



2019年第17期总184期

## 粮食和食物安全专题

### 本期导读

#### ▶ 前沿资讯

1. 非洲猪瘟肆虐中国 将重塑全球猪肉供应格局
2. 经济波动之下的阿根廷玉米出口量尚无定论

#### ▶ 行业报告

1. 中国谷物供求年报-201904
2. 乌克兰谷物供求年报-201904
3. 世界农业生产状况-201904

中国农业科学院农业信息研究所

联系人：董渤

联系电话：010-82106260

邮箱：[agri@ckcest.cn](mailto:agri@ckcest.cn)

2019年4月29日

更多资讯 尽在农业专业知识服务系统：<http://agri.ckcest.cn/>

## ▶ 前沿资讯

### 1. 非洲猪瘟肆虐中国 将重塑全球猪肉供应格局

**简介:** 随着数百万生猪在中国消失,世界其他地区开始注意到形势的严重性。由于非洲猪瘟肆虐中国各地的养殖场,中国的生猪存栏量(目前为世界最大)可能下降近三分之一,减少1.3亿头。此次疫情将在全球各地重塑蛋白质市场,推高肉类价格,因为作为猪肉主要消费和生产国的中国将需要多年时间应对猪肉供应短缺和紊乱。欧洲领先的猪肉加工商丹麦皇冠集团(Danish Crown)的首席执行官雅伊·瓦勒(Jais Valeur)表示:

“这是一起改变市场格局的事件。我们才刚刚开始看到非洲猪瘟的真正冲击。”最早出现在非洲的非洲猪瘟病毒对猪的致死率极高,而且目前没有疫苗或治疗方法。目前这波疫情始于2007年的格鲁吉亚,随后扩散至东欧及俄罗斯部分地区,2018年8月传入中国。8个月来,中国政府一直声称疫情总体可控,但这场危机如今已成为无可争辩的事实。中国农业部上周表示,初步预计,2019年下半年猪肉价格同比涨幅可能超过70%。中国生猪存栏量急剧下降给全球食品行业带来了冲击波。芝加哥猪肉期货价格大幅上涨。圣保罗和纽约上市的肉类公司股价飙升。虽然在中美两国贸易战期间中国将美国输华猪肉的关税升至62%,但美国对华猪肉出口最近创下了历史新高。中国14亿人口每年消费5500万吨猪肉产品,远远超过其他任何国家。家庭肉类消费量随着收入增加稳步上涨,此次疫情爆发前,中国国内超4.3亿头的生猪存栏量满足了大部分需求。但荷兰合作银行(Rabobank)驻纽约分析师克里斯蒂娜·麦克拉肯(Christine McCracken)估计,到今年年底,非洲猪瘟致死和扑杀预计将令中国生猪存栏量减少1.3亿头。她说:“这可是大事。他们拥有世界一半的生猪,但却要损失30%。”这种影响将持续下去。龙洲经讯(Gavekal Dragonomics)中国消费分析师Ernan Cui表示,其他国家消灭非洲猪瘟病毒至少花了5年时间,但中国市场的规模、监管结构以及较低的卫生标准将使这场危机延续更长时间。她说:“对整个中国而言,这可能是一个非常漫长的过程,很可能要超过10年。”Ernan Cui补充称,随着占市场三分之二左右的小型养殖场难以应对控制非洲猪瘟的成本,这波疫情最终应会加速行业整合。

**来源:** FT中文网

**发布日期:** 2019-04-24

**全文链接:**

<http://www.ftchinese.com/story/001082455?exclusive>

### 2 . How Much Corn Argentina Will Export Is Unclear as the Economy Reels (经济波动之下的阿根廷玉米出口量尚无定论)

**简介:** Argentina's corn crop, currently about 60% harvested, is projected to be 47 million tonnes, according to the USDA, well above the previous record of 41 million tonnes in 2017. The US agency also forecasts Argentina will export 30.5 million tonnes of corn (the previous record was 26 million tonnes in 2017). But Argentine farmers could disappoint the export markets by keeping a larger share of their crop at home.

**来源:** GRO

**发布日期:** 2019-04-23

**全文链接:**

<https://gro-intelligence.com/blog/how-much-corn-argentina-will-export-is-unclear-as-the-economy-reels>

## 行业报告

### 1 . China Grain and Feed Annual-201904 (中国谷物供求年报-201904)

简介: Persistent dry weather and lingering uncertainty about prices at harvest are likely to delay planting of the MY2019/20 corn crop for the second consecutive year in North East China and the North China Plain. China has employed various trade measures against the United States, Canada, and Australia, driving processing and input costs for grain end-users higher. China's total corn demand in MY2019/20 is forecast to reach a new record as processors continue to binge on state-owned inventories. However, capacity expansion has quickly outpaced demand for processed corn products. African Swine Fever's impacts on China's feed sector are forecast to stabilize in late 2019, weakening feed demand in MY2018/19 and recovering in MY2019/20. Wheat production is nearly unchanged compared to last year and stocks are forecast higher in MY2019/20 due to weak demand.

来源: USDA

发布日期:2019-04-17

全文链接:

<http://agri.ckcest.cn/file1/M00/06/6A/Csgk0FzBchGAbbaFAAwbhJOHGZo093.pdf>

### 2 . Ukraine Grain and Feed Annual (乌克兰谷物供求年报-201904)

简介: Ukraine harvested a record-breaking volume of corn in MY2018/19. To date, the 2019 climatic conditions have been favorable for winter crop growth. Changes in Ukrainian tax policy for oilseeds may affect farmers' planting decisions with regard to grains. Domestic feed consumption remains stable, while food consumption is decreasing slightly for both MY2018/19 and MY2019/20, paving the way for a further growth in exports. Ukraine is expected to remain a leading grain exporter in the Black Sea region.

来源: USDA1

发布日期:2019-04-12

全文链接:

<http://agri.ckcest.cn/file1/M00/06/6A/Csgk0FzBcXyAPzxFABgykqXmVgE113.pdf>

### 3 .World Agricultural Production-201904 (世界农业生产状况-201904)

简介: South Africa's 2018/19 corn production is forecast at 11.0 million metric tons (mmt), unchanged from last month and down 2.1 mmt (16 percent) from last year. Area is estimated at 2.4 million hectares (mha), unchanged from last month and down 0.23 mha (9 percent) from last year. Yield is forecast at 4.58 metric tons per hectare, unchanged from last month, down 8 percent from last year and down slightly from the 5-year average. The USDA forecast includes output from both the developing and commercial sectors, with the

更多资讯 尽在农业专业知识服务系统:<http://agri.ckcest.cn/>

commercial sector accounting for approximately 95 percent of the total crop.

来源: USDA

发布日期:2019-04

全文链接:

<http://agri.ckcest.cn/file1/M00/06/6A/Csgk0Fy320CAVdyFABepu6IV5Xk006.pdf>