

U.S. SOY FOR A GROWING WORLD

美国大豆作物展望 U.S. SOYBEAN CROP PERSPECTIVES

梅宝波 BOB METZ | 中国 CHINA | 2014年9月 SEPT 2014

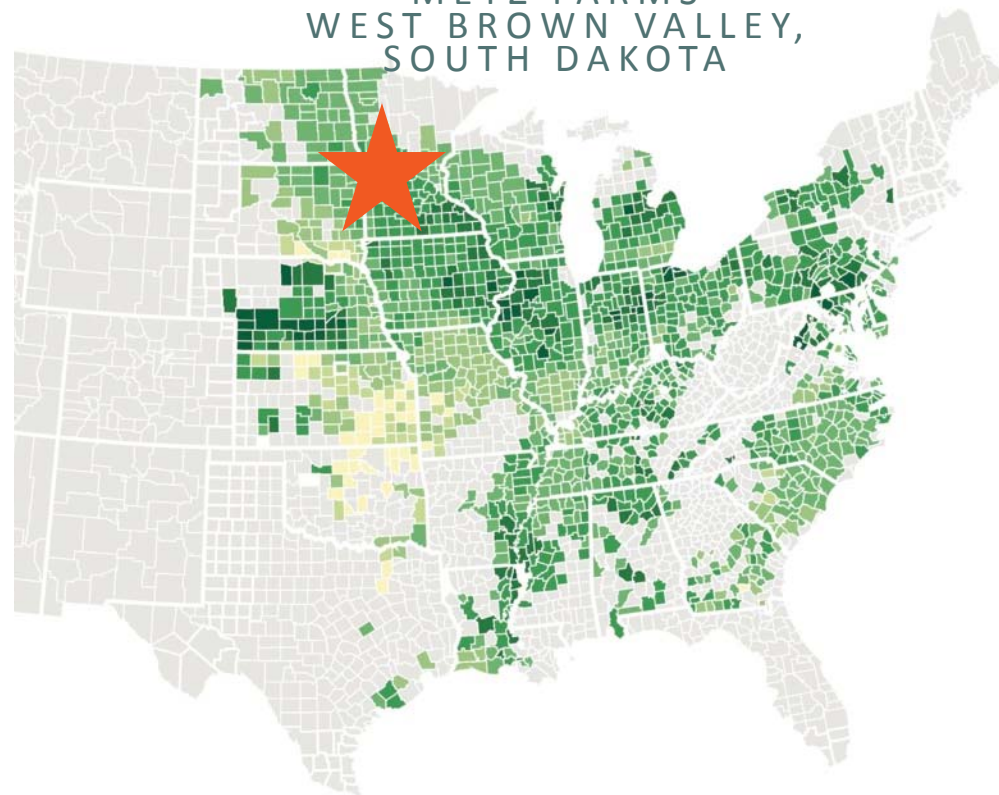


梅宝波 Bob Metz



美国大豆基金会董事
南达科塔州大豆种植主
USB BOARD OF DIRECTOR
SOUTH DAKOTA SOYBEAN FARMER

梅氏农场 南达科塔西布朗山谷
METZ FARMS
WEST BROWN VALLEY,
SOUTH DAKOTA



U.S. SOY FOR A GROWING WORLD



梅氏农场 METZ FARMS

U.S. SOY FOR A GROWING WORLD

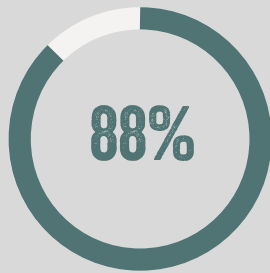


U.S. SOY FOR A GROWING WORLD

超过84%的美国耕地是农民自有土地 MORE THAN 84% OF FARMED LAND IS OWNED BY U.S. FARMING FAMILIES

SMALL FAMILY FARMS

averaging 93 hectares

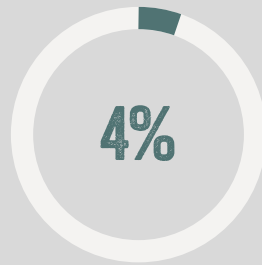


OF FARMS

and 45% of total hectares
小型家庭农场平均93公顷，占全国总面积45%

LARGE FAMILY FARMS

averaging 575 hectares



OF FARMS

and 13% of total hectares
大型家庭农场平均575公顷，占全国总面积13%

VERY LARGE FAMILY FARMS

averaging 844 hectares



OF FARMS

and 5% of total hectares
特大型家庭农场平均844公顷，占全国总面积5%

美国大豆品质完全体验

U.S. SOY TOTAL QUALITY EXPERIENCE



COMPLETE DELIVERY CONFIDENCE

U.S. soy customers experience a supply chain that delivers the consistent support, information and infrastructure needed for business success.

对交货体系充分信任



LONG-TERM PARTNER

The U.S. soy industry will meet emerging global needs that enhance our customers' businesses, measurably and sustainably.

长期的伙伴关系



U.S. SOY PERFORMANCE ADVANTAGE

U.S. soy reliably and consistently delivers a high-quality nutrient profile that provides its customers with a distinct performance advantage.

美国大豆营养表现优势

美国大豆出口协会能提供哪些帮助

HOW USSEC HELPS

贸易服务 Trade servicing
风险管理 Risk management
饲料及生产 培训

Feed & production courses
豆粕品质研讨会

Soymeal quality workshops
行业会议 Industry meetings
技术传授 Technology transfer

USSEC
U.S. SOYBEAN EXPORT COUNCIL

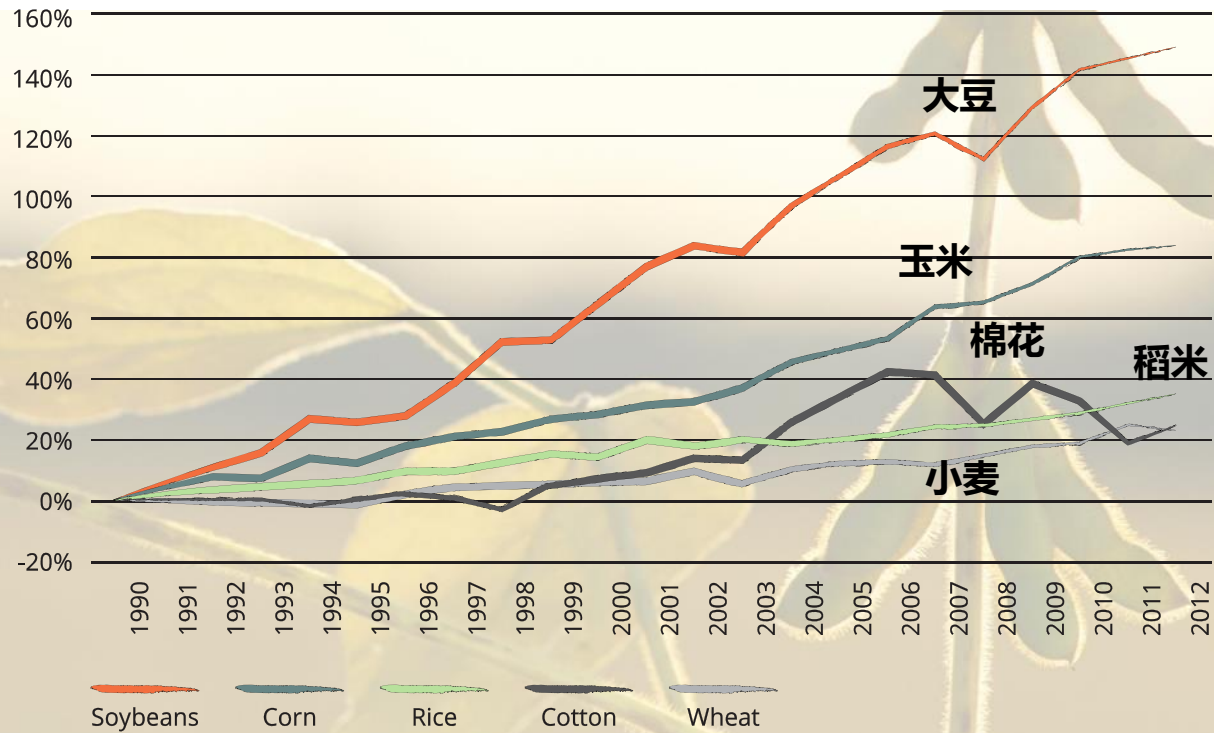
ASA
American Soybean Association
International
Marketing

USB
UNITED SOYBEAN BOARD

U.S. SOY FOR A GROWING WORLD

增长的需求需要更多的关注

INCREASED DEMAND REQUIRES INCREASED FOCUS





**美国大豆是
高品质的产品**
**U.S. SOY IS A HIGH
QUALITY PRODUCT**

氨基酸组分

Amino acid profile

更高的均一度

Greater uniformity

消化率

Digestibility

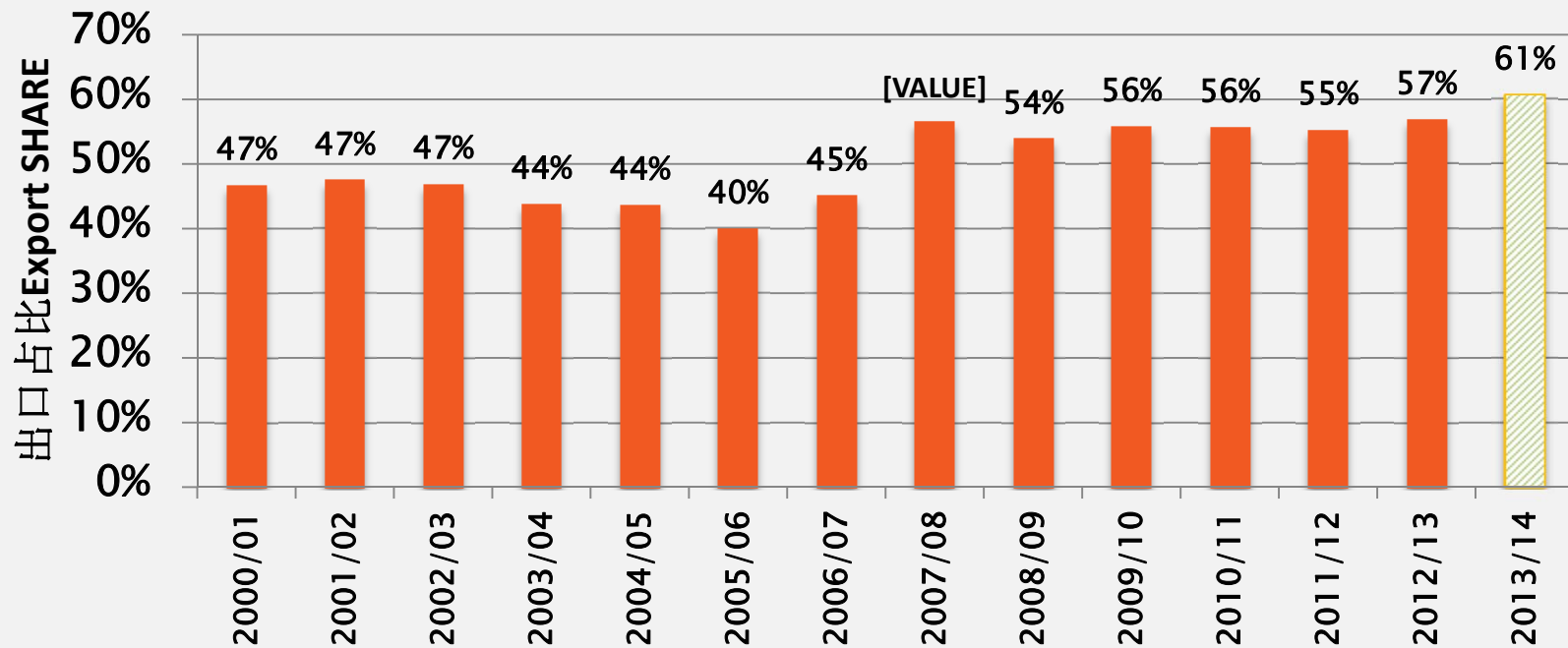
代谢能

Metabolizable energy

U.S. SOY FOR A GROWING WORLD

美国大豆生产及大豆、豆粕、豆油出口占比

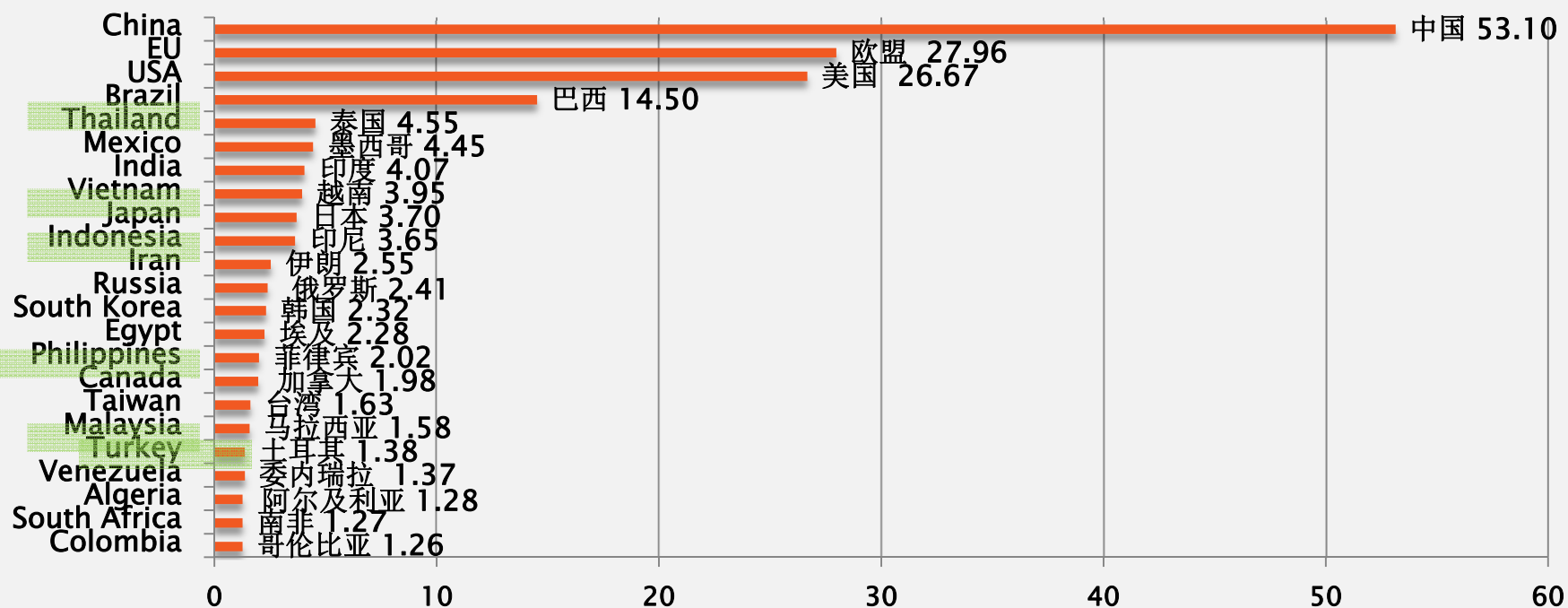
SHARE OF U.S. SOYBEAN PRODUCTION EXPORTED AS SOYBEANS, SOYMEAL, OR SOYOIL



U.S. SOY FOR A GROWING WORLD

13/14全球最大豆粕消费国预测

WORLD'S LARGEST SOYMEAL CONSUMERS FORECAST FOR 2013/14 MARKETING YEAR



百万吨 MMT

U.S. SOY FOR A GROWING WORLD

美国大豆供需形势

U.S. SOYBEAN SUPPLY AND DEMAND

美国农业部 (USDA) 预测-百万公吨

项目 ATTRIBUTE	2011/12	2012/13	2013/14
期初库存 Beginning Stocks	5.85	4.61	3.83
产量 Production	84.19	82.56	89.51
进口 Imports	0.44	0.98	2.45
总供应量 Total Supply	90.48	88.15	95.79
压榨 Crush	46.35	45.97	46.13
出口 Exports	37.15	35.91	43.55
种用/剩余 Seed/Residual	2.37	2.44	2.58
总用量 Total Use	85.89	84.35	92.26
期末库存 Ending Stocks	4.61	3.83	3.53

U.S. SOY FOR A GROWING WORLD

PLANTING INTENTIONS

种植意愿

Price ratio
Input costs
Rotations
Planting conditions
Weather

比价
投入成本
轮作
种植条件
天气



U.S. SOY FOR A GROWING WORLD



天气 WEATHER

延迟播种 Planting delays

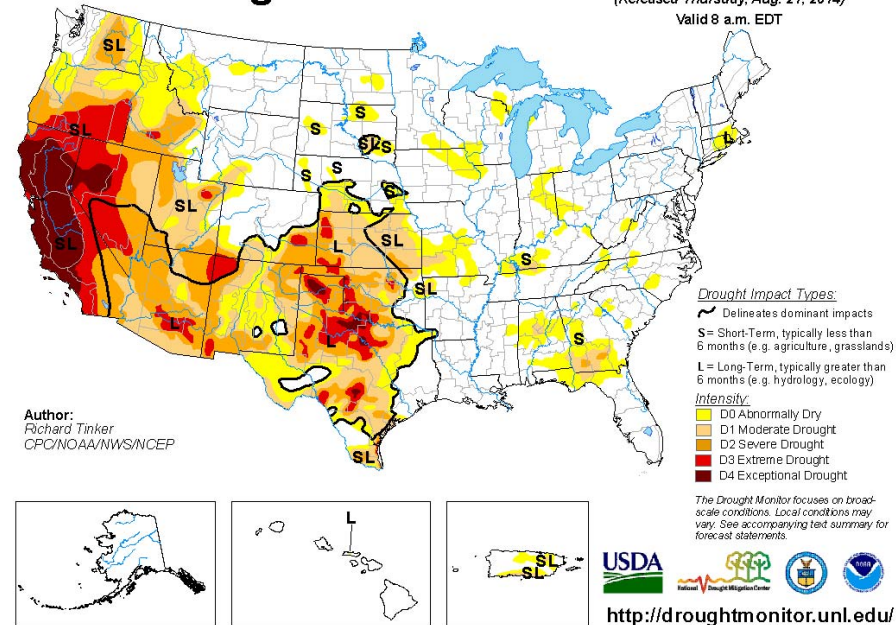
长势良好 Good progress

土壤条件 Soil conditions

寒冬 Cold winter

美国旱情监测 U.S. Drought Monitor

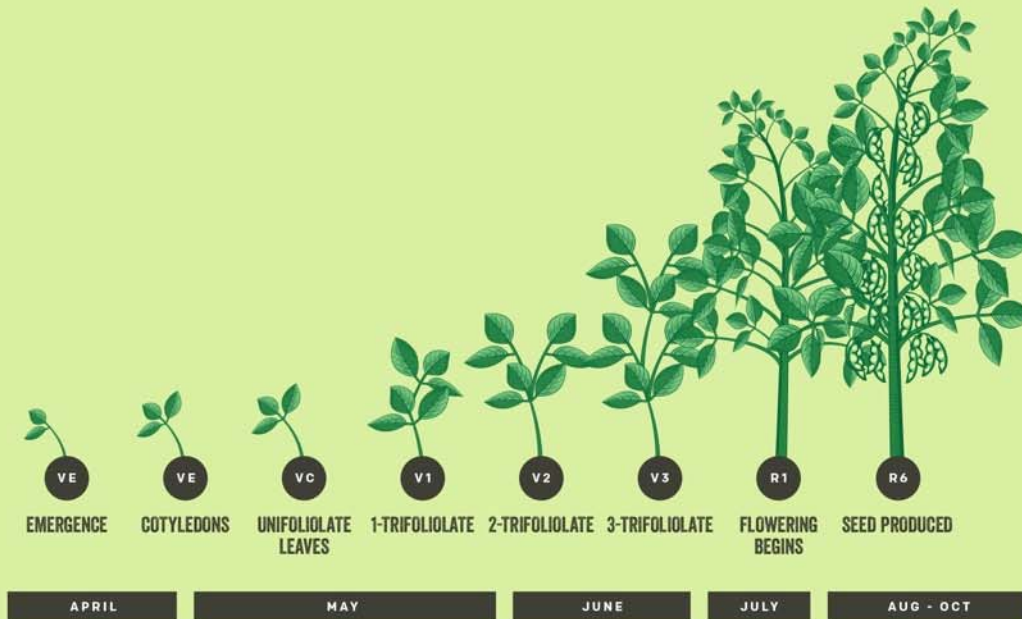
August 19, 2014
(Released Thursday, Aug. 21, 2014)
Valid 8 a.m. EDT



U.S. SOY FOR A GROWING WORLD

大豆生长周期

SOYBEAN GROWTH CYCLE



EMERGENCE (VE)

Hypocotyl pushed through soil surface.

COTYLEDONS (VC)

Unfolding endosperm of specialized seed leaves.

1-TRIFOLIOLATE (V1)

First node containing 3 leaflets of 1 full leaf.

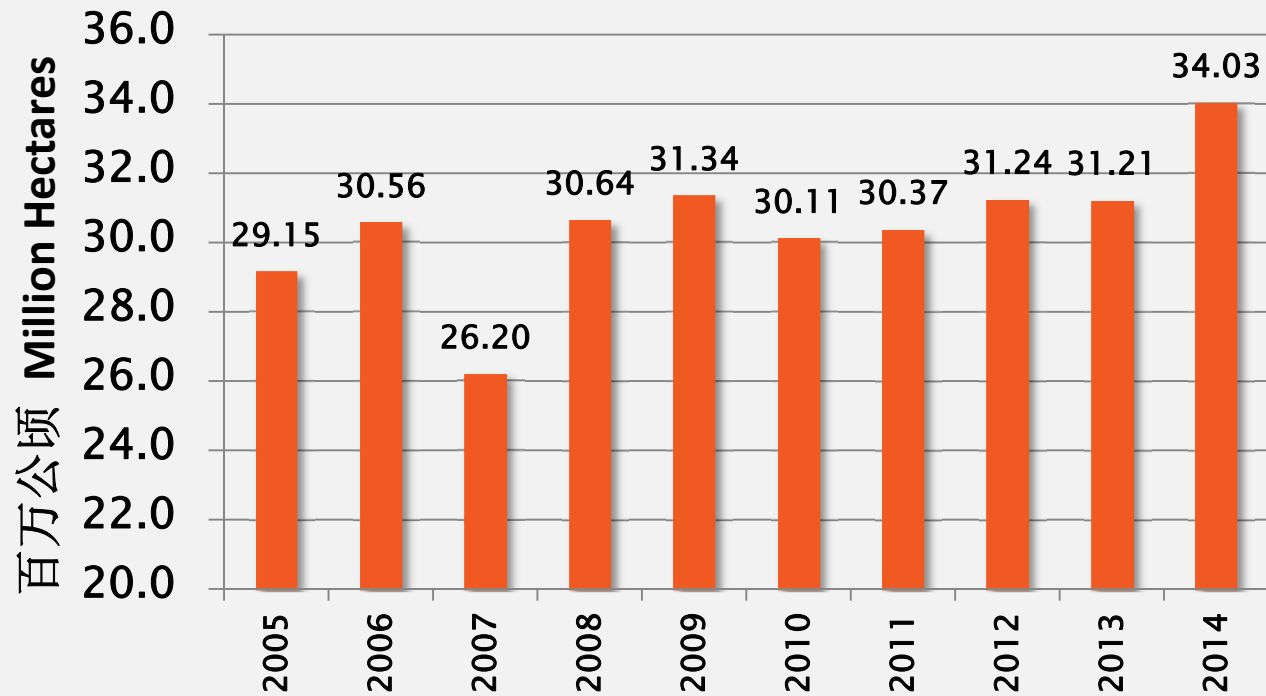
R6

Seed produced.

U.S. SOY FOR A GROWING WORLD

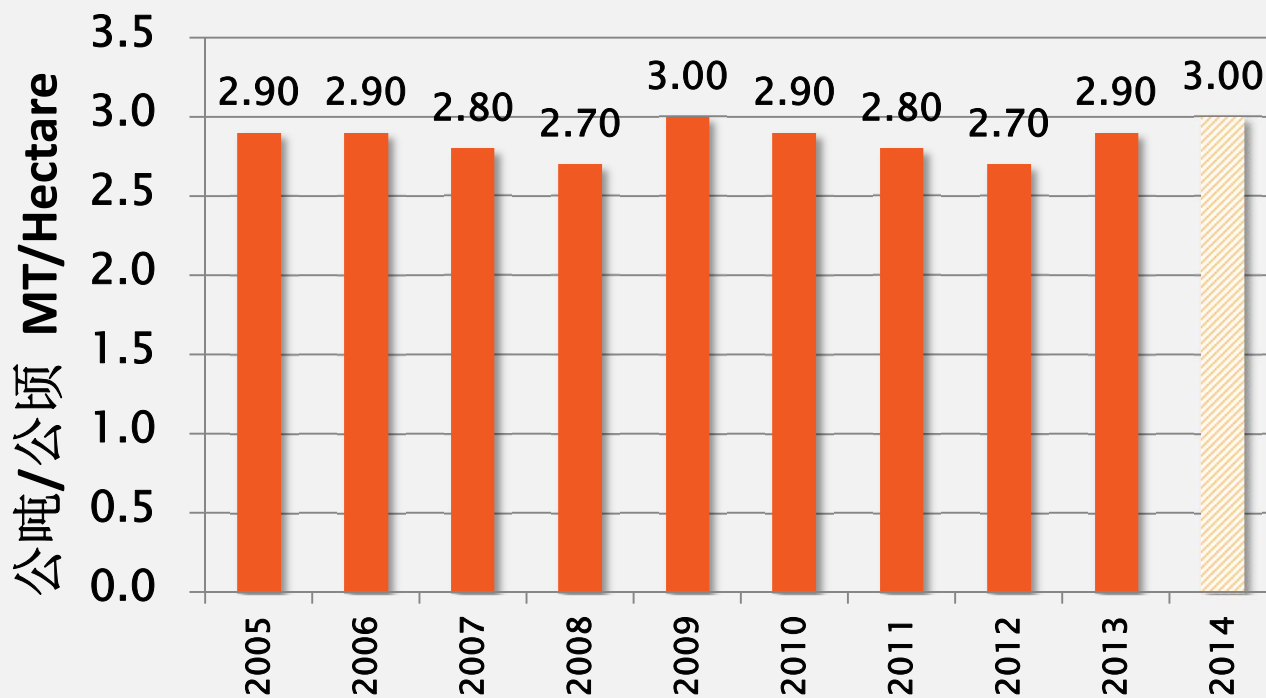
美国大豆播种面积

U.S. SOYBEAN PLANTED HECTARES



U.S. SOY FOR A GROWING WORLD

美国大豆单产 U.S. SOYBEAN YIELDS



U.S. SOY FOR A GROWING WORLD



结语 TAKE-AWAYS

出口是关键 Exports essential

期待大丰收 Expecting a great crop

高品质产品 High quality product

畜禽动物是最大消费者 Animals are top consumers



U.S. SOY FOR A GROWING WORLD

谢谢您 THANK YOU

U.S. SOY FOR A GROWING WORLD

