

中国小麦市场展望

China Wheat Market Outlook (2017-2026)

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引言

Introduction

- 小麦是中国重要的口粮作物之一。**1978**年以来，小麦播种面积在粮食中的占比逐渐下降，由**1978**年的**24.2%**降至**2016**年的**21.4%**；但因单产增长较快，小麦产量占比由**17.7%**升至**20.9%**。
- Wheat is one of the most important grain crops in china. Since 1978, the proportion of wheat sown area in grain has gradually declined from 24.2% in 1978 to 21.4% in 2016. But due to the rapid growth in yield, the proportion of wheat production rises from 17.7% to 20.9%.
- 从世界范围看，中国小麦收获面积占全球的**10.9%**，总产量占**17.2%**，仅次于欧盟。
- From the perspective of the world, China's wheat acreage accounts for 10.9% of the world, and production accounts for 17.2%. only after the EU.

主要内容 Contents

一、2016年中国小麦市场形势回顾

Review of Chinese Wheat Market in 2016

二、未来10年中国小麦市场走势判断

Chinese Wheat Market Outlook in Next 10 Years

三、不确定性分析

Analysis of Uncertainties

（一）供需形势

Supply and Demand Analysis

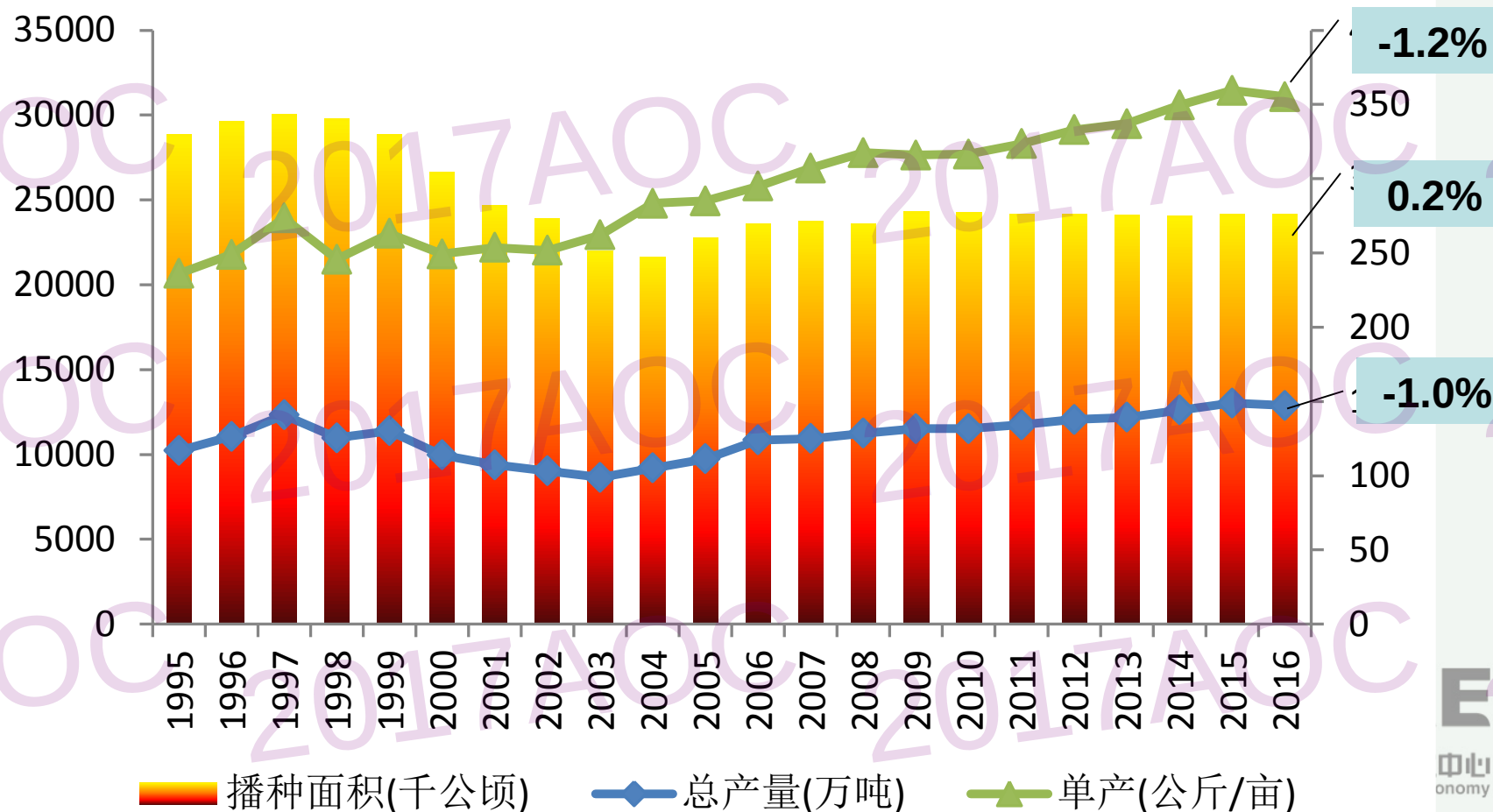
供给

小麦产量同比略降

最低收购价小麦库存充足

进口同比大幅增加

小麦生产结束“十二连增” Wheat Production Declined Slightly



新麦质量明显不如去年

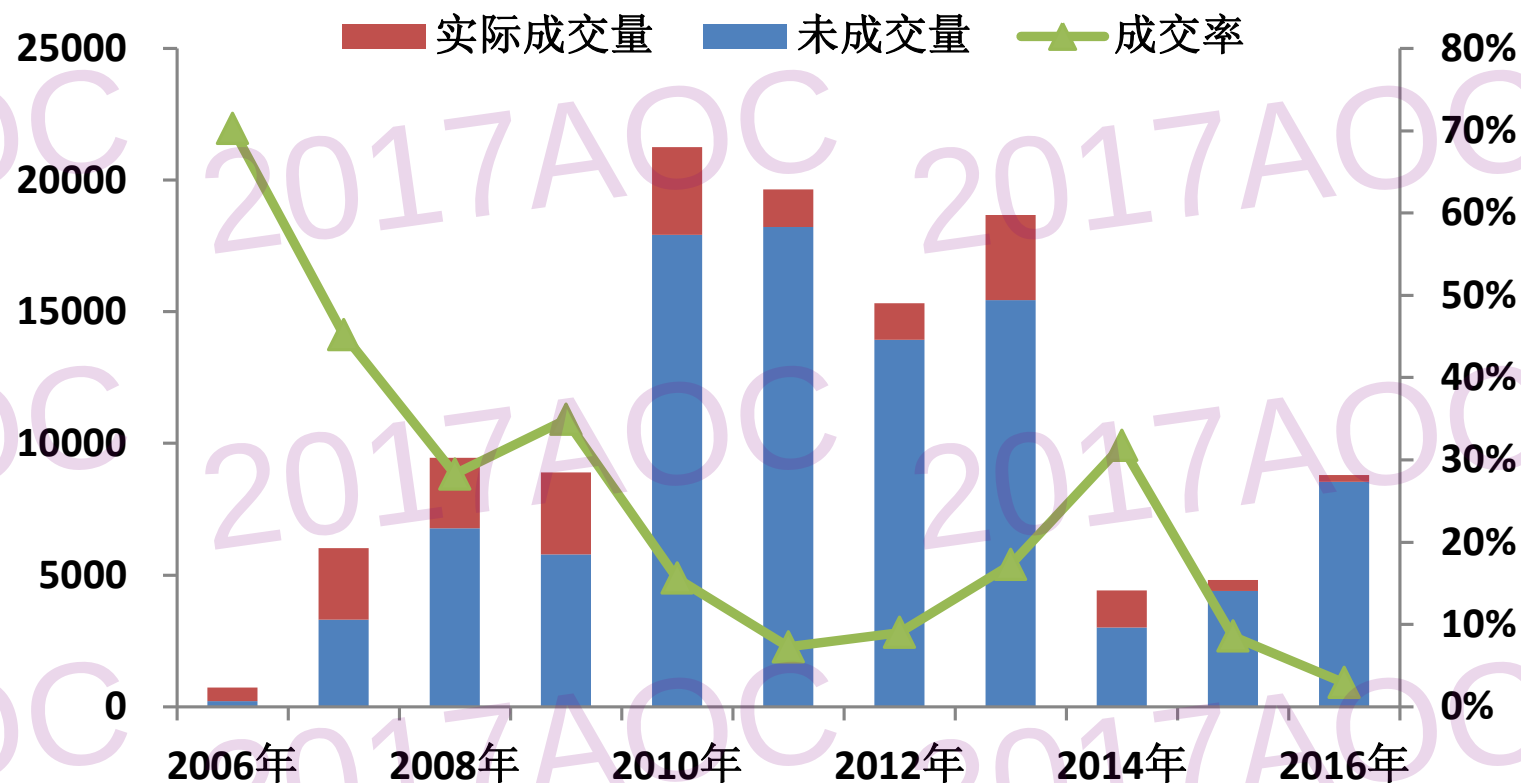
Wheat quality lower than that of last year

	容重	三等以上	千粒重	硬度指数	不完善粒	符合国标	降落数值
单位	g/L	%	g		%	%	秒
2016年	783	90.3	42.9	62.8	7.1	81.0	311
同比	↓ 6	↓ 4.7	持平	↓ 1.0	↑ 1.6	↓ 7.5	↓ 37

数据来源：国家粮食局

最低收购价小麦拍卖成交率创新低

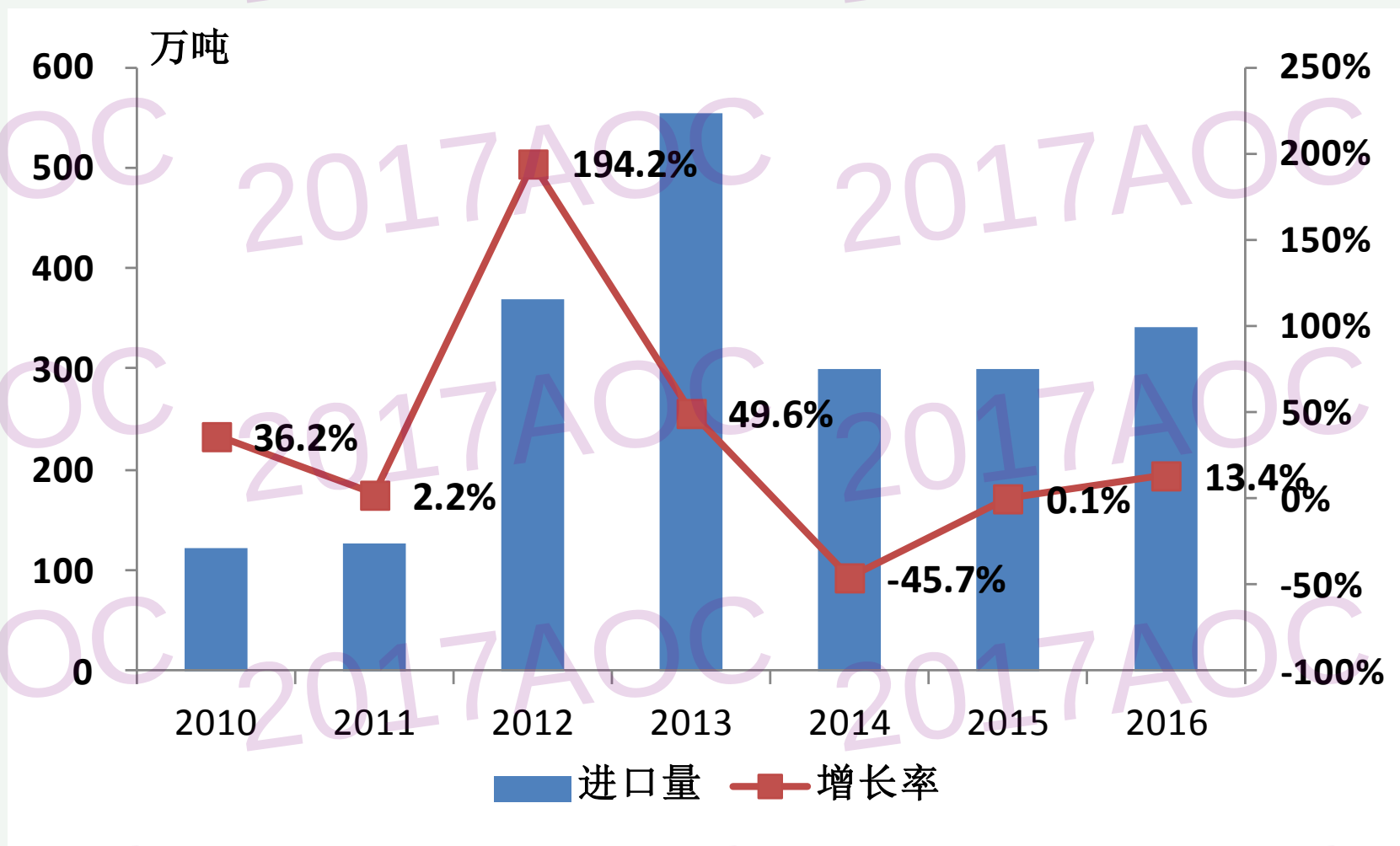
Minimum-purchase-price Wheat Auction Hit Record Low



截至2017年4月，国家最低收购价小麦剩余库存量5900万吨左右，较2016年同期明显增加。

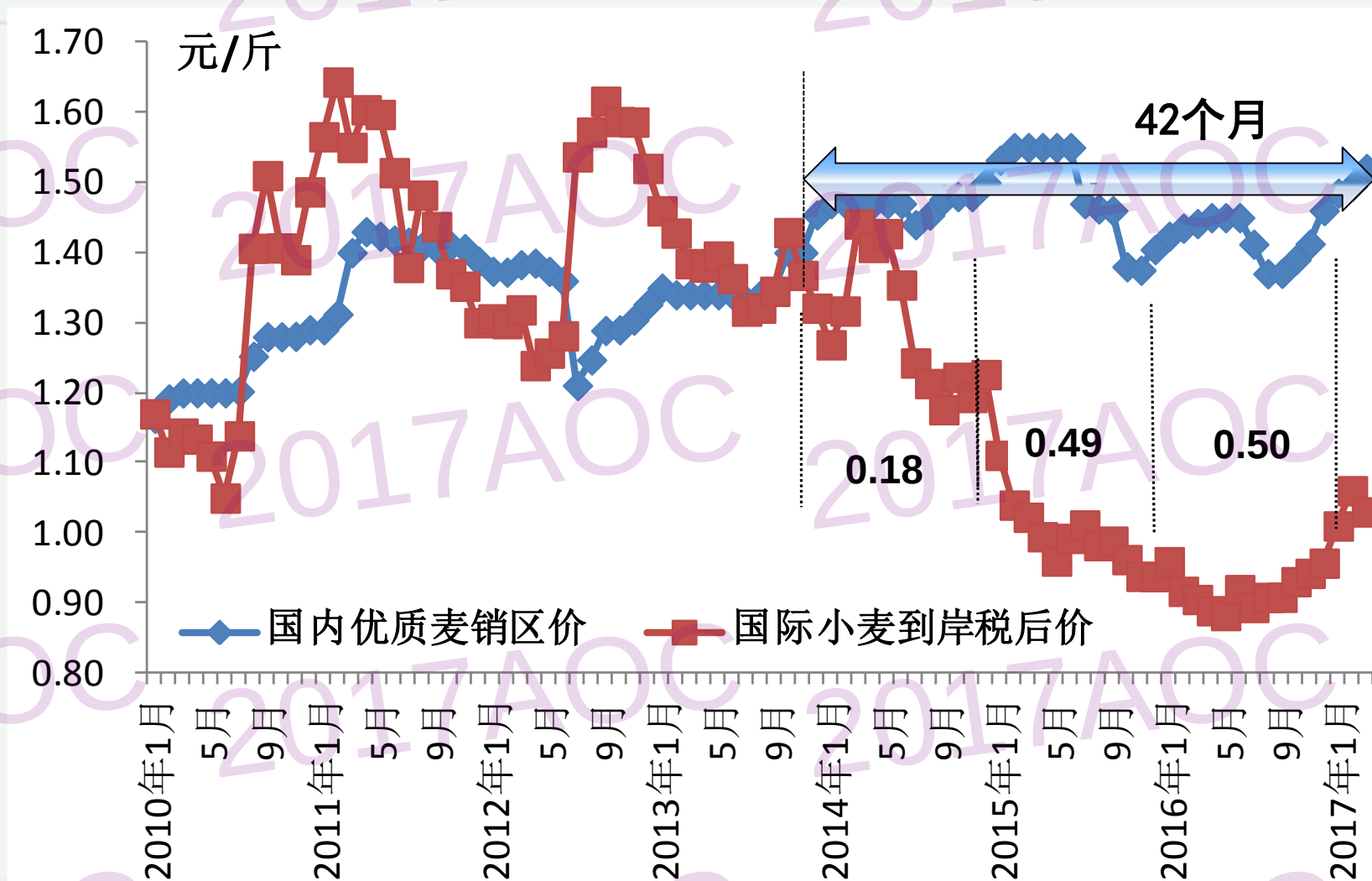
近年来我国小麦进口情况

China's Wheat Imports in Recent Years



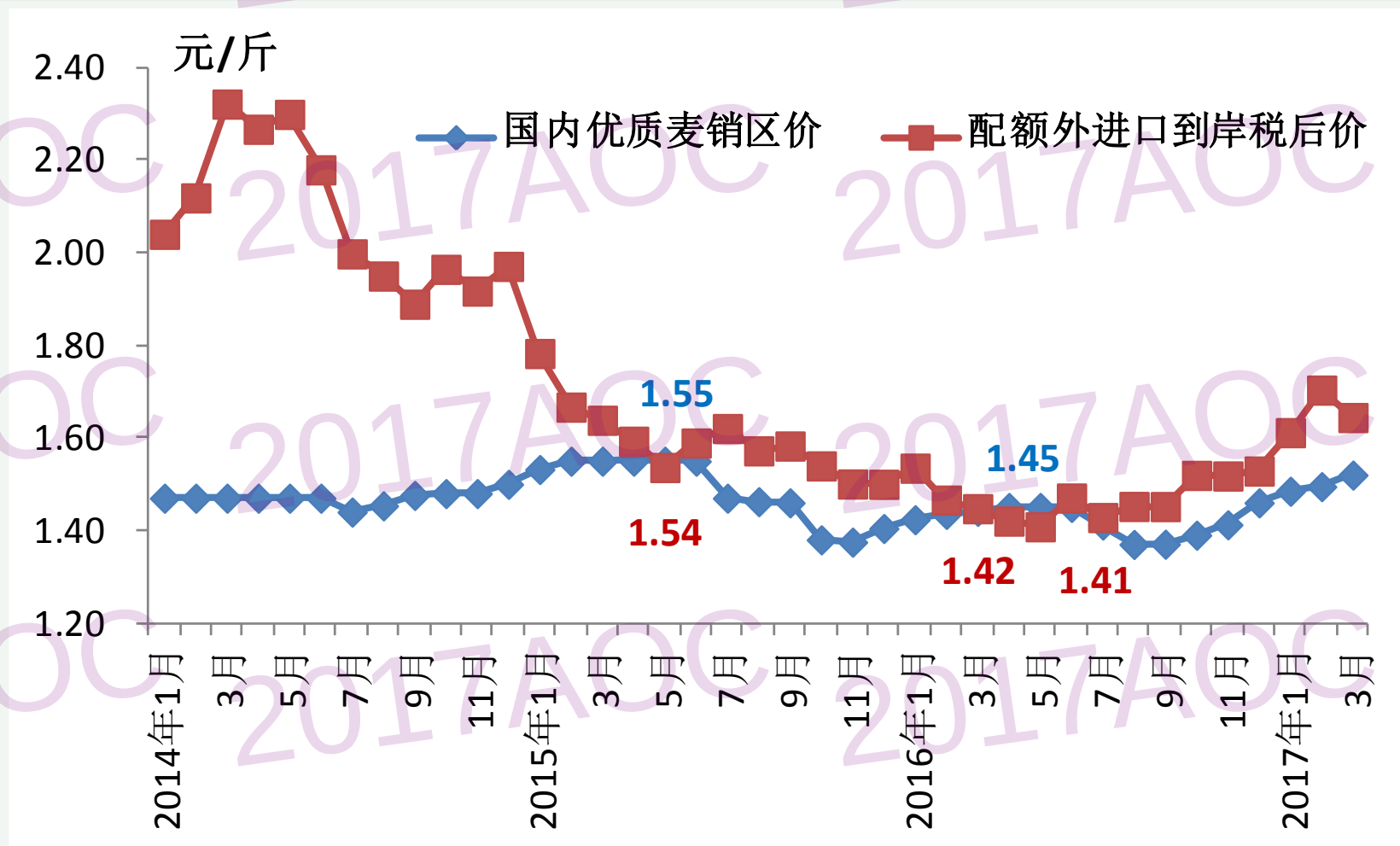
2010年以来国内外价差对比

Price Difference between China and USA.



国内外价差对比（65%关税下）

Price Difference between China and USA. (65% tariff)



（一）供需形势

Supply and Demand Analysis

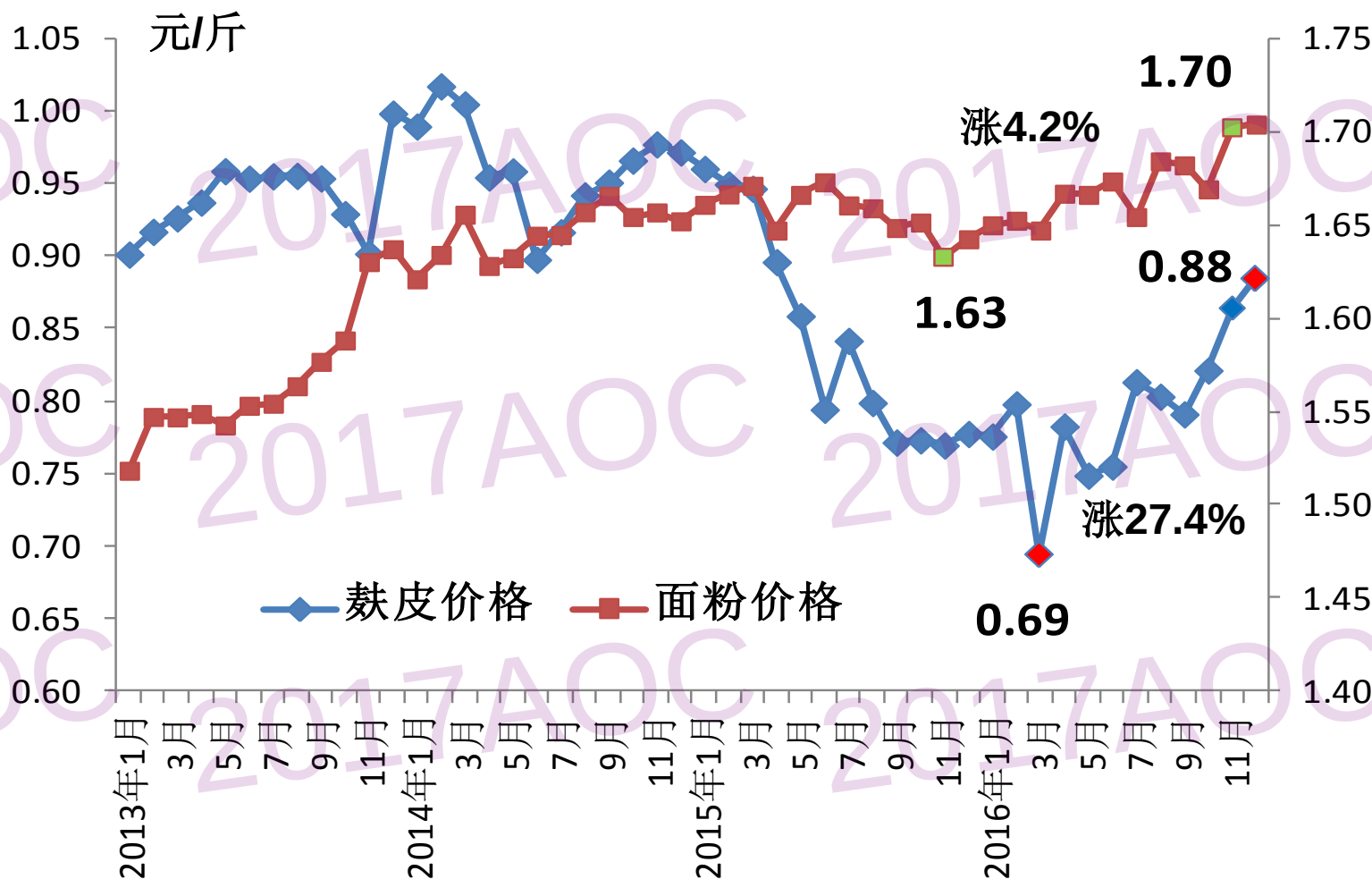
需求

制粉消费同比略增

饲用消费同比增加

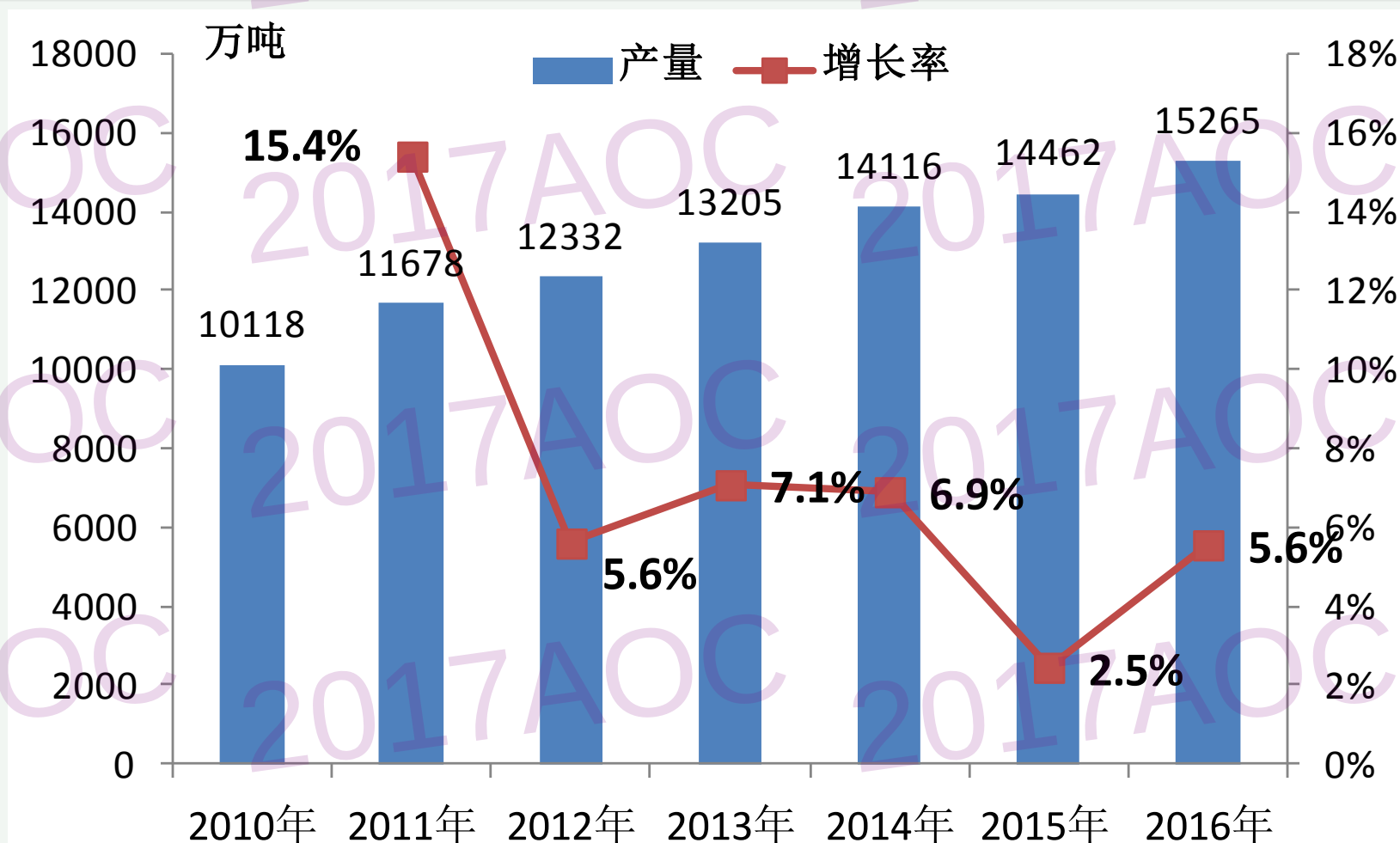
出口同比大幅下降

2013年以来麸皮与面粉价格走势 Wheat Bran and Flour Price since 2013



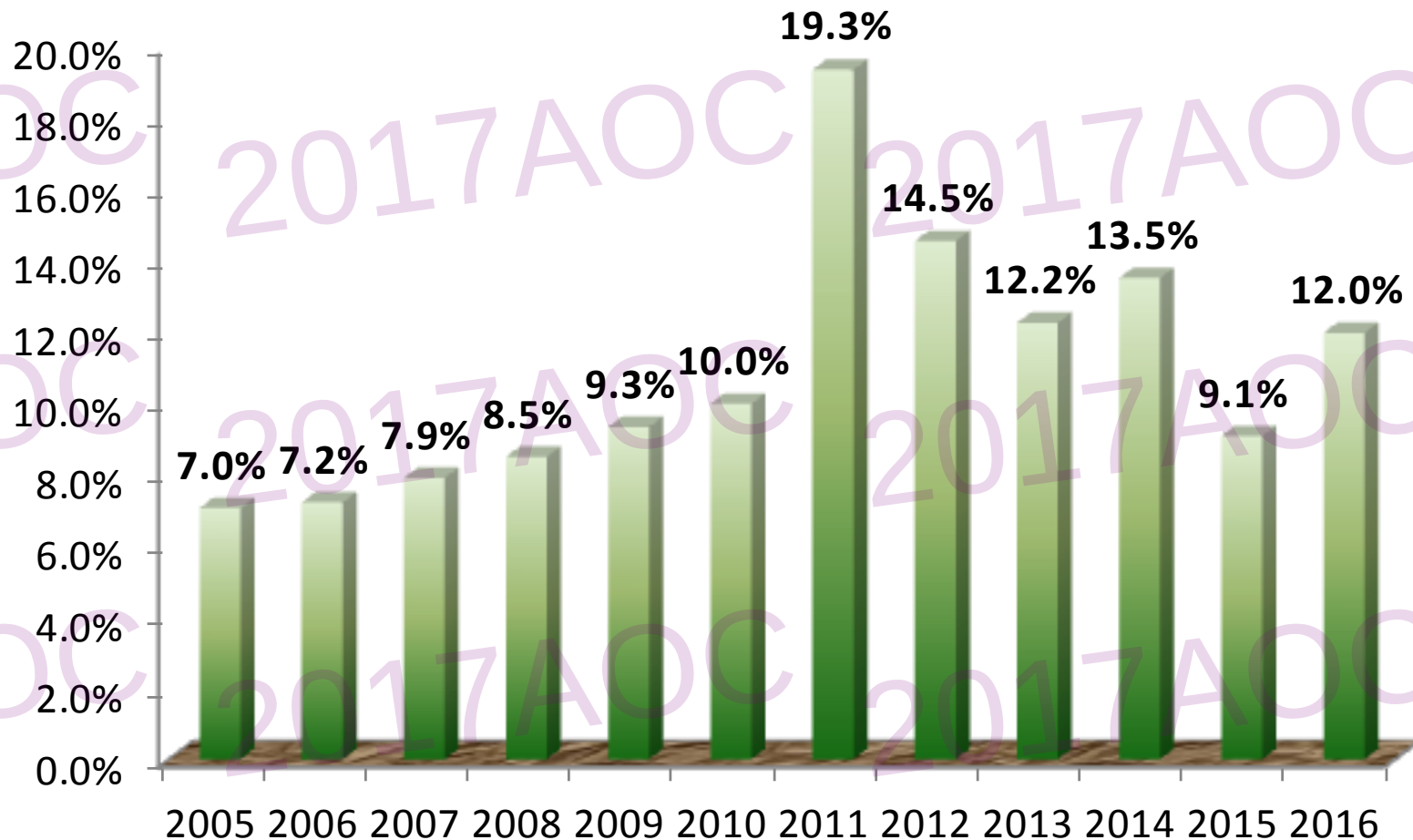
2010年以来小麦粉产量增长趋势

Wheat Flour Production since 2010



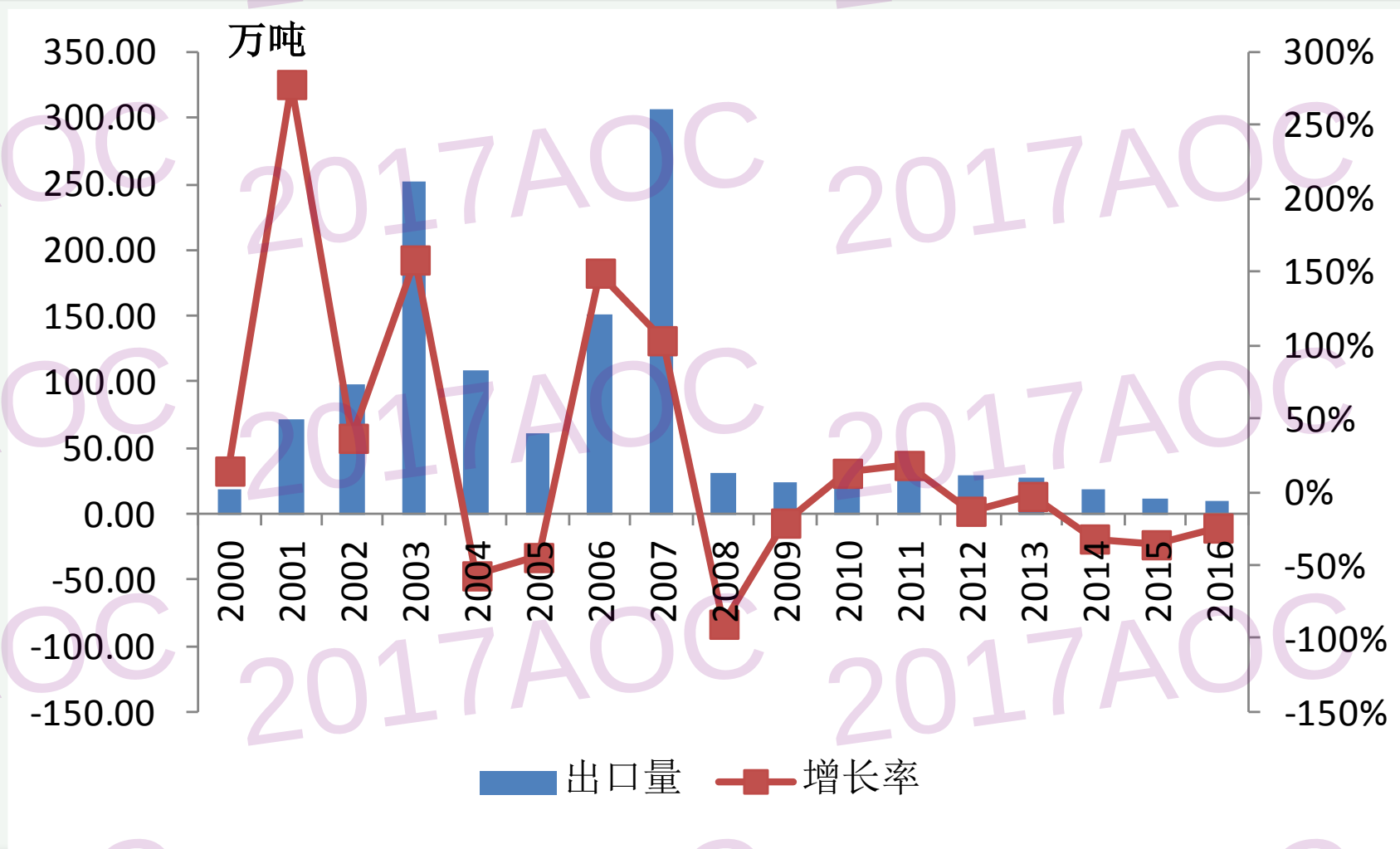
近年来小麦饲用消费占比估计

Feed Consumption of Wheat from 2005



近年来我国小麦出口变化趋势

China's Wheat Export in Recent Years



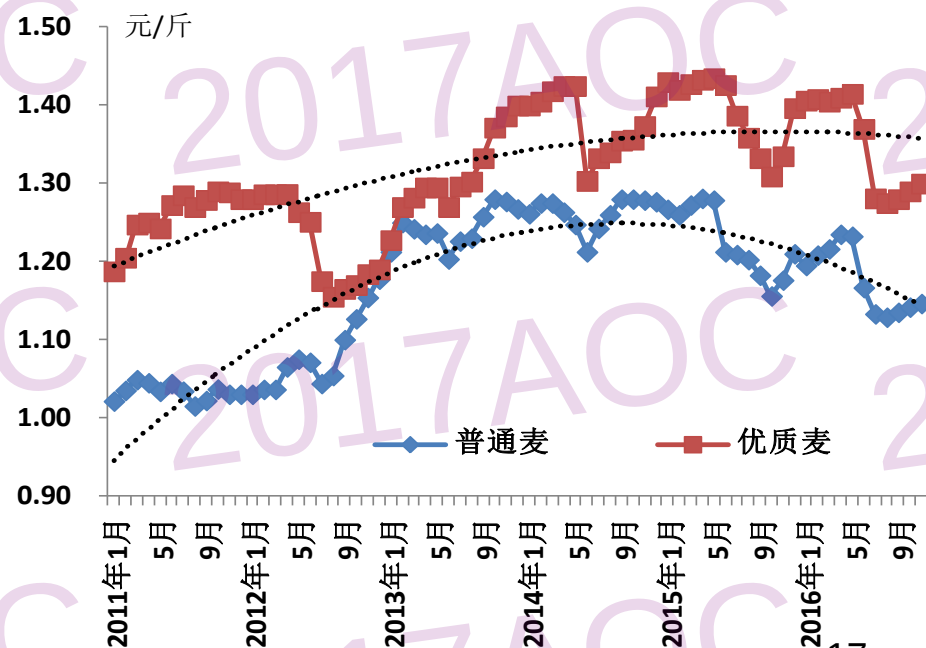
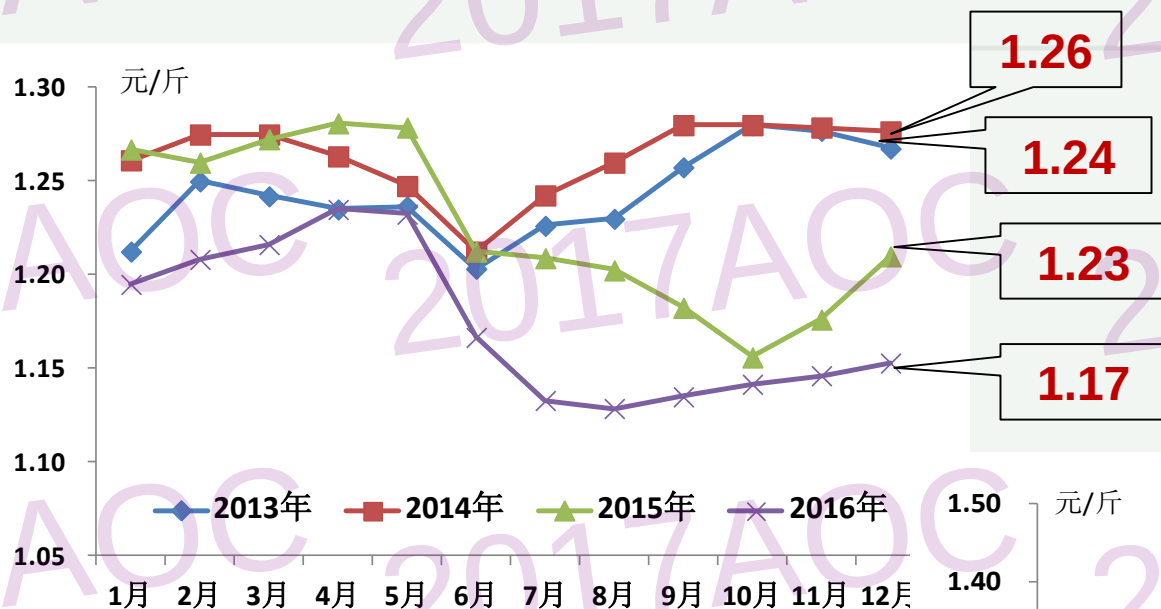
(二) 价格走势

Domestic Wheat Market price in 2016



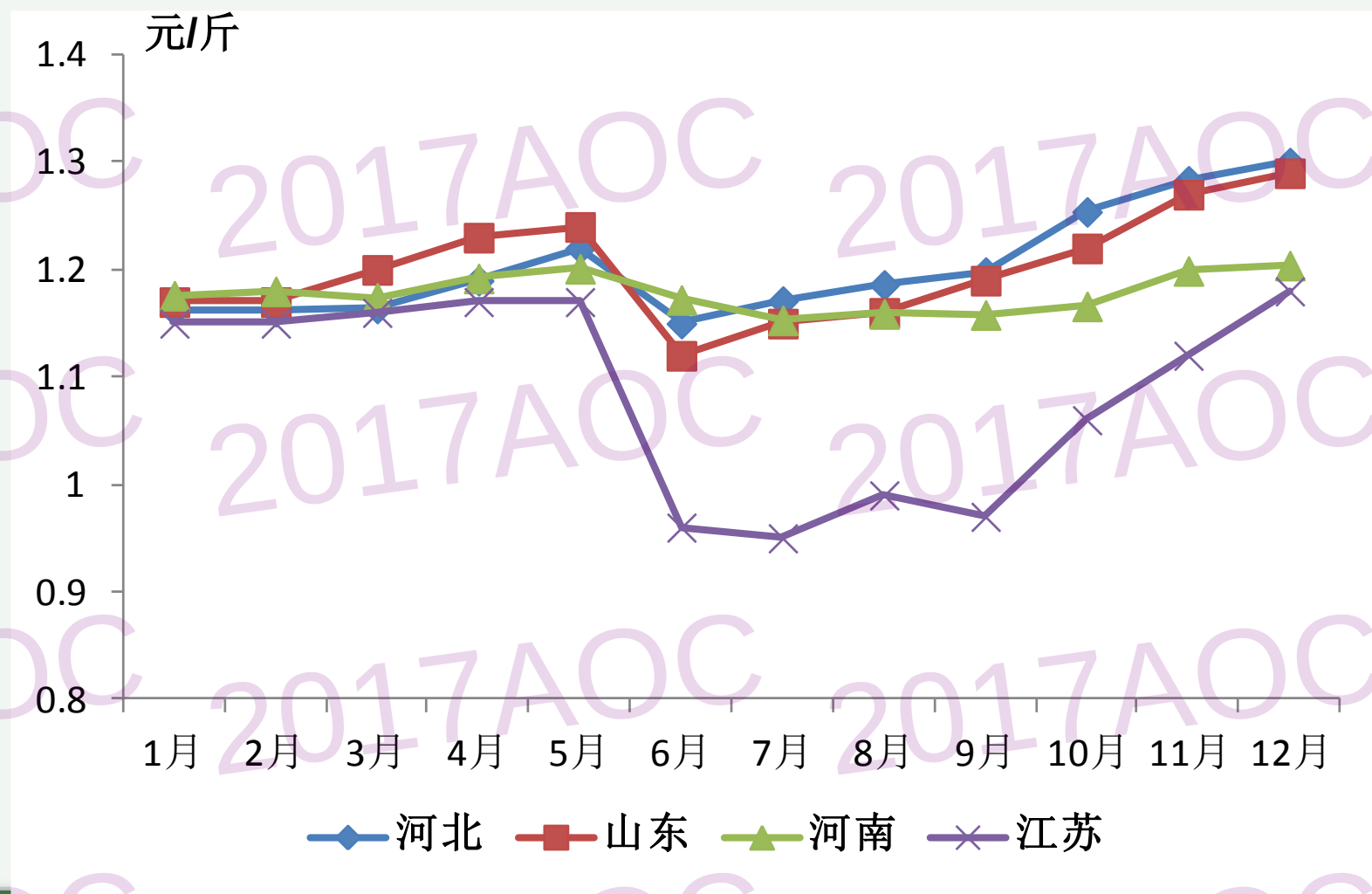
近年来国内小麦价格走势

Domestic Wheat Price in Recent Years



2016年主产省小麦收购价格走势

Wheat Purchase Price in Major Producing Provinces



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生产保持稳定
Production will remain stable

消费稳中有增
Consumption will increase steadily

总体判断

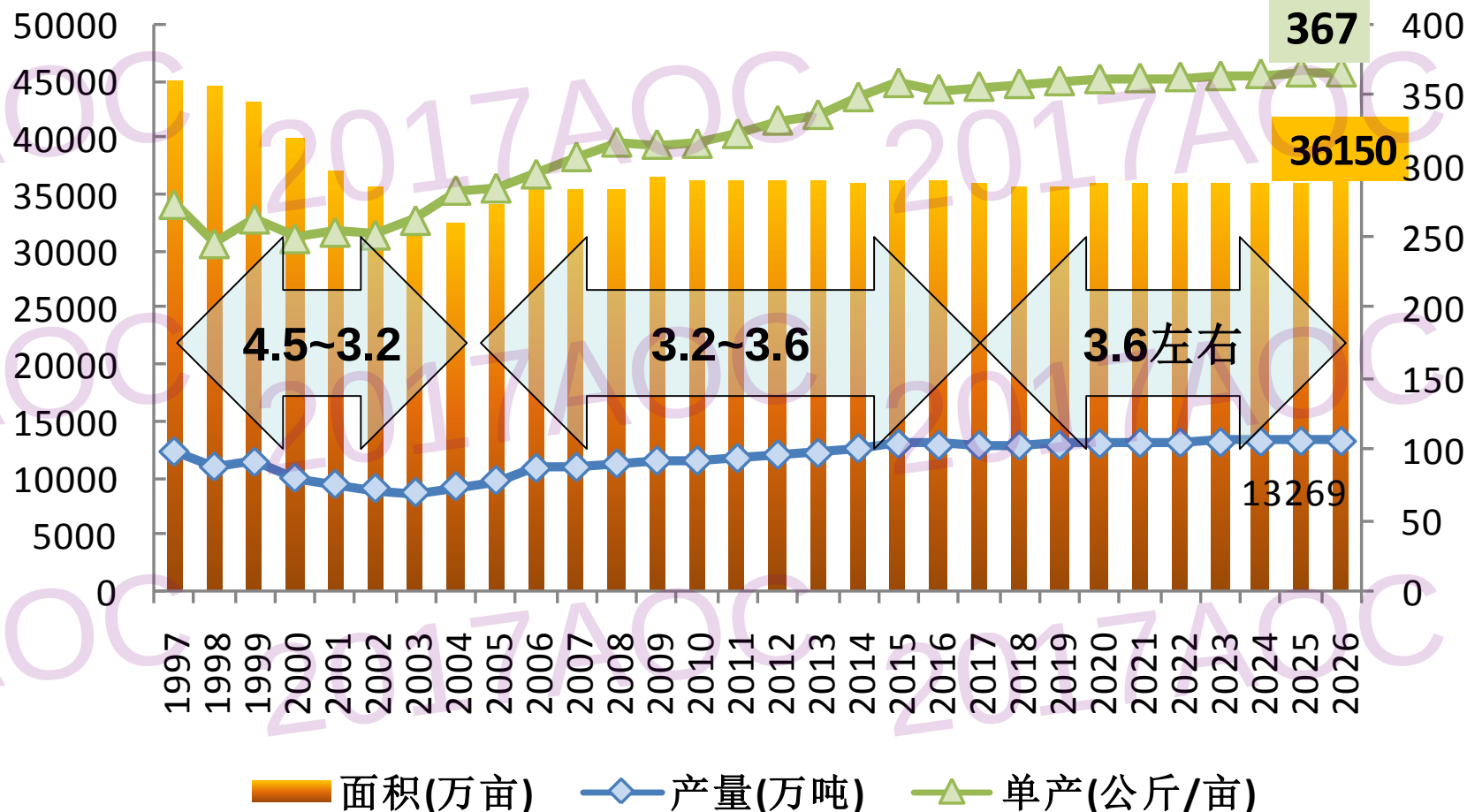
Overall Judgments

净进口量先降后增
Net imports will decrease firstly and then increase

价格逐步向市场回归
Prices will gradually return to the market

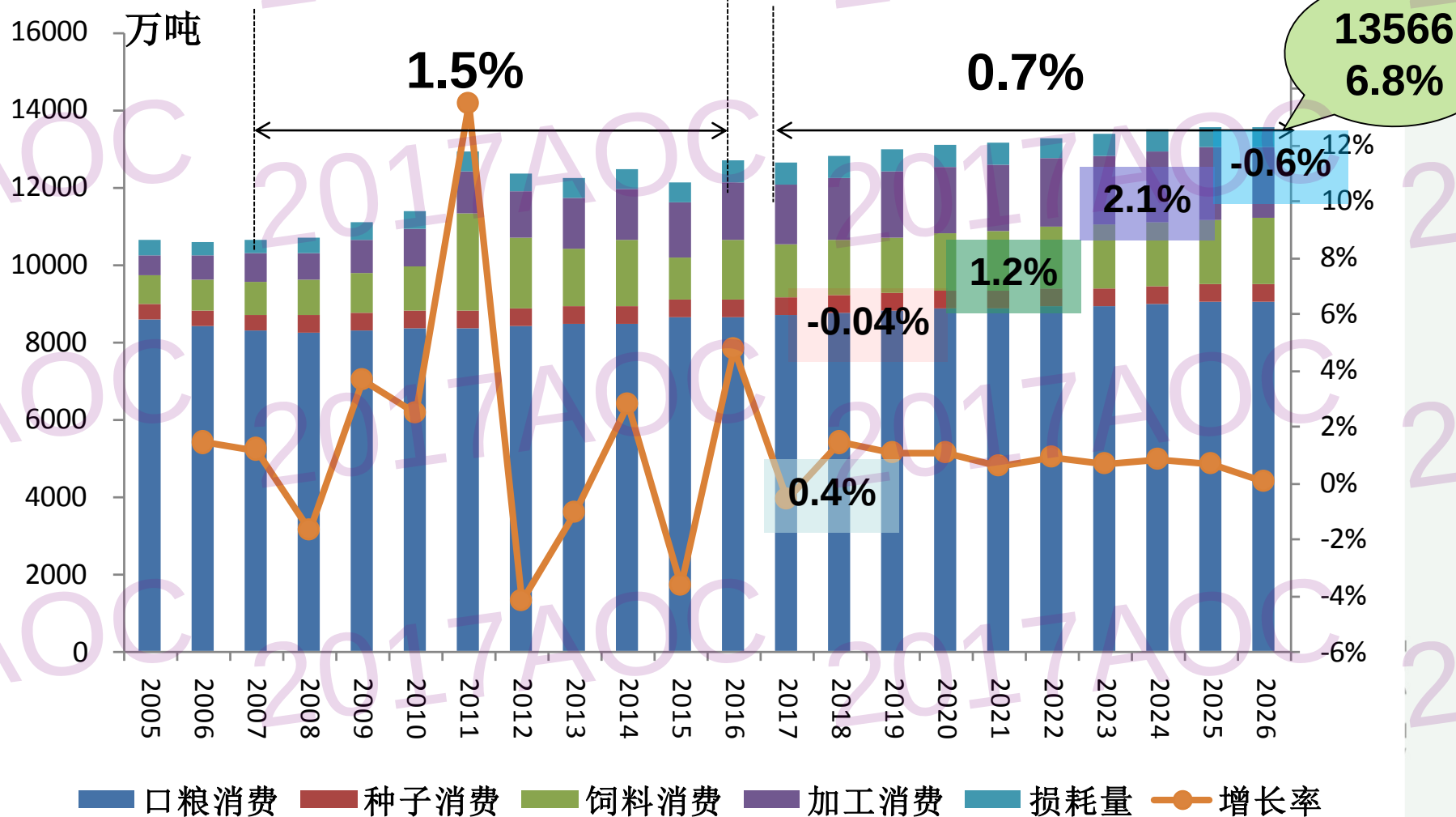
生产展望：面积稳中略降,单产持续提升

Area Harvested will decrease, and Yield will keep increasing



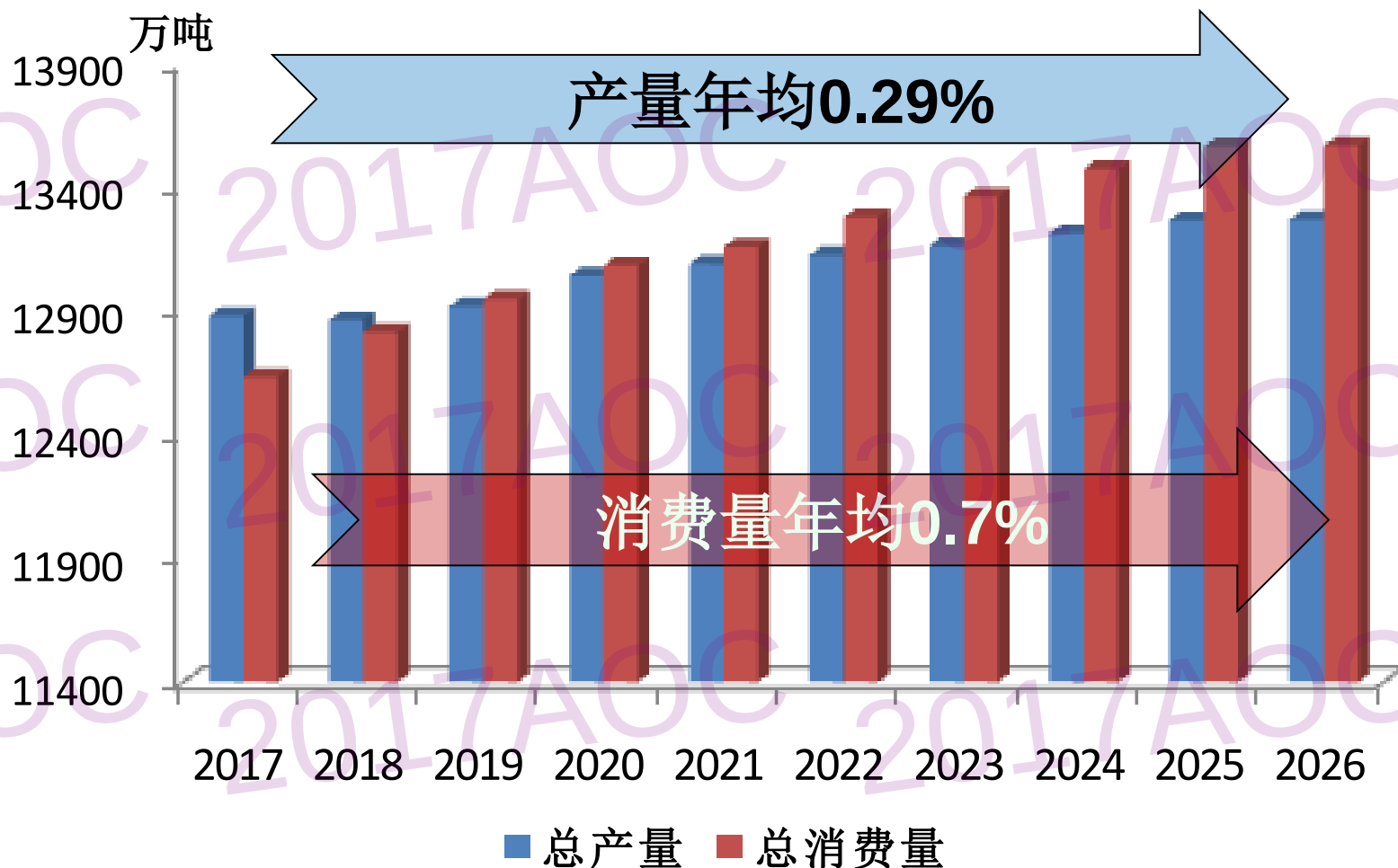
消费展望：整体呈现上升态势

Consumption will increase steadily



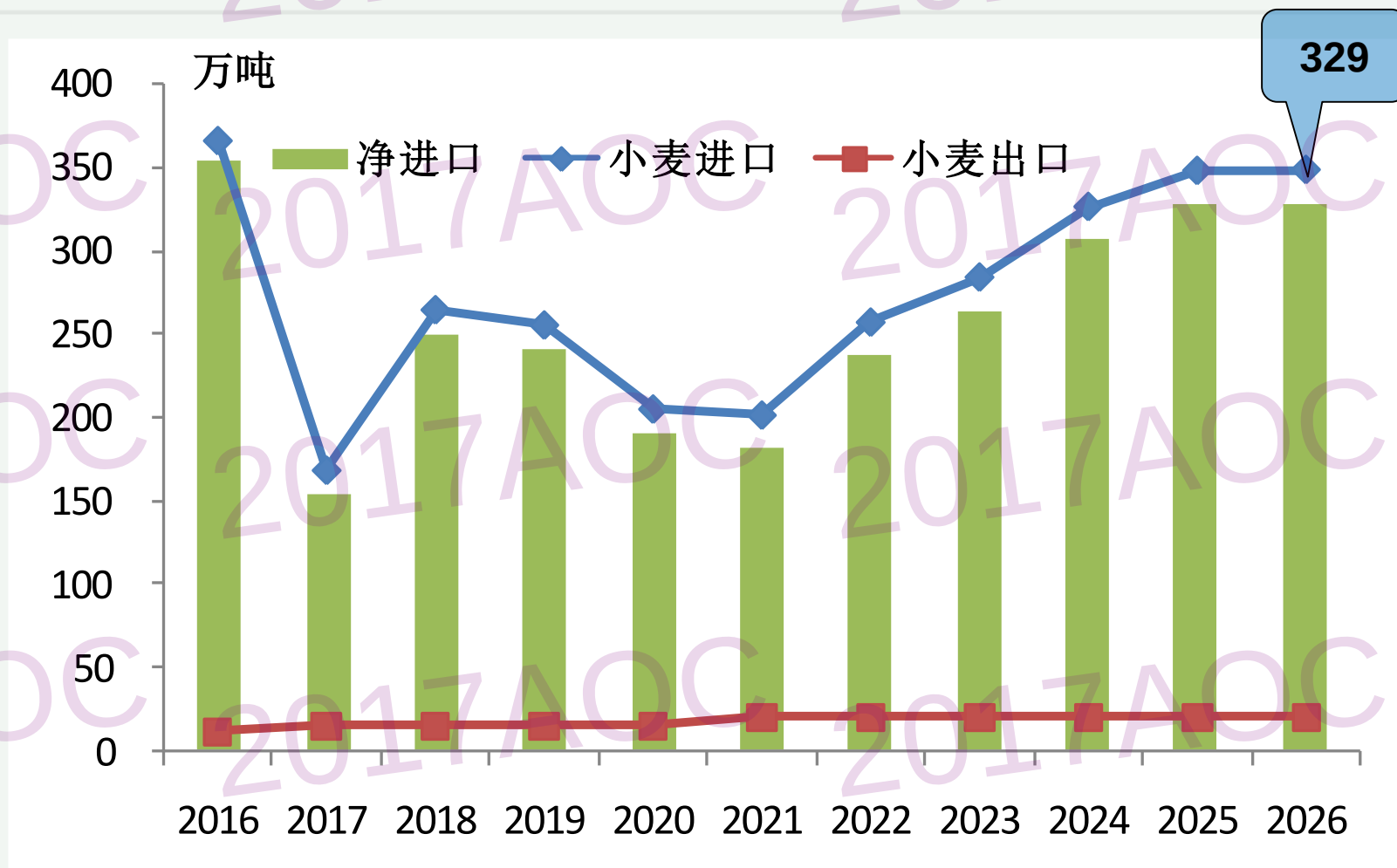
产消形势变化

Balance of Supply and Demand



净进口量先降后增

Net imports will decrease firstly and then increase



价格有望稳中略降

Price is expected to drop slightly

调控政策调整，价格回归市场

整体稳中有降，品种差异明显

生产成本上升，人工和土地尤为突出

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不确定性分析

Analysis of Uncertainties

➤ 价格政策因素

➤ 调整时间？ 调整内容？

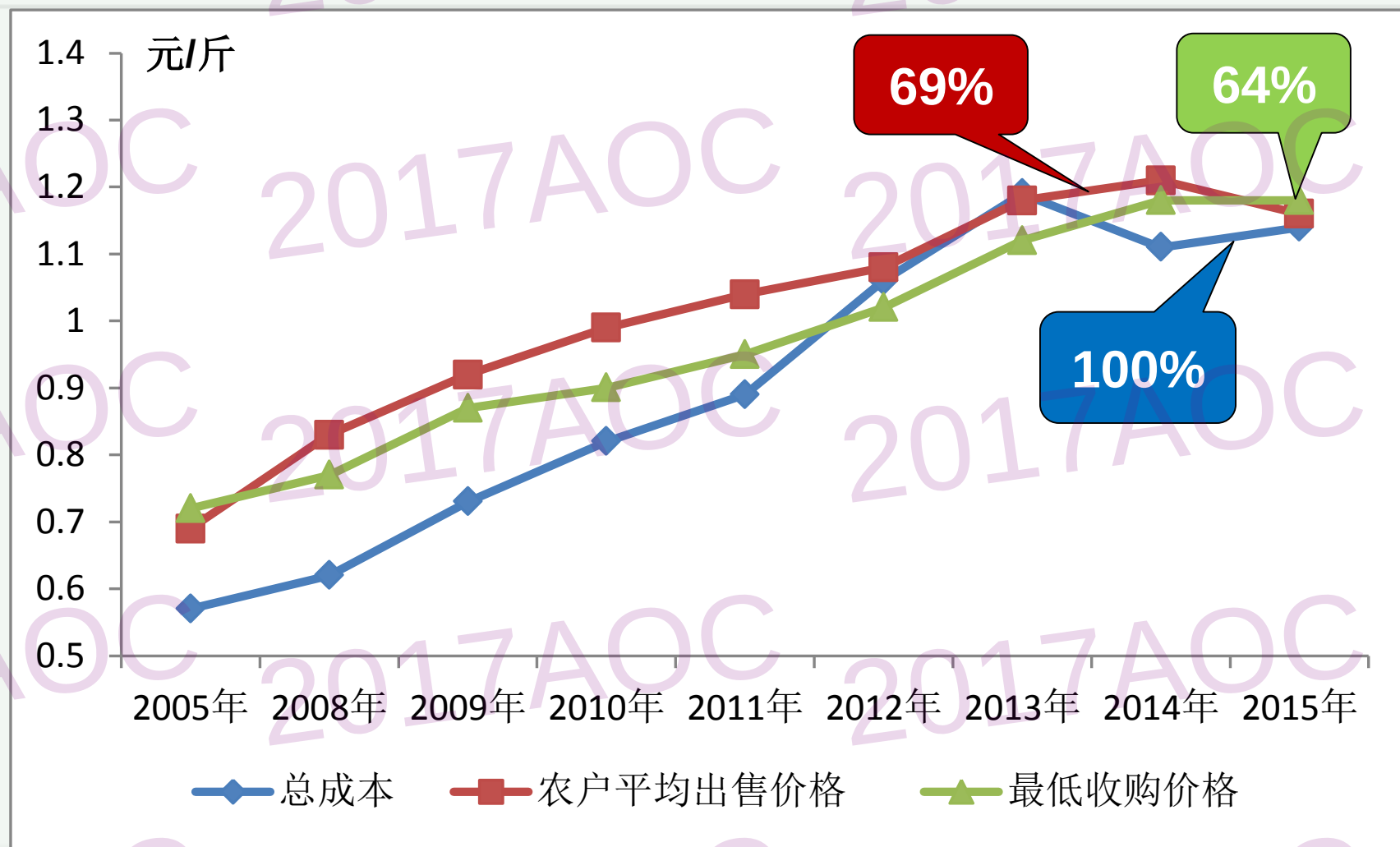
➤ 补贴政策因素

➤ 政策出台时间？ 对象、标准和范围？

➤ 气候变化因素

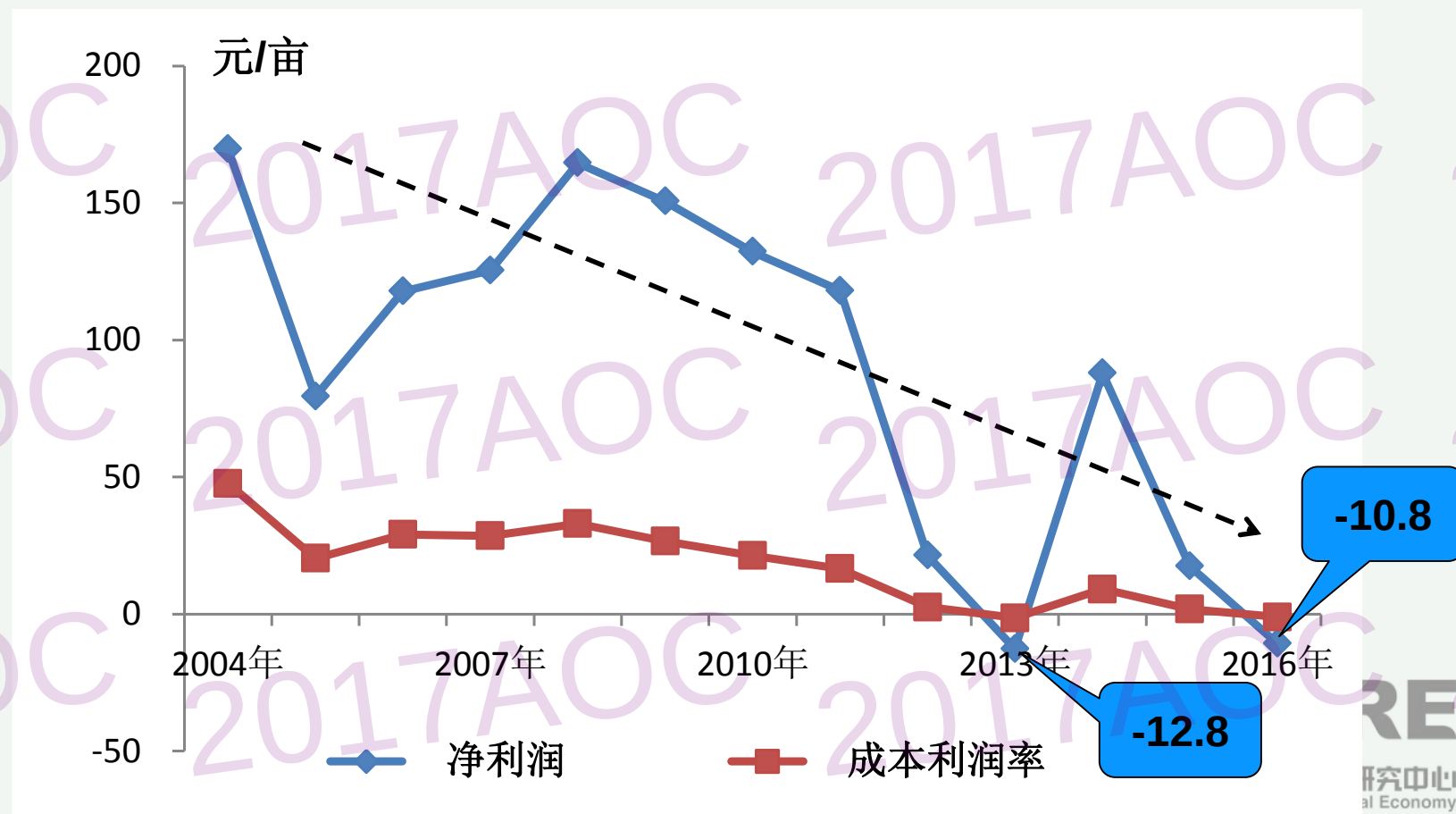
最低收购价与总成本/农户出售价格对比

Minimum Purchase Price & total cost/farmers selling price



小麦种植亩均收益下降明显

Income of wheat decreased significantly



不确定性分析

Analysis of Uncertainties

➤ 价格政策因素

➤ 补贴政策因素

➤ 气候变化因素

➤ 4月6日~7日全国农技中心会商会，2017年全国小麦中后期病虫害总体呈重发态势，发生程度重于常年。赤霉病大流行风险高，条锈病和穗期蚜虫分别呈偏重和大发生态势。

谢谢！
Thanks!