

《“一带一路”战略背景下中国农业国际合作发展战略研究》 专题快报

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中国工程科技知识中心农业分中心

中国农业科学院农业信息研究所

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【动态资讯】

1. Oil industry urges Trump administration to dismiss biofuel industry wish list

【Reuters】The American Petroleum Institute on Tuesday urged the Trump administration to reject proposals floated by U.S. farmers and ethanol producers to boost ethanol demand, the latest development in the clash over biofuel policy. President Donald Trump last week said his administration was planning a “giant package” related to ethanol that would please U.S. farmers angry that many more oil refiners have been freed from obligations to use the corn-based fuel. Trump is counting on support from both farmers and the oil industry in next year’s presidential election. “We are deeply concerned by the RFS (Renewable Fuel Standard) policy changes the White House is currently considering,” said Frank Macchiarola, API’s vice president of downstream and industry operations, during a press call on Tuesday. “We hope the administration walks back from the brink of what would be a disastrous political decision that potentially hurts American drivers.”

链接:

<https://www.reuters.com/article/us-usa-biofuels-oil/oil-industry-urges-trump-administration-to-dismiss-biofuel-industry-wish-list-idUSKCN1VO2I8>

2. Global dairy prices fall, volumes increase at fortnightly auction

【Reuters】Global dairy prices edged lower at an auction early on Wednesday as prices declined for whole milk powder, the most widely traded item. The Global Daily Trade (GDT) Price Index edged down 0.4%, with an average selling price of \$3,202 per tonne, having fallen 0.2% in the previous sale two weeks ago and slumping 2.6% at an auction in early

August. Prices for whole milk powder (WMP) dropped 0.8%, largely in line with futures markets expectations. Prices of Anhydrous Milk Fat dropped 1.5%.

链接:

<https://www.reuters.com/article/us-dairy-auction-results/global-dairy-prices-fall-volume-s-increase-at-fortnightly-auction-idUSKCN1VO2UK>

3. 东欧非洲猪瘟肆虐 保加利亚宰杀13万头猪

【中国农业信息网】 这一个月来，非洲猪瘟疫情在东欧不断肆虐升级，据外媒报道显示，从七月初开始，保加利亚这个国家就爆发了超过30起非洲猪瘟事件，蔓延了多个大型经济农场，宰杀了约13万头猪。6个大型农场中饲养的超过1,000头生猪数量锐减：7月19日：Nikolovo，鲁塞地区：17,590头生猪。7月24日：Brashlen，Slivo Pole，鲁塞地区：36,551头生猪。7月26日：Golyamo Vranovo，Slivo Pole，鲁塞地区：28,041头生猪。7月30日：Popina，锡利斯特拉地区：21,448头生猪。7月31日：Bulgarsko Slivovo，大特尔诺沃地区：17,200头生猪。8月1日：Vetren，锡利斯特拉地区：8,244头生猪。由于保加利亚所有616,000（2017年统计数据）头生猪都面临着感染非洲猪瘟的风险，恐慌之余，保加利亚境内的一些非洲猪瘟重灾区宣布进入紧急状态。

链接:

http://www.agri.cn/V20/ZX/sjny/201909/t20190904_7188542.htm

4. 中国从周日起对包括美国大豆在内的美国商品加征关税

【中国农业信息网】据CNBC报道，周日（9月1日）中国对一些美国商品加征5%到10%的关税，其中包括美国大豆和原油，以反击美国对1100多亿美元中国商品加征关税。中国曾宣布将对5000多种美国商品加征关税，在9月1日和12月15日分两批进行。周日加征关税的美国商品数量大约为计划加征商品总量的三分之一左右。

链接:

http://www.agri.cn/V20/ZX/sjny/201909/t20190904_7188549.htm

5. Will genetic engineering contribute to disease-resistant crops, and who will benefit?

【IFPRI】 Genetic engineering (GE)—the introduction or change of DNA, RNA or proteins by human manipulation to effect a change in an organism’s genome—has thus far delivered a very limited range of products to agriculture—principally pest- and disease-resistant crop varieties. But this is about to change. A much broader range of applications is becoming available, including new options to enhance disease and pest resistance, nutritional quality,

and the ecological sustainability of cropping systems. The technologies include gene editing (site-specific changes to DNA in a genome), gene drives (greatly enhancing or reducing the frequency of genes that affect insect or pathogen reproduction) and synthetic biology (re-designing or constructing biological devices, e.g. chromosomes or organelles).

链接:

<http://www.ifpri.org/blog/will-genetic-engineering-contribute-disease-resistant-crops-and-who-will-benefit>

6. New Chinese Import Tariffs Go Into Effect

【AGWEB】 The U.S. started imposing a 15% tariff on \$110 billion worth of Chinese imports over the weekend. Beijing has retaliated with tariffs of 5% to 10% on \$75 billion of American goods. More than two-thirds of the consumer goods the U.S. takes in from China now face higher taxes.

链接:

<https://www.agweb.com/article/new-chinese-import-tariffs-go-effect>

7. 中俄加强农业合作 俄罗斯大豆大量出口中国

【中国农业信息网】为改变中国大豆进口过度依赖美国的不利局面，我国决定加强与其它国家的农业合作，现在，大豆已成为中俄农业合作的先行者。日前，中国海关总署日前宣布，在俄罗斯境内所有产区种植的大豆，经检验检疫合格后可以进入中国市场。这是中俄农业合作不断走深走实的新探索，也是中国大豆进口多元化迈出的新步伐。《中俄关于发展新时代全面战略协作伙伴关系的联合声明》指出，双方将扩大并提升农业合作水平，深化农业投资合作。积极开展两国农产品食品相互市场准入合作，扩大双方优质农产品食品贸易。从大豆贸易“窥一斑而知全豹”，中俄农业合作的广度和深度在不断拓展。在确保中国人的饭碗端在自己手里的同时，加速农产品进口渠道多元化，为中俄双边务实合作注入了新动力，也将对优化两国贸易结构产生深远影响。

链接:

http://www.agri.cn/V20/ZX/sjny/201909/t20190903_7187031.htm

8. 全球小麦市场一周要闻：供需形势依然偏空，麦价下跌

【中国农业信息网】全球小麦市场价格大多下跌，其中美国春小麦价格创下十年来的新低。全球小麦供应庞大，出口市场竞争激烈，美国小麦面临季节性收获压力，中美贸易战面临升级风险，继续对小麦价格构成全面压制。周五，芝加哥期货交易所（CBOT）

软红冬小麦期货市场12月期约比一周前下跌15.25美分，报收462.50美分/蒲式耳。堪萨斯城期货交易所（KCBT）的12月硬红冬小麦期约报收397.25美分/蒲式耳，比一周前下跌7.5美分；明尼阿波利斯谷物交易所（MGEX）的12月硬红春小麦期约报收496.75美分/蒲式耳，比一周前下跌17.75美分。Euronext的2019年12月制粉小麦期约报收168欧元/吨，比一周前下跌2欧元。阿根廷小麦现货报价为230美元，比一周前下跌4美元，FOB价格。郑州商品交易所的9月小麦期货收于2,287元/吨，比一周前下跌31元。

链接:

http://www.agri.cn/V20/ZX/sjny/201909/t20190903_7187018.htm

9. 泰国对华出口水果同比增长152% 越南比起去年同期下降明显

【中国农业信息网】近年来，中国与东南亚地区的国家合作不断加深，基建项目合作之后，中国对这些国家的投资力度也加强了不少，并不断对东南亚国家开放了水果市场，今年前四个月泰国对华出口水果同比增长152%，然而，越南比起去年同期下降了近74%，这是怎么回事呢？有数据显示，2019年1-6月，中国共对泰国投资了290亿泰铢。而在企业方面，有不少轮胎、金属和模具厂商正在计划进入泰国市场，此外泰国还表示，来自中国汽车企业的洽询也明显增多了。值得一提的是，日本一直以来都是泰国最大的投资国，今年上半年其对泰的投资金额虽然达到了424亿泰铢，但增速却远低于中国，仅增至2.1倍。

链接:

http://www.agri.cn/V20/ZX/sjny/201909/t20190903_7187020.htm

10. Can boosting yields slow the global palm oil expansion and ease its environmental impacts?

【IFPRI】Over the past two decades, global palm oil production has increased rapidly to meet rising demand from the food, energy, and industrial sectors. Palm oil is a common ingredient in many food products including bread, cereal, peanut butter, chocolate, and margarine; in personal products such as shampoo, cosmetics, and cleaning products; and a source of biodiesel fuel. Unfortunately, the global palm oil expansion has also exacted a high price on the environment: In some areas, oil palm plantations have displaced forests and peatlands, resulting in biodiversity losses and increased greenhouse gas emissions. Finding a solution may be a challenge, but not impossible.

链接:

<http://www.ifpri.org/blog/can-boosting-yields-slow-global-palm-oil-expansion-and-ease-its-environmental-impacts>

【文献速递】

1. Rural Food Markets and Child Nutrition

文献源: American Journal of Agricultural Economics,2019

摘要: Child dietary diversity is poor in much of rural Africa and developing Asia, prompting significant efforts to leverage agriculture to improve diets. However, growing recognition that even very poor rural households rely on markets to satisfy their demand for nutrient-rich non-staple foods warrants a much better understanding of how rural markets vary in their diversity, competitiveness, frequency and food affordability, and how such characteristics are associated with diets. This article addresses these questions using data from rural Ethiopia. Deploying a novel market survey in conjunction with an information-rich household survey, we find that children in proximity to markets that sell more non-staple food groups have more diverse diets. However, the association is small in absolute terms; moving from three non-staple food groups in the market to six is associated with an increase in the number of non-staple food groups consumed by ~ 0.27 and the likelihood of consumption of any non-staple food group by 10 percentage points. These associations are similar in magnitude to those describing the relationship between dietary diversity and household production diversity; moreover, for some food groups, notably dairy, we find that household and community production of that food is especially important. These modest associations may reflect several specific features of our sample which is situated in very poor, food-insecure localities where even the relatively better off are poor in absolute terms and where, by international standards, relative prices for non-staple foods are very high.

链接:

<http://agri.ckcest.cn/file1/M00/0E/80/Csgk0F1vRPOAMi3pAASBwTXIIAc028.pdf>

2. Estimating the Impact of Financial Investments on Agricultural Futures Prices using Changes in Volatility

文献源: American Journal of Agricultural Economics,2019

摘要: This paper studies the impact of financial investments on agricultural futures prices, using structural vector autoregressions. We identify exogenous variation in net long positions of speculators through heteroskedasticity. We first show that demand shocks of both index investors and noncommercial traders lead to a statistically significant contemporaneous increase in futures prices. We then quantify the economic importance of

these shocks. Our findings suggest a negligible contribution of index investors' demand shocks and only a small contribution of noncommercial's demand shocks to futures price dynamics, both on average and during the boom-busts in 2007/08 and 2011/12.

链接:

<http://agri.ckcest.cn/file1/M00/0E/80/Csgk0F1vSLOAPxtbAAasNcTg4Jo299.pdf>

3. Productivity Spillovers From Pollution Reduction: Reducing Coal Use Increases Crop Yields

文献源: American Journal of Agricultural Economics,2019

摘要: Air pollution reduces crop yields by slowing down photosynthesis. We estimate the increase in US corn and soybean yields attributed to the recent dramatic reductions in emissions of nitrogen oxides (NOx) from electric power plants. In response to the observed changes in power plant NOx emissions over the eight-year period from 200305 to 201113, we estimate that average corn yields improved by 2.46% and soybean yields by 1.62%. These improvements imply an increase in total surplus of \$1.60 billion annually across the two crops. The estimated yield improvements vary substantially across states depending on the change in NOx emissions. For corn, they range from 0.32% to 6.87% and for soybeans, they range from 0.21% to 4.30%. The demand for the two crops is quite inelastic, which means that prices decrease by more than production increases in response to this positive productivity shock and the implied rightward shift of the crop supply curve. Due to the low elasticities of supply and demand for U.S. corn and soybeans, we conclude from a welfare analysis that these changes made consumers better off and farmers worse off.

链接:

<http://agri.ckcest.cn/file1/M00/0E/80/Csgk0F1vNd-ALy6qAAX48a1AuaA059.pdf>

4. Non-tariff measures, quality and exporting: evidence from microdata in food processing in Ukraine

文献源: European Review of Agricultural Economics,2019

摘要: Domestic non-tariff measures (NTM) influence firm's production and import decisions. We introduce NTMs into a model with heterogeneous firms. NTMs increase the cost of production and play a role of a positive demand shifter. Interplay of these two factors leads to ambiguous impact of NTMs on extensive and intensive margins of trade. We test predictions of the model by looking at food-processing firms in Ukraine in 20082013.

Evidence shows that more SPS regulations on inputs in upstream industries lead to exports of better quality products. At the same time, mandatory certifications have a negative impact on quality by limiting access of domestic firms to new technologies and equipment.

链接:

<http://agri.ckcest.cn/file1/M00/0E/80/Csgk0F1vShSAMoH0AAxCI9kPdPY705.pdf>

5. 中国与“一带一路”沿线主要国家农业贸易成本测度分析

作者: 佟光霁;杨伟

文献源: 亚太经济,2019

摘要: 对我国与“一带一路”沿线主要国家近20年的农业贸易成本进行测算,分析结果表明,我国与沿线主要国家农业贸易成本当量呈现逐渐降低趋势。贸易收入对双边贸易增长贡献最大,其次为双边贸易成本下降,多边协定逐渐由负转正。由此说明,“一带一路”框架下的多边协定开始对区域内农业贸易自由化发挥促进作用,进而得出了相应的政策启示。

链接:

<http://agri.ckcest.cn/file1/M00/0E/80/Csgk0F1mPg-AOCapABGctwNWYXQ739.pdf>

6. “一带一路”倡议下中越农产品贸易增长的影响因素研究——基于修正的CMS模型的分析

作者: 杨月元; 黄智铭

文献源: 世界农业,2019

摘要: 越南是中国“一带一路”倡议下的重要贸易伙伴,中越两国同属农业大国,双边农产品贸易发展迅速。本文基于2002—2016年UN Comtrade数据库中中越两国农产品贸易数据,运用修正的恒定市场份额模型(CMS模型)对中越农产品贸易增长因素进行分解。结果显示:市场需求引致效应是中国对越南农产品出口增长的主要因素,其次是市场结构效应,而市场竞争力效力则限制了中国对越南农产品出口的增长;市场需求引致效应同样是越南对中国农产品出口增长的主要因素,其次是市场竞争力效应,相比之下,市场结构效应偏低。

链接:

<http://agri.ckcest.cn/file1/M00/0E/80/Csgk0F1mQJ-AAHY5ABFSx3IILWc221.pdf>

7. “一带一路”背景下农产品贸易实证研究——以中国与中亚五国为例

作者: 洪秋妹

文献源: 技术经济与管理研究,2019

摘要: 文章首先从贸易规模及结构两方面分析了中国与中亚五国的农产品贸易现状,其次在引力模型的基础上,通过引入“一带一路”政策变量,运用面板数据模型分析了中国与中亚五国农产品贸易的影响因素。研究发现,中国与中亚五国的农产品贸易增幅较大,但总量仍偏低,且进出口结构和市场结构有待进一步完善;“一带一路”倡议有利于促进中国与中亚五国的农产品贸易;国内生产总值、人口数量、人均GDP差额、物理距离、农业增加值占比以及两国是否接壤会对农产品贸易产生影响。最后,为更好地促进中国与中亚五国的农产品贸易,提出了相关政策建议。

链接:

<http://agri.ckcest.cn/file1/M00/0E/80/Csgk0F1mQx2AHSJCAET33SBZo4E483.pdf>

8. Exporting out of Agriculture: The Impact of WTO Accession on Structural Transformation in China

文献源: The Review of Economics and Statistics,2019

摘要: This paper analyzes the effect of China's accession to the World Trade Organization in 2001 on structural transformation at the local level, exploiting cross-sectional variation in tariff uncertainty faced by county economies pre-2001. Using a new panel of 1,800 Chinese counties from 1996 to 2013, we find that counties more exposed to the reduction in tariff uncertainty post-accession are characterized by increased exports and foreign direct investment, shrinking agricultural sectors, expanding secondary sectors, and higher total and per capita GDP. In addition, when labor substitutes from nonagricultural to agricultural production in counties exposed to positive trade shocks, agricultural output declines.

链接:

<http://agri.ckcest.cn/file1/M00/0E/80/Csgk0F1vMOKAZ00UAAC2DLACXiQ793.pdf>

9. 中国农产品流通效率及其演变特征——基于流通环节的视角

作者: 吕建兴;叶祥松

文献源: 世界农业,2019

摘要: 基于2006—2015年省级面板数据,利用两阶段BCC-DEA模型和DEA窗口分析,分别估算了中国农产品整体、批发和零售环节的流通效率。研究发现:①总体上中国农产品流通整体、批发和零售环节的综合效率不高,均处于DEA非有效状态,且纯技术无效是综合

效率损失的主要来源。②各区域不同环节的效率发展不均衡,主要表现为东部整体和批发环节的效率较高,而西部整体和零售环节的效率较低。③总体上农产品流通效率呈波动性上涨趋势,且中部和西部的上涨幅度更大。④研究期间农产品批发和零售环节的纯技术效率和规模效率发生交叉,表明农产品流通综合效率损失的来源发生了变化,为此应调整相应的政策。

链接:

<http://agri.ckcest.cn/file1/M00/0E/80/Csgk0F1mQU-ANUjyACT297rW6Rg246.pdf>

10. 我国农业援助项目可持续发展的路径分析与对策建议——以援非农业技术示范中心为例

作者: 张晨;秦路

文献源: 国际经济合作,2019

摘要: 推动我国农业援助项目可持续发展是服务新时代国家对外援助战略,全面深化援外体制改革的重要抓手。笔者基于对当前中国援非农业技术示范中心建设发展现状的调查研究,从援助项目的最终目标、实施单位、经营管理等方面进行分析,建议我国农业援助项目的可持续发展应以我国先进适用农业技术为切入点,以公益功能和经济功能可持续为路径,做到我国国家战略发展需求与受援国农业发展需求相结合、我国国家战略发展目标与企业经营发展目标相结合。

链接:

<http://agri.ckcest.cn/file1/M00/0E/80/Csgk0F1mP3uAUEaFABi7mVxzl4677.pdf>

【行业报告】

1. World Agricultural Production-201908

发布源: USDA

发布时间: 2019-08-19

摘要: Ukraine sunflowerseed production for 2019/20 is forecast at 15.5 million metric tons (mmt), up 5 percent from last month and up 3 percent from last year. Yield is forecast at a record 2.50 tons per hectare, up 5 percent from last month and up 8 percent from last year. The month-to-month increase in yields is due to recent favorable weather for sunflowers in eastern and central Ukraine. Total area is estimated at 6.2 million hectares, unchanged from last month. USDA Foreign Agricultural Service analysts conducted crop assessment travel in mid-to-late July. The team observed favorable growth for sunflowers in the Steppe and Forest-Steppe regions. The sunflower heads were larger than average and seeds fully filled

out the heads. Harvest will begin in early September and continue through mid-November.
USDA crop production estimates for Ukraine include estimated output from Crimea.

链接:

http://agri.ckcest.cn/file1/M00/0E/7E/Csgk0F1acFCANM_iAD7OxU2Mqx0268.pdf

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