


中国饲料粮

市场供给需求与贸易发展

田维明 周章跃等◎著

 中国农业出版社

中国饲料粮市场 供给需求与贸易发展

**Supply, Demand and Trade Prospects
of China's Feed Grain Market**

田维明 周章跃 等 著

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前 言

随着我国经济的发展和居民收入的提高，口粮消费已经出现下降，而畜产品和水产品消费量则在继续上升。因而从长期看，我国面临的粮食问题将主要是饲料粮问题。

国内外已经有很多学者对中国粮食市场的变化前景做了分析研究。然而，大多数过去的研究从总供给和总需求角度考察粮食市场变化，对口粮和饲料粮供求决定因素和变化前景分项做深入分析的研究则较少。此外，这类研究通常依赖正式出版物发表的统计资料，大量使用缺乏足够代表性的二手经验参数，很少能够通过深入基层做调研来掌握一手实际情况，并深化到地区层次展开分析。从本书引用的文献资料可以看出，不同研究对于中国的粮食生产能力和需求变化前景做出的判断差异极大。乐观者认为，中国人完全有能力靠自己的资源养活自己；悲观者则认为，中国今后势必要大量进口粮食，从而可能使整个世界都受到冲击。研究结论的巨大分歧表明，我们仍然未能准确把握决定中国粮食市场变化前景的重要因素。很显然，这种状况既不利于政府制定具有远见的粮食政策，也不利于粮食经营者做出合理的决策。

本书发表的研究报告是以由澳大利亚谷物研究发展公司资助的《中国饲料粮地区市场的发展和展望》研究项目（GRDC 项目编号 US282）为基础的。该项目的目的是增进对中国饲料粮市场的了解。该项目从多个角度考察了与中国饲料粮市场发展变化有关的问题，包括畜牧业生产发展、畜产

品需求、不同地区的牲畜饲养模式、饲料工业的发展、饲料粮生产和贸易、国际农产品市场变化前景、饲料粮跨地区流通、口粮消费与饲料粮消费的联系等。在项目执行过程中，我们到吉林省公主岭市、河南省杞县、浙江省嘉善县和四川省郫县做了专项调查，取得了农户畜牧业经营情况的大量资料，特别是有关饲料使用结构和饲料转化率的信息。我们利用对城乡居民肉类消费调查数据深入分析了不同肉类产品的户内和户外消费数量，从而部分回答了为什么国家统计局报告的居民肉类消费量与农业部门报告的畜产品生产量出现巨大偏差这一问题。我们还利用 GTAP 模型评估了 WTO 多边贸易政策改革对国际畜产品和饲料粮市场可能产生的影响，进而从更广阔的角度考察我国饲料粮市场的变化前景。我们也专门建立了中国饲料粮市场空间均衡模型，用其评价国内流通政策改革、收入增长、技术进步等因素对饲料粮供给、需求和地区间调运的影响。

GRDC 项目结束后，我们仍继续关注中国粮食市场和政策的发展变化，并在原来工作的基础上进一步扩展和深化研究，最终形成了本书。本书深入分析了中国粮食政策的演变过程，全面地考察分析了口粮和饲料粮市场的联系，指出了影响中国粮食市场变化前景的重要因素。虽然本项目研究工作已经完成近 5 年，而这 5 年中粮食市场形势在不断变化，但我们当时的发现和认识与现实在相当程度上相吻合。这使我们相信，本书报告的研究成果能够为读者提供一些有用的信息。

本书的完成首先得益于澳大利亚谷物研究发展公司提供的资助。在项目进行期间，该公司的项目顾问 Mike Taverner 持续不断地提供了各种帮助。澳大利亚悉尼大学和中国农业大学的有关负责人也以多种方式对本研究提供了支

持。在研究工作中，我们得到了农业部、吉林农业大学经贸学院、吉林省公主岭市农业局、浙江大学经贸学院、浙江省嘉善县农业局、河南省杞县农业局、四川省郫县农业局有关人员的大力支持。中国农业大学经济管理学院张莉琴、王莉、郭庆方、滕华勇、李岚、高颖等参加了农户调查工作和资料的整理分析工作，来自澳大利亚和中国多个单位的学者也在不同阶段为本研究提供了大量建设性的意见，使我们得以对研究结果做出重大改进。对于上述各方面人员提供的支持，我们借此机会表示衷心的感谢。

由于我国的粮食统计数据仍不够完整准确，并且受到时间和能力的限制，本研究肯定存在很多不足之处。我们希望，本研究可以为今后的类似工作提供一个更高的起点，从而使我们对中国粮食问题的认识能够不断地深入。

中国农业大学经济管理学院 田维明
澳大利亚 James Cook 大学商学院 周章跃
2007 年 7 月

Preface

This book provides grains industries in China and many other major grain-producing countries with an in-depth understanding of China's feedgrain markets at both the regional and national levels. It also provides useful information to other industries whose businesses are related to the use of feedgrains and who have an interest in the Chinese market such as livestock, pulses and feed industries. This book is a result of a combination of key findings from a research project, supported by Australia's Grains Research and Development Corporation (GRDC), and recent research discoveries by members of the research team.

In recent years, China's rising demand for feedgrain has been increasingly recognised as an important issue and many believe that any future increase in total grain demand in China will be mainly caused by an increasing demand for feedgrains. On the other hand, an increase in demand for feedgrain by China would have an important impact on the international grain market. What will be the demand for and supply of feedgrain in China in the years to come? Will China be importing large amounts of feedgrain? Studies have attempted to answer these important questions, and produced very different answers. Large discrepancies between forecasts of supply and demand of feedgrains provide information of limited value to producers,

consumers, traders and policy-makers. Better information about supply and demand is needed to improve decisions and outcomes.

To address this important issue, GRDC supported a project that looked into China's feedgrain demand and supply issues at both the national and regional levels. The project was three years in duration (2000—2002) and was led by Associate Professor Zhangyue Zhou (who earlier worked at the University of Sydney and now works at James Cook University) and Professor Weiming Tian of China Agricultural University. A number of researchers from Australian and Chinese institutions contributed to this project at various stages. Since the accomplishment of the project, members of the research team have closely followed many important issues concerning China's feed grain economy and their new findings and updated discussions are also reflected in this book.

In this book, authors examined various feedgrain issues in China at great depth and from various angles. Among various other important issues, this book offers the reader with insights into: China's current animal product consumption and production development and trends; China's regional feedgrain production, consumption and trade patterns; household animal raising practices; China's feed industry development and its demand for feedgrains; China's future feedgrain supply and demand and regional-level feedgrain trade patterns; and the impact of international agricultural market reforms on China's demand for feedgrain imports.

Without GRDC's funding support, this project would not have been conducted. We are most grateful to GRDC for its support to make this study possible. Dr Mike Taverner, GRD

Program Consultant, has been most instrumental in the design and implementation of this project. Throughout the project, he has been very supportive and encouraging.

Various collaborating institutions provided enormous support to the conduct of this project. Many staff and postgraduate students from collaborating institutions provided assistance to this project at various stages in various capacities. Among them we thank in particular Ms Li Wang, Mr Qingfang Guo, Mr Huayong Teng, Ms Liqing Zhang, Ms Lan Li, Ms Ying Gao for conducting the surveys, data collection and entry.

Comments and suggestions received at a project workshop were most valuable to refine our research findings and we thank all the participants for their inputs and assistance. In particular, we owe a great deal to those discussants at the workshop who spared their valuable time to examine our draft reports. The discussants are: Dr John Brennan, Principal Research Scientist, NSW Agriculture; Mr Tim Kelf, Regional Manager, South Asia, Meat and Livestock Australia; Ms Belinda Howe, International Market Analyst, Australian Wheat Board; Dr Ray Trewin, Program Manager, Australian Centre for International Agricultural Research; Dr Ray King, Principal Research Scientist, Victorian Institute of Animal Science; Professor Ron Duncan, Director, National Centre for Development Studies, Australian National University; Dr Jammie Penm, Manager, Commodity Forecasting Support Unit, ABARE; and Mr Vince O'Donnell, Senior Program Manager, ABARE.

We also record our gratitude to all members in the research team for their willingness and cooperation to work on this project. We are most fortunate for having such a wonderful and

capable research team.

We believe findings contained in this book will greatly facilitate readers' understanding of issues concerning China's feedgrain economy and various other related issues. It is noted that many our predictions or remarks regarding the development of China's feedgrain economy have withstood the tests of what has actually happened since 2002 when the major project was finished. We welcome any comments and suggestions about our work.

Wei-Ming Tian, China Agricultural University

Zhang-Yue Zhou, James Cook University

July 2007, Beijing

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