



中国粮食市场发展报告

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中国财经出版传媒集团
中国财政经济出版社



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图书在版编目 (CIP) 数据

2017 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, 2017. 6

ISBN 978 - 7 - 5095 - 7493 - 5

I. ①2… II. ①李… III. ①粮食市场 - 研究报告 - 中国 - 2017
IV. ①F724. 721

中国版本图书馆 CIP 数据核字 (2017) 第 115467 号

责任编辑: 樊 闽

责任校对: 李 丽

封面设计: 汪俊宇

中国财政经济出版社出版

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

E-mail: cfeph@cfeph.cn

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社址: 北京市海淀区阜成路甲 28 号 邮政编码: 100142

营销中心电话: 88190406 北京财经书店电话: 64033436 84041336

北京中兴印刷有限公司印刷 各地新华书店经销

787 × 1092 毫米 16 开 23.25 印张 314 000 字

2017 年 6 月第 1 版 2017 年 6 月北京第 1 次印刷

定价: 52.00 元

ISBN 978 - 7 - 5095 - 7493 - 5

(图书出现印装问题, 本社负责调换)

本社质量投诉电话: 010 - 88190744

打击盗版举报电话: 010 - 88190414 QQ: 447268889

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李经谋



“新故相推，日生不滞。”岁月的长河奔腾不息，梦想的希冀催人奋进。

已然离去的2016年，是难忘的一年，也是非凡的一年。一则幽默的网络语言颇令人寻味：美国总统，不是她；英国公投，脱了；誓言一生献给国家，被“闺蜜”揭了老底；欧美多国政治动荡，不确定因素增加；恐怖主义肆虐，威胁国际安全；世界经济复苏乏力，贸易保护主义抬头……“凡事如是，难可逆料”，无不让人忧心忡忡。

然而，在如此乱局中“风景这边独好”：杭州峰会，贡献中国智慧；“一带一路”，宏图快速推进；科技成就，惊见异彩纷呈；改革深化，经济触底企稳……2016，中国释放出的温暖成为融化世界政治经济坚冰的深厚滋养。“中国担当了全球经济火车头的角色”，达沃斯论坛创始人兼执行主席施瓦布在第47届年会上如是说。

中国经济的出色表现，见证了供给侧结构性改革攻坚之年取得的丰硕成果。一年多来，党中央坚持稳中求进工作总基调，紧紧围绕供给侧结构性改革的目标，明确“三去一降一补”的重点工作，

直指多年经济发展沉疴。

“风乍起，吹皱一池春水。”很显然，供给侧结构性改革，已在深化中国经济改革中发挥着重大作用，路透社评论认为，改革将“使市场力量获得更大的发展空间”。

“供给侧”一词，从一个生僻的经济学术语，时间不长，即成为破解中国改革难题的战略重点和炙手可热的十大社会流行语，足见其为“雄才大略，经纬远图”，应当为它多点几个赞。

作为“三农”领域的一场深刻变革，过去的一年间，农业供给侧改革高度吸睛，粮食供给侧改革紧锣密鼓。然而，一些深层次结构性矛盾尚未有效缓解，“高库存、高进口、高成本”持续叠加，给我国粮食安全带来严峻挑战——库存高企与粮价走低交织，粮食对农民增收支撑能力下降；国内外粮价长期倒挂，粮食国际竞争能力下降；成本高企与产能透支，粮食可持续发展能力下降；阶段性过剩和结构性失调并存，粮食供需匹配能力下降。应对这些挑战，根本出路在于深入推进粮食供给侧结构性改革，提高粮食的市场竞争力和可持续发展能力。

粮食供给侧改革是一盘大棋局。既要调整粮食种植结构、更好满足全社会对粮油产品的需求破题，也要在转变粮食经营方式、为粮食发展注入新动能方面谋篇布局。

粮食供给侧改革是一项系统工程。既要矫正粮食供求失衡，提升供需匹配能力，也要通过系统性、整体性、根本性改革，促进粮食供给由过度依赖资源消耗、主要满足“量”的需要，向追求绿色生态可持续、更加注重满足“质”的需求转变。

与以往几次粮食结构调整相比，此次粮食供给侧结构改革，是一场涵盖范围广、触及层次深的既治标又治本的全方位变革，也是一次前所未有的粮食流通格局的战略性转型。因此，博采诸言，推究综括，全面认知粮食供给侧结构改革是十分必要的。

发力供给侧，要下好价格机制和收储制度改革“先手棋”。“不破不立，不塞不流，不止不行。”价格机制和收储制度若不改革，打下的粮食国家照单全收，生产者就无法摆脱政策依赖，就不会有动力优化种植结构，就无法终止过度生产的行为。激活市场，关键是要让价格机制真正引导农业资源合理配置。这是个根本性的问题。此前进行的几次种植结构调

整，虽然要求农民面向市场调优生产，也在某种程度上解决了财政负担过重、农民卖粮难和“打白条”等难题，但由于价格机制没有实质性改变，粮食购销市场化改革徘徊徘徊，结构调整陷入循环往复的轮回。

改革价格机制，需要全盘谋划、系统设计。要按照市场定价、价补分离的原则，坚定推进玉米收储制度改革，健全生产者补贴制度，鼓励多元市场主体入市收购，防止出现卖粮难。坚持并完善稻谷、小麦最低收购价政策，合理调整最低收购价水平，改变只涨不降的刚性预期，形成合理比价关系，尽量减少对市场供求的过度干预。大豆、玉米价格与市场接轨后，东北地区可能更倾向于“旱改水”，分品种施策固然考虑了不同品种的战略重要性，但要防止“按下葫芦浮起瓢”。稻谷加工链条短，若不能及时纠偏，去库存将面临更大的压力。

改革价格机制，应充分体现优质优价的经营理念。抓紧制订优质米、面、油等质量品质分类标准，建立覆盖范围广的测评体系，定期向社会发布粮油质量信息，引导农民紧跟消费需求变化，调优“米袋子”，满足“舌尖上的诉求”，靠市场鼓起增收的“钱袋子”。引导有条件的粮食企业通过订单收购、合作入股等方式建设优质粮基地，培育从田间到餐桌的全产业链优质粮油经营模式，增加安全、优质、绿色、健康的中高端粮油的供给。

改革价格机制，亦应给特色粮油作物留出利润空间。制定更加灵活主动、便于操作的结构调整政策，探索建立不同农作物种植收益、不同农业经营主体之间的补贴联动机制，有效引导农民合理调整结构。比如，东北地区种植结构调整补贴低于玉米生产者补贴，势必产生逆向激励，弱化农民种植大豆、杂粮杂豆的动力。统一实施旱粮生产者补贴，或许可以平衡不同品种的比较效益，减少逆向选择行为。

发力供给侧，要唱好去库存“重头戏”。去库存是当前粮食流通领域最为突出的矛盾，也是深化流通体制改革的一场硬仗。科学处理粮食存量与增量的关系，抓好“藏粮于地、藏粮于技”工作，真正从供给侧缓解粮食库存压力。抓住治理环境污染、减霾治霾等环保生态建设机遇，统筹粮食安全、食品安全和能源安全，以霉变玉米、毒素超标小麦、“镉大米”等为原料，在“问题粮食”集中区，稳步适度扩大粮食燃料乙醇生产规模和使用区域；优化南方水网地区生猪养殖区域布局，引导产能向玉

米主产区 and 环境容量大的地区转移，在东北四省区开展生猪种养结合循环发展试点，促进生猪产业转型升级。

结合产业结构调整与转型升级，深入研究消化粮食特别是玉米库存，扩大有效消费新途径，适当调低竞价交易底价，在财政、税收、信贷等方面采取优惠政策，进一步加大对主产区玉米加工转化的支持力度，扶持发展以玉米为原料的生物基材料新兴产业。结合精准扶贫和耕地休养生息，加大生态严重退化地区退耕休耕轮作力度，对退耕、休耕农民给予必要的粮食补助，对贫困人口给予粮油等实物救济。

把好粮食进口关。健全农产品贸易反补贴、反倾销和保障措施法律法规，依法对进口农产品开展贸易救济调查。严格控制玉米及高粱、大麦等替代品进口，把控好肉类、禽类、乳制品等转化产品进口。擦亮“国门利剑”，坚决打击粮食走私。扩大对外粮食援助，为深加工产品出口创造良好的外部环境。

发力供给侧，要紧紧抓住降成本“牛鼻子”。粮食生产离不开土地、劳动、资金、技术等生产要素的投入。近年来，由于要素价格快速上升，使得我国粮食国际竞争力持续下降，出现了“边进口、边积压”“洋货入市、国货入库”的尴尬局面。“万山磅礴必有主峰，龙袞九章但挈一领。”补强中国农业的软肋，最终要靠科技创新提高质量效益，要靠制度创新提升生产组织效率。

强化科技支撑，以创新驱动行业发展。在小麦、稻谷、玉米等单产步步登高、连续“跨栏”的同时，大豆单产却原地踏步、踟蹰不前。科技投入过少，造成我国大豆育种、栽培技术等长期落后于国际水平。因此，有必要加大科技投入，瞄准我国与发达国家农业差距的关键环节，加大借鉴和创新力度，取长补短，为降低农业生产成本、提高产量和质量效益“加油给力”。在新一轮结构调整中，要加快适宜机械化生产、轻简化栽培、优质高产多抗广适新品种的选育。特别要注重大豆、杂粮杂豆等特色作物的基础研究、品种改良和技术推广，提高生产效率和比较效益，将政府的宏观目标有效传导给微观经营主体，降低农民调整品种结构的难度和风险，把地方特色小品种做成带动农民增收的大产业。

加快构建培育新型农业经营主体的政策体系，以适度规模经营提升农业竞争力。这是应对城乡人口结构变化和农业兼业化、农民老龄化、农村

空心化的必然要求，也是提高农业劳动生产率、控制农产品人工成本过快上涨、增强我国农业基础竞争力的根本出路。

发展规模经营，不能只局限于发展土地的规模经营，规模化服务也是规模经营的重要方面。要坚持以农户家庭经营为基础，大力培育新型农业经营主体和服务主体，通过经营权流转、股份合作、代耕代种、土地托管等多种方式，加快发展土地流转型、服务带动型等多种形式的规模经营。要逐步淡化农业收入型补贴，防止补贴越多，地租上涨越快，租地经营风险越大的被动局面，解决新型农业经营主体资金投入、风险分担、产后的服务等现实难题。用好“互联网+”精准利器，帮助新型农业经营主体对接市场，低成本孵化粮油品牌，线上线下互动发展。同时，改善农业基础设施，下决心解决好地块细碎化问题，补齐农业机械化短板，着力推进“机器换人”，良种良法配套，农机农艺结合，为规模化经营打下良好的物质技术基础。

发力供给侧，要补齐市场化经营“新短板”。当前国内粮食市场正处于政策大调整、改革再推进时期。在实现国内粮食供求再平衡的过程中，要努力促进国内粮食市场发育，补齐市场化经营的“新短板”，激发多元主体活力。

信息的准确、透明和及时是市场化的标志。政府作为服务者，要根据市场流通的需要，建立基本的信息服务体系，定期向社会公布为市场运行服务的统计信息、调查信息、预测信息、产量信息、消费信息、库存信息，帮助生产者和企业了解市场基本情况，进而做出合理的价格判断。毋庸讳言，我国在粮油信息服务方面，还有巨大的提升空间，在信息的准确性、系统性、基础性、预期性方面，尚需重大突破。

着力健全三大机制，更好地调动和保护各类经营主体参与购销活动的积极性。建立市场化收购资金保障机制，在继续发挥好政策性银行主渠道作用的同时，鼓励引导商业性金融机构开展收购、加工等信贷业务，解决多元主体入市收购的融资问题；大力促进现货和期货市场发展，建立市场风险转移规避机制，为经营者提供规避市场风险的工具；建立粮食运输协调机制，激活物流产业，打通物流节点，确保粮食运输高效、便捷、经济。

近几年，全球气候变暖，我国极端天气频发，加剧了粮食生产的自然

风险，而政策性收储的逐渐淡出，也使得种粮农民不得不承担更多的市场风险。农业保险符合国家调整改进“黄箱”政策，支持扩大“绿箱”政策的导向，比直接补贴操作成本低、市场效率高。粮食收入保险既保产量又保价格，能够同时弥补产量保险和价格保险的不足，是降低自然风险、市场风险损失的“双保险”。可以在主产区、主产县开展区域性收入保险试点，也可以对种粮大户等规模经营主体开展专项试点。

发力供给侧，要拓展国有粮企发展“新空间”。此次供给侧改革，是1993年、1998年、2004年粮改之后，粮食行业又一次重要改革。改革势在必行、不得不为，必然会带来利益的调整，但改革未尝不是凤凰涅槃、再辟蹊径的机遇。

随着超储库存消化、收储规模缩减，基层收储企业面临业务锐减、经营乏力的难题。在当前经济下行压力加大的背景下，国有粮食收储企业一定要努力找准历史定位，破除传统观念，拓展新的业务领域，拼出新的发展空间，“百舸争流，奋楫者先”，决不可重演10多年前大规模下岗分流的悲剧。

“行到水穷处，坐看云起时。”专业化水平低，是我国农业的一个短腿。粮食产后服务，更是短腿中的短腿。为新型农业经营主体和小农户提供代储存、代烘干、代销售服务，有利于粮食提质进档，减少损失浪费，有利于增强市场化收储条件下农民售粮的议价能力。基层收储企业开展粮食产后服务，拥有其他主体不可比拟的先天优势。有条件的企业，要注重发展产业经济，统筹收储运加销各环节，实现贸易、加工双轮驱动、两翼并举。

随着供给侧改革的深入推进，国有粮食企业改革将大幅提速。打破各种藩篱，坚持政企分开、政资分开、所有权与经营权分离的原则，以产权制度改革为核心，加快企业改制步伐，建立健全现代企业制度，发展混合所有制经济，实施跨行业、跨区域兼并重组，培育竞争力强的大型粮食企业集团，以体制改革机制创新促进国有粮企提质增效。

改革开放30多年来，我们经历了数次大规模的农业结构调整。除了1984年的结构调整是由于仓储能力不足而触发，其余几次结构调整都是因经济下行、需求疲软、财政不堪重负而触发的。权宜之计与长远之策相互干扰，致使之前数轮粮改或浅尝辄止或功亏一篑。

去年以来的粮食供给侧结构性改革，将“供给侧+结构性+改革”三个关键词合并为一个义项，彰显了国家高瞻远瞩、毕其功于一役的决心和意志。而改革道路从来不是一帆风顺的。此前数轮粮改的艰难、曲折、复杂提醒我们，“莫言下岭便无难，一山放过一山拦”。哪怕供求形势有所变化，我们也要保持足够的战略定力与历史耐心，锁定市场化改革这个大目标，矢志不渝、坚定不移，做改革的忠实践行者和坚强捍卫者。

自1993年起，二十四载魂萦梦牵，纵使青丝变白发，亦不忘追寻粮食市场化的初心。中国经济结构调整最困难的时期已经过去，由全民创业、万众创新所蕴积的巨大能量迸发在望。让我们使出洪荒之力，在推进粮食供给侧改革的大潮中迎难而上，浴火重生。

“咬定青山不放松，立根原在破岩中。

千磨万击还坚劲，任尔东西南北风。”

2017年2月15日

Upright Stands the Bamboo Amid Green Mountains Steep

(Preface)

Li Jingmou

“The new replaces the old, and it will never change as time goes on.” The long river of time runs in surge endlessly, and the hope of dream inspires people to go forward fearlessly.

The past year of 2016 is both unforgettable and extraordinary. Some humorous online sayings are really worth consideration; the US president is not her; the result of the British referendum is exit; she is determined to devote all her life to her country, but is exposed by one of her best friends; many countries in Europe and America are in political unrest with uncertainties increasing; terrorism spreads rapidly, threatening international security; the world economy is in sluggish recovery with trade protectionism rising. “Everything is unpredictable just like this,” and it is really depressing.

However, in such a disorder, “the scenery here is exceptionally beautiful”: the Hangzhou Summit contributed China’s wisdom; the “One Belt and One Road” initiative is put into practice rapidly; scientific achievements are coming up one after another; the reforms are deepening and the economy is stabilizing on its bottom. The heat released by China has helped melt the hard ice in world politics and economy. Just as what Schwab, the founder and the Executive Chairman of Davos Forum said at the 47th Annual World Economic Forum, “China has been playing the role of ‘locomotive’ in the world economy.”

The outstanding performance of China’s economy witnessed the abundant achievements of the supply-side structural reforms. Since last year, the central

committee of the CCP has insisted on the basic general tone of seeking improvements through stability, aimed at the target of supply-side structural reforms, clarified the key tasks of “Three Removals, One Decrease and One Subsidy”, and pointed out directly the lingering problems with China’s economic development in the past several years.

“Sudden winds wrinkle spring water in the pool.” Obviously, the supply-side structural reform has played a major role in deepening China’s economic reforms. According to Reuters, the reform will “make more room for development of market power in China.”

From an esoteric word in economics, “supply-side” has quickly become a key strategy in tackling problems with China’s reforms and one of the top 10 most popular words. It fully shows that the supply-side structural reform is of “great vision and long-term importance”, which are worth appreciation from all of us.

As a profound reform in the area of “agriculture, farmers and rural area”, the agricultural supply-side reform caught a lot of attention and got well under way in the past year. Yet, some deep-level structural contradictions are still not relieved, and the constant accumulation of “high inventory, high import and high cost” poses an austere challenge to China’s food security—with high inventory causing lower grain prices, grain is playing a smaller role in increasing farmers’ income; due to inverted disparity between domestic and foreign grain prices, China’s grain is less competitive in international markets; because of high cost and high capacity, development of China’s grain industry is less sustainable; periodic surplus and structural imbalance are resulting in weak ability in matching grain supply and demand. The fundamental way to deal with those challenges is to deepen grain supply-side structural reform and to improve competitiveness and sustainability of China’s grain industry.

The grain supply-side reform is a big game. For overall planning, we should start by restructuring grain plantings to better satisfy the whole society’s need for grains and oils on one hand. And on the other hand, we should also change the current grain operation modes to inject new energy into development of China’s grain industry.

The grain supply-side reform is a systematic project. We should correct

the imbalance in grain supply and demand to improve our ability to match supply and demand. And we should also change from grain supply mainly meeting quantity demand by over-relying on resource consumption to grain supply meeting quality demand to a larger extent by seeking green and ecological sustainability through systematic, overall and fundamental reforms.

Compared to the previous grain structure readjustments, this grain supply-side structural reform is an comprehensive reform that covers more areas and touches deeper levels and that provides both a temporary solution and a permanent cure. It is also an unprecedented strategic transformation of China's grain circulation pattern. Therefore, it is very necessary to adopt and summarize various opinions, and to comprehensively acknowledge the grain supply-side structural reform.

To make the grain supply-side structure reform successful, we should make the "first step" of reforming the current pricing mechanisms and the purchasing and storing systems. "There would be no new establishment without breaking down the old one." If the current pricing mechanisms and purchasing and storing systems are not reformed and harvested grains are all purchased by the government, farmers would not be able to stop relying on the government's policies, to be motivated to optimize their planting structures, and to end overproduction. The key to activate the market is to really enable the pricing mechanism to guide agricultural resources to be reasonably allocated. This is a fundamental issue. During the previous grain planting structure readjustments, farmers were required to optimize production according to market demand, and some tough problems such as over-heavy financial burdens, farmers' difficulty to sell grain and "promissory notes" were solved to some extent. However, those structure readjustments all ended up in a circle as there was no substantial change to the pricing mechanisms, and there was hesitation with the reform of grain purchasing and selling marketization.

Reforming pricing mechanisms involves comprehensive planning and systematic designing. We should firmly promote reform of the corn purchasing and storing system, perfect the producer subsidy system, and encourage diversified market main bodies to purchase in the market so as to avoid

farmers' difficulty in selling corn, in accordance with the principle of market pricing and separation of price and subsidy. We should stick to and perfect the policy on minimum purchasing prices for rice and wheat, reasonably adjust minimum purchasing prices, change the rigid expectation for prices to rise only rather than fall, form a reasonable price relationship, and reduce over-intervention in market supply to the largest extent. When soybean and corn prices are integrated with the market, the northeastern region will more probably tend to change from "dry farming to wet farming". It is out of consideration for strategic importance of various crops that we set different policies for different crops, but we should avoid solving one problem only to find another cropping up. The rice processing chain is short, and if we don't rectify deviations, inventory removal would face greater pressure.

Reforming pricing mechanisms should fully embody the core concept of top price for top quality. We should quickly set up classifying standards for quality rice, four, oils, etc., establish a comprehensive assessment system, periodically issue information on grain and oil quality to the society, guide farmers to follow changes in consumer needs, optimize "rice bags", meet "appeals for quality food", and plump up farmers' "purse" to increase income through markets. We should guide potential grain enterprises to establish quality grain production bases by means of contract purchase, partnership through shares, etc., develop quality grain and oil operation modes in the whole industry chain from the field to the table, and increase supply of safe, quality, green and healthy middle and high-end grain and oil.

Reforming pricing mechanisms should also enable farmers to gain enough benefits for planting special grain and oil crops. We should work out more flexible, active and convenient policies for structure readjustment, explore establishing subsidy linkage mechanisms for different crop plantings and different agricultural operation main bodies, and effectively guide farmers to reasonably restructure their plantings. For example, in the northeastern region, if subsidies for restructuring plantings are less than those for corn production, it would surely result in adverse encouragement, and weaken farmers' initiative to plant soybean and other coarse grains. If we standardize subsidies for dry grain farmers, it might balance comparative benefits for different crops

and reduce adverse choices.

To make the grain supply-side structure reform successful, we should perform well the “key play” of inventory removal. Inventory removal is both the most prominent contradiction in the current grain circulation area and a tough task in deepening reforms of grain circulation systems. We should scientifically deal with the relationship between grain stock and increment, carry out the task of “storing grain in land and in technology”, and really relieve the pressure on grain stock from the supply side. We should seize the opportunity of ecosystem construction to control environmental pollution and reduce smog, make an overall plan for food security, food safety and energy security, make use of moldy corn, toxic wheat, “cadmium rice”, etc., in “problem grain” concentrated area to expand ethanol production and usage stably and properly. We should also optimize the arrangement of pig raising zones in the southern water network region, guide capacity to transfer to main corn production areas or areas with larger environmental space, make pilot tests of raising pigs while planting crops in 4 provinces in the northeastern region, and promote the transforming and upgrading of pig raising industry.

We should deeply explore new ways to digest grain (especially corn stock) and to expand effective consumption, properly lower bottom prices for bid trades, and adopt preferential policies in terms of finance, tax and credit to further support corn processing and transforming in main corn production areas, and to support development of new bio-based material industry. We should make bigger efforts for restoration and fallow of farmland in areas with severe ecological regression, provide necessary grain subsidy to farmers for restoration and fallow of farmland, and offer grain and oil relief to poor people.

We should keep grain imports in good order, perfect the laws and regulations on anti-subsidy, anti-dumping and guarantee measures in agricultural trade, and make investigation into trade reliefs with imported agricultural products accordingly. We should strictly control import of substitutes like corn, sorghum and barley, as well as import of transferred products like meat, poultry and dairy products. We should polish up the “sword at border gate”, and crack down grain smuggling. We should also