

## 《“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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### 【动态资讯】

#### 1. Global Food Prices Slide on Optimistic Supply Forecasts

【Gro】The FAO's food price index tracks global prices for a variety of agricultural commodities including meat, cereals, sugar, dairy, and oilseeds. Analysts often use it to identify possible food security risks in vulnerable or developing countries. In August of 2019, the index fell for the third consecutive month to 169.8, mainly driven by declines in the prices of cereals and sugars.

链接:

<https://gro-intelligence.com/insights/articles/global-food-prices-slide-on-optimistic-supply-forecast>

#### 2. 丹麦、巴西、德国等进口猪肉陆续进入广东

【中国农业信息网】“我们公司现正在寻找冷冻肉渠道，与大供应商协商货源，届时将在广州越秀区、荔湾区的10个肉菜市场里推出冷冻肉档口，尽快供应市场。”9日，广州市东川肉菜市场有关负责人钟主管告诉记者，冷冻肉档口要求较高，需要冷柜、冷链配送，需要时间、投入资金对档口进行改造，目前他们已在加快速度推进各项工作。记者发现，除了广州部分肉菜市场在积极行动，拓宽猪肉供应，一些大型连锁零售企业如沃尔玛、华润万家、盒马生鲜等也利用自有全球采购资源，加大进口猪肉比例，为市民“双节”消费提供稳定、充足的供应。

链接:

[http://www.agri.cn/V20/ZX/sjny/201909/t20190916\\_7195117.htm](http://www.agri.cn/V20/ZX/sjny/201909/t20190916_7195117.htm)

### 3. 欧亚经济联盟在蔬果和罐头方面市场缺口达1000多万吨

【中国农业信息网】亚美尼亚卫星通讯社8月23日报道，欧亚经济委员会工业与农工综合体委员苏博金表示，欧亚经济联盟在蔬果和罐头方面市场缺口达1000多万吨，联盟各成员国和其他国家均享有商机。日前，委员会对联盟内粮食供需情况做了深入分析。分析指出，2019-2020年，联盟牛肉市场缺口为31.7万吨，牛奶缺口近100万吨，土豆和蔬菜的缺口各为150万吨，新鲜和加工水果、水果罐头的市场缺口约为800万吨。

链接:

[http://www.agri.cn/V20/ZX/sjny/201909/t20190916\\_7195122.htm](http://www.agri.cn/V20/ZX/sjny/201909/t20190916_7195122.htm)

### 4. African nations push UN to improve drought research

【Nature】Scientists from African countries are asking the United Nations to help them with research and data collection so that they can better identify — and prepare for — drought. Delegates from the continent made the call as the UN Convention to Combat Desertification (UNCCD) concluded its two-week annual meeting, in New Delhi. “More than 70% of Africa is impacted by drought. It is the most serious problem,” says Tariq Ibrahim from Sudan’s National Centre for Research in Khartoum.

链接:

[https://www.nature.com/articles/d41586-019-02760-9?utm\\_source=Nature+Briefing&utm\\_campaign=690b47106e-briefing-dy-20190916&utm\\_medium=email&utm\\_term=0\\_c9df d39373-690b47106e-44044989](https://www.nature.com/articles/d41586-019-02760-9?utm_source=Nature+Briefing&utm_campaign=690b47106e-briefing-dy-20190916&utm_medium=email&utm_term=0_c9df d39373-690b47106e-44044989)

### 5. 日本猪瘟疫情：13万头猪被扑杀 接种疫苗要求强烈

【中国农业信息网】中新网9月10日电 据日媒报道，自去年日本岐阜市养猪场26年来发现国内首例猪瘟感染后，日本又出现新的感染。截至9日，在4个县共确认了40例，共计逾13万头家猪被扑杀。此外，在感染地区，给家猪接种疫苗的要求强烈；但农林水产省考虑到对进出口的影响等，持慎重态度。据报道，40例感染的具体发生县为岐阜县21例、爱知县16例、福井县2例、三重县1例。由于对发生感染的养猪场的出货对象等也实施了扑杀处理，包括长野县、滋贺县、大阪府在内的7个府县合计逾13万头家猪被扑杀。

链接:

[http://www.agri.cn/V20/ZX/sjny/201909/t20190912\\_7194254.htm](http://www.agri.cn/V20/ZX/sjny/201909/t20190912_7194254.htm)

### 6. 2019年前八个月柬埔寨对中国的大米出口增加54%

【中国农业信息网】据柬埔寨大米出口单一窗口管理局称，2019年1月到8月期间柬埔寨

向中国出口成品米132,947吨，同比增加54%。中国占到同期柬埔寨大米出口总量的39%。中国仍是柬埔寨大米的头号进口国。同期柬埔寨向欧洲市场出口大米120,061吨，同比减少47%。欧盟的市场份额从52%降至35%。今年前八个月柬埔寨共向51个国家和地区出口大米342,045吨，同比仅增加0.1%。

链接:

[http://www.agri.cn/V20/ZX/sjny/201909/t20190911\\_7193157.htm](http://www.agri.cn/V20/ZX/sjny/201909/t20190911_7193157.htm)

#### 7. 美国对华大豆出口最新统计：对华销售总量同比减少49.1%

【中国农业信息网】美国农业部周度出口销售报告显示，美国对华大豆出口销售总量同比减少49.1%，一周前同比减少49.2%。截止到2019年8月29日，2018/19年度（始于9月1日）美国对中国（大陆地区）大豆出口装船量为1302.9万吨，远远低于去年同期的2761.6万吨。当周美国对中国装运78万吨大豆，相比之下，前一周装运了54.5万吨。迄今美国对中国已销售但未装船的2018/19年度大豆数量为115万吨，去年同期为24.5万吨。2018/19年度迄今为止，美国对华大豆销售总量（已经装船和尚未装船的销售量）为1417.9万吨，较去年同期的2786.1万吨减少49.1%，前一周是减少49.2%，两周前是减少49.6%。

链接:

[http://www.agri.cn/V20/ZX/sjny/201909/t20190910\\_7192192.htm](http://www.agri.cn/V20/ZX/sjny/201909/t20190910_7192192.htm)

#### 8. African Swine Fever (ASF) Confirmed in the Philippines

【USDA】The Philippine Department of Agriculture (DA) announced today that 14 out of the 20 samples submitted to the World Animal Health (OIE) Reference Laboratory for Swine Diseases in the United Kingdom have tested positive for African Swine Fever (ASF). ASF is a highly contagious disease that is fatal to pigs, but does not pose a risk to human health. According to the DA, seven areas in two provinces in Luzon have been affected by ASF. These are Rizal Province (Rodriguez and Antipolo) and Bulacan (Guiguinto). The DA reports that a total of 7,416 pigs within the 1-kilometer radius of the affected areas in Rizal and Bulacan have been culled. The results of another test, which will determine strain and virulence of ASF, are still pending. ASF has caused serious production and economic losses in the region, and its impact in the Philippines will depend on the government and private sector's ability to limit its spread from the initially affected areas.

链接:

<http://agri.ckceest.cn/file1/M00/0E/C8/Csgk0F199s-ASaSpAAOllYDzixk998.pdf>

## 9. Thailand's Price Subsidy Programs for Rice and Oil Palm Farmers

**【USDA】**The Cabinet agreed to allocate a budget of 60.36 billion baht (U.S. \$1.98 billion) for three agricultural price subsidy programs for small rice and oil palm farmers. These programs are seen as the government's action to keep its promise from the General Election campaign in early 2019 that Thai farmers must have better livelihoods through higher incomes from their farming.

链接:

<http://agri.ckcest.cn/file1/M00/00/02/Csgk0V199Y6AXdyLAAQCXx3NnWg186.pdf>

## 10. €100 million German insect protection plan will protect habitats, restrict weed killers, and boost research

**【Science】** Save the whales, sure. But save the dung beetles? In 2017, researchers reported a dramatic loss of insects in Germany's nature reserves: 76% less biomass over 3 decades. Spurred by wide public concern about the findings, the federal government announced on 4 September a €100 million "action plan for insect protection," which includes at least €25 million a year for research and monitoring of insect populations. "This takes several steps in the right direction," says Lars Krogmann, an entomologist at the State Museum of Natural History in Stuttgart, Germany, who with colleagues last year published a nine-point plan with recommendations for reversing insect population declines.

链接:

[https://www.sciencemag.org/news/2019/09/100-million-german-insect-protection-plan-will-protect-habitats-restrict-weed-killers?utm\\_source=Nature+Briefing&utm\\_campaign=eb2514af50-briefing-dy-20190909&utm\\_medium=email&utm\\_term=0\\_c9dfd39373-eb2514af50-44044989](https://www.sciencemag.org/news/2019/09/100-million-german-insect-protection-plan-will-protect-habitats-restrict-weed-killers?utm_source=Nature+Briefing&utm_campaign=eb2514af50-briefing-dy-20190909&utm_medium=email&utm_term=0_c9dfd39373-eb2514af50-44044989)

### 【文献速递】

#### 1. Women's empowerment and nutrition status: The case of iron deficiency in India

文献源: Food Policy, 2019

摘要: In this paper we study the relationship between women's empowerment in agriculture and their iron deficiency status in Maharashtra, India. This is the first time the Women's Empowerment in Agriculture Index (WEAI) has been used in association with explicit measurement of medical biomarkers for women's iron deficiency status. Using primary data for 960 women we find that the log odds of a poor iron status in women

decline as women's empowerment levels in agriculture improve. Further, this decline is seen in the presence of multiple dietary diversity measures (dietary diversity score, share of rice and wheat in the diet, total iron intake and iron intake from iron-rich food groups all for 24-h and 30-day recalls) suggesting that in addition to dietary pathways women's empowerment can play a role in addressing micronutrient deficiencies like those of iron in a vulnerable sub-group of the population. It also reinforces the need to move away from the 'staple grain fundamentalism' that has characterized agricultural policy in India, towards more nutrition-sensitive food systems.

链接:

<http://agri.ckcest.cn/file1/M00/00/02/Csgk0V2BIeAXfGUAAlbcFwpqz8322.pdf>

## 2. 中国与南亚东南亚乡村的现状和未来——首届“‘一带一路’乡村振兴国际论坛”会议综述

作者: 冯璐;曾艳;赵鸭桥;唐丽霞

文献源: 中国农业大学学报(社会科学版),2019

摘要: 2018年11月7日至9日,由中国农业大学、云南农业大学和“一带一路”南南合作农业教育科技创新联盟主办的首届“‘一带一路’乡村振兴国际论坛”在云南省西双版纳州勐腊县勐伴镇河边村召开。来自英国牛津大学、英国伦敦政治经济学院、印度阿育王大学、孟加拉农业大学、缅甸蒙育瓦经济大学、泰国清迈梅州大学、越南太原农林大学、印度尼西亚大学、马来西亚大学、柬埔寨全国国土管理委员会、老挝农业部的农村发展知名学者和国务院发展研究中心、中国农业大学、厦门大学、云南农业大学等

链接:

[http://agri.ckcest.cn/file1/M00/00/02/Csgk0V1\\_I\\_yAWchkAAKnGj-YqRY238.pdf](http://agri.ckcest.cn/file1/M00/00/02/Csgk0V1_I_yAWchkAAKnGj-YqRY238.pdf)

## 3. 未来15年中国粮食安全面临的主要风险及应对思路

作者: 卞靖

文献源: 经济纵横,2019

摘要: 随着我国粮食综合生产能力的持续提升,粮食安全保障层次已跨过“吃得饱”阶段,正从“吃得好”向“吃得健康、吃得安全”阶段迈进。在此过程中,农业大国之间的竞争将进一步加剧,国内外各种利益诉求和矛盾相互交织,我国粮食安全保障将面临更加多元和复杂的风险挑战。未来15年,为基本实现农业农村现代化,必须改变立足国内、眼睛朝内的传统思维,以更加开放、更为积极、更具全球思维的方式,树立新粮食安全观,推动从数量型安全向质量型和能力型安全的战略转变。应客观认识未来可能出现的农业全产业链被

外资挤压控制、生态环境和农产品质量安全问题进一步凸显、国际化过程中外部挑战增多等新风险,借鉴国际经验,着力提升我国农业国际竞争力,增强参与全球农业治理的话语权和影响力,强化企业"走出去"和"运回来"的保障力,健全农产品质量安全监管体系与能力,从而全面掌握未来保障国家粮食安全的战略主动性,有效化解各类重大风险。

链接:

[http://agri.ckcest.cn/file1/M00/0E/C8/Csgk0F1\\_M82AC9wKAAXVlyw7cxs223.pdf](http://agri.ckcest.cn/file1/M00/0E/C8/Csgk0F1_M82AC9wKAAXVlyw7cxs223.pdf)

#### 4. 基于全球化肥供需匹配的中国化肥产业“走出去”战略分析

作者: 张弦;杨易;朱玉华;高阔;江浩

文献源: 世界农业,2019

摘要: 本文首先在化肥产业形势及相关研究文献综述的基础上,运用FAO数据库2002—2014年的世界化肥生产、消费及进出口数据,分析了中国化肥的生产、消费和国际贸易情况,并对全球化肥产业供需进行分析和趋势研判。研究结果表明:①中国是最大的化肥生产国和消费国,化肥产业处于贸易顺差。②从全球化肥需求区域变动来看,增长最快的地区是非洲,其次是东欧中亚以及拉丁美洲和加勒比海地区,占未来5年全球化肥需求增长的比例分别为11%、10%和26%。③从化肥新增供给区域分布来看,未来5年全球新增供给主要集中在东欧中亚、东亚、非洲和北美等,这4个地区新增化肥供给占全球新增化肥供给的83.33%。基于此,统筹考虑和综合利用国际国内两个市场、两种资源、两类规则,从全产业链布局的视角出发,长远谋划,提出中国化肥产业“走出去”战略布局、技术路径和区域布局。①从空间布局来看,中国化肥企业重点投资区域可以分成两类:一类是非洲地区,主要是摩洛哥和尼日利亚(氮素和磷酸盐)、埃及和阿尔及利亚(磷酸盐)、坦桑尼亚和莫桑比克(天然气);另一类是东南亚地区,氮肥和磷肥需求旺盛,泰国和老挝国家有钾盐储藏,东南亚钾盐需求占全球的11%。②从市场选择来看,主要是满足国内钾盐进口的需求,其次是满足全球市场氮肥和磷肥的需要。

链接:

[http://agri.ckcest.cn/file1/M00/0E/C8/Csgk0F1\\_L8qAZsW-AAmmEkoK-M8939.pdf](http://agri.ckcest.cn/file1/M00/0E/C8/Csgk0F1_L8qAZsW-AAmmEkoK-M8939.pdf)

#### 5. 中国与加拿大农业现代化发展的差异性分析

作者: 丁香香

文献源: 世界农业,2019

摘要: 现代农业是中国农业发展的必然趋势,也是中国农业发展的机遇与挑战。本文通过对比,分析了中国与加拿大农业现代化发展在生态农业、规模农业和科技农业上的现状,并针对具体指标比较了两国的农业现代化发展水平,分析了中国农业现代化发展缓慢

的原因,并借鉴加拿大农业发展的经验提出较为完整的中国现代农业发展的建议。

链接:

[http://agri.ckcest.cn/file1/M00/00/02/Csgk0V1\\_LxuAMu4QAAcd6OSjJdE344.pdf](http://agri.ckcest.cn/file1/M00/00/02/Csgk0V1_LxuAMu4QAAcd6OSjJdE344.pdf)

## 6. Indonesia—Chicken: Tensions between International Trade and Domestic Food Policies?

文献源: World Trade Review,2019

摘要: This paper analyzes the dispute Indonesia Measures Concerning the Importation of Chicken Meat and Chicken Products from a legal-economic perspective. We evaluate alternative explanations for the motive behind Indonesia's import restrictions and conclude that they can be linked to protectionist political-economic motives and are most likely due to a self-sufficiency objective and the legal requirements attached to it. Economically, the import restrictions on chicken and other food products have led to substantial price volatility, and they impose costs on Indonesian consumers and small farmers who are net buyers of food, firms that import certain raw materials, as well as foreign exporters. Therefore, by making food more expensive and less accessible, they could reduce food security. We also argue that an additional issue with the goal of self-sufficiency in Indonesia is lack of comparative advantage in some food items, including chicken meat and chicken products. Legally, although the Panel highlighted that self-sufficiency is a legitimate policy objective that as such does not lead to a violation of WTO law, the IndonesiaChicken case leads to the question of whether, in practice, it is feasible to implement a self-sufficiency target resorting only to WTO-compliant policies. Finally, we discuss potential alternative economic policies and examine whether Indonesia could have attained its food self-sufficiency objective in a WTO-consistent manner.

链接:

<http://agri.ckcest.cn/file1/M00/0E/C8/Csgk0F2BvNCAKw7EAAcKYwU6I0w590.pdf>

## 7. 中国与“21世纪海上丝绸之路”沿线国家农产品出口贸易研究

作者: 王凤婷;田园;程宝栋

文献源: 国际经济合作,2019

摘要: 本文基于2000-2015年农产品贸易数据,利用随机前沿模型对中国对“21世纪海上丝绸之路”沿线国家的农产品出口现状和影响因素进行分析,并估算农产品出口贸易的效率和出口潜力。研究表明,中国对沿线国家农产品出口集中在东线的东亚国家,对中线 and 西线沿线国家农产品出口有较大的开拓潜力;沿线国家的人均GDP、人口规模、农业增加

值比重、贸易开放程度等因素对农产品出口有显著影响;中国与沿线国家农产品贸易效率逐年增长,但出口贸易效率水平较低,未来农产品出口潜力大,有较大的提升空间。

链接:

[http://agri.ckcest.cn/file1/M00/00/02/Csgk0V1\\_MoqAR2\\_QAB7GVW-kMj4809.pdf](http://agri.ckcest.cn/file1/M00/00/02/Csgk0V1_MoqAR2_QAB7GVW-kMj4809.pdf)

## **8. International trade in wheat and other cereals and the collapse of the first wave of globalization, 1900–38**

文献源: Journal of Global History,2019

摘要: The aim of this article is to analyse the dynamics of international trade in cereals, primarily wheat, in the first third of the twentieth century, with a special focus on the causes of the fall in exchanges and prices that took place in the 1930s. Developments over this period are compared with the general trade in food and agricultural products. An examination of the structure of the trade in wheat, maize, and rice shows the operation of their respective markets, giving special attention to the import and export flows between consumers and producers. To understand the functioning of the market for these products, the article examines the changes in supply, demand, and prices, and the emergence and development of intermediary companies in this business. The argument draws from a new database, based on the statistics published by the International Institute of Agriculture.

链接:

<http://agri.ckcest.cn/file1/M00/00/02/Csgk0V2Bvz-ARJ4wAAXNczWSXJ4426.pdf>

## **9. International crop trade networks: The impact of shocks and cascades**

文献源: arXiv,2019

摘要: Analyzing available FAO data from 176 countries over 21 years, we observe an increase of complexity in the international trade of maize, rice, soy, and wheat. A larger number of countries play a role as producers or intermediaries, either for trade or food processing. In consequence, we find that the trade networks become more prone to failure cascades caused by exogenous shocks. In our model, countries compensate for demand deficits by imposing export restrictions. To capture these, we construct higher-order trade dependency networks for the different crops and years. These networks reveal hidden dependencies between countries and allow to discuss policy implications.

链接:

[http://agri.ckcest.cn/file1/M00/00/02/Csgk0V2BuleAW9eQACyP6i6W2\\_M757.pdf](http://agri.ckcest.cn/file1/M00/00/02/Csgk0V2BuleAW9eQACyP6i6W2_M757.pdf)



## 10. US-China conflict in global trade governance: the new politics of agricultural subsidies at the WTO

文献源: Review of International Political Economy,2019

摘要: This article shows how China's rise has radically altered the politics of one of the most prominent and controversial issues in the global trading system: agriculture subsidies. Agriculture subsidies depress global prices and undermine the competitiveness and livelihoods of poor farmers, and therefore have been long seen as a symbol of the injustice of the trading system. The issue has traditionally been understood in North-South terms, with developed countries seen as the perpetrators of harm and developing countries as innocent victims. In this article, however, I challenge this prevailing conception of the agricultural subsidies issue, arguing that it is now out of date and no longer corresponds with the emerging reality. A momentous but underappreciated change has taken place, largely beneath the radar of IPE scholarship: China has emerged as the world's largest subsidizer, profoundly transforming the global politics of agricultural subsidies. From a North-South battle, WTO negotiations on agricultural subsidies are now primarily centered on a conflict between the US and China. While reducing subsidies remains a pressing concern for developing countries, efforts to negotiate new and strengthened disciplines at the WTO have been thwarted by an impasse between the two dominant powers.

链接:

<http://agri.ckcest.cn/file1/M00/0E/C8/Csgk0F2Boc6Ae-8NACAuzCeRSgG838.pdf>

### 【行业报告】

#### 1. World Agricultural Production-201909

发布源: USDA

发布时间: 2019-09-12

摘要: USDA forecasts Australia's 2019/20 wheat production at 19.0 million metric tons (mmt), down 2.0 mmt (10 percent) from last month, but up 1.7 mmt (10 percent) from last year. Harvested area is now expected to total 10.7 million hectares (mha), down 0.3 mha from last month, but up 0.5 mha (5 percent) from last year. Expected yield is estimated at 1.78 tons per hectare or 4 percent above last year.

链接:

[http://agri.ckcest.cn/file1/M00/00/02/Csgk0V19-WWAftw2ADGBY\\_yHKqM818.pdf](http://agri.ckcest.cn/file1/M00/00/02/Csgk0V19-WWAftw2ADGBY_yHKqM818.pdf)

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