

Special Research Report on China Grain Market

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Abstracts

Background

Under the loose monetary policy of the central bank since 2009, in early 2010 the money supply of China exceeded 60 trillion, more than the U.S. money supply of 55 trillion. China became the world's largest country in money supply. As of October 2010, the total money supply in China exceeded 80 trillion. Excess money supply leads to price volatility of some in-shortage farm products and grain market is also affected.

The 'Proposal on Making the Twelfth Five-Year Plan of the National Economy and Social Development' was adopted on the fifth plenary meeting of the 17th CPC Central committee on October 18, 2010. The proposal proposed: stick to the path of agricultural modernization with Chinese characteristics, take "to ensure national food security" as a primary goal, accelerate the changes in agricultural development methods, improve comprehensive agricultural productive capacity, risk resisting capacity and market competitiveness. To implement the productive capacity planning of tens of thousand mt newly added grains nationwide, to intensify investments in major grain producing areas and benefit compensation for peasants. The 2010 Central Economic Work Conference pointed out: to promote the development of modern agriculture and ensure the effective supply of agricultural products. To do everything possible to ensure the supply safety of major agricultural products, to stabilize grain planting area, to increase subsidies for agricultural production, to steadily raise the minimum grain purchasing price, to intensify the efforts on investment in major grain producing areas and benefit compensation and to implement the 'rice bag' responsibility system of provincial governors.

The most prominent issue that China's agricultural production faced in 2010 is the unusual weather conditions and the repeating of frequent agriculture disasters; in 2011, the opening of grain production will encounter major disasters once again.

According to the National General Headquarters for Flood Control and Drought Relief: as of December 1, 2010, accumulative area of drought-hit arable lands is 26,533 thousand hectares, drought-hit crops area is 13,267 thousand hectares. During the 2010 flood season, the nation's rainfall is heavy and frequent with long cycle and large quantities. Precipitation in many parts of the country exceeded historical extremes. The country's 30 provinces and autonomous regions experienced varying degrees of flood disasters and extraordinary floods occurred with more than 100 rivers far above historical level. Flood disasters resulted in a total of 18,000 thousand hectares of crops affected and direct economic loss was 34.75 billion yuan.

According to news from the Ministry of Agriculture: in 2010 a large area of winter wheat was affected by low temperature and freezing disaster. In northeast and northwest agricultural region, a rare low-temperature in history occurred during the winter and spring period. Entering the spring, the temperature was consistently low. Spring land preparation and sowing time were generally delayed for 7-10 days, resulting in sowing period shortened.

BOABC's monitoring shows: since October 2010, the nation's temperature is 2-4°C higher in most regions. Rainfall in winter wheat main producing areas generally is 50%-80% less than normal, of which precipitation in the main producing areas in Huanghuai is 80%-100% less than normal. As of mid-December, drought-hit area of winter wheat in Huanghuai and Jiang Huai region was 3866 thousand hectares, high temperature and drought have a serious impact on the production of wheat.

According to the communique of the National Bureau of Statistics: in 2010, grain sown area of the country was 109,872 thousand hectares, an increase of 0.8%; the country's total grain output was 546.41 million mt, an increase of 2.9%. Among them, the sown area of summer grain was 27,421 thousand hectares, an increase of 0.14%; early paddy sown area was 5794 thousand hectares, down by 1.3%; sown area of autumn grain was 76,657 thousand hectares, an increase of 1.21%

How will the excessive money supply affect the price of staple foods? How to interpret the agriculture and food policy of the central authorities? What is the impact on China's food security production? What is the future development trend?

What are the impacts of the serious natural disasters in 2010 on the overall situation of grain production, product structure, supply and demand of the main varieties and grain security, regional supply and demand balance and grain prices, etc.? The opening of 2011 once again faced serious natural disasters, how will grain production be in the new

year? What effect will be generated on the grain market in 2011?

By answering these questions in detail, this report provides various types of businesses, trade agencies, investment institutions and individuals that hope of successful investments in the grain industry with references for effective decision-making; this report also can provide references for grain and agriculture-related policy decisions of government, research institutions , international organizations and international institutions to study China's grain and the World grain.

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