



中国粮食市场 发展报告

李经谋 主编



中国财政经济出版社



中国粮食市场 发展报告

李经谋 主编

刘文进 乔林选 副主编

图书在版编目 (CIP) 数据

2011 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, 2011. 5

ISBN 978 - 7 - 5095 - 2854 - 9

I. ①2… II. ①李… III. ①粮食市场 - 研究报告 - 中国 - 2011
IV. ①F724. 721

中国版本图书馆 CIP 数据核字 (2011) 第 070637 号

责任编辑: 刘瑞思

责任校对: 张 凡

封面设计: 汪俊宇

中国财政经济出版社出版

URL: [http: // www. cfeph. cn](http://www.cfeph.cn)

E - mail: [cfeph @ cfeph. cn](mailto: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: 100142

发行处电话: 88190406 财经书店电话: 64033436

北京富生印刷厂印刷 各地新华书店经销

787 × 960 毫米 16 开 24 印张 342 000 字

2011 年 5 月第 1 版 2011 年 5 月北京第 1 次印刷

定价: 52.00 元

ISBN 978 - 7 - 5095 - 2854 - 9/F · 2418

(图书出现印装问题, 本社负责调换)

本社质量投诉电话: 010 - 88190744

专家顾问编辑委员会

高级顾问

(按姓氏笔画排序)

白美清	包克辛	陈锡文
段应碧	聂振邦	高铁生

专家委员会

(按姓氏笔画排序)

丁声俊	王献立	邓亦武	方 言
卢景波	叶贞琴	朱远洋	乔林选
刘小南	刘文进	李经谋	李思恒
肖永成	肖春阳	吴 硕	何 毅
宋 则	陈春平	陈晓华	杨光焰
赵文先	赵素丽	洪 涛	耿书海
殷久勇	郭晓利	黄守宏	曹宝明
常 清	韩 俊	曾丽瑛	程国强
颜 波			

编辑委员会

主任：刘文进 乔林选
副主任：孙复兴 肖永成 邱清龙
宋贤军 许世文

委员(按姓氏笔画排序)：

申洪源	乔林选	刘文进
刘正敏	许世文	孙复兴
宋贤军	肖永成	邱清龙
陈艳军	杨京	裴华梅

主 编

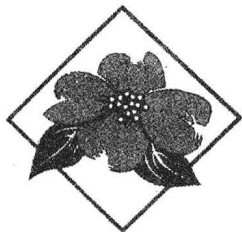
李经谋

副主编

刘文进 乔林选

将军金甲夜不脱

(代序) 李经谋



新春的喜庆似乎并未冲淡庚寅“灾难之年”的伤痛和记忆：南美的大地震、北美的暴风雪、南亚的特大洪灾、北亚的森林大火、欧洲的火山喷发、澳洲的飓风洪水……近 30 万人死于非命，数千亿美元化为乌有。真的是“世纪末日”降临了吗？不是！是大自然的愤怒，是上天对人类破坏环境的警告和惩罚。

“前门拒虎，后门进狼”。2008 年世界粮食危机的阴霾至今挥之不去，百年不遇的极端天气，又使全球粮价再起波澜，真可谓“前波未灭后波生”，粮食安全再一次成为世界瞩目的焦点。截至 2010 年底，联合国粮农组织（FAO）谷物价格指数达 238 点，年涨幅为 39%，主要粮食品种的价格已经接近或超过上次危机时的峰值，食品价格指数再创历史新高，世界贫困人口不减反增。如果说 2008 年世界粮食危机并非完全由供求矛盾决定，那么这一次危机是不是真的“狼来了”？联合国粮农组织已发出多次警告，世界银行（WBG）行长佐利克惊呼：“粮食价格已经达到危险水平。”北非、中东地区多国政局动乱的蔓延，无疑会给高企

的粮价火上浇油。也有专家预测，此轮粮食涨价将会持续数年。不少业内人士断言：“粮食低价时代已经结束”，“粮价高企或成全球经济头号威胁”。而佐利克行长则把粮食危机的认知提升到前所未有的高度：“粮食安全是一个全球安全问题。”

在全球粮食安全形势日益严峻的背景下，中国的粮食安全是否有保障，不少人提出了质疑。说实在的，这个问题很难一言以蔽之。

从长远来看，我国的粮食安全形势无疑是非常严峻的。处于工业化、城市化进程中的中国，人多地少的矛盾有增无减，环境污染的问题积重难返，温室效应的影响进一步显现，这些都成为粮食安全的隐患。中国虽然把粮食自给率确定为 95% 以上，但仍需靠进口来维持紧平衡，粮食形势稍有变化，都会牵动世界的神经。自 2004 年以来，中国实现粮食生产“七连丰”，并出现结构性供过于求，但一些国家仍把粮食危机的成因之一归罪于中国等发展中国家的经济增长和人民生活水平的提高。联合国世界粮食计划署（WFP）在 2010 年世界粮食安全风险的排名中，把中国列为“中度风险”国家，这也从另一个侧面反映出中国粮食安全在全球安全中的重要地位。因此，确保中国粮食安全的可持续发展任重而道远。

就目前形势而言，我国传统意义上的粮食安全，即粮食的数量安全是有保障的。据粮食主管部门披露，我国目前粮食的库消比在 40% 左右，大大高于国际公认的 17% ~ 18% 的安全警戒线，得到国际社会的高度赞赏。但粮食安全并非仅指数量安全，还应包括质量安全。长期以来，人们通常把粮食数量安全与质量安全分割开来，好像粮食安全就是数量安全，食品安全才涉及质量安全，这显然是不全面的。联合国粮农组织自 1974 年首次提出“粮食安全”的概念以来，其内涵和外延是不断发展和变化的，到 1996 年世界粮食首脑会议期间，又对其内涵作了新的表述：“只有当所有人在任何时候都能在物质上和经济上获得足够、安全和富有营养的粮食，来满足其积极和健康生活的膳食需求及食物爱好时，才实现了粮食安全。”也就是说，粮食安全包括四个方面，即数量充足、价格合理、无毒无害、营养丰富，简言之，数量安全和质量安全二者贯穿于粮食生产、流通（分配、交换）和消费的全过程。从这个概念出发，如果说目前我国粮食数量安全是有保障的，那么粮食质量安全（包括原粮、粮油食品及转化食品）则十分令人担忧。尽管同一国家的不同时期，或同一时期

的不同国家，对粮食安全的需求不尽相同，但就目前我国而言，粮食的数量安全和质量安全均是不可偏废的。

纵观我国 60 年来粮食安全的发展历程，大体可分为三个阶段。第一为“不够吃”阶段，即建国之后前 30 年。这一时期，粮食短缺是制约我国经济发展的头等大事，“以粮为纲”成为家喻户晓的口号，因此，粮食数量的多少是衡量粮食安全的唯一标准。第二是“不好吃”阶段，即上世纪八九十年代。农村实行联产承包责任制后，粮食生产获得较快发展，供求矛盾逐步缓解，特别到后期，实现了粮食供求的紧平衡。然而，产量上去了，质量却下来了，靠化肥催生的粮食质量，不仅营养成分降低，而且口感也越来越差。人们的温饱问题初步解决之后，粮食质量需求开始显现。第三是“不敢吃”阶段，即进入本世纪后。随着中国开始步入小康社会，为应对迅速增长的粮食需求，重高产、轻优质的问题十分突出，化肥农药残留、重金属含量超标、有害物质添加等问题，都严重威胁粮食质量安全。加之肉、蛋、奶等粮食转化食品安全丑闻不断曝光，百姓陷入“吃什么都不放心”的无奈境地。不少人高价求购“石磨粉”、“柴鸡蛋”、“土猪肉”、“有机菜”等“绿色食品”，殊不知，轻信和善良成就了不少“骗子企业”。由此可见，随着社会经济的发展和人民生活水平的提高，人们对粮食安全的需求经历了由“量变”到“质变”的飞跃。粮油食品安全危机已成为我国当前最为突出的社会问题之一。

随着世界粮食供求矛盾的不断加剧，特别是粮食金融属性的日益强化，世界粮食危机正向着常态化方向发展，已经引起国际社会的高度关注，多国政府都在重新认识并积极应对粮食安全问题，一场“粮食革命”或称第二次“绿色革命”正在悄然兴起。在粮食安全方面，中国虽然取得了重大成就并积累了丰富经验，但面对日益频发的世界粮食危机，也将面临许多新问题和新的挑战。靠进口弥补“紧平衡”也许会付出更大的代价，“七连丰”的大好形势极易忽视“全则必缺，极则必反”的哲理。因此，作为一个粮食工作者，虽然人微言轻，但只要以科学发展观为指导，系统审视粮食再生产各环节存在的风险和机遇，革故鼎新，励精更始，也许对中国粮食安全的可持续发展不无裨益。

第一，加大科技投入，实现“科技兴农”。世界上不少国家科技对农业增长的贡献率可达 70%、甚至 90% 以上，而我国仅为 50%。通过基因

工程和生物育种工程培育高产、优质的新品种，被认为是第二次“绿色革命”的重头戏。虽然国内外对基因工程褒贬不一，但毕竟是现阶段解决粮食需求增长的重大科技成果之一，不能“因噎废食”。要加大对种业的投资力度，研究开发具有自主知识产权的创新粮油品种，以打破国际垄断集团的封锁和控制。

第二，加快粮食生产规模化、集约化经营步伐。随着城市化、工业化进程的加快，农民种粮积极性减弱是个趋势性问题，政策性提价只会产生短期效应。要认真把握有利时机，在自愿原则下，充分利用土地经营权流转的政策，加快粮食生产经营组织的建设，逐步实现粮食生产的规模化、集约化经营，是农业现代化和粮食生产可持续发展的重要方向。

第三，建立赏罚分明的粮食补贴政策。粮食生产补贴是一种补偿、激励机制，而不是福利待遇。要完善现行补贴政策，对种粮的要补贴，不种粮的不补贴，无故撂荒的应处罚，只有“赏罚分明，施予有节”，才能真正调动农民种粮的积极性，才能提高其为社会提供商品粮的责任感。

第四，建立粮食价格形成新机制。根据我国国情和国外经验，建立“国家支持价格、宏观调控价格和市场形成价格”的粮食价格形成新机制，是社会主义市场经济条件下实现粮食价格安全的关键所在。国家支持价格，即通过实施目标价格，逐步取代现行的粮食价格政策；宏观调控价格，即在粮食价格异常波动时，政府利用储备手段和调控载体平抑市场价格；市场形成价格，即正常情况下，遵循“三公”原则，在规范化粮食市场通过竞争形成价格。政策性提价成本较大，弊端较多，与市场经济体制不相适应，应逐步完善。

第五，加快粮食批发市场和期货市场的发展。粮食批发市场和期货市场是现代粮食市场体系不可或缺的重要组成部分，也是粮食流通安全的重要载体。我国的粮食批发市场，特别是国家粮食交易中心，已初步发挥了国家宏观调控载体的重要作用，为稳定粮食价格作出了重要贡献。较之政策性粮食，社会商品粮的流通秩序尚待规范。由于我国现代粮食物流刚刚起步，粮食生产与消费之间尚未实现规范有序的链接，加之我国地域辽阔，粮食结构不合理、分布不平衡、信息不对称等问题，在紧平衡情况下，若货不畅其流，有可能形成局部的价格扭曲和放大效应，对粮食流通安全构成威胁。我国期货市场已逐步走上稳步、健康的发展轨道，与国际

期货市场宽松放任的价格管理机制相比，我国的期货风险管理制度更具优越性，特别是粮食期货市场，可以有效防范短期内粮食价格持续、大幅度波动，较好地发挥发现未来价格和熨平现货价格的重要作用。只有国内期货市场发展了，才有可能在国际上取得粮食话语权，才有可能防范国际粮价大幅度波动对我国粮食安全带来的重大影响。

第六，强化对粮油食品安全的日常监督检查。粮油食品安全关系人民的生命和健康，“食为天”既是经济问题，也是政治问题。尽管《食品安全法》已实施多年，但质量欺诈、价格欺诈行为已经到了让人难以容忍的地步，群众啧有烦言。“有法不依，执法不严”则是问题的关键所在。因此，提高全民的质量安全意识，建立政府官员负责制，理顺管理关系，加大处罚力度，加强日常监督，每天都过“3·15”，群众才会对食品安全放心，才能提振政府的“公信力”。

第七，积极开拓粮油新资源。早在我国粮油短缺时期，就开始了粮油新资源的探索，但由于种种原因，大多虎头蛇尾，不知所终。我国丧失油脂话语权已是不争之事实。大力发展木本油料，逐步改善我国油脂供应状况，极具长远发展意义：既可优化环境，又利水土保持，且不与粮争地，一举多得。另外，鼓励有条件的企业和个人走出国门，开展粮油生产经营活动，是一个有益的探索。因此，制定优惠政策，积极支持开拓粮油新资源，是我国粮食安全可持续发展的新途径。

第八，更新观念，提高全民族的节粮意识。节俭是中华民族的传统美德，墨子说过：“节俭则昌，淫佚则亡”，他把“节俭”上升到民族兴亡的高度。而孔子“食无求饱，居无求安”、“节食安胃”的修身养生之道，已被现代科学所称颂，使其成为当之无愧的“健康饮食专家”。要摒弃“酒足饭饱”的饮食陋习，珍惜粮食，杜绝浪费，保护健康，让“七分饱”成为现代文明新时尚。

世界粮食危机的常态化，对全球粮食安全的影响极为深远。政府的重视、环境的改善、科技的进步和上天的恩赐，有可能实现阶段性粮食价格的回稳和供求关系的缓解，但“缓解”是暂时的，而“短缺”是长久的。改革开放以来，我国经历了多次粮食“患多、患少”的矛盾，而业界对粮食安全的认知也是见仁见智。面对世界粮食危机频现的今天，希望“任何时候不可轻言粮多”能够成为社会的共识。就全球而言，粮食商品

成为“武器”早已不是什么秘密，粮食市场成为“战场”也不是什么新鲜事物，世界“粮食战争”早就悄然拉开帷幕，可以预见将会愈演愈烈，并将旷日持久。曾经为国家粮食安全作出过重要贡献的“粮食人”，早就习惯了“一年三百六十日，多是横戈马上行”的日子，今后也注定要面对“将军金甲夜不脱，半夜行军戈相拔”的艰苦岁月。回顾过去，虽然历经磨难但无怨无悔；展望未来，明知前程艰险却义无反顾，这就是我国“粮食人”的光荣与豪迈，也是“粮食人”的职责和信仰。一首电视剧主题曲《忠诚》，道出了“粮食人”共同的心愿，我略改几字，献给粮食战线上永不卸甲的将士们：

听你的，我搁下满怀轰轰烈烈，舍生在无垠的荒野。

在那城市与乡村的交界，隐约站着我的青春岁月。

永不问，永不说，我愿用生命奔赴你的重托。

我把忠诚当成一种颜色，让她每刻从心底流过。

无怨无悔人生路，定然成就安康祖国。

2011年3月10日

“Generals Never Take off Golden Armors at Night”

(Preface)

Li Jingmou

The happiness in the spring seems not to have weakened the pains and memories of the disaster year of 2010: the great earthquake in South America, the strong snow storm in North America, the serious flood in South Asia, the big forest fire in North Asia, the volcano eruption in Europe, the tornado and flood in Australia, etc. , which cost nearly 300 000 people's lives and hundreds of billions of dollars. Was it that “the End of the Century” had really come? No! It was the anger of the nature, and the warning and punishment by the Heaven to the humans for their destroying the environment.

“The wolf comes in through the backdoor while you are fighting against the tiger at the front door.” Although the aftermath of the world grain crisis in 2008 has not yet disappeared, the extreme weather unprecedented in the past 100 years has caused global grain prices rising up again, just as the old saying goes, “New waves arise while front waves are still in sight.” Food security has again become the focus throughout the world. At the end of 2010, the FAO Cereal Price Index reached 238, an increase of 39% than a year before. The prices of main grains approached or even surpassed the peak in the last grain crisis, the Food Prices Index reached a new record high, and the poor population in the world increased rather than decreased. If we say that the global grain crisis in 2008 was not caused completely by the contradiction of supply and demand, is this new crisis caused by it really? The FAO gave out several warnings and Mr.

Zoellick, the President of World Bank, exclaimed that “the grain prices have reached a dangerous level.” The spread of political turmoil in several countries in North Africa and Mideast is doubtlessly going to make the already high grain prices to go higher. Some experts predict that this round of rising of grain prices is going to continue for some years to come. Many industry insiders assert that “The era of low grain prices has gone,” and “High grain prices may become the top threat to the world economy.” President Zoellick even raised the cognition of the grain crisis to an unprecedented height, saying “Food security is an issue of global security.”

While the global food security situation is deteriorating, many people wonder if there is any guarantee for China's food security. Frankly speaking, it is a question hard to be answered in a few words.

In the long term, the situation of China's food security is sure going to be very serious. China is now in the process of industrialization and urbanization, so it is very difficult to solve the contradiction of so many people with so little land, the problems of environmental pollution, and the effects of greenhouse emissions, which are hidden dangers to China's food security. Although China has set its grain self-sufficiency rate at above 95%, it still has to depend on imports to keep tight balance. If there is any change with China's grain production, it will certainly have an important effect on the whole world. Since 2004, China's grain production has been increasing for 7 consecutive years, and there have appeared some structural supply surplus over demand. However, some countries still list the economic growth and improvement of people's living standard in China and some other developing countries as one reason for the grain crisis. The WFP of the UN lists China as a “middle risk” country in its *World Food Security Risk Ranking in 2010*, which reflects on the other side the important position of China's food security in global security. Therefore, much still remains to be done to guarantee the sustainable development of China's food security.

In terms of the current situation, China's food security in its traditional meaning, which refers to food quantity security, is guaranteed. According to

the grain administration, China's grain stock/use ratio is about 40% , much higher than the internationally acknowledged safe ratio of 17% ~ 18% , which is highly appreciated by the international communities. But food security refers to not only quantity security but also quality security. For a long time , people usually have divided food quantity security and quality security as if food security meant food quantity security and only food safety involved quality security , which is obviously incomprehensive. Since FAO first put forward the concept of “food security” in 1974 , its connotation and denotation have been developing and changing. The World Food Summit in 1996 redefined the connotation of “food security” as “a situation when all people at all times have physical , social and economic access to sufficient , safe and nutritious food to meet their dietary needs and food preferences for an active and healthy life. ” This means that food security includes 4 elements , i. e. , sufficient amount , reasonable prices , harmless food , and nutritious food. In short , it includes both quantity security and quality security , which run throughout the process of grain production , circulation (distribution and exchange) and consumption. From the viewpoint of this concept , while we can say that there is guarantee for China's food quantity security at present , however there are still lots of worries with its food quality security (including raw grain , grain and oil food , and grain – and – oil – based food). The same country in different periods or different countries in one same period have different needs for food security. As far as China is concerned currently , both food quantity security and food quality security should never be neglected.

The development history of China's food security in the past 60 years can be roughly divided into 3 phases. The first is the “Insufficient to Eat” phase for the first 30 years after the foundation of New China. During that phase , grain shortage was the top element limiting China's economic development , “grain orientation” was a well known slogan , and thus the quantity of grain was the only standard for measuring food security. The second is the “Not So Good to Eat” phase for the 1980's and 1990's. During that phase , after the household output – related system of contracted responsibility was practiced in rural areas ,

grain production increased quite rapidly, the contradiction of supply and demand was relieved gradually, and tight balance of grain supply and demand was achieved at a later time particularly. But while the grain quantity improved, the grain quality worsened. The grain catalyzed by fertilizer contained less nutrition and worse flavors. After the public initially solved the problem of having enough grain to eat, they began demanding for grain quality. The third is the “Afraid to Eat” phase since the start of the new century. During this phase, as China started entering a well – off society, due to the need to meet the rapidly increasing demand for grain, the problems of emphasizing high production and neglecting quality have become more and more serious, and chemical and drug residues, contents of heavy metals and harmful additives are threatening seriously China’s food quality security. In addition, many frauds were exposed on grain – based food such as beef, eggs and milk. Thus, the public are in a helpless position of “being afraid to eat anything”, and many people seek to buy at high prices the so – called “green foods” such as “stone milled flour”, “pollutant – free eggs”, “pollutant – free pork”, “organic vegetables”, etc. , and they even don’t know that their credulity and kindness are resulting in the achievements of many “cheating enterprises”. It is apparent that, along with the development of social economy and the improvement of people’s living standard, the public demand for food security has jumped from “quantity change” to “quality change”, and the grain and oil food security crisis has become one of the current top social problems in China.

Along with the worsening of contradiction of global grain supply and demand, especially the strengthening of grain’s financial attributes, world grain crisis is going in the direction of normalization, and has caused great concerns of the international communities. Governments of many countries are reconsidering the issue of food security and taking active measures to cope with it, and a “Grain Revolution” or a second “Green Revolution” is arising silently. In terms of food security, China has made great achievements and gained rich experiences, but it still faces many new problems and challenges due to frequent global grain crises. We might pay greater cost for depending on imports to make

up for “tight balance”, and under the situation of bumper harvests for 7 consecutive years we might easily neglect the philosophy that “Comprehensiveness results in shortage, and extremeness results in opposite.” Therefore, although we are in a humble position and our words do not carry much weight, if we, as grain – related workers, stick to the guideline of Scientific Outlook on Development, systematically examine the potential risks and opportunities throughout the links of food security, discard the old and establish the new, we might be able to make a contribution to the sustainable development of China’s food security.

1. We should increase investment in science and technology, and “revitalize agriculture with science and technology”. In many countries, science and technology’s contributions to agricultural growth account for 70% , even up to more than 90% , but it is only 50% in China. It is considered as a key element of the second “Green Revolution” to cultivate high – yield and high – quality species through genetic engineering and biotechnology breeding engineering. There are both praises and criticisms on genetic engineering both at home and abroad, but it is one of the great scientific achievements to meet the growing grain demand at the present. So we should not refrain from adopting it for fear of possible risks. We should increase investment in seed industry, and research and breed new varieties of grain and oilseeds with our own intellectual property rights in order to break down the blockade and control of international monopoly groups.

2. We should speed up massive and intensive operation of grain production. Along with the expedition of the process of urbanization and industrialization, it is a trend that farmers would have less initiative to produce grain, and enhancing prices by policy could only result in short – term effects. So it is an important direction for agricultural modernization and sustainable grain production that we carefully seize the right opportunities, make full use of the policy on transferring rights of farm land operation under the principle of volunteering, expedite the establishment of grain production and operation organizations, and gradually achieve massive and intensive operation of grain production.

3. We should make a grain subsidy policy that keeps strict rules for reward

and punishment. Grain production subsidy is a mechanism for compensation and inspiration rather than welfare. We should perfect the existing subsidy policies to provide subsidies to farmers who produce grain, give no subsidy to those who don't produce grain, and punish those who abandon farmland. Only when we keep strict rules for reward and punishment could we really stimulate farmers' initiative to produce grain and strengthen their sense of responsibility to provide commercial grain to the society.

4. We should set up a new grain pricing mechanism. In accordance with China's own characteristics and foreign experiences, it is the key to achieving grain price security under the condition of socialist market economy that we set up a new grain pricing mechanism with "the government supporting and macro - regulating prices, and the market forming prices". The government supporting prices means that the government should set up target prices and gradually replace the current grain price policies; The government macro - regulating prices means that the government should stabilize market prices by means of using reserves and regulating the carriers when grain prices fluctuate abnormally; The market forming prices means that under normal conditions prices should be formed in standardized grain markets according to the principle of "being open, fair and just". Enhancing prices by policy costs a lot, has many disadvantages, and is incompatible with the market economy system. So it should be gradually improved.

5. We should speed up the development of grain wholesale markets and futures markets. Grain wholesale markets and futures markets are an important integral part of the modern grain market system, and they are also important carriers for grain circulation security. The grain wholesale markets, especially the national grain marketing centers in China, are initially playing the important role of the carriers for the government's macro - regulation, and making important contributions to stabilizing grain prices. Compared with the policy grain, the circulation order of social commercial grain is still in need of standardization. Due to the fact that China's modern grain logistics system is still in its initial stage, grain production and consumption have not yet been linked in a standard