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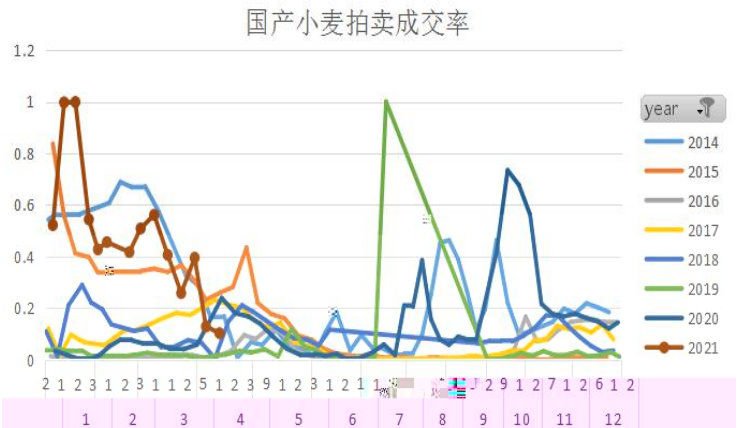
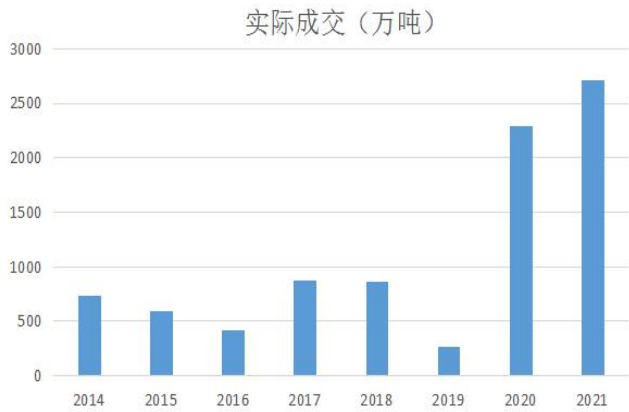
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songcongzhi@jinxinqh.com



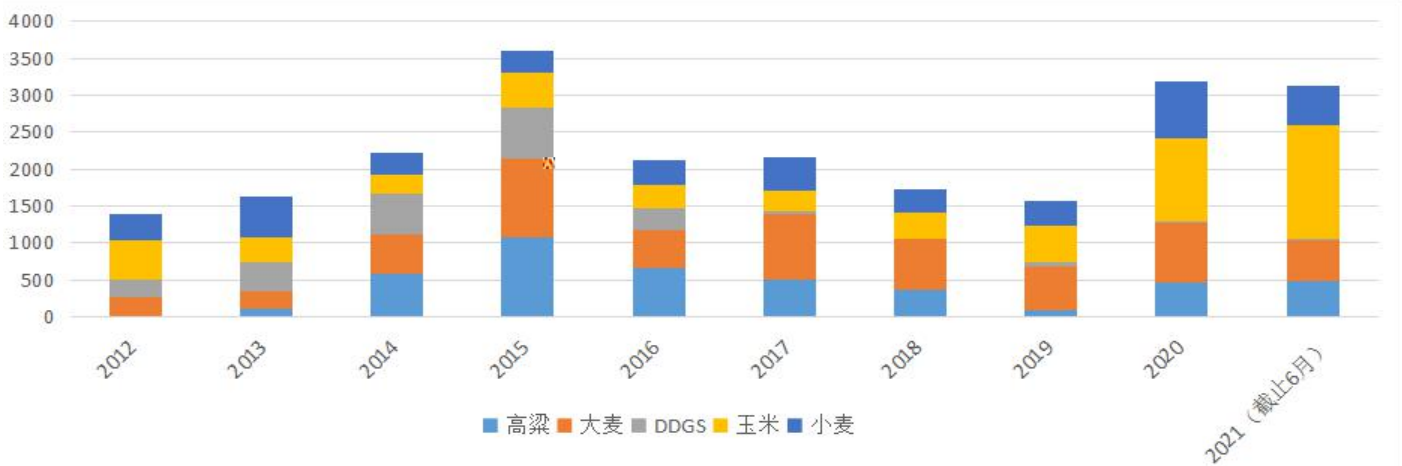
请务必仔细阅读正文之后的声明





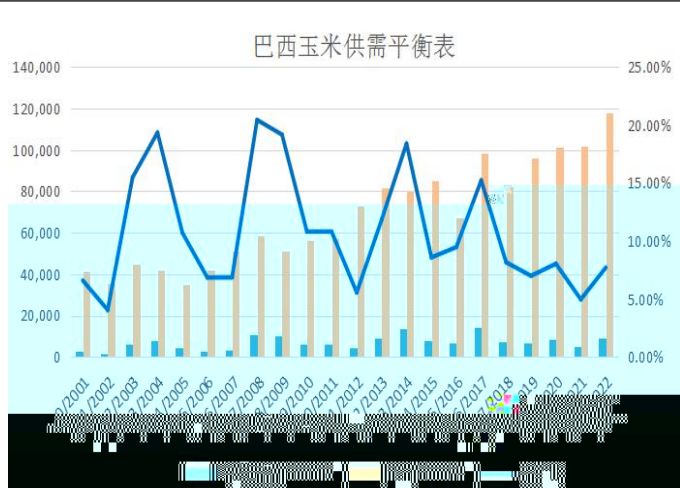
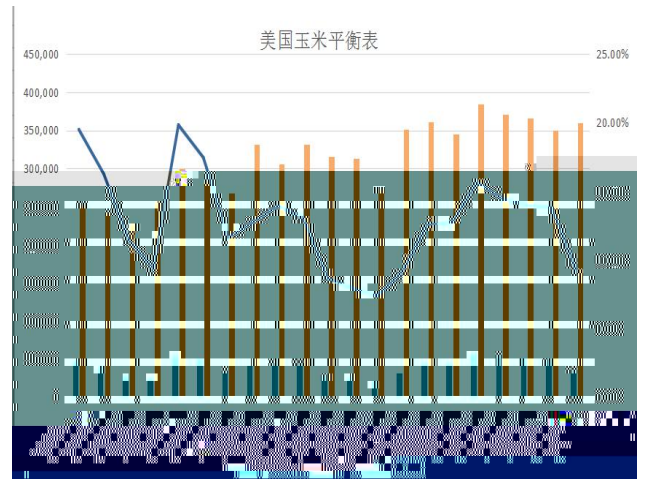
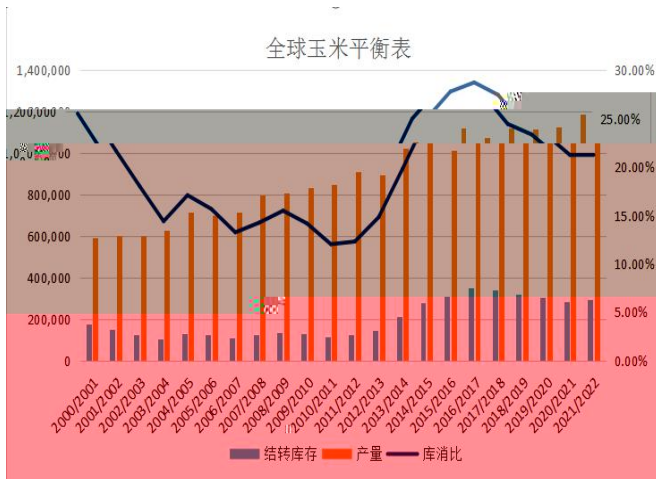
小麦剩余库存分布 (2021. 5. 6)

区域	2014	2015	2016	2017	2018	2019	2020	合计
江苏	65	185	168	75	14	239	367	1113
安徽	47	178	288	152	2	256	206	1129
山东	3	4	7	0	0	54	0	68
河南	74	51	401	825	0	855	24	2230
河北	0	59	2	4	0	113	0	178
湖北	64	12	7	3	0	2	0	88
合计	253	489	873	1059	16	1519	597	4806





美玉米平衡表	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	2021/2022	2021/2022
期初库存(1000 MT)	31,292	43,974	44,123	58,253	54,367	53,709	48,757	27,483	27,483	27,483
产量(1000 MT)	361,136	345,506	384,773	371,096	366,287	359,011	360,258	300,306	317,379	370,870
进口(1000 MT)	804	1,716	1,450	923	1,016	1,270	635	635	635	635
总供给(1000 MT)	393,232	391,196	430,351	430,272	421,670	404,994	410,644	413,454	400,491	406,955
出口(1000 MT)	47,421	48,229	58,270	61,935	58,423	48,241	72,393	63,503	63,503	63,503
饲料消费(1000 MT)	134,307	129,993	137,816	137,753	134,626	134,626	145,422	145,422	144,787	144,787
工业消费(1000 MT)	167,830	168,846	174,892	179,237	176,919	173,109	164,346	168,029	168,029	168,029
乙醇消费(1000 MT)	301,837	298,844	313,828	313,970	311,545	307,735	309,768	313,451	312,816	312,816
结转库存(1000 MT)	43,974	44,123	58,253	54,367	51,702	48,993	27,483	36,530	24,172	30,669
Yield (MT/HA)	10.73	10.57	10.96	11.08	11.07	10.57	10.8	11.27	10.89	11.08
库存使用比	12.59%	12.71%	15.66%	14.46%	13.97%	13.76%	7.19%	9.69%	6.42%	8.15%
产量变化百分比										

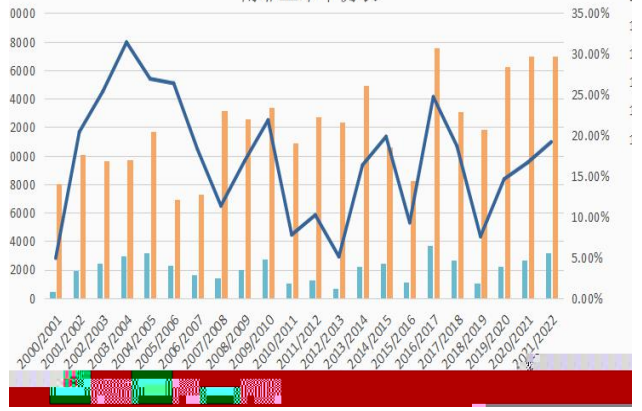




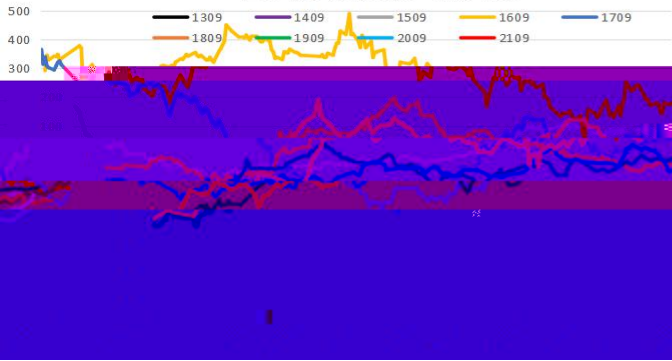
乌克兰玉米平衡表



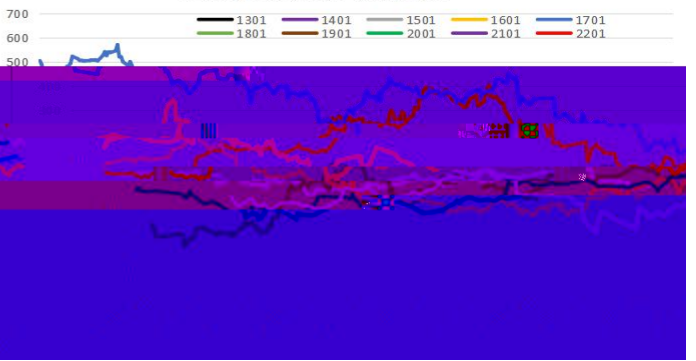
南非玉米平衡表



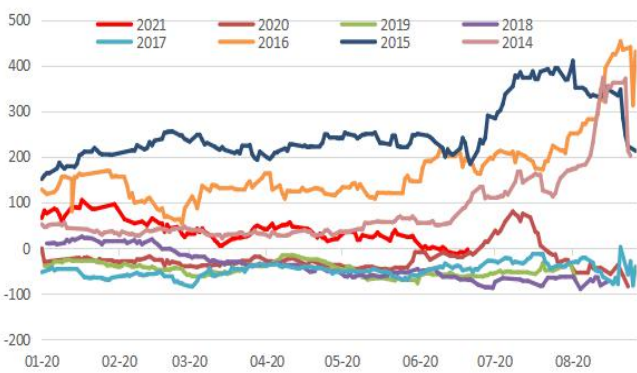
玉米9月合约基差（锦州港）



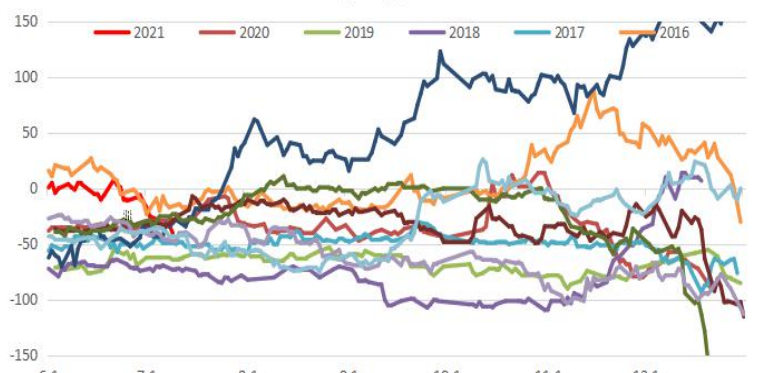
玉米01合约基差（锦州港）

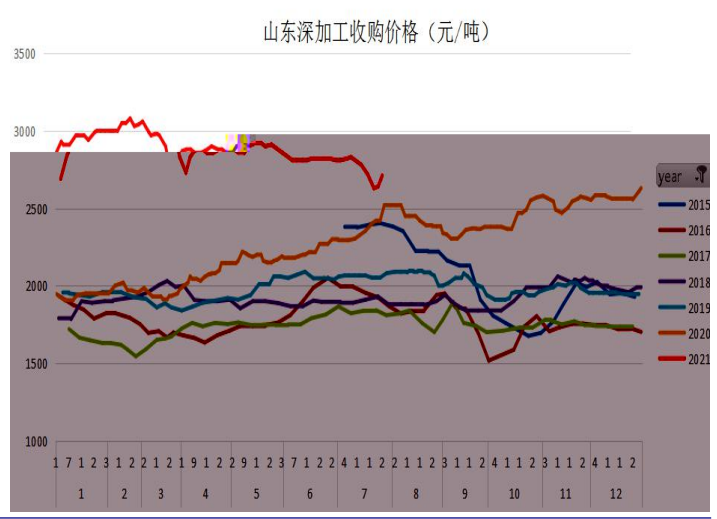
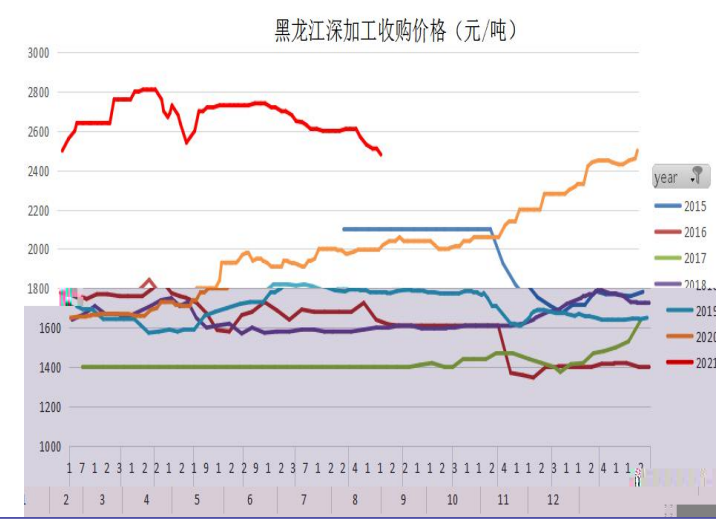
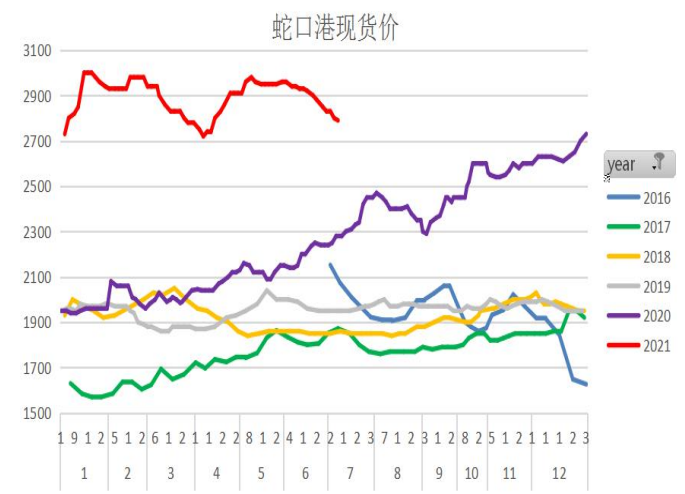
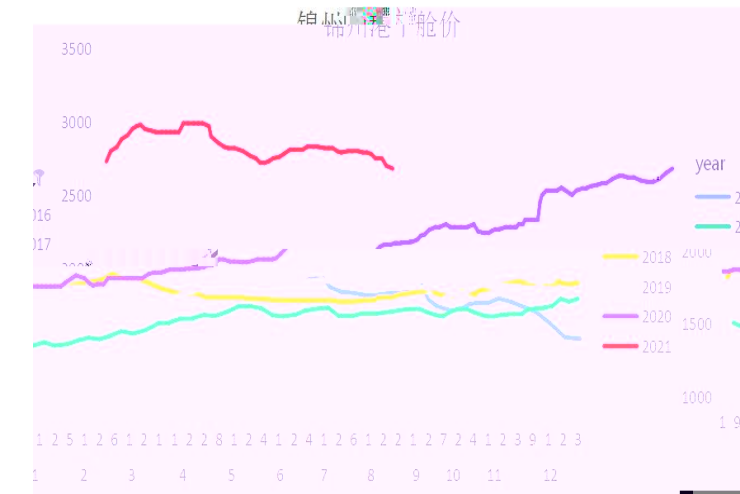
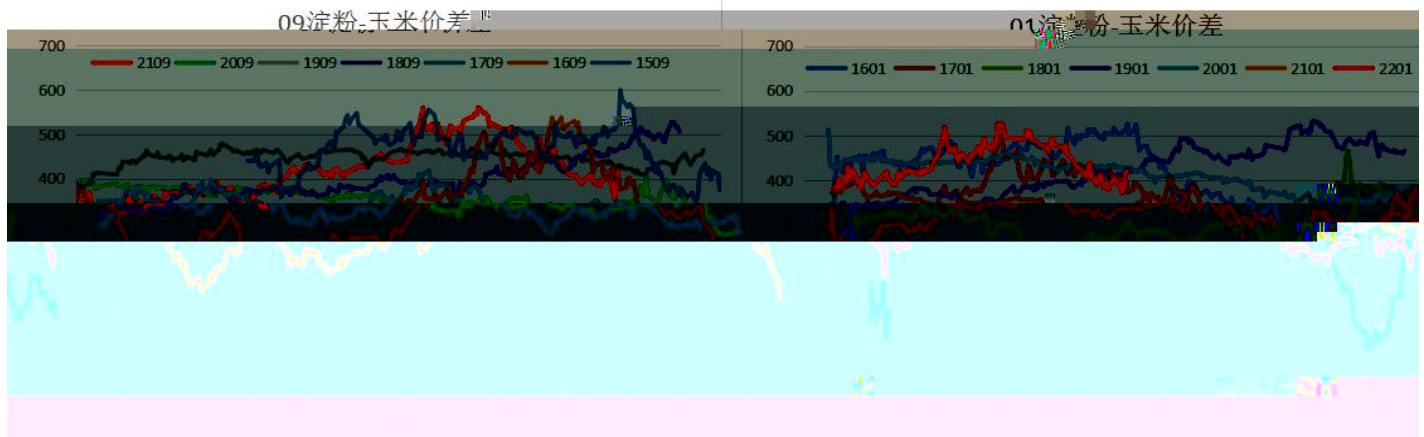


玉米91价差

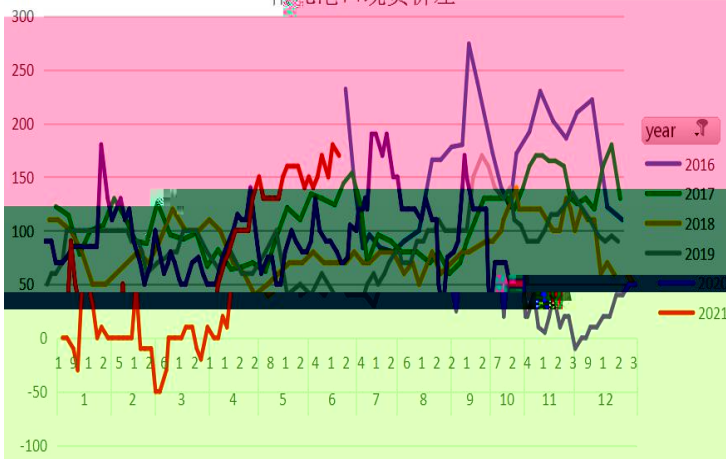


玉米15价差

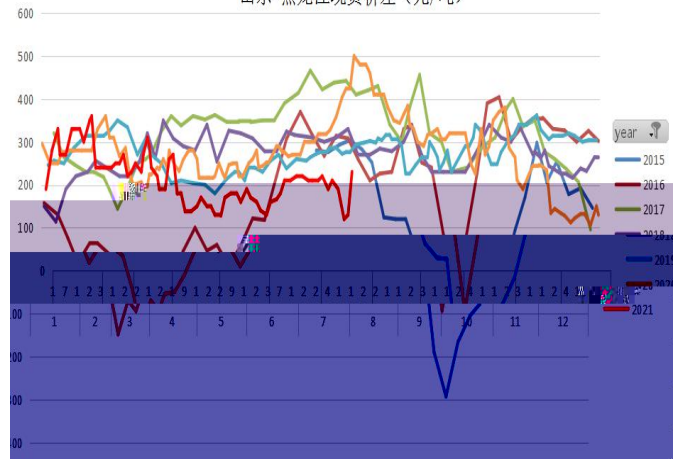




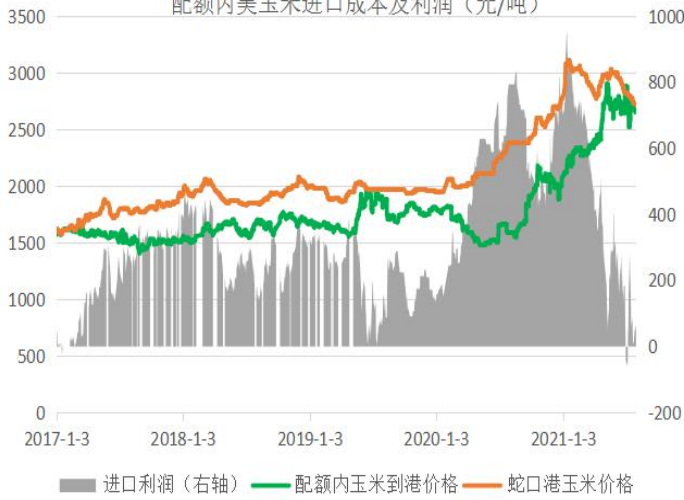
南北港口现货价差



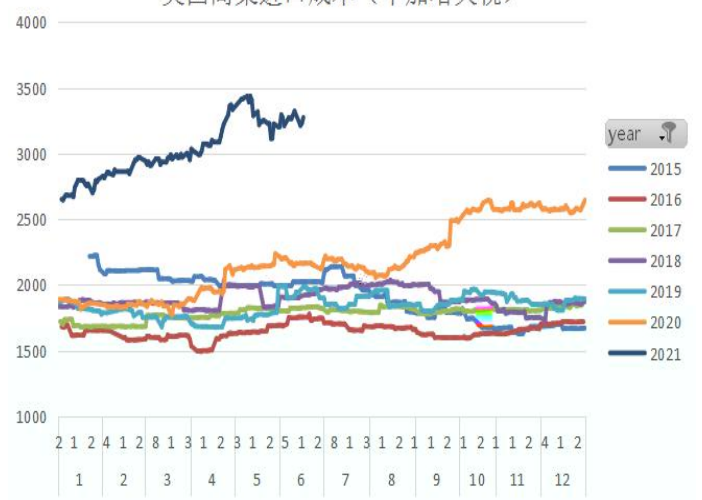
山东-黑龙江现货价差(元/吨)



配额内美玉米进口成本及利润(元/吨)



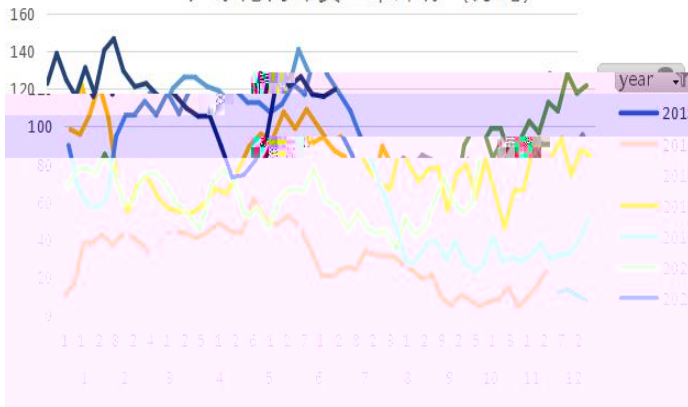
美国高粱进口成本(不加增关税)



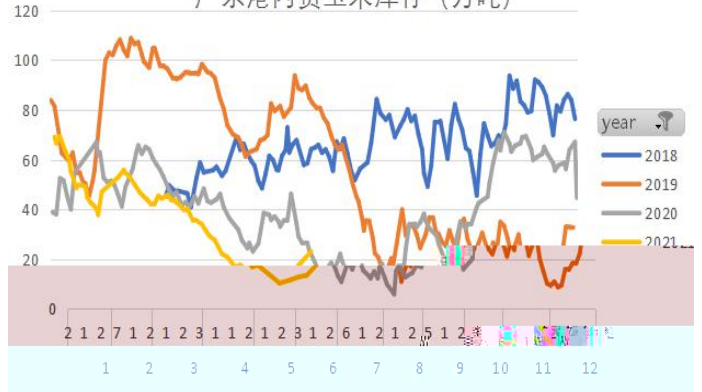




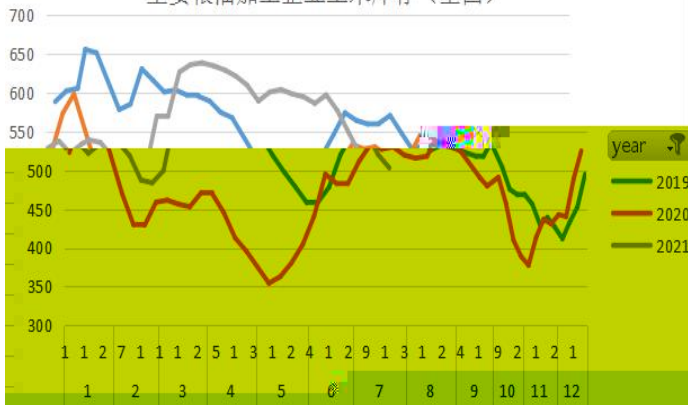
广东港内外贸玉米库存 (万吨)



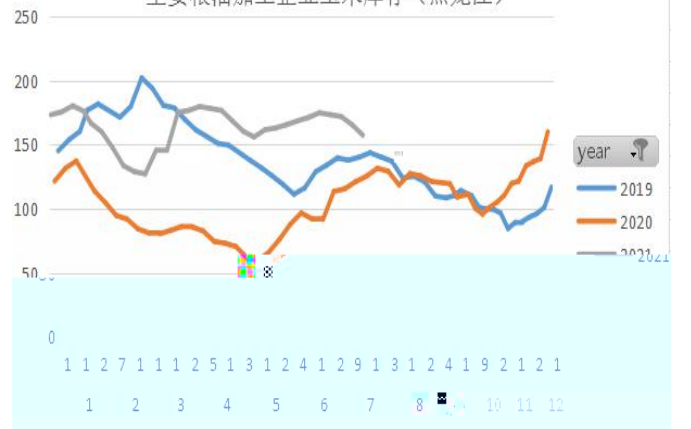
广东港内贸玉米库存 (万吨)



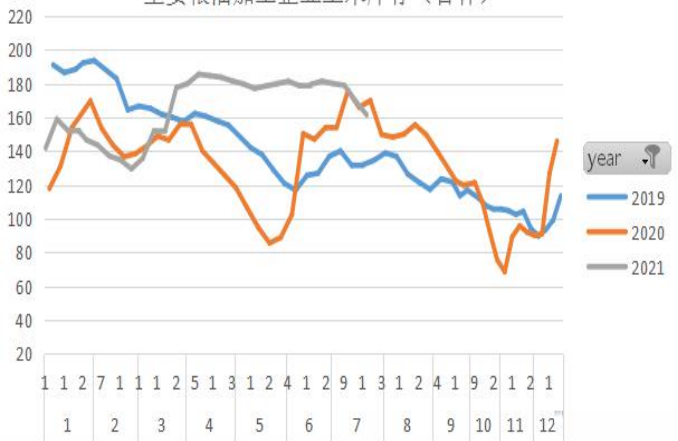
主要粮油加工企业玉米库存 (全国)



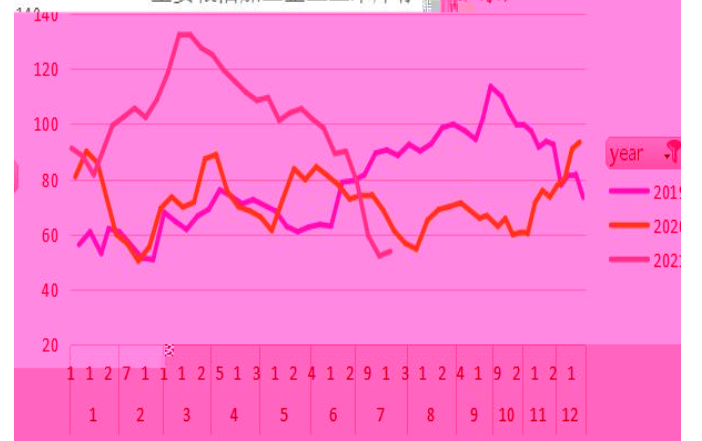
主要粮油加工企业玉米库存 (黑龙江)

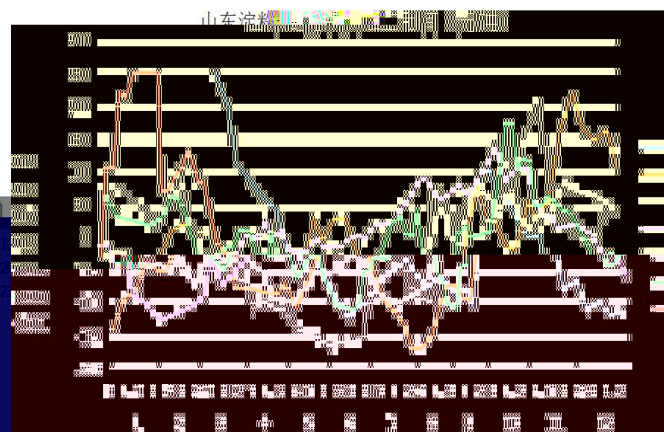
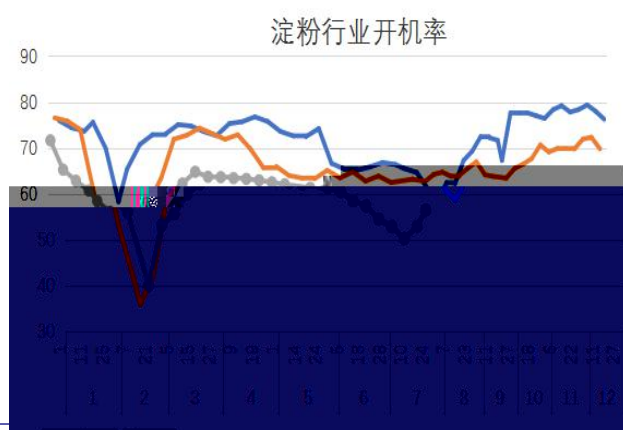


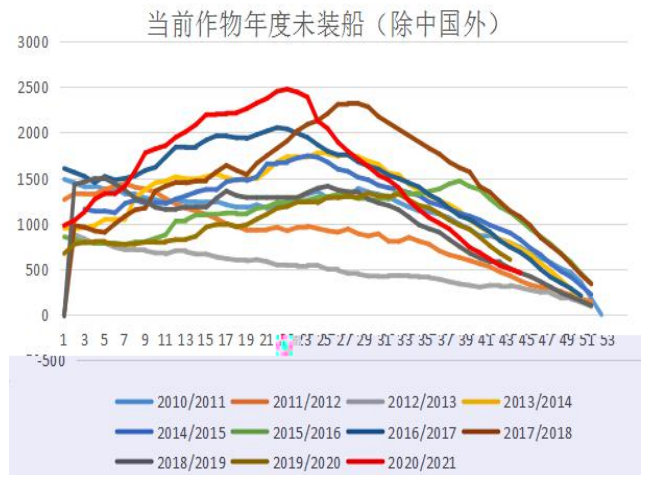
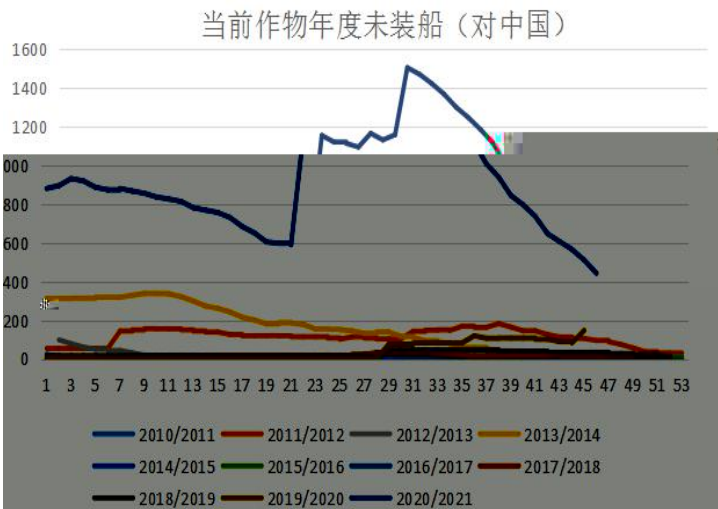
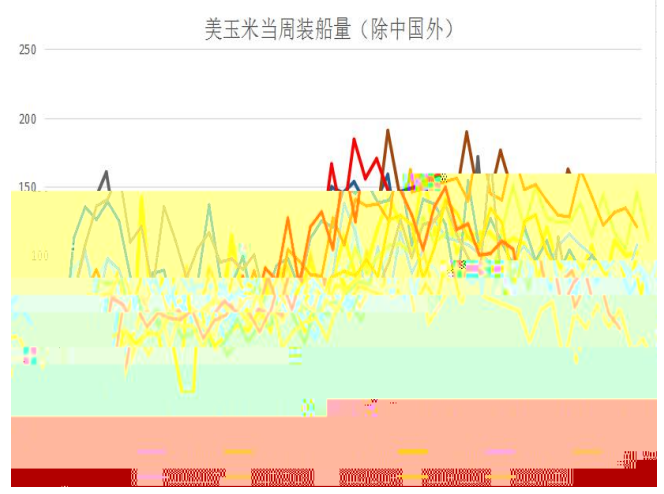
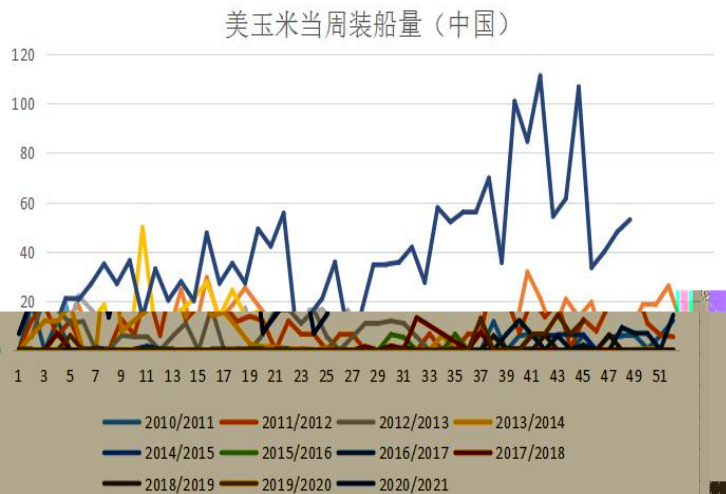
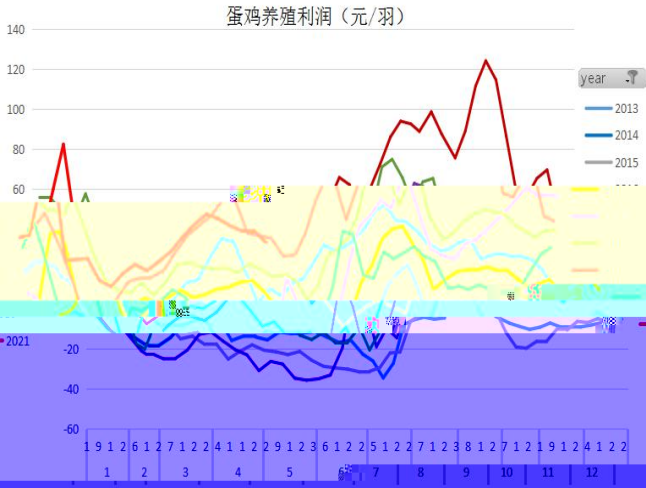
主要粮油加工企业玉米库存 (吉林)



主要粮油加工企业玉米库存 (山东)

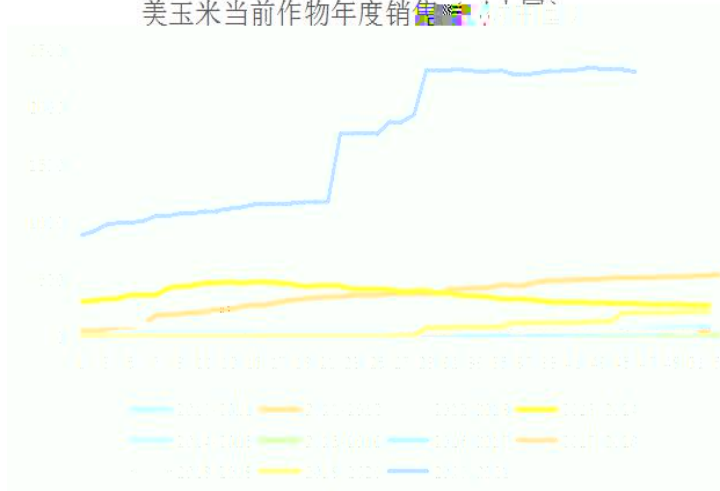




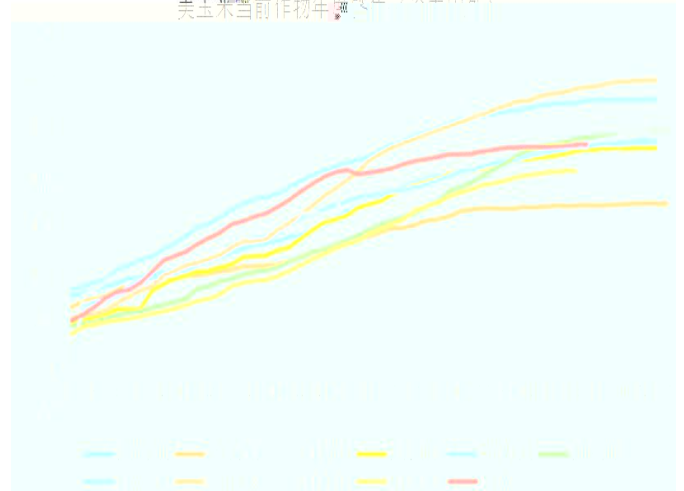




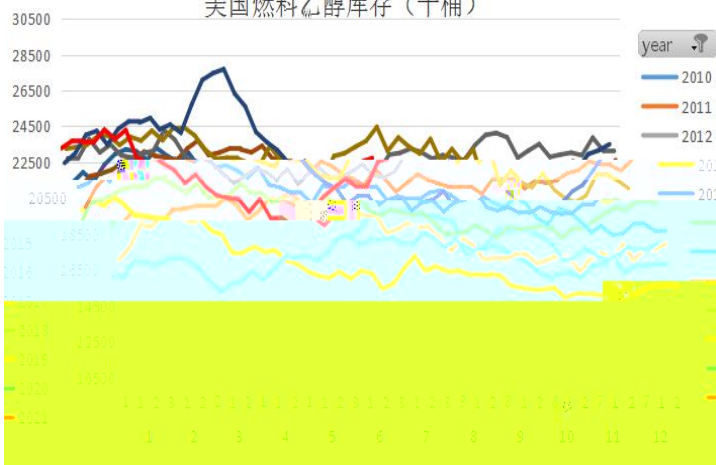
美玉米当前作物年度销售 (百万吨)



美玉米当前作物年度产量 (百万吨)



美国燃料乙醇库存 (千桶)



美国燃料乙醇产量 (千桶/天)

