

2005 ZHONGGUO LIANGSHI SHICHANG FAZHAN BAOGAO

2005 中国粮食市场 发展报告

李经谋 主编

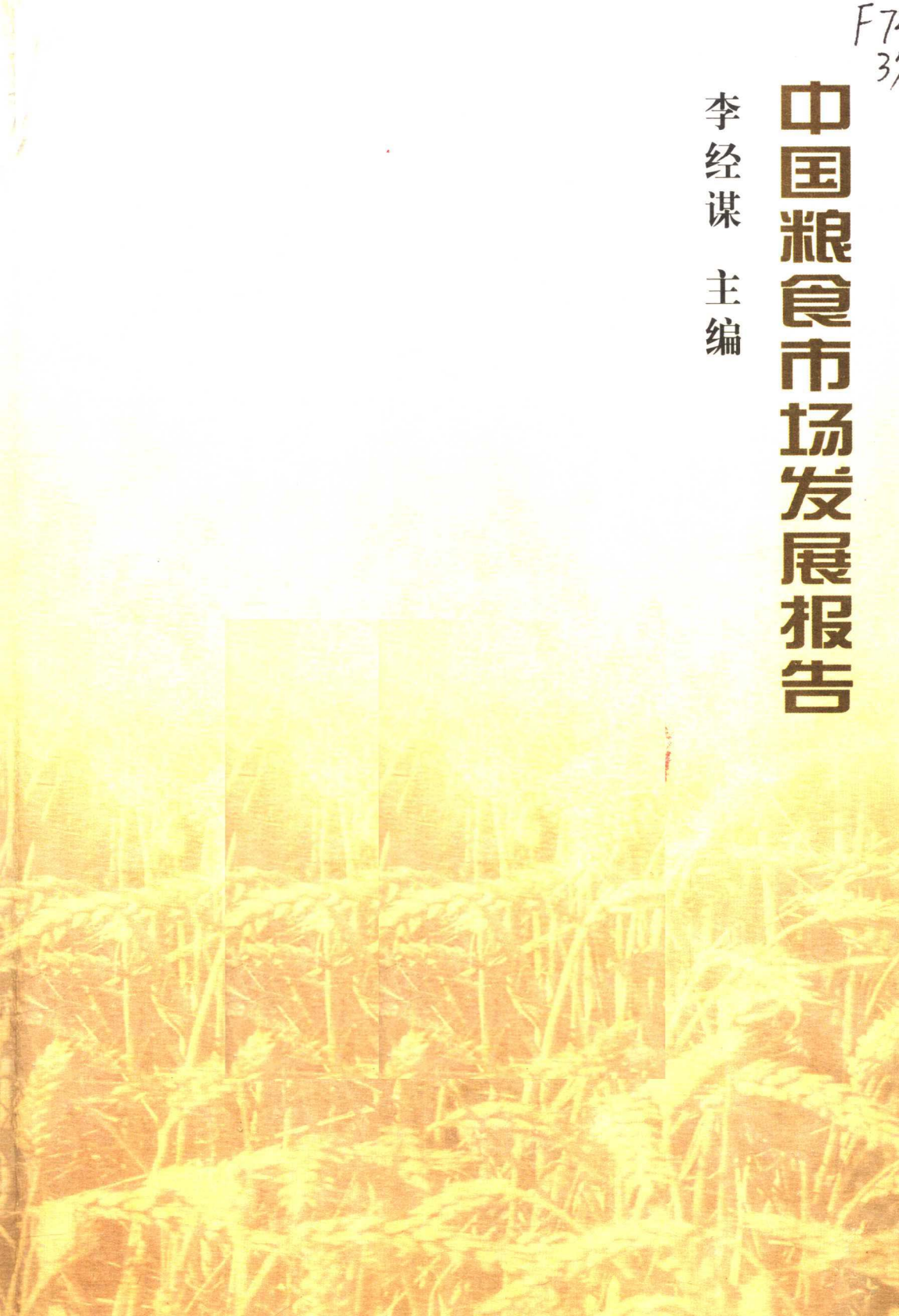


中国财政经济出版社

F74
37

中国粮食市场发展报告

李经谋 主编



图书在版编目 (CIP) 数据

2005 中国粮食市场发展报告/李经谋主编. —北京: 中国财政经济出版社, 2005.6

ISBN 7-5005-8271-4

I. 2… II. 李… III. 粮食-市场-研究报告-中国-2005 IV. F724.721

中国版本图书馆 CIP 数据核字 (2005) 第 054653 号

中国财政经济出版社 出版

URL: <http://www.cfeph.cn>

E-mail: cfeph@cfeph.cn

(版权所有 翻印必究)

社址: 北京市海淀区阜成路甲 28 号 邮政编码: 100036

发行处电话: 88190406 财经书店电话: 64033436

北京牛山世兴印刷厂印刷 各地新华书店经销

787×960 毫米 16 开 26 印张 396 000 字

2005 年 7 月第 1 版 2005 年 7 月北京第 1 次印刷

定价: 52.00 元

ISBN 7-5005-8271-4/F·7232

(图书出现印装问题, 本社负责调换)



主 编 简 介

李经谋 汉族。1942年5月生于山东济宁。1966年毕业于山东财经学院，中共党员，高级经济师，享受国务院特殊津贴的著名粮食专家和期货专家，全国五一劳动奖章获得者，我国粮食批发市场、期货市场创始人之一，国家粮食局顾问，第八届河南省人大代表，第九届全国人大代表。受聘为中国人民大学、西安交通大学、北京工商大学、郑州大学等院校兼职教授，中国社会科学院兼职研究员。历任河南省商业管理委员会副主任，河南省粮食厅副厅长，中国郑州粮食批发市场主任，郑州商品交易所总裁、理事长；现任中国粮食行业协会批发市场分会理事长，郑州粮食批发市场总经理，中华粮网高级顾问。在长期的市场实践中，形成了自己关于粮食批发市场、期货市场、电子商务、市场体系和宏观调控等方面的理论观点。在国内外发表论文、著作300多万字，代表著作有《期货交易必读》、《中国期货市场理论研究》、《国债期货》、《期货交易方略和技巧》、《期货市场教程》、《市场中介组织研究》、《农产品期货套期保值》、《中国粮食批发市场发展研究报告》、2003—2005年度系列《中国粮食市场发展报告》等。

2005

2005 ZHONGGUO LIANGSHI
SHICHANG FAZHAN BAOGAO

中国财政经济出版社

此为试读, 需要完整PDF请访问: www.ertongbook.com

专家顾问委员会

高级顾问

(按姓氏笔画排序)

白美清	田源	朱长国	陈锡文
林军	段应碧	高铁生	

专家委员会

(按姓氏笔画排序)

丁声俊	邓亦武	王献立	刘文进
乔林选	朱远洋	李思恒	李经谋
张汉麟	陈晓华	吴硕	吴志华
宋则	肖春阳	肖永成	洪涛
戚维明	常清	黄守宏	曾丽瑛
韩俊	程国强	颜波	

主编

李经谋

春天的思考

(代序) 李经谋



2004年是值得浓墨重彩的一年，又是值得回顾与思索的一年。当粮食市场化的春风吹绿神州大地，市场的无常和认知的彷徨似乎应验了“乍暖还寒时候，最难将息”。年初，在依然供过于求的形势下，粮食价格大幅攀升；年底，虽获丰收，但产不足需，在仍需挖库存保障供应的情况下，价格却稳中趋跌。市场经济这只“无形之手”桀骜不驯的性格初露峥嵘。它向人们昭示：单纯依靠行政手段掌控粮食价格的时代已经一去不复返了。因此，如何从市场经济的视角认真总结**2004**年粮价波动的经验教训，建立一个以科学发展观为指导的粮食宏观调控的长效机制，避免“头痛医头，脚痛医脚”，让难免“兵戎相见”的“有形之手”和“无形之手”相处为安，是一个需要认真探讨和亟待解决的问题。

粮食价格的合理回升，实质上是粮食供求关系趋紧的一个重要信号。连续几年挖库存弥补当年的产不足需，是激活多年低迷粮价的重要原因。至于在依然供过于求的情况下，粮食价格短期内大幅攀升，主要是心理因素造成的，诸如抬价抢购、待价而沽、自卖自买等逆向操作行为，不适

当地扭曲、放大了价格信号。不到一年，粮食价格却又稳中趋跌，归根结底是粮食供求关系得以改善的客观反映。由于政府加大了对“三农”的支持力度，加之人努力，天帮忙，粮食增产，进口骤增，缓释了人们的惜售、抢购心理，使粮食价格高位回落。这是市场经济条件下粮食价格的理性回归，也是“无形之手”对粮食价格非理性上涨的一种有效纠正。

综观 2004 年粮食市场的风云变幻，给我们留下了许多宝贵的经验和教训。

首先，2004 年初党中央、国务院审时度势，做出了加强粮食宏观调控的决策和部署，及时出台了《中共中央国务院关于促进农民增收若干政策的意见》。这是自 18 年前，中央连续发出五个有关农村工作的“一号文件”后，出台的第六个“一号文件”，足见中央领导对“三农”问题的重视程度。实践证明，它是在我国粮食市场全面放开、粮食供求关系发生重大变化、粮食安全问题成为关注焦点的情况下，一次十分成功的国家粮食宏观调控举措。经济运行中的不稳定、不健康因素得到抑制，出现了粮食增产、农民增收的良好局面。这充分说明，市场经济不是万能的，国家的宏观调控恰恰可以弥补市场的缺陷和失灵。当然，在正常情况下，市场经济中的问题应当由市场自行解决，确需国家宏观调控时，应该突出重点，把握时机，掌控力度。重点应放在粮食供求平衡上，时机应把握在市场价格失真上，力度要适可而止。若矫枉过正，容易陷入“多了多，少了少”的怪圈，也很容易重蹈历史覆辙。2005 年国家又加大了农村工作的力度，以确保粮食增产、农民增收。但在市场经济条件下，增产与增收往往是鱼和熊掌的关系，二者很难兼得。在去年农民增收的部分中，粮价上升因素占有相当大的比重。因此，应高度关注有可能出现的粮食丰收、粮价下跌问题，做到未雨绸缪。

其次，应该看到，去年一系列有关粮食问题的政策法规的出台，对确保市场化初期国家粮食安全十分必要和及时。但总体来看，主要是行政手段的强化，而市场作用的发挥明显不足。不可否认，行政手段确能起到立竿见影的效果，但随着市场化进程的不断深入，过多使用行政手段容易扭曲市场关系，加大改革成本，也容易让人产生粮食市场化改革“彷徨收放”的错觉。

再次，对粮食价格的大幅波动国家没有进行过多的行政干预，这是一

个历史的进步。但也不能不看到，由于粮价监测预警体系不健全，加之各方面认识不尽一致，也贻误了调控粮价非理性上涨的时机，这也是需要认真探索的问题。

2004年，国务院颁布了《粮食流通管理条例》，明确把粮食宏观调控纳入相应条款。其实，早在15年前，在社会主义市场经济体制尚未确立的情况下，国务院就建立了国家粮食储备制度和郑州粮食批发市场作为粮食宏观调控的重要手段和载体。15年来，虽然“郑州价格”作为中国粮食市场的“晴雨表”在国内外产生了重要影响，但其功能和作用还远未得到充分发挥。当然，市场经济条件下的粮食宏观调控是个系统工程，涉及面广，难度比较大，它的健全和完善需要一个过程。但是，我们认为以下几个方面的问题需要形成共识并亟待解决：

确立一定历史时期粮食综合平衡的基本原则和粮食宏观调控的战略目标，如粮食总产量、粮食自给率、耕地面积、粮食安全储存量、粮食进出口量等。提纲挈领，则事半功倍。

健全完善现代粮食市场体系。以市场为基础的价格形成机制是现代市场体系的核心，也是配置资源的中心环节。因此，要充分发挥中央粮食批发市场作为国家粮食宏观调控载体的重要职能，通过国家储备粮的吞吐调节和推陈储新，形成全国性的指导价格，乃至世界粮食话语权，引导和调节粮食资源的合理流动，带动和促进全国各级各类粮食市场的协调发展；要充分发挥市场体系不可或缺的粮食期货市场发现未来价格、套期保值转移现货价格风险的重要功能和作用。期货市场的预期功能可自发调节和熨平现货价格，形成粮食的基准价，保持粮价的相对稳定。通过市场体系的完善和健全，逐步形成国家调控市场、市场形成价格、价格引导生产和流通的机制。

建立健全粮食价格保护体系。要研究借鉴国外粮食支持价格、目标价格的经验，改革现行的最低收购价政策，建立一个既能保护农民在粮价低于国家预期价位时直接得到国家经济补偿，又不影响和干扰市场形成价格和市场主体共担风险的价格保护体系。

建立国家粮食宏观调控中心。要克服现行粮食管理部门分割、认知不一、决策滞后的弊端，建立具有权威性的、专家型的国家粮食宏观调控中心。调控中心要及时对粮食供求、粮食价格实施监测和预警；协调相关部

门的政策，统一相关部门的认识，及时向国务院提出涉及粮食生产、流通、进出口、储备粮调节以及财政、税收、信贷方面的调控建议，增强宏观调控的前瞻性、准确性和实效性；并受国务院委托，对国家粮食宏观调控举措行使决策权。

要建立健全粮食法律法规体系。市场经济是规范经济、法制经济，国家的宏观调控主要依托经济手段和法律手段，同计划经济时期的行政干预是完全不同的两个概念。因此，要加快粮食法、批发市场法、期货法等的立法进程，以规范粮食生产、流通行为，提升市场经济条件下国家粮食宏观管理的整体水平。

《中国粮食市场发展报告》已出版3卷。从2003年报告序言《春天的报告》，到2004年《又是一年春来时》，2005年《春天的思考》，“春天三部曲”的旋律如实记录了粮食价格全面放开前后我们对粮食市场发展的忧虑、期待、思索和建议。而全卷所展现的专家学者的高屋建瓴和企业精英的真知灼见，以及对粮食流通体制改革热点、焦点、难点问题的深入研讨，给粮食行业一个全新的视野、深层的思考、对称的信息、准确的预期，这大概是《中国粮食市场发展报告》得到领导肯定、专家青睐和业界认可的重要原因吧。

由于粮食问题在我国有特殊战略地位，决定了粮食流通体制改革的艰巨性、复杂性和曲折性。面对粮食市场化改革出现的新问题，进乎？退乎？用我国商业文化创始人胡平先生关于体制改革的一句经典名言“苦海无边，回头无岸”来作解答，再恰当不过了。“大鹏一日乘风起，扶摇直上九万里”，我们相信，既然粮食市场化的风帆已经鼓起，必将冲破惊涛骇浪，驶向胜利的彼岸。

2005年3月19日

Reflection in Spring

Preface

Li Jingmou

The year of 2004 deserves thorough description as well as deep review and reflection. When the spring breeze of grain marketization added green to China, both the uncertainty of the market and the hesitation of people's cognition seemed to make the line in one ancient poem come true —— “It is most difficult to recuperate oneself as it suddenly becomes warm from out of severe cold.” At the start of the year, grain prices rose sharply while the supply exceeded the demand; at the end of the year, grain prices stabilized and went down a bit while the output could not meet the demand even after a good harvest so that the stock had to be used to guarantee the supply. The “intangible hand” of the market economy has initially demonstrated its characteristic of untameness. It shows that the era of relying only on administrative means to control grain prices has gone and never to return. Therefore, it is a very important issue that needs serious exploration and quick solution how to deeply sum up the experiences and lessons learnt from the fluctuations of grain prices in last year from the angle of the market economy, establish a long-term effective mechanism for the state's grain macro-regulation under the guidance of the view of scientific development, avoid “treating the symptoms but not the disease”, and allow the “tangible hand” and the “intangible hand”, which inevitably conflict with each other in the initial stage of grain marketization, to coexist in harmony.

The reasonable rise of grain prices was in essence an important message on the

tightening up of the relationship between grain supply and demand. Relying on the stock to cover the gaps between the output and the demand for several years on end was one of the important factors that activated the grain prices that had kept low for several years. And the sharp rise of grain prices in a very short period while the supply exceeded the demand was caused mainly by mental factors. The adverse operations such as raising up prices, scare buying, waiting for the highest bid, and self-selling and self-buying, improperly enlarged the signal on prices. The fact that grain prices stabilized and went down a bit again within one year was in the final analysis an objective reflection of the improvement of the relationship between the supply and the demand. Due to the government's strengthened emphasis on the issue of "agriculture, rural area and farmers", farmers' hard work, good weather, increased grain output and rapid growth of import, people's mentality of reluctance to sell and scare buying was alleviated, which resulted in bringing down grain prices from a high level. It was a rational regress of grain prices under the circumstance of market economy, and an effective correction by the "intangible hand" to the irrational rise of grain prices.

After making a comprehensive review of the fluctuations of grain prices in 2004, we are left with many precious experiences and lessons learnt.

First of all, at the start of 2004, the Central Committee of the Communist Party of China and the State Council judged the hour, sized up the situation, made proper decisions and arrangements to strengthen macro-regulation on the grain market accordingly, and issued *Opinions of the Central Committee of the Communist Party of China and the State Council on Several Policies on Promoting Increase of Farmers' income*. It was the sixth No. 1 Document of the Central Committee of the Communist Party of China since it issued 5 No. 1 Documents successively 18 years ago, from which we can clearly see how much importance the Central Committee of the Communist Party of China has been attaching to the issue of "agriculture, rural area and farmers". The practice has proved that the measure taken by the state government for macro-regulation on grain market was a great success at a time when the grain market in China was fully opened up, the relationship between grain supply and demand was changing significantly and the issue of food security became a focus

of the public attention. The unstable and unhealthy factors in economic development were put under control, and appeared the exciting situation of enhanced output of grain and increased income of farmers. It fully shows that the market economy is not omnipotent, and the state government's macro-regulation can make up for the defects and failures of the market. However, under normal conditions, the market economy's problems should be solved by the market itself. When it is needed indeed, the state government's macro-regulation should lay stress on the balance of grain supply and demand, seize the occasions when market prices are distorted, and be implemented to a proper extent. Hypercorrection could easily lead us into the vicious cycle of extremes and onto the track of an overturned cart in the history. In 2005, the state government has further strengthened its emphasis on the issue of rural development in order to ensure enhancing grain production and increasing farmers' income. But under the circumstance of the market economy, it is nearly impossible to both enhance grain production and increase farmers' income. The increased part of farmers' income in last year was mainly due to the rise of grain prices. Thus, we should pay great attention to getting prepared in advance to deal with the situation of bumper harvest and fallen grain prices that might appear.

Secondly, we should notice that the issuing of a series of policies and regulations on grain was very necessary and timely for ensuring our country's food security in the initial stage of marketization. But in general, it mainly ended in the strengthening of administrative means, and the obvious underplaying of the market's role. There is no doubt that administrative means can indeed get effect instantly, but along with the continuous development of the marketizing process, overuse of administrative means could distort the market relations, increase the cost of reform, and tend to cause people to have the misunderstanding that the reform of grain marketization is hesitating at the crossroad of regulation and deregulation.

Thirdly, it was a historical progress that the state government did not intervene too much with the fluctuations of grain prices. But we must also realize that we missed the best occasion to regulate the irrational rise of grain prices due to our imperfect grain price monitoring and warning system and the disagreements among various agencies. It is an important issue that needs serious explorations.

In 2004, the State Council promulgated *Regulation on Management of Grain Circulation*, placing grain macro-regulation clearly into relevant legislation. In fact, as early as 15 years ago when the socialist market economy was not yet set up, the State Council established the State Grain Reserve System and Zhengzhou Grain Wholesale Market as an important means and a medium respectively for grain macro-regulation. For the past 15 years, the “Zhengzhou Price” as the “barometer” of China’s grain markets has played an important role both at home and abroad. But its functions and roles are far from being put into full play. Of course, the state’s macro-regulation on grain market under the circumstance of the market economy is a systematic project involving a wide range of areas and a lot of difficulties, and it needs to take some time to complete and perfect the mechanism. But we think we should reach consensus and give priority to addressing the following issues:

Determining basic principles for comprehensive balance of the grain market and strategic goals for macro-regulation on the grain market in certain historical periods of time, such as total grain output, grain self-sufficiency rate, farmland area, amount of stock for food security, grain export and import, etc. If we concentrate on the main points, we would be able to get twice the result with half the effort.

Completing and perfecting a modern grain market system. The pricing mechanism based on the market is the core of the modern market system as well as the central link of resource allocation. Therefore, we should give full play to the functions of the central grain wholesale markets as the media for the state’s macro-regulation on the grain market, form nationwide guidance prices and even have a say on world grain prices through regulating the inflow and outflow of state grain stock and replacing old grain with new grain, guide and regulate flows of grain resources reasonably, and drive and expedite the integrated development of various grain markets at different levels throughout China. We should give full play to the important functions and roles of grain futures markets inseparable to the market system in guiding future prices, hedging and shifting risks of grain supply on hand, because the expected functions of futures markets can automatically regulate prices of grain supply on hand, form basic grain prices and keep grain prices relatively stable. We should complete and perfect the market system, and gradually form a mechanism for the

state government to regulate the market, for the market to form the price, and for the price to guide the production and circulation.

Establishing and perfecting a grain price protection system. We should re-search into and use for reference foreign countries' experience on grain support prices and target prices, reform the current policies of minimum purchasing prices, and set up a grain price protection system that can enable farmers to get financial compensations directly from the state when grain prices fall below the state's predicted price levels while causing no effect on and interference with markets forming prices and markets' main bodies assuming risks together.

Establishing a national center for macro-regulation on grain market. We should overcome such abuses as segmentation, disagreement and lagging-behind decision making of the current agencies for administration of the grain market, and set up an authoritative and expert-type national center for macro-regulation on the grain market. The center should be responsible for monitoring and providing warnings on grain supply and demand and grain prices, coordinating and unifying relevant agencies' policies and opinions, forwarding to the State Council suggestions on regulation of grain production, circulation, import and export, stock, and related financing, taxation and credit in order to improve the foresightedness, accuracy and practicability of the macro-regulation, and exercising the right of decision making on measures of macro-regulation on grain market under the entrustment of the State Council.

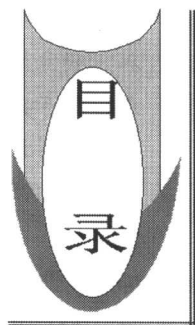
Establishing and perfecting a system of laws and regulations on the grain market. The market economy is a standardized economy as well as an economy under the rule of law. The state's macro-regulation should rely mainly on economic and legal means, which belong to a completely different concept with the one of administrative interference during the time of the planned economy. Therefore, we should expedite the process of enacting such legislations as *Grain Act*, *Wholesale Market Act*, *Futures Market Act*, etc. to standardize grain production and circulation and enhance the overall quality of the state's macro-regulation on the grain market under the circumstance of the market economy.

Report on Development of China's Grain Markets has been published in three

volumes. The rhythms of the trilogy from the preface of *Report in Spring* to the 2003 report, through *Time of Spring Again* to the 2004 report and *Reflection in Spring* to the 2005 report, record according to the facts our worries, expectations, reflections and suggestions before and after the full opening up of grain prices. The penetrating judgments by experts, scholars and business elite and their deep explorations into the hot areas, focuses and difficult issues on reforms of the grain circulation system as shown in the volumes, provide the grain industry with brand-new views, thorough reflections, symmetric information and accurate expectations. That might be one of the important reasons why *Report on Development of China's Grain Markets* has won affirmation, flavor and acceptance from leaders, experts and the industry respectively.

The particular strategic position that the issue of grain occupies in our country determines the difficultness, complexity and tortuousness of the reform of the grain circulation system. In the face of new problems arising out of the reform of grain marketization, shall we go ahead or step back? The best answer might be the famous remarks on system reforms by Mr. Hu Ping who is the founder of our country's commercial culture — “There is a bound to the sea of bitterness, but no shore for repentance.” “Once the roc starts flying along with the wind, it will go ninety thousand li straight up into the sky.” We firmly believe that since the reform of grain marketization has raised its sails, it will surely break terrifying waves and reach the shore of victory.

March 19, 2005



第一部分 2004 年粮食市场概述	(1)
一、中国粮食市场	(3)
二、世界粮食市场	(15)
第二部分 2004 年中国粮食市场体系建设	(27)
一、粮食批发市场发展状况与展望	(29)
二、粮食期货市场发展状况与展望	(39)
三、粮食电子商务发展状况与展望	(48)
第三部分 中国粮食市场主要品种供求形势	(59)
一、小麦市场分析	(61)
二、玉米市场分析	(71)
三、稻米市场分析	(85)
四、大豆及豆油市场分析	(96)
五、油菜籽市场分析	(106)
六、花生及花生油市场分析	(130)
第四部分 中国粮食市场专论	(137)
一、建立和完善粮食宏观调控的长效机制	(139)
二、国家粮食储备管理体制和运行机制创新	(148)
三、市场化条件下国有粮食企业改革正在展开	(157)
——2004 年全国国有粮食企业改革综述	(157)
四、建立我国新型的粮食补贴机制	(166)
五、我国粮食批发市场建设的形势与任务	(184)
六、中国粮食批发市场的物流战略探析	(193)
七、加强银企合作 推动粮食网上交易	