





3%

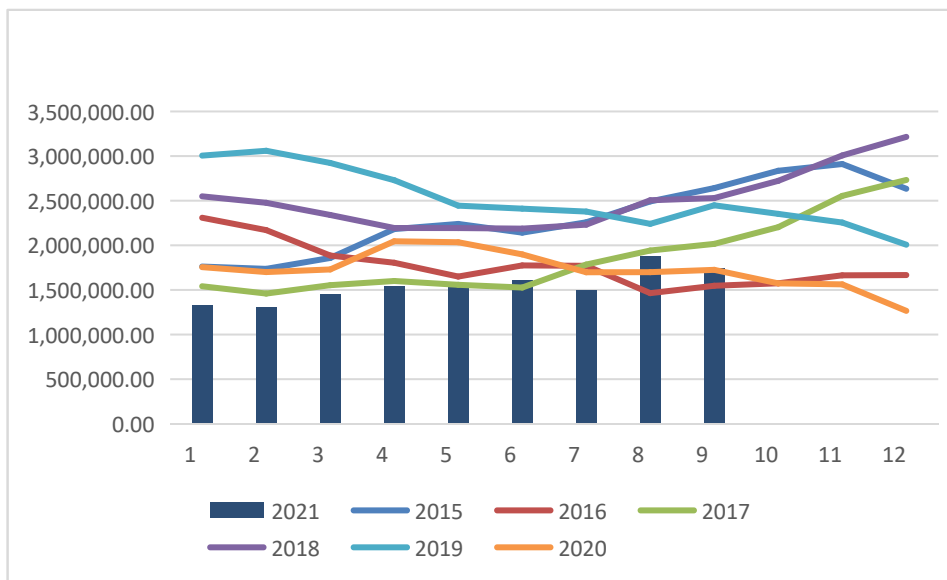
1.92%

10

MPOB



	2021年8月	7月	环比 (%)
产量	170.4	170.2	0.12%
进口	7.5	9.1	-17.58%
出口	159.7	116.3	37.32%
国内消费	31	25.1	23.51%
期末库存	174.7	187.5	-6.83%



0.98% 169

11.7% 141

10

3.4%

181



3.83%	MPOA	10	1-20	3.34%
	2.51%			



9 10
MPOB 9 8 0.1% 170.4
10 MPOA SPPOMA
32000
1-5 12



➤ ITS

10

1468977

13





10 10





10 31

79%

73%

86%

81%

81%

75%

68%

67%

63%

88%

83%



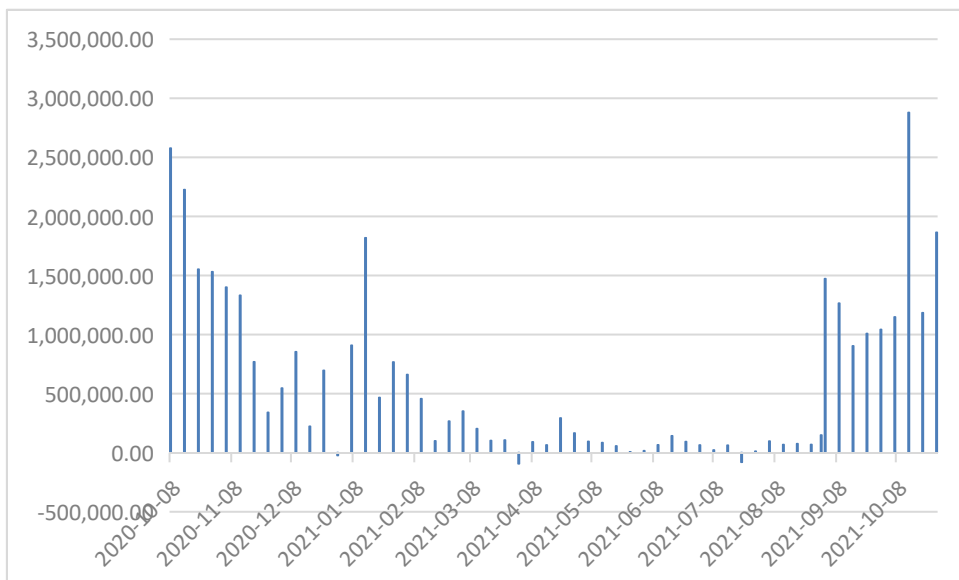
➤ Safras & Mercado 10 29 2021/22 51%
35.8% 35% 40.4%

41% 83% 69% 67% 63%
➤ 65.4% BAGE 2021 10 27 2021/2
4.6%

87% 2021 12 2022 2 NOAA 10 14



USDA



USDA
10 28 2021/22
186.39
58% 19%
100-200 120.73



项目/市场年度	2019/20	2020/21	2021/22	
			9月	10月
播种面积 (万英亩)	7610	8340	8720	8720
收获面积 (万英亩)	7490	8260	8640	8640
单产 (蒲/英亩)	47.4	51	50.6	51.5
美豆产量 (百万蒲)	3552	4216	4374	4448
出口 (百万蒲)	1679	2265	2090	2090
压榨 (百万蒲)	2165	2141	2180	2190
期末库存 (百万蒲)	525	256	185	320

USDA

2021/22

44.84

51.9

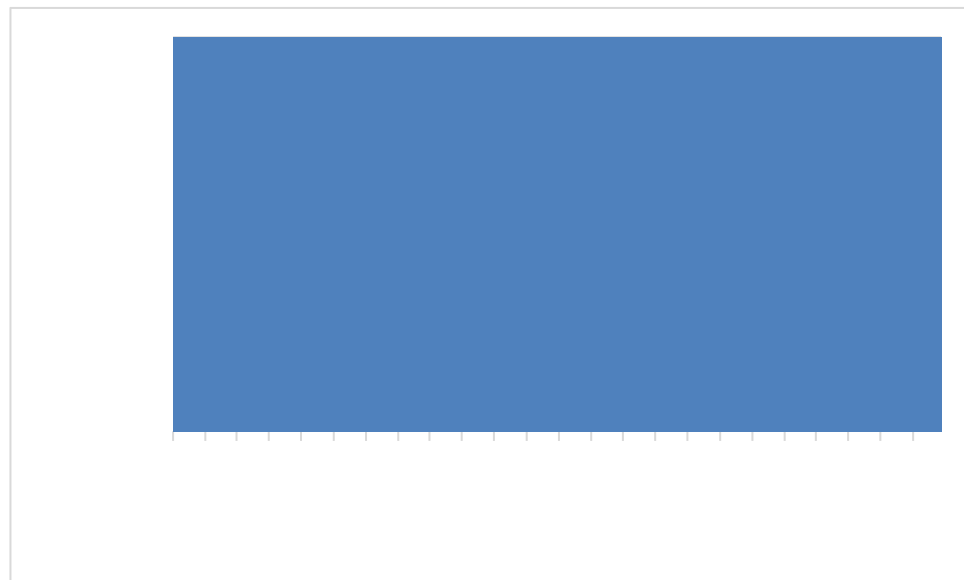
USDA

44.48

51.5

3.62

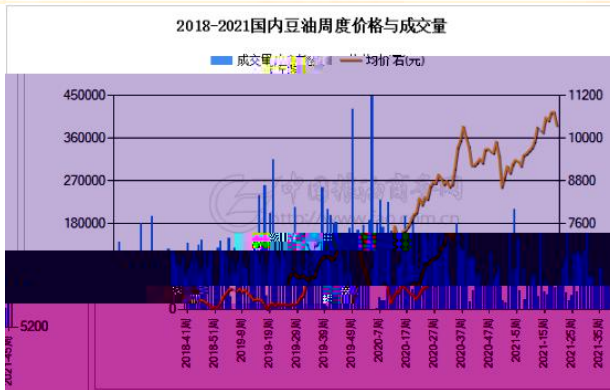
3.2



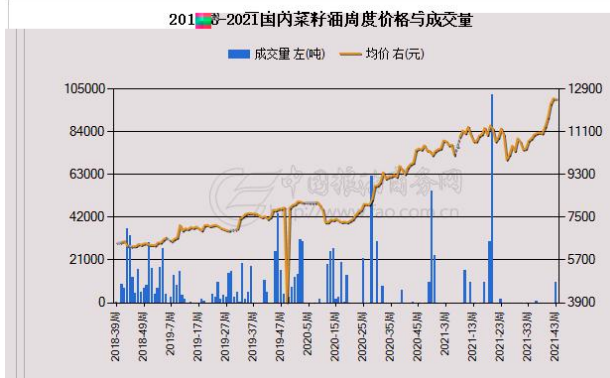
2021	11	736	
563.2		172.8	30.68%
	849		113
	-13.31%		
	53.11%	48.91%	4.20%
		196.8	
181.2	15.6		



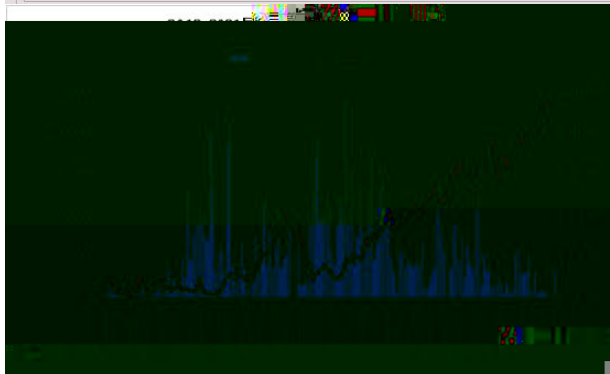
50



1.14



0.79



0.81

10143

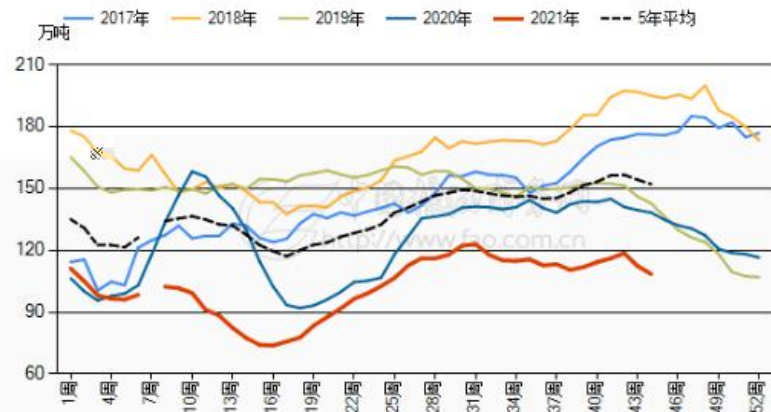
0.21

376

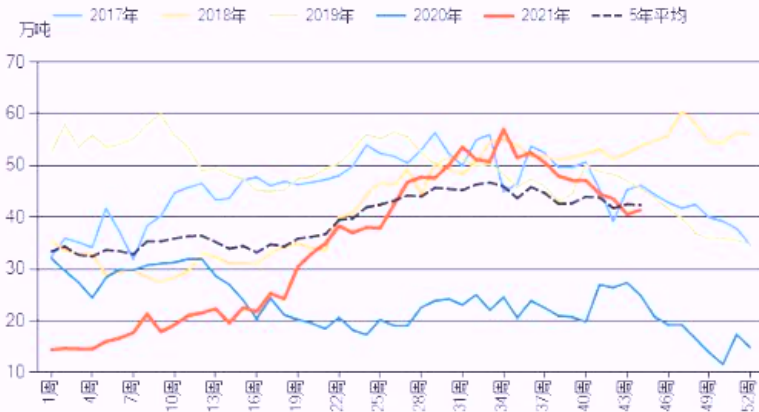
0.61



2017-2021年第44周全国油厂豆粕周度库存对比



2017-2021年第44周全国进口压榨菜粕周度库存对比



2017-2021年第44周全国棕榈油周度库存对比





2021/11/08 收 6247 幅 -4.81%(-316) 开 6467

豆油2201-豆粕2201 日线 MA5:6616 MA10:6632 MA20:6612 MA60:5903 MA120:5388

2021/07/13-2021/11/08(78日)

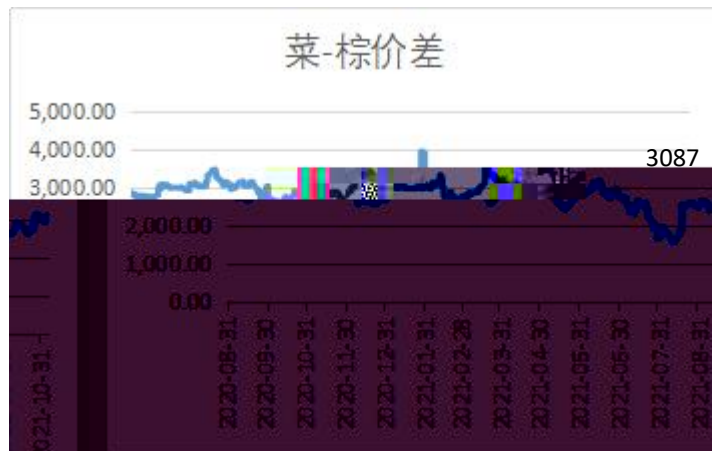


wind



菜-豆

10年均值 814.77
5年均值 1,185.05



菜-棕

10年均值 1,776.65
5年均值 2,015.27



豆-棕

10年均值 961.87
5年均值 830.22





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长安期货
CHANG-AN FUTURES

