是探索现代农业管理方式创新的重要举措。由于市场形势分析不仅要以本行业和相关行业最新信息为基础，并且市场供需要受到气候、政策、经济变化等变量因素影响，展望报告难免会出现预测偏差。我们正在探索建立预测偏差的分析评估机制，以便为用户提供更为准确的信息服务。诚然，中国农业展望制度建设还处于起步阶段，展望报告编写也处于探索阶段，展望报告中难免有疏漏和不足之处，恳请国内外同行多提宝贵意见，我们将在今后的工作中持续改进，努力打造具有中国特色的农业展望制度。

农业部市场预警专家委员会

二〇一五年四月

Foreword

It is an important initiative to conduct agricultural outlook activities to regulate the agricultural market under the condition of market economy, which is a common practice among developed countries and international organizations. The 18th National Party Congress clearly put forward to "make the market to play a decisive role in the allocation of resources and better play the role of the government". In recent years, in order to adapt to the need of market economy development and explore modern agricultural management methods, we have constantly strengthened research on agricultural outlook. Experiences have been accumulated through the successful convocation of "2013 World Agricultural Outlook Conference" and "2014 China Agricultural Outlook Conference" hosted by Agricultural Information Institute of Chinese Academy of Agricultural Sciences (CAAS). China Agricultural Outlook Conference has become a significant platform to gather information resources from home and abroad, to make China's voice heard, and to project a sound image of China in the international stage.

The launch of agricultural outlook report is the crystallization of all the agricultural outlook efforts. The agricultural outlook report is the results of projection pertained to the future agricultural development undertaken by experts and competent agencies. The projection is generated by the model simulation, based on the available data, and incorporated expert analysis as well as uncertainties. The main conclusion of the China Agricultural Outlook 2015—2024 is a baseline projection on the basis of specific assumptions regarding the macroeconomic conditions, agricultural policies, climate conditions, scientific and technical progress, resources endowment and international market developments. The results are calculated by China Agricultural Monitoring and Early Warning System (CAMES) developed by Agricultural Information Institute of CAAS. And the baseline data mainly come from statistics released by China statistical authorities, agricultural market monitoring data collected by agricultural sector, and field survey data accumulated by relevant research institutions for many years.

Market Early Warning Epert Committee of Ministry of Agriculture (MOA) has reviewed several times the basic conclusion of the China Agricultural Outlook 2015—2024, contributed to scenario simulations on the possible risks of the baseline projection, and elaborated objectively the potential uncertainties of the projection results. Committee members have made significant contributions to data provision and review of the outlook conclusion. They are from the following agencies/institutions: Department of Rural Economy of National Development and Reform Commission (NDRC), Department of Trade of NDRC, Department of Market Operation and Consumption Promotion of Ministry of Commerce, Department of Macro-control and Adjustment of State Administration of Grain, Rural Development Institute of Chinese Academy of Social Sciences, Shanghai Jiao Tong University, Renmin University of China, University of International Business and Economics, China Agricultural University, China Grain Reserves Corporation, China National Agricultural Development Group

Co. , LTD, Department of Market and Economic Information of MOA, Department of Development Planning of MOA, Department of Crop Production of MOA, Department of Animal Production of MOA, Bureau of Fisheries of MOA, Information Center of MOA, Agricultural Trade Promotion Center of MOA, Agricultural Information Institute of CAAS, Institute of Agricultural Economics and Development of CAAS.

Since 2002, China agricultural information analysis and early warning team has worked assiduously on both domestic and international agricultural market development for 12 years. The China Agricultural Outlook 2015-2024 has brought together the expertise and inputs of team members as specified bellow: Chapter I (Overview) by Market Analyst Li Ganqiong; Chapter II (Cereal) by Analysts Peng Chao and Zhang Huan for rice, Analysts Cao Hui and Zhong Yongling for wheat, and Analysts Xi Yinsheng and Xu Weiping for maize; Chapter III (Oilseeds) by Analysts Xu Xuegao, Yin Ruifeng for soybean, and Analysts Li Songlin and Zhang Wenli for oilseed; Chapter IV (Cotton) by Analysts Li Xiang, Zhai Xueling; Chapter V (Sugar) by Analysts Xu Xue, Ma Kai, Ma Guangxia; Chapter VI (Vegetable) by Analysts Wang Shengwei, Li Huishang, Kong Fantao; Chapter VII (Fruit) by Analysts Zhao Junye, Wu Jie; Chapter VIII (Meat) by Analysts Zhu Zengyong, Zhang Xuebiao, Nie Fengying for pork, and Analysts Zhang Li, Zhu Haibo for poultry, and Analysts Qu Chunhong, Si Zhizhi for beef and mutton; Chapter IX (Poultry Eggs) by Analysts Li Zhemin, Zhang Chao; Chapter X (Dairy) by Analysts Dong Xiaoxia, Wang Dongjie; Chapter XI (Aquatic) by Analysts Liu Jingjing, Chen Chen; Chapter XII (Feed) by Analysts Xu Lei, Zhang Qiao and Tao Sha.

Agricultural Information Institute of CAAS has provided technical assistance for the outlook report. China Agriculture Monitoring and Early Warning Innovative Team led by Senior Research fellow Xu Shiwei, Director General of Agricultural Information Institute of CAAS and Chief Scientist, has developed database and run model simulation for the China Agricultural Outlook 2015-2024. Model simulation and report editing were done by Li Ganqiong, Wu Jianzhai, Zhang Yumei, Dong Xiaoxia, Zhang Yongen, Li Zhiqiang, Xu Lei, Zhu Zengyong, Pan Yuehong, Ren Yufeng, Zhuang Jiayu, Liu Jiajia, Li Yanni. , and typography of the report was prepared by China Agricultural Science and Technology Press.

The official launch of China Agricultural Outlook 2015-2024 by Market Early Warning Epert Committee of Ministry of Agriculture, as an important initiative to explore the way of modern agricultural management, is a milestone in China' s outlook efforts. Errors and inaccuracies are unavoidable in the outlook because market analysis is not only on the basis of the latest information in the industries, but also affected by various factors such as climate, policies and economic changes. We are exploring to establish a mechanism to evaluate projection errors in order to provide more accurate information service for users. Obviously, the development of China's agricultural outlook is still in the infancy and the formulation of the report is also at the exploratory stage. Therefore, the gaps and inadequacies in the report are hard to avoid. We would be grateful if colleagues at home and abroad could give us invaluable suggestions, which will help us to improve our work and to better agricultural outlook system with Chinese characteristics.

Market Early Warning Expert Committee of Ministry of Agriculture
April 2015

摘　要

《中国农业展望报告（2015－2024）》以粮食、棉花、油料、糖料、蔬菜、水果、肉类、禽蛋、奶类、水产品、饲料等主要农产品为对象，对未来10年的生产、消费、价格、贸易进行了展望。总的结论是，预计未来10年中国农业生产将继续稳步发展，转变农业发展方式将持续推进，现代农业发展的质量和效益将明显提升，与全球农业的互动融合将显著加强，农产品消费结构将加快转型升级，国家粮食安全特别是“谷物基本自给、口粮绝对安全”的战略目标能够实现。

农业生产将继续稳步发展。未来10年，在不断完善的政策支持体系支撑和相关生产配套措施推动下，中国谷物、油料、蔬菜、水果、肉类、禽蛋、奶类、水产品等主要农产品生产继续稳步发展。展望期内，预计谷物产量年均增幅0.6%，其中玉米生产在强劲需求拉动下将继续保持较快发展，2024年预计比2014年增长13%，谷物产量增加将主要来自于玉米。同时，2024年，油料（含大豆）产量预计比2014年增长13%，蔬菜和水果产量预计比2014年分别增长6%和12%，肉类、禽蛋、奶类、水产品产量预计比2014年分别增长16%、11%、24%和19%。

国家粮食安全能够得到切实保障。未来10年，中国谷物播种面积将保持总体稳定，粮食综合生产能力将进一步提升。2024年，预计中国稻谷、小麦、玉米总播种面积将稳定在13.6亿亩（15亩=1公顷，全书同）以上，产量将达到5.8亿吨，总消费量预计为6亿吨。其中，2024年的稻谷产量预计稳定在2.06亿吨左右，折合大米产量1.45亿吨左右，大米口粮消费预计1.14亿吨；小麦产量预计达到1.29亿吨，小麦口粮消费量预计0.89亿吨；玉米产量预计达到2.44亿吨，玉米口粮消费预计700万吨，饲料消费和工业消费预计保持较快增速，通过适度增加进口实现供需平衡。展望期内，中国谷物将保持合理自给率，稻谷、小麦两个品种口粮消费自给有余，能够实现“谷物基本自给，口粮绝对安全”的粮食安全目标。

农产品消费保持较快增长。未来10年，在人口增长、居民收入水平提高和城镇化推进等因素的作用下，中国主要农产品消费将保持较快增长。其中，大米消费年均增长0.3%，2024年预计达到1.45亿吨；小麦消费年均增长0.6%，2024年预计达到1.32亿吨；玉米消费年均增长3.1%，2024年预计达到2.65亿吨；蔬菜人均直接消费量年均增长1.0%左右，加工消费较快增长；水果消费平稳增长，2024

年人均消费量预计达到93.9千克，其中城镇居民105.4千克，农村居民73.6千克，总消费量2.8亿吨左右；食糖和肉类消费继续小幅增长，2024年预计分别接近1 800万吨和1亿吨；食用植物油消费增速放缓，2024年预计达到3 313万吨；禽蛋消费需求继续增加，2024年预计为3 195万吨，比2014年增长11%；奶制品消费仍将继续增长，2024年预计达到6 300万吨左右，比2014年增长30%；水产品消费继续增长，2024年预计达到7 700万吨，比2014年增长19%；饲料消费年均增长1.7%，2024年预计达到2.29亿吨。

农产品价格总体温和上涨。未来10年，中国农产品价格在成本推动下将呈上涨态势，随着农产品价格市场形成机制进一步完善，国内农产品与国际市场联动性将增强。其中，大米、小麦、玉米价格在生产成本上涨推动下将呈稳中略涨态势；棉油糖价格与国际市场联系将更加紧密，食用植物油、棉花价格将跟随国际价格震荡运行，国内外食糖价格将步入缓慢回升通道；蔬菜价格总体呈现平稳上涨态势，个别品种在个别年份可能出现较大波动；生猪和猪肉价格将呈震荡上涨态势；牛羊肉价格继续保持高位运行，可能出现明显季节性波动；禽蛋价格将整体呈现出波动上涨趋势；水产品价格预计总体小幅上涨，但不同类别产品走势不同，季节性价格波动仍比较明显；饲料价格预计温和增长，但可能受到饲料原料和动物疫病影响出现较大波动。

农业发展质量将明显提升。未来10年，随着“调结构、转方式”战略的深入实施，中国农业发展将由数量增长型逐步转向质量效益型，主要农产品产量增速将放缓，代表科技进步的单产水平提高将成为主要增产因素，农产品消费多样化、优质化将渐成趋势，农业产业链将进一步延伸。展望期内，小麦、玉米、肉类、禽蛋、奶类、水产品产量增速预计分别为0.2%、1.3%、1.5%、1.0%、2.1%和2.8%，明显低于过去10年2.6%、5.2%、2.8%、2.0%、5.1%和3.4%的水平；2024年，稻谷、小麦、玉米单产预计分别达到每亩466千克、367千克、436千克，比2014年分别提高2.6%、4.9%、12.5%。伴随消费结构转型升级，农产品加工需求发展加快，2024年，小麦工业消费预计达到1 540万吨，比2014年增长14%；玉米工业消费预计达到8 600万吨，比2014年增长59%；肉类、蔬菜、水果等鲜活农产品加工比例进一步提高，预计分别达到16%、15%、11%。

国内外农业互动融合明显增强。未来10年，中国将更加注重农业资源环境保护，更加注重统筹利用国内外“两种资源、两个市场”，在农产品国内消费快速增长并日益多样化的需求拉动下，农产品进出口贸易将保持稳定增长的态势。特别是随着WTO多哈回合谈判渐入尾声，中国与有关国家（地区）多边、双边贸易协定

的实施和谈判的推进，以及“一带一路”战略的深入推动，国内农业发展与全球农业的互动融合将明显加强。生产资源紧缺的产品进口将保持适度增长，预计2024年玉米进口将达到400万吨左右，大豆进口将达到8 300万吨左右，奶制品（折合原料奶）进口将达到1 600万吨；蔬菜、水果、水产品等传统优势农产品出口继续增长，蔬菜出口预计达到1 200万吨左右，比2014年增长20%；水果出口预计达到450万吨，比2014年增长10%；水产品出口将达到540万吨，继续保持世界领先地位。与此同时，国际市场低价农产品过度进口给国内棉花、糖料产业发展带来严重冲击，棉花面积预计2024年为356.4万公顷，比2014年下降15%，产量预计565.2万吨，比2014年下降8%；食糖产量将出现萎缩，2024预计为1 223万吨，产需缺口达630万吨左右。

Executive Summary

China Agricultural Outlook 2015—2024 describes the outlook for major agricultural commodities of production, consumption, prices and trade in the next decade in China. The commodities mainly include grain, cotton, oilseeds, sugar, vegetables, fruits, meat, Poultry Eggs, dairy, fish and seafood and feed. The overall conclusions are: ①the agricultural production will keep steady development in the next decade; ②the quality and benefits of the development of modern agriculture will be greatly improved by transferring the mode of agricultural development; ③the interaction and integration with the global agriculture will be significantly strengthened; ④the consumption structure of agricultural products will be transformed and upgraded at higher speed; ⑤the strategic goal of national food security, in particular, basic self-sufficiency of cereals and absolute security of ration grain could be reached.

Continuous steady development in agricultural production

In the next 10 years, with the constant improvement of policy support system and related production supporting measures, the production of cereal, oilseeds, vegetables, fruits, meat, Poultry Eggs, dairy, aquatic products and other major agricultural products will continue developing steadily. Within the forecast period, the total output of cereal is estimated to increase at an annual rate of 0.6%. The maize production driven by strong domestic demand will continue to maintain rapid development, and the output in 2024 is predicted to increase by 13% compared to that of 2014, which accounts for most of cereal output increase. Oilseeds (including soybean) production for 2024 is estimated to grow by 13% compared to that of 2014, and vegetables and fruits production are expected to increase by 6% and 12% respectively, compared to those in 2014; the production of meat, Poultry Eggs, dairy and aquatic products is estimated to increase by 16%, 11%, 24% and 19% respectively.

Food security ensured

The area of cereal will remain steady, and the comprehensive grain production capacity will be further enhanced in the next 10 years. By 2024, the total area of rice, wheat, maize is expected to be kept at more than 1.36 billion mu (1 mu = 0.0667 ha), the total output will reach 580 million tons, and the total consumption be 600 million tons. The output of rice in 2024 is expected to be around 206 million tons or around 14.5 million tons in milled rice, and the food consumption of milled rice will be 114 million tons. The output of wheat is expected to reach 129 million tons, among which 89 million tons will be consumed as food. The maize output is expected to reach 244 million tons, and the food consumption of maize is expected to be 7.0 million tons and its feed con-

sumption and industrial consumption will maintain a higher growth rate. The balance between supply and demand could be ensured through the moderate increase of imports. Within the forecast period, the reasonable self-sufficiency rate of cereal will be maintained, and the supply of rice and wheat will fully meet the demands. The goal of basic self-sufficiency of cereal and absolute security of ration grain could be achieved.

Relatively rapid growth in agricultural product consumption

With the increase of population, the rising of people's incomes and driving force of urbanization, the consumption of major agricultural products will maintain a relatively rapid growth in the next 10 years. The consumption of rice in 2024 is expected to reach 145 million tons by an annual rate of 0.3%. The wheat consumption is estimated to increase by 0.6% annually and reach 132 million tons in 2024. The maize consumption is expected to increase to 265 million tons by the annual rate of 3.1% in 2024. The direct per capita vegetable consumption is expected to increase by 1.0% annually, and the consumption of processed vegetables will grow rapidly. The consumption of fruits in 2024 is expected to reach 93.9 kg per capita at a higher growth rate, that of urban residents is 105.4 kg, and of rural residents is 73.6 kg, and the total consumption is expected to reach 280 million tons. The consumption of sugar and meat will continue to increase slightly, and reach nearly 18 million and 100 million tons in 2024 respectively. Edible vegetable oil consumption will increase at a slower rate and reach 33.13 million tons in 2024. Poultry Eggs consumption continues to grow, and in 2024 reaches 39.15 million tons, increased by 11% compared to 2014. Dairy consumption will continue to increase and the estimate for 2024 is 63 million tons, 30% more than that in 2014. The consumption of aquatic products is estimated to reach 77 million tons in 2024, up by 19% over 2014. Feed consumption will be raised to 229 million tons in 2024 by an annual rate of 1.7%.

Slight rise in agricultural product prices

The price of agricultural products will be driven up by cost in the next 10 years. With the improved market pricing mechanism, the interaction of prices of agricultural products on domestic and international markets will be strengthened. The prices of rice, wheat and maize are expected to be stable, perhaps with slight rise due to the rising costs. With strong links to international market, the prices of cotton, oil, and sugar will fluctuate along with international prices. Sugar prices will recover at a small pace. The prices of vegetables will go up, and the selected vegetables may experience increased price volatility in some years. The prices of live pig and pork will rise. The prices of beef and mutton are expected to hover at a high level with obvious seasonal changes. Egg prices will rise with volatility. The prices of aquatic products will be higher than the previous 10 years. The prices in various aquatic products will show a diverse trend with seasonal volatility. It is expected that feed prices will follow a slightly upward trend. Considering the potential impacts of feedstuff and animal diseases, the prices may fluctuate violently.

Significant improvement in the Quality of agricultural development

As the strategy of Restructuring and Remodeling is implemented, the development of China's

agriculture will transfer from the quantitative to the qualitative growth pattern. Major agricultural product output will increase more slowly. The yield increase (representing the progress in science and technology) will become the main yield-increasing factor, and the consumption of diversified and high quality agricultural products is becoming a prevailing trend, and agricultural industry chain will be further extended. Within the forecast period, the outputs of wheat, maize, meat, Poultry Eggs, dairy and aquatic products are estimated to grow at 0.2%, 1.3%, 1.5%, 1.0%, 2.1% and 2.8%, which are significantly lower the levels of 2.6%, 5.2%, 2.8%, 2.0%, 5.1% and 3.4% in the last 10 years, respectively. The yield forecasts of rice, wheat and maize for 2024 are 6990kg/ha, 5505kg/ha and 6540 kg/ha, 2.6%, 4.9% and 12.5% higher than those in 2014, respectively. With the adjustment and upgrade of consumption structure, the demand for agricultural product processing develops rapidly. In 2024, the industrial consumption of wheat and maize are predicted to reach 15.4 and 86.0 million tons, 14% and 59% higher than those in 2014, respectively. The processing rates of meat, vegetables, fruits and other fresh agricultural products will increase significantly, and are estimated to reach 16%, 15% and 11%.

Agricultural interaction and integration at home and abroad has been significantly strengthened

In the next 10 years, more attentions will be paid to the protection of agricultural resources and environment, and the integrated utilization of both domestic and overseas resources and markets. With the stimulation of demand for the rapid growth and further diversification of domestic consumption of agricultural products, the import and export volumes of agricultural products will steadily grow. As the Doha round of trade talks under the WTO coming to an end, the bilateral and multilateral trade agreements signed by China and related countries (regions) are implemented and the bilateral trade negotiations are promoted, and the Belt and Road Strategy is deepened, the interaction and integration of domestic and international agriculture will be significantly strengthened. The imports of agricultural products with limited production resources are expected to maintain appropriate growth. The imports of maize are estimated to reach about 4 million tons in 2024, that of soybean about 83 million tons, and milk products (equivalent to raw milk) about 16 million tons. The exports of the traditional competitive agricultural products such as vegetables, fruits and aquatic products will continue to grow in volume. The exports of vegetables and fruits are predicted to come up to 12 and 4.5 million tons, 20% and 10% higher than those in 2014 respectively. The exports of aquatic products are expected to reach 5.4 million tons, and continue to be in a leading position in the world. Meanwhile, the excessive imports of low-price agricultural products have already brought about severe shocks to domestic cotton and sugar industry. It is estimated that the cotton area and output will be 3.56 million hectares and 5.65 million tons in 2024, 15% and 8% lower than those in 2014 respectively. The output of sugar will drop, and is expected to reach 12.23 million tons in 2024, with a gap of about 6.3 million tons between supply and demand.

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