

2008 ZHONGGUO LIANGSHI SHICHANG FAZHAN BAOGAO

# 2008 中国粮食市场 发展报告

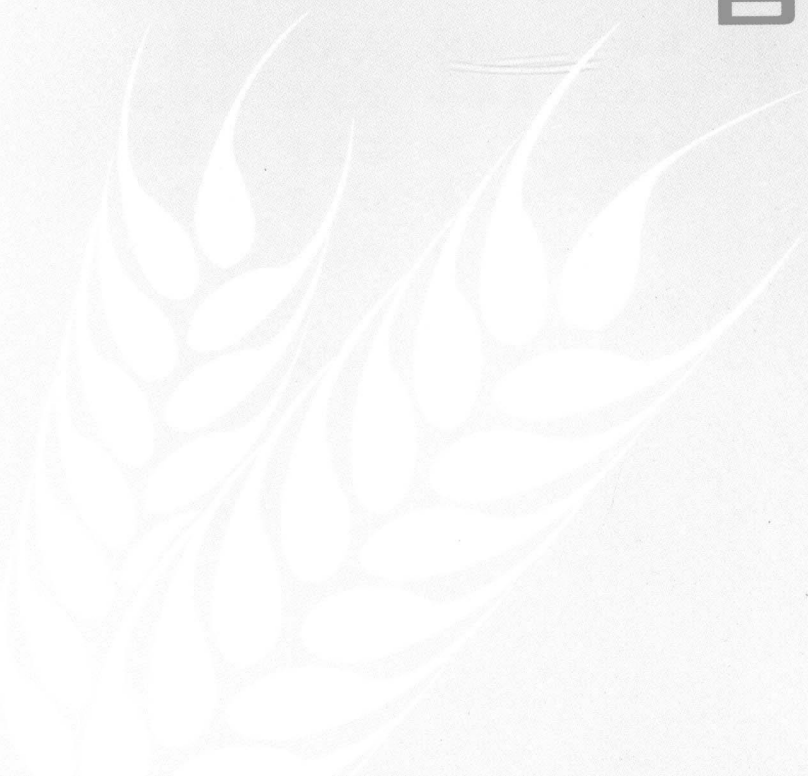
李经谋 主编



中国财政经济出版社

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**图书在版编目 (CIP) 数据**

2008 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, 2008. 6

ISBN 978 - 7 - 5095 - 0694 - 3

I. 2… II. 李… III. 粮食 - 市场 - 研究报告 - 中国 - 2008  
IV. F724. 721

中国版本图书馆 CIP 数据核字 (2008) 第 065617 号

中国财政经济出版社出版

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

E-mail: [cfeph@cfeph.cn](mailto: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: 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 23.5 印张 339 000 字

2008 年 6 月第 1 版 2008 年 6 月北京第 1 次印刷

印数: 1—3 560 定价: 52.00 元

ISBN 978 - 7 - 5095 - 0694 - 3/F·0563

(图书出现印装问题, 本社负责调换)

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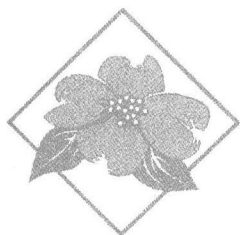
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## 主编

李经谋

# 春天的回顾

(代序) 李经谋



**2008**年注定是一个值得纪念和令人难忘的年份。当奥运圣火点燃13亿中华儿女的爱国激情、寄托炎黄子孙的百年梦想、照亮五洲四海的时候，我们也迎来了中国改革开放30周年和现代粮食市场体系孕育发展的18周年。

30年前，当中国人民刚从“十年浩劫”的梦魇中清醒，又在“两个凡是”和“真理标准”中探寻彷徨的时候，党的十一届三中全会一声春雷，“忽如一夜春风来，千树万树梨花开”，从此，亿万中国人民在春天的故事中尽情沐浴灿烂的阳光，在美丽的憧憬中辛勤耕耘未来的希望。劫后重生的中国“三十而立”，奇迹般地从中崛起，屹立于世界大国之林，成为国际政治、经济舞台上的一支重要力量。

18年前，当神州大地刚从一场“政治风波”的阴霾中惊醒，许多国家对中国的改革开放失去信心的时候，郑州粮食批发市场在中原腹地横空出世，令西方世界为之一震。世界银行在一份报告中声称“令人不可理解”，英国《独立报》载文说“资本主义种子在中国萌芽”，而“改革开放的重

要标志”、“市场经济的里程碑”的评价也让我们颇感意外。世界舆论的见仁见智究竟意味着什么？直到两年后中国社会主义市场经济体制的确立，才让我们顿开茅塞：郑州粮食批发市场像一只“报春鸟”，预报了一个新时代的到来。

“问渠哪得清如许，为有源头活水来”。正是这场始于农村而源于粮食的中国经济体制改革大潮，造就了现代粮食市场体系的孕育、探索、创新和发展。18年来，粮食市场的建设者们“弄潮儿向潮头立”，历经磨难，风雨兼程，取得了令人瞩目的成绩，一个现代粮食市场体系正在形成。

### 建立规范批发市场是构建现代粮食市场体系的必然选择

30年前，安徽凤阳小岗村18户农民“冒天下之大不韪”，将集体耕地分田并包产到户，拉开了中国经济体制改革的序幕。十一届三中全会则正式吹响了改革开放的号角，农业发展成为焦点。特别是20世纪80年代初期连续五个有关农村的中央“1号文件”，稳定了联产承包责任制，极大地调动了农民的生产积极性，粮食产量不断跨上新台阶，长期困扰人们的粮食问题得到了有效缓解。但是随着粮食价格“双轨”运行、市场调节规模的不断扩大，由于市场机制自身所具有的自发性、盲目性和滞后性的特点，导致年度间粮食数量时多时少、价格忽低忽高的周期性循环，既影响了农民的种粮积极性，也加深了管理层对粮食的“患多患少”和对价格的“患低患高”，人们不得不承受价值规律自发调节的“戏谑”。

1988年，国家期货市场研究工作小组成立，开始了新型市场机制的探索之旅，经过调研，确立了“由现货起步，向期货发展”的目标。1990年7月，国务院正式批准试办郑州粮食批发市场。1990年10月12日，一个遵循公开、公平、公正原则，引进期货机制，规范运作的郑州粮食批发市场正式成立，从而拉开了我国现代粮食批发市场发展的序幕。此后，各级各类粮食市场如雨后春笋般建立起来。尽管在粮食批发市场建设中还存在诸多问题，但经过十多年的不懈努力，一个以全国性粮食批发市场为龙头、区域性粮食批发市场为骨干、基层粮食批发市场为基础的多层次粮食批发市场体系逐步形成。现代粮食批发市场的建立和发展，对规范粮食交易行为、形成市场价格信息、有效调节粮食供求、合理配置粮食资源、促进产销区间粮食流通发挥了重要作用。

随着粮食价格的全面放开，粮食批发市场又进入了一个新的发展时期。自 2006 年以来，国家粮食主管部门从宏观调控的需要出发，批准建立了郑州、合肥等国家粮食交易中心，进行临时存储粮的常年常时集中竞价交易，收到了良好的调控效果。在通货膨胀和世界粮食危机的内外双重压力下，中国粮食价格却在国家宏观调控中平稳运行，为国民经济的稳定作出了重要贡献。

### 创新国际期货机制是发展中国粮食市场体系的必由之路

期货市场是组织远期标准化合约交易的高级市场形态，是市场经济的产物，虽源于远期现货交易，但其功能和作用又迥异于现货市场，在现代粮食市场体系中，二者相辅相成，不可或缺。郑州粮食批发市场成功运行两年后，于 1992 年完成了我国首部期货交易规则——《郑州商品交易所期货交易规则》的制定，1993 年 5 月 28 日成功推出我国第一个真正意义上的农产品期货合约，实现了国家的既定目标。由于期货机制与生俱来的魅力，注定其发展初期菁芜并存，经过两次规范整顿，逐步走上了健康发展的轨道。1996 年 6 月 5 日，在期货市场发展的困难时期，国家主席江泽民在对郑州商品交易所考察时给予高度评价，并对期货试点工作寄予热切期望。国际期货界也对“由现货起步，向期货发展”的“郑州模式”给予充分肯定，认为是发展中国家发展期货市场的成功模式。

从农产品期货起步，到工业品期货上市，再到金融期货和期权的待机推出，中国期货市场逐步走上了一条规范发展的道路。它不仅对人们的思想观念和行为方式产生了巨大冲击，而且其发现价格、套期保值、规避风险、投资套利的功能已被社会广泛认知。利用期货市场保值避险已成为许多粮食生产、加工、收储企业生产经营的重要组成部分。由于期货价格的预期指导作用和订单农业的现实需要，“农民跟着期货走”的愿望正逐步变成现实。农产品期货市场的健康发展已成为稳定粮食市场、服务“三农”的一支重要力量。将期货市场成功植入社会主义中国，既是对国际期货“公论”的挑战，也是对国际期货机制的创新和发展。

### 引入现代电子商务是完善中国粮食市场体系的重要举措

电子商务是利用电子网络进行的商务活动。这个被称为继农业革命、工业革命之后的人类第三次产业革命，颠覆了传统的市场观念和社会生产方式，代表着未来贸易的发展方向。粮食行业开展电子商务，具有提高管

理水平、降低交易成本、加速商品流转、增强竞争能力、促进全国统一大市场形成的重要作用。早在1992年,“全国粮食批发市场交易网络和计算机通讯网”已经建立;1995年,在全国粮食批发市场的共同努力下,发展成为集诚信信息网,后经多次升级换代,于2000年建立了被称为“利用现代科技改造传统产业典范”的中华粮网,成为我国粮食行业第一个门户网站和BtoB电子交易平台。与此同时,全国各大粮食批发市场也陆续建立了“互联互通、资源共享”的粮食交易网络,通过网上招标、投标、竞价、协商及场内网上联动等多种交易方式开展交易活动。特别是国家主管部门在安排临时存储粮销售时,明确提出现场和网上相结合的要求,极大地推动了粮食电子商务的开展。一个覆盖全国、联结各大批发市场和产销企业的电子交易网络已初步形成,让“粮食在网上流通”的梦想正逐步变成现实。全国统一的粮食大市场借助电子网络正在形成之中。

“实践是检验真理的唯一标准”。当我们以审慎的眼光回顾18年粮食市场发展历程的时候,会欣喜地发现:在国家统一、开放、竞争、有序的现代市场体系基本原则的指导下,以零售市场为基础、以批发市场为主体、以期货市场为先导、以电子商务为方向的现代粮食市场体系的框架已然形成。它是粮食市场建设者们在一张白纸上共同描绘的一幅最美的图画,同时也见证了一个新兴市场体系演进的光辉历程。

但是我们也应该看到,由于中国粮食问题的特殊性和社会主义市场经济的探索性,脱胎于计划经济的中国粮食市场既存在先天不足,也存在后天制约。政府与市场的协调、人治与法制的冲突、“暗箱”与“阳光”的较量、盲目与规范的对垒、徘徊与前进的权衡,无不昭示着完善健全现代粮食市场体系建设之路的漫长和遥远。

“长风破浪会有时,直挂云帆济沧海”。中国现代粮食市场体系建设已经“十八成年”。回顾过去,不忘感恩,社会主义的昌明盛世造就了现代粮食市场的灿烂辉煌;展望未来,勿忘立志,市场经济的明媚春天成就探索者们的宏图伟愿。虽任重而道远,但我们坚信,“只要路是对的,就不怕遥远”。

2008年3月18日



# Review in Spring

## Preface

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Li Jingmou

The year of 2008 is sure to be memorable and unforgettable. During the year, the sacred Olympics flame will ignite the patriotic enthusiasm of the 1.3 billion Chinese, realize the 100 – year dream of the descendants of Emperors Yan and Huang, and illuminate the whole world; meanwhile, the year is also going to be the thirtieth anniversary of China’s reform and opening up, as well as the eighteenth anniversary of the development of its modern grain market system.

30 years ago, when the Chinese people were waking up from the nightmare of the “10 – Year Calamity” and hesitating between the “Two Whatevers” and the “Criterion of Truth”, the Third Plenary Session of the 11th CCP Central Committee was just like a spring thunder “as if thousands of pear trees were flowering after one night’s blowing of spring breeze.” Since then, the Chinese people came under the bright sunlight in the story of the spring and started hard working for their future in their beautiful longing. After 30 years, just like a miracle, China has grown up in the East, and become one of the strongest countries in the world as well as an important force on the international political and economic stages.

18 years ago, when China was just waking up from the haze of the “Political Incident” and many countries were losing confidence on China’s reform and opening up, Zhengzhou Grain Wholesale Market was established on the middle plain of China as a great surprise to the West. One report of the World Bank claimed “it is unimaginable” and the *Independence* of Britain said that “Capital-

ist seeds are budding in China.” But their comments like “important symbol of reform and opening up” and “milestone of market economy” were also out of our expectation. What did the various comments of the outside world mean? It was only after the setting up of China’s socialist market economy 2 years later that we came to know: the establishment of Zhengzhou Grain Wholesale Market was just like a “spring bird” symbolizing the start of a new era.

“If you want to know why the water in the canal is so clear, you must search for its origin.” It is just the current of reform of China’s economic system which originated from the rural areas and was based on grain industry that has caused the gestation, exploration, innovation and development of China’s modern grain market system. During the past 18 years, the builders of the grain markets overcame lots of hardships and made many attractive achievements. A modern grain market system is coming into shape.

#### **Setting up A Regular Wholesale Market Is A Necessary Choice for Establishing A Modern Grain Market System**

30 years ago, 18 farmers in Xiaogang Village of Fengyang, Anhui, risking everyone’s condemnation, divided their collective land to each family, signed household production contracts and started the prelude of the reform of China’s economic system. The Third Plenary Session of the 11th CCP Central Committee formally blew the bugle for reform and opening up focusing on agricultural development. The 5 consecutive “Number One Files of the Central Government” in the early 1980s in particular stabilized the contract system with remuneration linked to output, promoted greatly the farmers’ initiatives for production, raised the grain production onto new levels continuously, and effectively alleviated the longstanding public concern on grain supply. But along with the “dual rail” operation of grain prices and the gradual expansion of market regulation, the features such as spontaneity, blindness and hysteresis of the market mechanism resulted in a periodical cycle of frequent fluctuations in grain supply and prices in different years, which not only affected the farmers’ initiatives for production, but also deepened the government’s concerns on the fluctuations of grain supply and prices. And our people were forced to accept the

“kidding” of the spontaneous regulation of the rules of value.

In 1988, the state “Research Team on Futures Markets” was set up, starting exploring new market systems. After investigations, it set the goal of “starting from spot markets and heading for futures markets”. In July of 1990, the State Council formally approved the trial operation of Zhengzhou Grain Wholesale Market. On Oct. 12, 1990, Zhengzhou Grain Wholesale Market, which follows the rule of publicity, fairness and justice, introduces futures systems and operates regularly, formally came into existence, starting the prelude of the development of China’s modern grain wholesale markets. And various grain markets at different levels were set up afterwards just like bamboo shoots after a spring rain. Although there still exist many problems with the building of grain wholesale markets, a multi-layer grain wholesale market system with national grain wholesale markets as the leaders, regional grain wholesale markets as the backbones, and base-level grain wholesale markets as the basis, is shaping up gradually. The establishment and development of modern grain wholesale markets is playing an important role in regulating grain transactions, forming market price information, adjusting grain supply and demand effectively, allocating grain resources reasonably, and promoting grain flow between production and marketing regions.

After full deregulation of grain prices, grain wholesale markets are entering a new development period once again. Since 2006, the State Grain Administration approved the establishment of national grain trade centers in Zhengzhou, Hefei and other cities, and converged tenders for temporary grain reserves on a regular basis throughout the year, which has achieved very good regulating effects. Although China is under the double pressure of domestic inflation and “world grain crisis”, its grain prices remain stable under the government’s macro-regulation, making an important contribution to the stable development of the national economy.

**Innovating the International Futures Mechanism Is A Necessary Way for Developing China’s Grain Market System**

The futures market is a senior form of market that organizes standardized

and contracted future transactions, and it is a product of the market economy. Although it originates from future spot transactions, its functions and roles are very different from the spot market. In the modern grain market, the two kinds of markets supplement each other and can not leave each other. In 1992, 2 years after successful operation of Zhengzhou Grain Wholesale Market, *Regulation on Futures Transaction of Zhengzhou Commodity Exchange*, China's first regulation on futures transaction, was issued. And on May 28, 1993, *Agricultural Commodity Futures Agreement*, China's first rule on futures transaction, was successfully brought into force, realizing the government's established goal. Due to the born charms of the futures mechanism, there were both strong and weak points with the initial stage of its development. After 2 standardizing rectifications, Zhengzhou Commodity Exchange gradually stepped onto the healthy road of development. On June 5, 1996, when Zhengzhou Commodity Exchange's development was in a very difficult period, President Jiang Zeming inspected it, spoke highly of it and extended sincere hopes for the trial futures market. The international futures community also expressed positive affirmation on the "Zhengzhou Mode" of "starting from spot market and heading for futures market", and pointed out that it was a successful mode for developing futures markets in developing countries.

Starting from the agricultural commodity futures to the opening of industrial commodity futures, and to the pending opening of financial commodity futures and options, China's futures markets are gradually stepping onto a standardized development road. They have brought great impact on people's concepts and behavior, and their functions of finding out values, arbitrage for preserving values, avoiding risks and investment arbitrage have become known to the society. Using futures markets to preserve values and avoid risks has become an important part of operations of many grain production, processing, purchasing and storing enterprises. At the same time, the function of anticipation guidance on futures prices, the practical need of order agriculture and the desire of "farmers following futures prices" are gradually being realized. The healthy development of the agricultural commodity futures markets is becoming a major force in stabi-

lizing grain markets and serving “agriculture, rural areas and farmers”. Introducing futures markets into socialist China successfully is not only a challenge to the axiom of international futures, but also an innovation and development of the international futures mechanism.

### **Introducing Modern Electronic Commerce Is An Important Step for Perfecting China's Grain Market System**

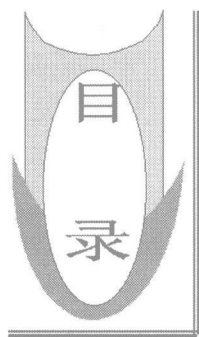
Electronic commerce refers to a kind of business using electronic networks. It is called the third industrial revolution after the Agricultural Revolution and the Industrial Revolution in the history of the human beings, which overturns the traditional market concepts and social production modes and represents the development direction of transactions in the future. Developing electronic commerce in the grain industry plays an important role in heightening management level, lowering transaction cost, expediting commodity flow, strengthening competitiveness, and helping form an uniform market throughout China. The National Grain Wholesale Market Transaction Network And Computer Communication Network opened up back in 1992, became an integrated information network in 1995 after upgrading for several times with the help of all the grain wholesale markets in China, and set up the [www. cngrain. com](http://www.cngrain.com) which is called “a model of using modern technology to reform traditional industries” and was the first website portal and B to B electronic transaction platform for China's grain industry. At the same time, the major grain wholesale markets in China set up their own grain transaction networks that “link and share resources with each other”, where transactions are conducted through tender invitations, bids, coordination, internet interactions, etc.. The state grain management agency clearly raised the requirement for both spot and online transactions when making arrangements for sales of temporary grain reserves, which in particular promoted the development of electronic grain commerce. An electronic transaction network covering the whole country and linking up all the major wholesale markets and production and marketing enterprises, is shaping up and realizing the dream of “making grain flow via the internet”. A uniform nationwide grain market is taking shape through the electronic network.

“Practice is the sole criterion for testing truth.” While prudently reviewing the development of our grain markets in the past 18 years, we gladly found that under the guidance of the basic rule for an uniform, open, competitive, orderly modern market system throughout the country, the framework of a modern grain market system with retail markets as the basis, wholesale markets as the main bodies, futures markets as the guide, and electronic commerce as the direction, is taking shape. It is the most beautiful picture drawn by the builders of grain markets on a blank piece of paper, witnessing the glorious history of the evolution of a new market system.

We should still notice that, due to the uniqueness of China's grain problem and the heuristic nature of the socialist market economy, there are both born disadvantages and posterior restrictions with China's grain markets that originate from the planned economy. All the coordination between the government and the markets, conflicts between the rule of law and the rule of man, the contest between the “dark box” and the “sunlight”, the fight between blindness and standardization, and the balance between hesitation and moving forward, show that the road for perfecting our modern grain market system is going to very very long.

“Wind shall certainly break waves, so let us shake out sails to sail the great seas.” China's modern grain market system has “grown up after 18 years” of development. While reviewing the past, we should be grateful that the millennium of prosperity of socialism has created the magnificent achievements of our modern grain markets; while looking into the future, we should not forget our aspiration that the bright spring of the market economy will make a reality of the great hopes of the explorers. Our task is arduous and our road will be long and tortuous, but we firmly believe: “if the road is right, we shall never fear remoteness.”

March 18, 2008



<b>第一部分 2007 年粮食市场概述</b> .....	( 1 )
一、中国粮食市场 .....	( 3 )
二、世界粮食市场 .....	( 14 )
<b>第二部分 2007 年中国粮食市场体系建设</b> .....	( 35 )
一、粮食批发市场发展状况与展望 .....	( 37 )
二、粮食期货市场发展状况与展望 .....	( 44 )
三、粮食电子商务发展状况与展望 .....	( 54 )
<b>第三部分 中国粮食市场主要品种供求形势</b> .....	( 63 )
一、小麦市场分析 .....	( 65 )
二、玉米市场分析 .....	( 78 )
三、稻米市场分析 .....	( 94 )
四、大豆及豆油市场分析 .....	( 110 )
五、菜籽及菜油市场分析 .....	( 121 )
六、花生及花生油市场分析 .....	( 133 )
<b>第四部分 中国粮食市场专论</b> .....	( 149 )
一、推进现代粮食流通产业发展的理论和实践 .....	( 151 )
二、增产背景下粮食价格波动的深层分析 .....	( 157 )
三、近年来国内外粮价的变动及正确应对 .....	( 164 )
四、粮食最低收购价政策述评 .....	( 178 )
五、2007 年国有粮食企业改革综述 .....	( 186 )
六、我国主要粮食作物生产波动周期研究：1949—2006 年 .....	( 191 )
七、当前我国粮食消费现状及发展趋势 .....	( 203 )

八、我国粮食加工业发展现状、问题及对策 .....	(210)
九、我国大豆产业化面临的问题与对策分析 .....	(222)
十、世界生物燃料迅猛发展的经验与启示 .....	(229)
十一、进一步加强粮食流通监督检查工作的思考 .....	(236)
十二、粮食产业化信贷支持问题思考 .....	(249)
<b>第五部分 2007 年中国粮食相关政策法规 .....</b>	<b>(255)</b>
一、十七大报告“三农”政策解读 .....	(257)
二、发展现代农业 .....	(263)
三、粮食最低收购价政策 .....	(269)
四、粮食现代物流发展 .....	(276)
五、粮食市场体系建设“十一五”规划 .....	(282)
六、粮食贷款政策与管理 .....	(289)
<b>第六部分 中国粮食市场统计资料 .....</b>	<b>(295)</b>
表 6-1 全国粮食作物播种面积、粮食总产量 .....	(297)
表 6-2 全国油脂、油料播种面积与产量 .....	(298)
表 6-3 2007 年主要农产品产量及其增长速度 .....	(298)
表 6-4 我国谷物、油料进口数量 .....	(299)
表 6-5 我国谷物、油料出口数量 .....	(299)
表 6-6 2007 年我国谷物、油料分国别进口数量 .....	(300)
表 6-7 2007 年我国谷物、油料分国别出口数量 .....	(302)
表 6-8 全国居民消费价格指数 (上年=100) .....	(303)
表 6-9 我国城乡居民家庭恩格尔系数 .....	(303)
表 6-10 2007 年全国主要粮油批发市场价格指数 (月度综合指数) .....	(304)
表 6-11 全国主要粮油批发市场价格指数 (年度综合指数) .....	(305)
表 6-12 2007 年郑州粮食批发市场年度平均交易价格 .....	(305)
表 6-13 2007 年全国期货市场交易情况 .....	(306)
表 6-14 芝加哥期货交易所期货交易情况 .....	(307)



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表 6-15 美国农业部世界谷物统计与预测 .....	(308)
附录一 2007 年中国粮食市场大事记 .....	(309)
附录二 2007 年中国粮食经济重要论著索引 .....	(321)
附录三 一部透视中国粮食市场风云的力作 ——《2007 中国粮食市场发展报告》简评 .....	(335)
附录四 小麦、玉米、大米、大豆价格走势图表 .....	(342)
主要参考资料 .....	(348)
后 记 .....	(352)