



中国粮食市场 发展报告

李经谋 主编



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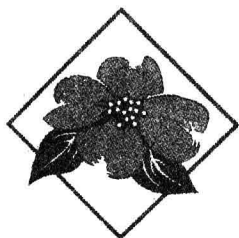
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(代序)

李经谋



当辞旧迎新的子夜钟声在人们的欢呼声中鸣响的时刻，回眸 2012，穷思极想，似乎很难用振奋人心来描述。倘若要搜索令人难忘的故事，大概首推地球人都知道的“世界末日论”吧。

就世界经济而言，欧债危机的反复、美国复苏的乏力、金砖四国的低迷，以及中东战争的升级……让许多世界政要在过去一年里备受煎熬。新的一年虽然值得期待，但似乎很难把“熊”赶回老窝。

就中国经济而言，有人说 2012 年是“五味杂陈”：“神九”飞天、“蛟龙”探海、航母试航，足以令华夏儿女激动不已。然而，经济增速的放缓、物价压力的增大、食品安全的严峻，加之领土主权的捍卫等等，更令人忧心忡忡。

但也有不少国际舆论对中国仍然翘首期盼，希望中国再次成为“全球经济的新火车头”。他们认为，中国仍是 2012 年世界经济的亮点，虽然经济增速下滑，“但与美国奋力挣扎的经济相比，中国经济仍然在快速增长”。

如果说 2012 年全球经济的亮点在中国，我以为，中国经济的亮点应该是农业。在世界粮食危机

几近常态化的今天，中国粮食生产“九连增”无疑是个奇迹，不仅为中国粮食安全的可持续发展做出了重要贡献，也对世界粮食安全功不可没。

中国粮食生产连续数年仓廪丰实，既得益于天时地利，更得益于政通人和。逾30年的改革开放，使我国总体上进入以工促农、以城带乡的重要发展阶段。但是伴随工业化、城镇化的深入推进，我国农村社会经济结构正加速转型，地块细碎化、生产分散化、流通无序化、村庄空心化、人口老龄化，已无力应对农业高投入、高成本、高风险的时代，必然会给中国的粮食安全带来新的隐患。因此，创新农业生产经营体制势在必行。

党的十八大报告指出：“坚持走中国特色新型工业化、信息化、城镇化、农业现代化道路”，“培育新型经营主体、发展多种形式规模经营，构建集约化、专业化、组织化、社会化相结合的新型农业经营体系”，这同国务院关于深化流通体制改革、打造农产品产销一体化流通链条和大力扶持农业产业化龙头企业的精神一脉相承，是中国农村又一次重大的组织创新和制度创新，也是实现农业现代化的必由之路。

实现“新四化”目标，需要一个相当长的历史过程。就农业现代化而言，伴随着新农村建设的深入开展，不少地方开始迈出农村体制改革的坚实步伐。许多新型生产经营主体蓬勃兴起，诸如多种形式的新型农民合作组织的建立，能够较好地解决分散的小生产与现代大市场间的矛盾，逐渐成为推动农村经济发展的主力军。特别是一些社会资本参与的新型股份合作经济组织，成为解决农村资金、人才和科技“瓶颈”的一个重要选择。当然，一些人对“资本下乡”心存疑虑是可以理解的，但“资本剥夺农民”、“农村会非农化”的高论，却令人大惑不解，这同改革开放初期听到的“外资剥削”、“中国变质”的慷慨陈词以及加入WTO前看到的“狼来了”的诚惶诚恐如出一辙。其实，社会资本关注“三农”，支持粮食生产，未必是件坏事，国家完全可以通过政策法规趋利避害，大可不必因噎废食。

农业生产经营体制的创新和国家流通体制的改革对粮食流通业将会产生什么影响？机遇乎？挑战乎？

一方面，现代粮食市场体系建设将面临重要的机遇期。作为粮食市场体系两翼的现货批发市场和期货市场，成立伊始就存在先天不足，即生产分散、组织化程度低的农民很难成为市场交易主体，这对粮食价格的形成

和市场功能的发挥均带来不利影响。而粮食生产规模化、组织化程度的不断提高，新型生产经营主体的形成，无疑会为现货市场和期货市场注入新的活力，促使粮食市场体系建设逐步走上健康发展的轨道。同时，新型农业经营体系的建立，也必然要大力培育现代流通方式和催生新型流通业态。

另一方面，传统粮食流通业将面临更加严峻的挑战。农业生产经营体制的重大改革，对流通业提出更新、更高的要求。李克强总理年初到国家粮食局科学研究院考察时明确指出，要“为农业现代化创造条件，提供市场”，要“广积粮、积好粮、好积粮”，“守住管好‘天下粮仓’”，这是摆在粮食流通业面前的一个新的课题。因此，如何为农业生产经营体制改革和农业现代化搞好服务，是需要研精覃思的。农业生产经营主体的日趋多元化，农产品产销一体化流通链条的不断延长，“从田间到餐桌”生产经营模式的推行，使得粮食购销渠道发生重大变化，原由粮食部门承担的商品流通业务会被逐步分流，进入流通环节的商品粮会愈益减少，粮食批发市场配置资源的作用有可能被弱化，粮食市场的竞争也会越来越激烈，这无疑是对传统粮食流通业生存和发展的重大挑战。也许会有人说，这种变化决不会屡及剑及，又何必杞人忧天？我以为“人无远虑，必有近忧”，未雨绸缪总比临渴掘井好。

可喜的是，随着改革开放的不断深化，现代粮食市场体系建设已步入一个新的发展时期。期货市场加快了改革、创新和开放的步伐，交易制度逐步完善，交易品种日渐增多，交易结构更趋合理，交易所公司化改革稳步推进，使之更好地服务于实体经济之需，更加适应社会主义市场经济的发展。而粮食现货市场也在不断革故鼎新，完善交易机制，拓展经营渠道，提升服务质量，市场功能得到更好的发挥。有的粮食企业已从单一的粮油食品经营，发展成为全产业链粮油食品集团，并且跻身全球企业500强。更多的粮食企业冲破传统的经营模式，走上多元化或产销一体化发展的新路。但从总体上看，我国粮食企业发展还很不平衡。因此，有必要以产业链的思维整合现有资源，充分发挥粮食行业连接城乡、服务产销的传统优势，打破行业、部门、区域、所有制界限，将流通链条通过多种方式向粮食生产和消费领域延伸或对接。要培育现代流通方式，打造新型粮食集团，促进粮食产业转型升级，这是现代粮食企业发展的重要方向。

然而，粮食收购市场尚未走出政府定价的老路。国有粮食企业的体制性弊端依然存在，国家的惠农政策有时难以落到实处，粮农也得不到在市场经济大潮中学习“游泳”的机会。若不适时理顺粮食价格形成机制，随着农业经营主体的日趋多元化，会愈加积重难返。建立市场经济条件下“国家支持价格、市场形成价格、政府调控价格”的新机制势在必行。看来，作为国家支持价格的“目标价格”还是要旧话重提——如果将既有的政府定价改为目标价格，虽一词之差，却是两重天地。

实现农业现代化是多少代中国人的梦想，也是粮食安全可持续发展的根本保障。虽然我国目前粮食供求处于“总量基本平衡，结构性紧缺”状态，如果用“一分为二”这个古老的哲学命题去分析，我国的粮食安全形势仍然十分令人担忧。据有关专家分析，一是粮食产量虽然连年增长，但粮食质量却逐年下降，特别是优质强筋小麦质量的退化，导致期货市场不得不修改其合约标准。而化肥、农药使用量与粮食产量同步增长，折射出科技对生产贡献率的弱化，这大概是粮食增产严重依赖化肥、农药投入所产生的恶果。如果说在我国“重产轻质”是个痼疾，那么“优质高产”则是个愿望。二是粮食生产虽实现“九连增”，但粮食进口却是“逐年增”。更需引起我们警惕的是，自2009年起我国由传统的玉米出口国连年成为玉米和谷物的净进口国。在粮食产量迭创新高的情况下，仍需靠大量进口来维持供需平衡，说明我国的粮食安全形势还是很脆弱的，况且，因灾减产的可能性并非不存在，这就需要我们“满则虑歉，平则虑险，安则虑危”。因此，全力推进“粮安工程”，确保国家粮食安全和粮食有效供应，强基固本，正是农业生产经营体制改革的重大意义之所在。

“青山缭绕疑无路，忽见千帆隐映来。”习近平总书记在十八大之后多次释放深化改革的信号，以重新凝聚改革开放之合力：“必须坚持社会主义市场经济改革方向，改革只有进行时没有完成时。没有改革开放，就没有中国的今天，也没有中国的明天。改革开放中的矛盾只能用改革开放的办法来解决。”这掷地有声的“中国好声音”，一扫近几年彷徨、徘徊甚至于倒退的阴霾，是中国经济“调结构、转方式、稳增长”最给力的“正能量”。有理由相信，在不久的将来，我们将迎来一个实现中国梦的新时代。

一位外国学者由于去年预测失误，今年再度聚焦中国经济时便显惴惴

不安：“新一轮充满信心的预测可能再度让位于更加严峻的现实。”但愿不会如此！美国《大众科学》刊登一则消息：“根据一项新的研究成果，人类可能存在未卜先知的能力……这可能与量子行为有关。”其实，预测是人类生存的本能，是进化过程中优胜劣汰的基因传承，关键在于“未卜先知”的准确与否。如果科学家能够研究出“准确预测基因”，意义岂不更加重大！“世界末日论”就不会甚嚣尘上，诺贝尔奖也一定会向你频频招手。实际上任何事物都是不断发展变化的，企望预测十分精准是不现实的，即便是对同一个问题，持不同观点、立场、角度的人，见仁见智，其预测结果也有可能大相径庭。如果能做到“博学之，审问之，慎思之，明辨之，笃行之”，或许预测的准确率就会高一些吧。

元芳，你怎么看？

2013年3月18日

There Seems to be No Way Through the Curling Mountains, and Suddenly Thousands of Sails Appear Vaguely

(Preface)

Li Jingmou

When the bell rang out the Old Year and rang in the New Year among people's applause, I looked back into 2012, and found it hard to describe it as exciting after wracking my brains. If you want to search for the unforgettable stories, the first must be the one about the Doomsday.

In terms of the world economy, the continuation of the European Debt Crisis, the little progress in the US economy recovery, the slowdown in the BRIC countries, the escalation of wars in the Middle East, etc. , made many political leaders around the world suffer a lot in the past year. The New Year is worth looking forward to of course, but it seems very hard to get the "bear" back into its hole.

As for China's economy, some people describe 2012 as full of mixed feelings: the successful space flight of Shenzhou IX, the deep - sea exploration of the Jiaolong, and the trial voyage of the aircraft carrier made the Chinese people very excited, while the slowdown of economic growth, the increase of pressure on prices, the seriousness of food safety problems, as well as the defending of territorial sovereignty were more worrisome.

But many international reports still expect a lot out of China, hoping that it will again become "the new engine in world economy". They think that China

was still the bright spot of the world economy in 2012. Although China's economic growth slowed down, "but compared with the struggling US economy, it still grew rapidly".

If we say that in 2012 the bright spot of the world economy was China, I think the bright spot of China's economy was its agriculture. At the current time when the world grain crisis is nearly normalized, the increasing for 9 consecutive years of China's grain production is no doubt a miracle, contributing greatly to the sustainable development of food security in both China and the world.

China has had bumper harvests for many years for reasons of favorable climatic and geographical conditions and more because of good governance and harmonious people. The reform and opening - up policy for more than 30 years has in general led China into the important development phase of promoting agriculture with industry and promoting rural areas with cities. But along with the further advancement of industrialization and urbanization, the social and economic structure in China's rural area has been transforming at a more rapid speed. Fragmentization of plots, decentralization of production, disorder of circulation, hollowing of villages and aging of population are unable to deal with the time of high investment, costs and risks of agriculture, which is sure to bring new hidden dangers to China's food security. Therefore, it is imperative to innovate China's agricultural production and operation system.

The report at the 18th Party Congress points out, "We shall insist on following the road of new types of industrialization, informatization, urbanization and agricultural modernization with China's characteristics", and "We shall cultivate new types of operational main bodies, develop a variety of scale operations, and create a new type of agricultural operation system combining intensification, specialization, organization and socialization." That is completely in line with the State Council's spirit on deepening the reforms of circulation systems, creating a circulation chain that will integrate production and marketing of agricultural commodities, and supporting leading enterprises in agricultural industrialization, and that is another organizational and institutional innovation and the inevitable course to achieve agricultural modernization.

It takes quite a long historical process to realize the goals of “industrialization, informatization, urbanization and agricultural modernization”. In terms of agricultural modernization, along with further development of the construction of the new countryside, people in many regions are taking firm steps to reform the rural systems. Many new types of main bodies in production and operation are rising up, including several new types of farmers’ cooperatives, which can quite well settle the contradiction between scattered small – scale production and modern huge markets, and are gradually becoming the main force to push forward the development of rural economy. In particular, the new type of economic organizations of joint stock partnership has become an important alternative to solve the “bottle necks” of capitals, talents and technologies in the rural area. It is understandable that some people have doubts about “capital investment in the countryside”, but the brilliant views of “capital depriving farmers” and “non – agriculturalization of agricultural organizations” are really puzzling. They are exactly the same as the brilliant statements about “exploration by foreign capitals” and “China’s deterioration” at the beginning of the reform and opening – up and the extreme fear that “the wolf is coming” before China’s accession into the WTO. In reality, it is not necessarily a bad thing that social capital pays attention to “agriculture, countryside and farmers” and supports grain production. The state government is completely able to draw on advantages and avoid disadvantages through its policies and regulations and should never refrain from doing something necessary for fear of a slight risk.

What effects will the innovation of the agricultural production and operation system and the reform of the countrywide circulation system have? Are they opportunities or challenges?

On the one hand, the construction of modern grain market system will meet an important period of opportunities. As the two wings of the grain market system, the spot wholesale market and the futures market were born with some inherent defects. That is, it is very difficult for farmers with scattered production and low – level organization to become the main bodies in marketing, which has brought adverse effects on both the forming of grain prices and the functioning of

the market. But the continuous enhancement of grain production scale and organization and the forming of new types of main bodies in production and operation will surely inject fresh vigor into the spot and the futures markets, and make the construction of grain market system to step onto the track of healthy development. At the same time, the establishment of the new type of agricultural production and operation systems will also surely cultivate a modern circulation mode and lead to a new state of the circulation industry.

On the other hand, the traditional grain circulation industry will meet more severe challenges. Great reforms of the agricultural production and operation system will present new and higher demands to the grain circulation industry. At his inspection trip in the State Grain Administration at the beginning of this year, Premier Li Keqiang clearly pointed out that it is a new subject facing our grain circulation industry to “create conditions and supply markets for agricultural modernization”, “to store grain widely, store good grain, and store grain well”, and to stick to and take good care of the biggest grain stock in the world.” Thus, it requires lots of deep thinking to better serve the reforms of the agricultural production and operation system and the agricultural modernization. But as the main bodies in agricultural production and operation are becoming more and more diversified, the continuous extension of the circulation chain integrating agricultural commodity production and marketing, and the introduction of the mode of production and operation “from field to table”, are causing great changes to the grain purchase and sale channels. The responsibility for commodity circulation undertaken by the government grain departments in the past is being gradually reduced. The commercial grain in the traditional circulation channels will become less and less, the grain market’s function of resource allocation might be weakened, and the competition in grain markets will be more and serious, which will present great challenges to the survival and development of the traditional grain circulation industry without any doubts. Maybe someone will say that this kind of changes will not be so imminent and we should not meet trouble halfway. In my view, “a man without distant care must have near sorrow”, and it is better to plan ahead than not to make timely preparations.

To our great pleasure, along with the deepening of reform and opening – up, the construction of the modern grain market system has stepped into a new development stage. The reform, innovation and opening – up of the futures market have accelerated, the marketing system is becoming better and better, the types of dealings are becoming more and more, the dealing structure is becoming more reasonable, and the demutualization reform of exchanges are pushing forward steadily, so as to better serve the needs of the real economy, and to better adapt to the development of the socialist market economy. And the grain spot market is also making general reforms, continuously perfecting its dealing systems, widening its operation channels, enhancing its service quality, and perfecting its market functions. Some grain enterprises have developed from simple grain and oil food operation into grain and oil food groups with a whole industry chain among the top 500 enterprises in the world. More and more grain enterprises have given up the traditional operation modes and taken the new road of diversified development or production and marketing – integrated development. But in general, the development of grain enterprises in China is very unbalanced. Therefore, it is necessary to integrate the current resources from the perspective of an industry chain, make full use of the traditional advantage of the grain industry's linking the city with the countryside and serving production and sale, and break down the boundaries among industries, departments, regions and ownerships, so as to extend and link the circulation chain to the areas of grain production and consumption through various ways. We must cultivate modern circulation modes, create new types of grain groups and encourage transformations and upgrades of the grain industry. That is an important direction for the development of modern grain enterprises.

However, the grain purchasing market has not stepped away from the old road of pricing by the government. The systematic disadvantages of the state – owned grain enterprises still exist, the state policies supporting agriculture sometimes are not effectively implemented, and grain farmers have no chance to learn how to “swim” in the big current of market economy. If the grain pricing system is not timely straightened out, it will be too difficult to reverse the above

situation as the main bodies in agricultural operation become more and more diversified. It is imperative to set up a new system of “the state supports the price, the market forms the price, and the government regulates the price” under the condition of market economy. It seems that we have to go over the matter of discussion before, that is, the “target price” for which the state supports the price—if the established government – set price is changed into the target price, it would have a completely different meaning, though it concerns just the difference of only one word.

It is the dream of many generations of the Chinese people and the essential guarantee for the sustainable development of China's food security to realize agricultural modernization. The present grain supply and demand in China is in the state of “overall supply in basic balance and structural shortage”, but if we analyze it according to the ancient philosophy that “everything has two sides”, the situation of the food security in China is still very worrisome. According to the analysis of related experts, one of the reasons is that while the grain quantity has been increasing yearly, the grain quality has been decreasing, and especially the degeneration of the quality of strong gluten wheat has forced the futures market to revise the standards of contracts. And the increase of fertilizer and farm chemical usage in pace with that of grain production reflects the decrease of contribution to production by science and technology, which might be the disastrous effect caused by increasing grain production mainly through more usage of fertilizer and farm chemical. If we say that quantity is paid more attention than quality in China, then “high quality and high quantity” is just a beautiful dream. The second reason is that China has achieved increase of grain production for 9 consecutive years, but its grain import has also grown in the meanwhile. What is worth much of our attention is that since 2009 China has become a net corn and cereal importer from a traditional corn exporter. Under the condition that its grain production has been increasing for so many years, the fact that China still need to import so much grain to keep the balance between supply and demand clearly shows that the situation of its food security is still very weak, and that we need to “think about poor harvests while enjoying bumper ones, and to pre-

pare for dangers while in peace". And it is just the purpose of reforming the agricultural operation system to push forward the "Food Security Project" and to ensure China's food security and effective food supply.

"There seems to be no way through the curling mountains, and suddenly thousands of sails appear vaguely." Since the end of the 18th Party Congress, General Secretary Xi Jinping has released for several time the signal to deepen reforms in order to re-concentrate people's efforts. "We must insist on the direction of the socialist market economy reform. There is only the continuous tense rather than the perfect one for the reforms. Without the reforms and opening-up, there would have been no today for China, and there would be no tomorrow for China. Any contradictions in the reforms and opening-up can only be solved through ways of reforms and opening-up." That hard-hitting "Voice of China" has swept away all the hesitance, hover and even backsets in the reforms and opening-up, and is the most powerful "positive energy" to "adjust structures, change modes and stabilize growth" for China's economy. We have reasons to believe that in the near future we will meet the new era to realize the Chinese dream.

One foreign scholar who made a mistake in forecasts in last year seemed on pins and needles while focusing on China's economy again this year: "Another round of forecasts full of confidence might again give way to more severe reality." I wish that would not be the case. There was a piece of news from *Popular Science* in the US, "According to one of the latest researches, the human has the ability to foretell things.....It might have to do with the quantum behavior." In fact, the human has the instinct of foretelling things so as to survive, and it is a gene inheritance through the survival of the fittest during the evolution process. The key point is whether the human can foretell things precisely. If scientists could come out with the "precise foretelling gene", it would be of greater importance! The Doomsday would not make so great a clamor, and the Nobel Prize would wave again and again to you. In effect, everything changes constantly and it is quite hard to foretell precisely. Even for the same the issue, people with different views, positions and perspectives have different opinions