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李经谋 主编



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春天的诺言

(代序) 李经谋



2006年中国粮食市场扑朔迷离，在粮食丰收的背景下，价格却面临下跌和上涨的双重压力，甚至使许多“老粮食”坠入“五里雾”中，发出“敢问路在何方”的感慨。那么问题究竟出在哪里呢？作为粮食宏观调控的重要手段，最低收购价成为引人注目的焦点。

自2004年中央政府出台粮食最低收购价政策以来，经历了政策储备（2004年）、政策实施（2005年）、扩大实施（2006年）三个阶段。如果说2004年该政策主要起到心理支撑的作用，2005年粮价仍然处于相对高位、作用有限的话，那么不可否认，2006年最低收购价则在政府粮食宏观调控中扮演了主要角色，取得了很大成功。

首先，保证了粮食安全。2006年，我国实现粮食连续第三年增产丰收，有效地改变了国家粮食安全状况。这与扩大最低收购价政策的覆盖范围（既包括品种，也包括省份），强化政策实施力度密切相关。其次，维护了粮价稳定。最低收购价政策对稳定市场粮价起到双向作用。新粮上市，可以化解粮价下行压力，并形成调控资源；粮价上涨，政

府可以通过抛售平抑粮价。2006 年最低收购价政策在这两个方面都起到了很好作用。再次,体现了调控意图。最低收购价政策通过预案制定、出台时机选择、收购品种确定、指定市场集中竞售等方式,强烈地体现了政府的宏观调控意图,尤其通过国家粮食交易中心集中销售,容易形成权威价格,有利于发挥价格对生产和流通的指导作用。最后,增加了农民收入。2006 年农村居民人均纯收入比上年实际增长 7.4%,最低收购价政策的作用功不可没。据有关部门初步测算,实施小麦最低收购价政策的地区,农民增收 40 亿元以上。

但是,应该看到 2006 年粮食宏观调控成功是有条件的。一是宏观经济环境宽松,政府财力有保证。二是政府掌握了大部分商品粮源,确保了顺价销售。三是定价比较合理,农民售粮积极性较高。四是收储企业积极性高,粮食库容有保障。五是由中储粮总公司集中收购,通过国家粮食交易中心竞价销售,避免了各行其是,便于履行调控职责。最低收购价政策在发挥积极作用的同时,还面临一些问题。比如,与市场形成价格的机制不相适应,存在某种程度的价格扭曲;政策实施成本提高,有可能形成新的“包袱”;不利于推进国有粮食企业改革;不利于培养农民的风险意识等。条件的限制,问题的存在,意味着最低收购价政策还存在多方面的局限性。

2006 年是粮食宏观调控获得成功的一年,也是大家困惑较多的一年。困惑之一是市场放开后,到底是市场定价还是政府定价。按照粮食流通体制改革的目标,要放开粮食市场,放开粮食购销价格,理应由市场定价,但我国粮价现在事实上是由政府定价。这难免让一些人对我国粮食市场化改革的目标产生怀疑。困惑之二是粮食丰收与粮价上涨。粮食连续三年丰收,产需缺口不断缩小,库存粮食进一步增加,在供求关系有效改善的情况下,2006 年粮食价格却在一定时段出现大幅上涨,令人困惑。追根寻底,这次价格上涨不是由市场因素造成,而是政策使然。这难免让人对我国现行的粮食政策,尤其是最低收购价政策产生一些怀疑。困惑之三是国有粮食购销企业的改革问题。一些国有粮食购销企业又靠“政策饭”过上“小康”日子,改革出现某种程度的“回归”,难免让人对国有粮食企业改革的前景产生怀疑。困惑之四是最低收购价政策成功实施的条件是否长期具备。随着时间的推移,很可能时过境迁,即使长期具备,还应考虑实施成本问题。由此决定了最低收购价政策应该是一个过渡性选择,那么目标

选择是什么？这又成为困惑人们的另外一个问题。

困惑源于认知的不同，推进改革需要人们对相关问题作更深刻的反思和定位。

长期紧缺与短期过剩问题。从长期看，粮食紧缺是不争的事实，但长期紧缺并不排除短期过剩的存在。客观地看，目前我国粮食供求已是基本平衡。因此，解决粮食问题不仅要解决短缺的问题，还要解决过剩的问题。我们不能用长期短缺的思维来掩盖在某些时段出现的粮食过剩问题，我们有过“前车之鉴”。因此，粮食宏观调控不仅要调“少”，而且还要调“多”。同时，应该看到，粮食科技的快速进步为粮食增产提供了有利条件，只要国家重视，政策合理，即使出现暂时短缺也会得到妥善解决。

生产安全与流通安全问题。粮食安全的内涵与外延十分丰富，是一个涉及多层次与多环节的概念。近年来，政府把粮食安全的重点放在生产环节，这在粮食供求趋于紧张的情况下无疑是正确的。问题的关键是：国家要认真确定某一时期我国粮食生产的总体目标和自给率，这有利于我国粮食生产与流通的良性循环。但生产不是问题的全部，当粮食生产达到安全边际的时候，也就是紧平衡阶段，粮食流通往往具有决定作用。粮食丰收出现粮价大幅上涨，提醒我们要更加重视粮食流通安全。

总量平衡与结构失衡问题。粮食连年丰收，国内粮食供需状况明显改善，总量平衡有余，但地区、品种结构性失衡问题突显。从地区结构看，产区粮食安全状况良好，但由于深加工和工业用粮等因素影响，粮食消费需求显著增加；部分销区和产销平衡区粮食产需缺口有扩大的趋势，安全形势不容乐观。从品种结构看，小麦和稻谷由前几年产不足需转变为产需基本平衡；玉米由以往供需平衡有余逐步向平衡偏紧转变；大豆产需缺口继续扩大，进口量居高不下。因此，在总量平衡的情况下，也可能会因为结构失衡的原因导致某些地区、某些品种出现粮食价格大幅波动。在当前粮食总量平衡的情况下，需要更多地关注结构失衡问题。

面对困惑与挑战，改革的道路究竟在何方？其实，这条路就是市场经济的阳关大道。世易时移，既要借鉴过去成功的经验，同时也要总结失败的教训，与时俱进，不断创新，才有出路。因此，我们必须坚持粮食市场化改革方向不动摇，加快改革的步伐。

建立与完善现代粮食市场体系。根据国家“健全统一、开放、竞争、

有序的现代市场体系”的总体要求，粮食流通体制改革的核心任务之一，就是要建立和完善现代粮食市场体系。这是发挥市场在粮食资源配置中的基础性作用，建立市场形成价格新机制的基本前提。现代粮食市场体系的基本框架应为：以零售市场为基础，以批发市场为主体，以期货市场为先导，以电子商务为方向，期货与现货结合、商流与物流结合、传统与网络结合、生产与流通结合的现代粮食市场体系。

建立与完善粮食价格形成新机制。首先，建立与完善市场形成价格的机制。要充分发挥粮食批发市场、粮食期货市场和粮食电子商务的功能与作用，推动全国统一大市场的形成，真正建立以市场为基础的粮食价格形成机制。其次，建立与完善国家支持价格的机制。针对最低收购价的局限性，变最低收购价为目标价格，变“暗补”为“明补”，切实保护农民的利益，构建粮食价格保护的新机制。最后，建立与完善政府调控价格的机制。市场失灵的存在，就有了宏观调控的必要。政府应该制定合理的调控目标，有效利用生产、流通、库存、进出口等调控手段，实现粮食供求平衡，保证粮食价格相对稳定。但政府对粮价的调控主要应是运用经济手段的间接调节，而不应是行政手段的直接干预。最简便易行、最有效的办法是通过确立的国家粮食交易中心进行政策粮的吞吐调节来平抑市场粮食价格，并形成粮食话语权。在社会主义市场经济条件下，国家要紧紧围绕“价格”做文章，最终实现政府调控市场，市场形成价格，价格引导生产、流通和消费的良性循环。

建立国家粮食宏观调控组织机构。粮食宏观调控是一个系统工程。针对我国粮食管理中存在的部门分割、职能分散的现状，建立国家粮食宏观调控中心势在必行。其职能是：协调相关部门的政策，统一相关部门的认识，对粮食供求、粮食价格实施监测和预测，对粮食安全形势进行及时评估和预警，向国务院提供涉及粮食生产、流通、进出口、储备粮调节和财政、税收等方面的宏观调控措施，增强重大决策的时效性、准确性和权威性。

走过春天，改革需要更加坚定的信念。回首过去，我们需要履行春天的诺言。粮食市场化虽然“路漫漫兮其修远”，但只要有“上下求索”的精神，“敢问路在何方？就在脚下”！

Promise in Spring

Preface

Li Jingmou

China's grain markets in 2006 was very uncertain. Grain prices contrarily faced the double pressure of falling and rising under the situation of a bumper harvest, and many veterans in the grain field felt as if they had fallen into a mist, asking with a sigh "Where is the road?". Then, where is the problem? As one important means of macro - regulation on the grain market, the minimum purchasing price has become an eye - catching focus.

Since the issuing of the policies of minimum purchasing prices by the state government in 2004, the policies had gone through three stages including policy reserve in 2004, policy implementation in 2005 and expanded implementation in 2006. There is no denying that the minimum purchasing prices had won a big success by playing a major role in the state government's macro - regulation on the grain market in 2006, if the policies performed the function of a mental support in 2004, and had a limited effect on grain prices at a relatively high level in 2005.

First of all, the safety of grain was guaranteed. The realization of the increased output with a bumper harvest in 2006, the third straight bumper harvest year, effectively improved the situation of China's grain safety. It was closely connected with the expansion of the coverage (both in varieties and in provinces) of the minimum purchasing prices policies, and with the emphasis on the implementation of the policies. Secondly, the stability of grain prices was maintained. The minimum purchasing prices policies had made a two - way effect on the stability of grain market prices. The entry of new grain into markets might dissolve the falling pressure of grain prices, forming regulating resources; and the rising grain prices

were able to be stabilized by selling grain by the state government. The minimum purchasing prices in 2006 had played a good role in both the respects. Thirdly, the intention of regulation was shown. The minimum purchasing prices strongly showed the state government's intention of macro - regulation by means such as draft decision - making, the choice of issuing moments, the determination of purchased varieties, concentrative bidding trade by directed markets, etc. Particularly the concentrative selling through national grain trade centers easily formed authoritative prices, and favorably put into play prices' guidance on production and circulation. At last, farmers' incomes were increased. In 2006, rural residents' incomes per capita were 7.4 percent up from last year actually, which mostly resulted from the effect of the minimum purchasing prices policies. According to the initial calculation by related departments, farmers' increased incomes were above 4 billion yuan.

However, it should be seen that the success of macro - regulation on the grain market in 2006 was conditional. Firstly, there was a financially relaxed macroeconomic environment, and the state government' finance was secure. Secondly, the state government ensured the selling at favorable prices by putting most of commercial grain resources under control. Thirdly, pricing was relatively reasonable so that farmers had a relatively high enthusiasm for selling grain. Fourthly, purchasing and reserving enterprises were enthusiastic, and the storage capacity of grain was ensured. Fifthly, the concentrative purchase by China Grain Reserves Corporation and the bidding trade through national grain trade centers avoided each - going - its - own - way and made easy the performance of regulating function. While the minimum purchasing prices were playing a positive role, there were still some problems to face. For example, the policies weren't consistent with the system of markets forming prices, making existent the distortion of prices to some extent; the rising cost of implementing the policies could form new burdens; the policies were unfavorable to the promotion of the reform of stated - owned grain enterprises, and to the cultivation of farmers' risk consciousness; etc. The limit of conditions and the existence of problems means the existence of the restriction of the minimum purchasing prices in many respects.

The year of 2006 was both the successful one of macro - regulation on the grain

market and the confusing one for everyone. The first doubt was which set prices, markets or the state government, after opening up markets. According to the goal of grain circulation system reform—opening up grain markets and grain purchasing and selling prices, prices should be set by markets. However, in China, the fact was that the state government set prices, which unavoidably made some people doubt the goal of China's grain marketization reform. The second doubt was that the grain prices were rising while having had a bumper harvest. It was confusing that the grain prices of 2006 showed a large rise in a particular period of time, under the situation that the relationship between supply and demand was effectively improved, as a result that there had been three straight bumper harvest years, the gap between production and demand was narrowing, and the grain reserves were further increased. The radical reason was that this rise of prices was not caused by market factors, but a result of the policies. It easily led to the doubts about China's existing grain policies, particularly about the minimum purchasing prices policies. The third doubt was the problem of state - owned grain purchasing and selling enterprises reform. Some state - owned grain purchasing and selling enterprises have had a well - off life again by depending on "policy meal", and there have been a recession in reform to some extent. The facts naturally brought doubts about the prospects of state - owned grain enterprises reform. The fourth doubt was whether there were, all the time, conditions needed for the successful implementation of the minimum purchasing prices policies. With the passing of time, it is very possible that the conditions are changing, and even if they exist all the time, the cost of implementing the policies must be put into consideration. So, it is decided that the minimum purchasing prices policies should be a transitive choice; then, what is the choice of goal becomes another question confusing people.

Doubts come from the difference of understanding. Promoting the reform needs people's deeper review and definition on related questions.

There is a question about long - term shortage and short - term surplus. In a long run, there is no doubt that the shortage of grain is a fact, but long - term shortage can co - exist with short - term surplus. Objectively, China's present situation of grain supply and demand has reached a basic balance. Therefore, the

settlement of the “grain” problem should be made both in shortage and in surplus. We have had lessons from the past experience so that we can’t cover the problem of surplus grain appearing in some periods in the thinking way of long – term shortage. Thus, macro – regulation on the grain market regulates “a large amount” as well as “a small amount”. Meanwhile, it should be seen that the rapid progress of grain science and technology has provided favorable conditions for grain production increase, and that as long as the state gives emphasis and rational policies, the situation of temporary grain shortage will also be able to be dealt with securely even if it appears.

There is a question about production safety and circulation safety. The inside and outside meanings of grain safety are very rich and a concept involving many levels and links. There is no doubt that it is right that the state government have put emphasis on productive link for grain safety in the recent years under the situation of the tightening relationship between grain supply and demand. The core of the problem is that the state should carefully decide the total goal and the self – sufficiency rate of its grain production, which benefits a good cycle of China’s grain production and circulation. However, production doesn’t mean the whole of the problem, and as grain production reaches the edge of safety—the tight balance period, grain circulation is often critical. The large rise of grain prices accompanying a bumper harvest reminds us of further emphasis on the safety of grain circulation.

There is a question about total output balance and structure unbalance. Straight years’ bumper harvest has made obviously improved the domestic situation of grain supply and demand—the total output balance with a surplus, but the unbalance of structure in regions and varieties is marked. In terms of regional structure, the situation of grain safety in the producing areas is good, but the consumption demand for grain has obviously been increased, under the influence of such factors as grain consumption of deep – processing and industry; the gap between grain production and demand in part of the selling areas and the producing and selling balance areas is enlarging, so that the situation of safety isn’t optimistic. In terms of variety structure, wheat and paddy have turned from production less than demand several

years ago to production basically balancing demand now; corn from supply balancing demand with a surplus to a slightly tight balance; and the gap between soybean production and demand goes on enlarging, keeping a high level of imports. Thus, under the situation of total output balance, it is possible that some varieties show large fluctuation of grain prices in some areas, due to structure unbalance. More attention should be paid to the issue of structure unbalance under the present situation of total grain output balance.

Facing doubts and challenges, where is the road of reform? In fact, the road is just the broad one of the market economy. With the world changing and the time passing, we should use for reference past successful experiences while summing up the lessons of failure, because progressing with the passing time and constant creation can just produce a way out. Therefore, we must stick to the direction of grain marketization reform and don't waver, quickening the pace of reform.

Establishing and perfecting a modern grain market system. According to the state's total requirement of the modern market system of "completion and unification, opening - up, competition, and order", one of the core tasks of the grain circulation system reform is to establish and perfect the modern grain market system, which is the basic precondition of putting into play markets' basic role in allocation of grain resources and of establishing markets forming prices. The infrastructure of the modern grain market system should be the one basing retail markets, using wholesale markets as main bodies, making futures markets pioneer, advancing in the direction of electronic business, and making a combination between futures and cash commodities, between commercial flow and logistics, between tradition and internet, and between production and circulation.

Establishing and perfecting a new grain prices forming system. Firstly, it is establishing and perfecting a markets forming prices system. We should give full play to the functions and roles of grain wholesale markets, grain futures markets and electronic grain business, promote the development of a big national unified market, and really establish the grain prices forming mechanism based on markets. Secondly, it is establishing and perfecting a state support prices system. Addressing the restriction of the minimum purchasing prices, we should turn the minimum

purchasing prices into the target prices, "hidden subsidy" into "daylight subsidy", really protect farmers' interests, and constitute a new grain prices protection system. At last, it is establishing and perfecting a governmental prices regulation system. The existence of market failure results in the necessity of macro - regulation. The state government should make rational regulation goals, realize the balance between grain supply and demand, and ensure the relative stability of grain prices, by effectively using means such as production, circulation, stock, import and export, etc. However, the state government' regulation on grain prices should mainly be indirect adjustment to use economic means, but not direct interference by administrative means. The simplest and most effective way is to make regulations of state grain stock' inflow and outflow through established national grain trade centers to regulate grain market prices, forming a say on the grain market. Under the circumstance of the socialist market economy, the state should take measures closely around "prices", and eventually realize a good cycle for the state government to regulate the market, for the market to form the price, and for the price to guide the production, circulation and consumption.

Establishing a national organization agency for macro - regulation on grain market. Macro - regulation on the grain market is a systematic program. It is imperative establishing a national center for macro - regulation on the grain market. The center should be responsible for coordinating and unifying relevant agencies' policies and opinions, monitoring and forecasting grain supply and demand and grain prices, making timely estimations and warnings of the situation of grain safety, forwarding to the State Council suggestions on macro - regulation of grain production, circulation, import and export, stock, and related financing and taxation, and enhancing the practicability, accuracy and authority of important decision - makings.

Going through spring, the reform needs firmer belief. Looking backwards, we need fulfill a promise in spring. Although there is a long way for grain marketization to go, we dare say "where is the road? It is just underfoot" by the spirit of constant exploration and seeking.

March, 2006



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