

中国全谷物市场及其发展

**Whole Grain Foods in China: Market and Development**

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February 1, 2011

# I. 全谷物食品在中国的市场前景

## The Market Trend of Whole Grain Foods in China

### 1. 市场变化 Market change

广大人民群众在进入小康生活水平后，追求健康、追求美丽、追求长寿……人们的食品消费已经不再满足于“饱腹”和感官享受，而是更加注重食品的营养补充、发育促进、疾病预防和辅助治疗等内在品质。

1. Having reached a higher living standard, Chinese people are seeking health, beauty, and longevity... Consumption of food is no longer to satisfy the stomach needs and sensory enjoyment; people pay greater attention to the nutritional supplementation of food, promotion of growth, disease prevention, supplementary treatment, and other internal qualities.

## 2. 环境变化及其它影响因素

### Environmental Changes and Other Influencing Factors

(1) 水、空气、土壤等污染

Water, air, and soil pollutions

(2) 生活节奏加快、工作压力加大

Life pace accelerating and greater work pressure

(3) 食物过度加工造成的营养损失增加

Excessive processing of food can increase the nutrition loss

(4) 抗生素过度使用

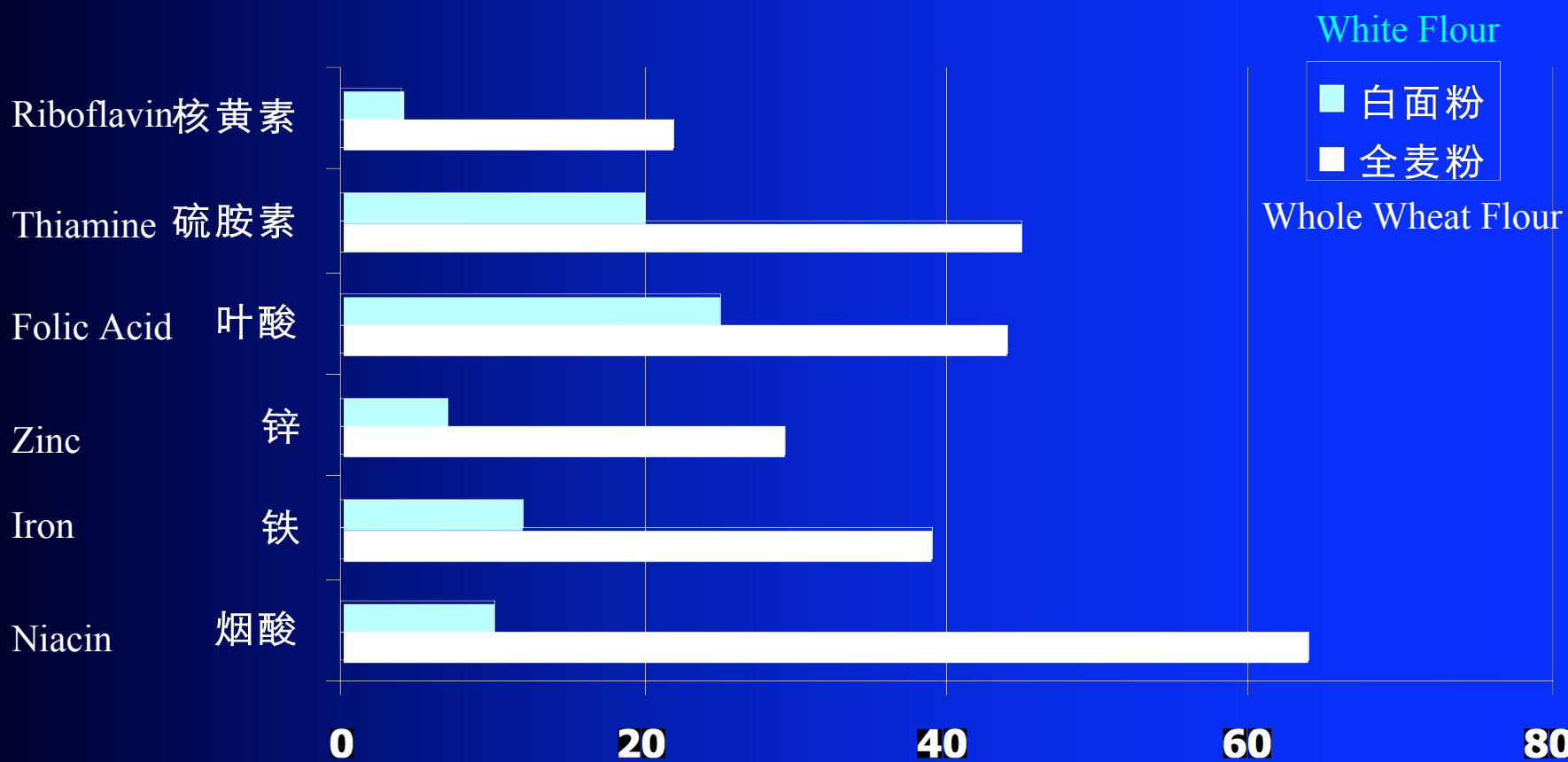
Excessive use of antibiotics

(5) 不良的生活习惯和不科学的饮食习惯

Bad living habits and unscientific eating habits

# 面粉生产过程造成的营养损失

## Nutrition Loss in Flour Milling Process



### 3. 营养状况不理想

#### Poor nutritional status

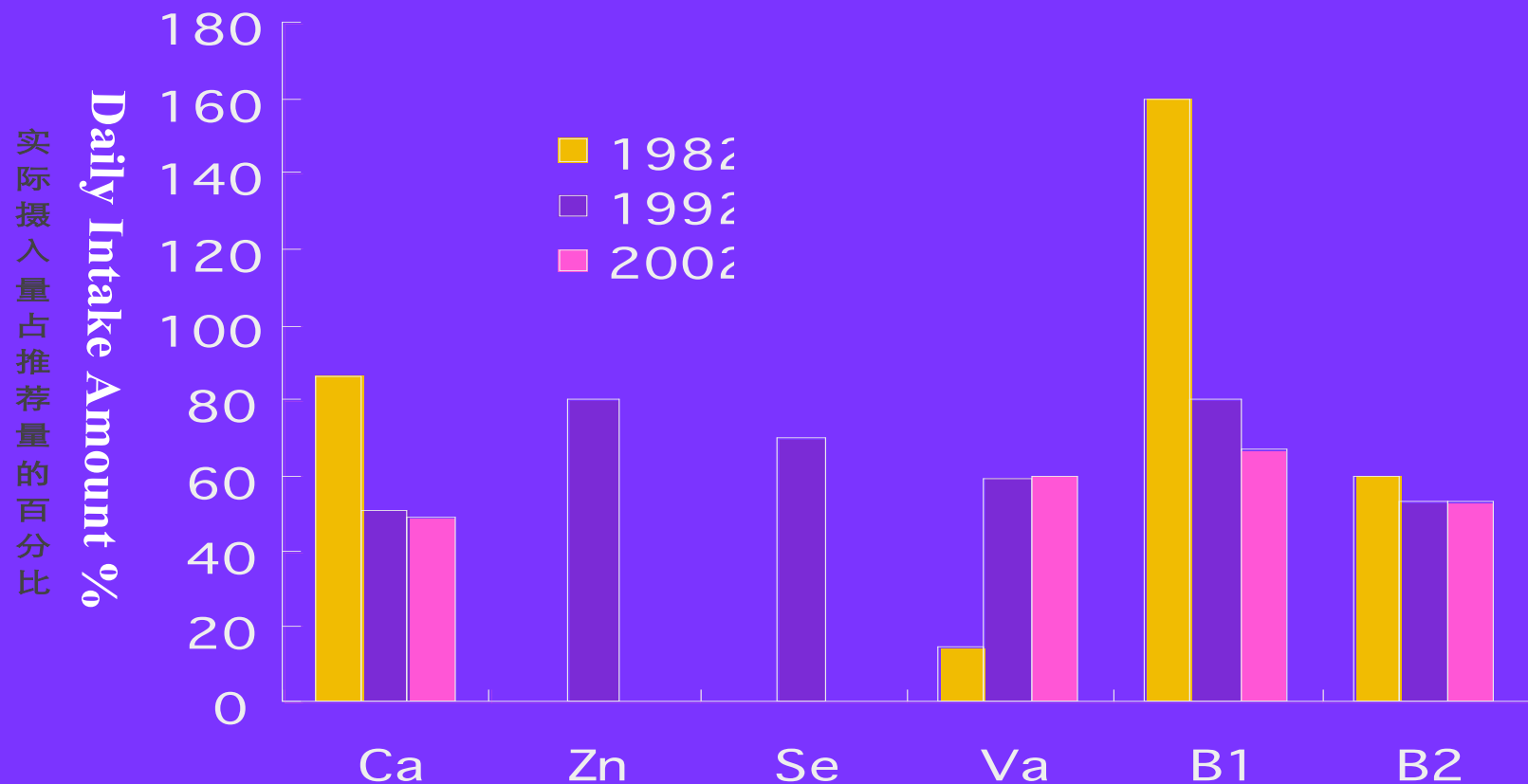
快速的国民经济发展和食品供应的成倍增长并没有带来理想的健康水平提高。根据我国2004年发布的《中国居民营养和健康现状》调查情况和相关研究报告分析，与十年前、二十年前的调查数据相比，虽然大部分公众的热量、脂肪摄入已达标甚至超量，而各种人体必需的维生素、矿物质、膳食纤维等营养素的缺乏状况并没有明显好转，有的甚至情况更加严重

Rapid national economic development and greater food supply have not brought improvements in citizens' health. According to the "Chinese Resident Nutrition and Health Status" report issued in 2004, although the calorie and fat intake of the majority of the Chinese people has reached or exceeded the target, the status of various essential vitamins, minerals, and dietary fiber shortage has not significantly improved; some have become even more serious.

## 1982---2002我国居民微量营养素摄入低于推荐量且呈下降趋势

The intake of micro nutrients by Chinese residents from 1982~2002 was lower than the recommended levels, and was trending downward.

### 1982- 2002中国居民微量营养素缺乏状况



## 4. 健康状况不理想

### Health Status is not Ideal

2004年我国仅成人高血压、糖尿病、成人血脂异常和肥胖几项的患病人数就达4亿人次（有些病人患病不止一种）。这还没有计算癌症、贫血等患病人数，以及数以亿计的超重、空腹血糖受损等各种“亚健康”人群。

In 2004, the number of adults in China suffering from hypertension, diabetes, abnormal blood lipids, and obesity had exceeded 400 million (some patients were suffering from several diseases). This figure did not include those with cancer, anemia, etc. , as well as several hundred millions who were overweight, or had fasting blood glucose damage and other “sub-health” populations

## 5. 手术刀+药片无法解决健康问题

### Surgical Knife + Pills Cannot Fundamentally Solve Health Problems

发达国家经验，疾病病谱转变(慢性疾病为主)后，疾病和不健康状的最重要的成因是生活方式和饮食结构。

The experience of developed countries shows that as the disease spectrum has changed (to mainly chronic diseases) , the most important contributor to disease and poor health is lifestyle and diet.

沿用以往的医学思维和治疗手段即“手术刀加药片”已难以解决，甚至根本无法解决。既然是食品“惹的祸”，还得依靠食品来解决。

These problems cannot be solved by turning to our traditional medical approach and treatment. In other words, it is very difficult to solve the problem by “Surgical knife + pills” . If a problem is caused by food, we have to rely on food to solve it.



## 6. 医疗支出不堪重负

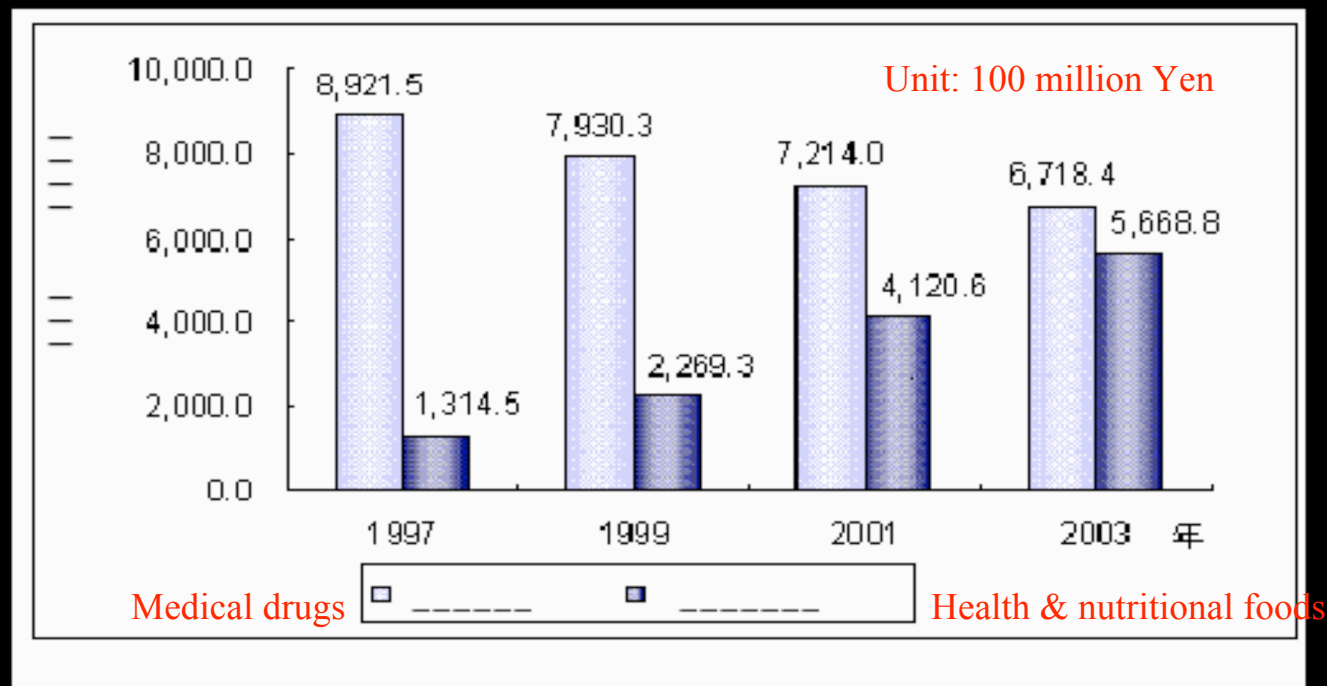
### Medical expenditure is a huge burden

我国卫生总费用1980年为143.2亿元，到2007年增长到10966亿元，猛增了76倍。人均达844元。无论对于政府还是居民而言，卫生费用都是一笔巨额支出，越来越不堪重负。疾病只治而不防，医药费肯定只升不降。

China had total medical costs of 14.32 billion RMB in 1980. By 2007, the figure increased to 1096.6 billion RMB, a sharp increase of 76-fold, with the medical care costs of 844 RMB per capita. It is an enormous expenditure for both the government and the residents. If we just treat diseases without prevention, the costs of medical care will only increase.

## 日本营养保健食品消费与医药品支出呈负相关关系

Negative correlation between the consumption of nutritional and health food and medical drug expenditures in Japan



## 7. 已具备消费能力

Chinese consumers can afford to consume more whole grain foods

(1) 2010年人均 GDP 3777美元

The GDP per capita in China reached \$3,777 in 2010

(2) 经验数据：发达国家营养健康食品消费增速起跑线人均  
GDP3000美元

The data show that nutritional and health food consumption increases rapidly when the GDP per capita reaches \$3,000 in developed countries.

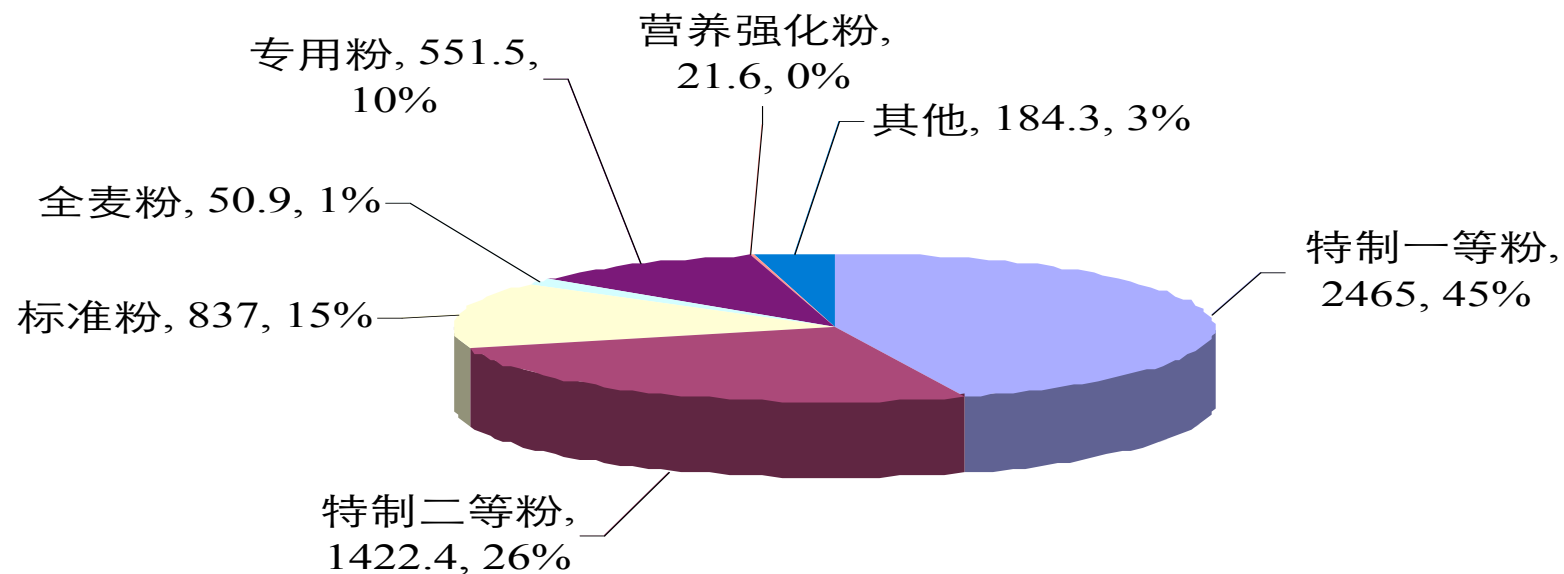
## 8. 市场容量

### Market potential

按照每人每天消费谷物食品0.3KG;其中全谷物食品占1/3计算,中国未来全谷物食品消费量大约为每年4千7百万吨。

If 0.3kg of grain foods were consumed per person per day, and 1/3 of these grain foods is whole grain foods (~100g), China would consume about 47 million metric tons of whole grain foods per year.

# 2009年小麦粉产量分品种结构 (单位：万吨)



## II. 发展全谷物食品遇到的挑战

### Challenges to Promote Whole Grain Foods in China

认知

Recognition

习惯

Habits

环境

Environment

科研

Scientific Research

# 1. 认知不足

## **Insufficient Recognition / Awareness**

### (1) 公民营养健康基础教育缺失

Lack of basic education about public nutrition and health

### (2) 公共机构未充分发挥作用

The public agencies have not exerted their full functions yet

### (3) 全谷物食品产业初步发展, 社会影响力有限

The whole grain industry is just beginning, and it has limited social influence.

## 2. 不良饮食习惯

### Bad Eating Habits

#### (1) 跟着感觉走

Eating with personal feeling/preference

#### (2) 害怕肥胖, 自觉限制谷物食品消费

Consuming fewer grain foods for fear of becoming overweight.



### 3. 宏观环境建设急需加快

#### **Need to Develop a Macro-Environment to Promote Whole Grain Foods**

鼓励全谷物食品科研开发、生产、销售、市场宣传、行业组织的法规、标准、规划、政策等促进产业发展的宏观环境建设工需要加快开展

China needs to rapidly develop a macro-environment to promote product development, production, marketing, advertisement as well as making laws, standards, strategic plans, and policies to speed up the development of the whole grain industry.

## 4. 加大科研开发力度

### More Efforts Devoted to Scientific Research

科研费用应是政府投入和企业投入相结合， 需要进一步研究的主要内容有：

Research funding should be provided by both the government and industry in the following areas:

(1) 大力发展全谷物食品的客观必要性

Necessity of promoting whole grain foods

(2) 全谷物食品的健康促进功效

Health benefits of whole grain foods

(3) 适合消费者需求的多种产品开发

Diverse products to meet consumers' needs

(4) 建立和完善相关法规、标准等所必须的政治、经济、社会、技术研究

Establish and improve a system of laws, regulations and standards for the whole grain industry.

### III. 中国发展全谷物食品的工作

#### The Practices of Chinese Government to Promote Whole Grain Foods

##### 1. 从国民教育入手

###### Starting from Education

##### (1) 教育部正在增加和完善中小学教材中营养健康科学知识

Ministry of Education of China is adding health & nutrition knowledge in elementary and middle school text books.

##### (2) 国家发展和改革委员会将于2011年4月18日—21日在北京举办中国首次全谷物食品发展的国际论坛 (WGC、GHF), 并在健康食品展览会中开辟专门的全谷物食品展区。计划组织国内外厂家同大型商超链接。

China National Reform and Development Commission will organize its first “Whole Grain International Symposium” together with WGC and GHF during April 18 – 21, 2011 in Beijing.

##### (3) 由6个国家机构和行业组织组成的《全国健康家庭行动宣传和科普活动》将就推动全谷物食品的消费开展一系列活动

“National Health Family” organized by 6 Government Branches and Industry Associations will start campaign to promote whole grain food consumption

## 2. 国家和行业组织倡导

### Guidelines for National and Industry Associations

- (1) 中国2011---2015年经济社会发展规划提出防止粮油食品的“过度加工”，为全谷物食品发展在国家政策层面铺路  
“China 2011 – 2015 Economic Development Plan” proposes preventing “Excess Processing” of grain foods.
- (2) 国家发改委公众营养和发展中心（PNDC）为全谷物食品办法《健康倡导产品》标志  
The Public Nutrition Development Center (PNDC) has issued a “Health Promotion Product” Stamp for healthy food products.
- (3) 中国粮油学会营养分会组织粮油营养入省行活动，逐省推广健康的粮油产品，2010年从北京启动，2011年将继续向其他省份推进  
The Nutrition Sub-Association of China Grains and Oils Association promotes the nutritional benefits of grains and oils into the provinces. It started in Beijing in 2010 and it will expand into other provinces in 2011

# The Health Promotion Product Stamp



### 3.加强国际合作

#### International Cooperation

PNDC、中国粮油学会营养分会已经同WGC、GHF形成了国际伙伴关系，共同组织论坛，今后会进一步在多方面合作

PNDC and The Nutrition Sub-Association of China Grains and Oils Association have formed a partnership with WGC and GHF. These four organizations will have the First International Whole Grain Symposium in Beijing, and will have more future cooperation.

## 4. 拟组织全国联盟

### To Establish a National Organization

建立一个由企业、多学科的科学家人、政府、行业组织、教育机构、宣传媒体等方面参加的全国全谷物食品发展联盟

Our goal is to establish a national whole grain foods organization with members from the manufacturers, scientists, government, industry associations, education, and news media, to promote whole grain foods.

感谢聆听！

Thank You!

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