



2024年第4期总406期

粮食和食物安全专题

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➤ 前沿资讯

1 . New business models for Brazilian agribusinesses (巴西农业综合企业的新商业模式)

简介: Brazil is the most important sugar cane producer world-wide. During the production process, large amounts of residual biomass accumulate. An international research project in which TH Köln/Germany is participating has developed new harvesting methods and processes in order to turn what has so far been a waste product into a profitable business. At approximately 715 million tonnes a year, Brazil is the largest sugar producer world-wide. According to Professor Sabine Schlichter of TH Köln's Institute for Technology and Resources Management in the Tropics and Subtropics (ITT) in Germany, every processed tonne of sugar cane leaves behind around 150 to 300 kilogrammes of crushed, frayed canes, so-called bagasse. No other cultivated plant has so much residual biomass, Schlichter notes. "In the majority of the sugar cane processing businesses, it is inefficiently burnt up in the sugar and alcohol manufacturing process. In order to make further and higher-value use of the bagasse, the entire process from harvesting on had to be newly conceived. That was up to us," explains the scientist, who heads an international project on new harvesting methods and processes in the sugar cane industry. In this context, the university is cooperating with a wide range of Brazilian and German partners.

来源: rural 21

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全文链接:

<http://agri.nais.net.cn/file1/M00/03/6B/Csgk0WXh8BuAf8yxAA3Wn26pAyI229.pdf>

2 . 2024 Hunger Funding Gap (2024年饥饿资金缺口)

简介: The global hunger funding gap has hit 65 per cent for countries with the most urgent needs, according to the Action Against Hunger 2024 Hunger Funding Gap report, published in January 2024. The new analysis of funding through the UN humanitarian system reveals that only 35 per cent of appeals from countries dealing with crisis levels of hunger were satisfied in 2023, resulting in a hunger funding gap up 23 per cent from the prior year. The report found that no appeals for either ongoing or emergency hunger-related programs were wholly met. Only 12 per cent of hunger-related programmes received more than half of the financial resources required. To fully fund the hunger-related appeals of the 17 countries included in this report, it would take USD 8.86 billion, which is roughly half of what the US public is estimated to have bet on last year's Super Bowl. Globally, as many as 783 million people more than the population of the European Union and the USA combined suffer from hunger. Compared to pre-pandemic levels, today, 122 million more people face hunger, which is primarily driven by conflict, climate change and chronic inequality.

来源: rural 21

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更多资讯 尽在农业专业知识服务系统: <http://agri.nais.net.cn/>

<http://agri.nais.net.cn/file1/M00/10/3E/CsgkOEGLQzGAJjaAAocTj-JCEc073.pdf>

3 . Gaza: Every day, more and more people are on the brink of famine-like conditions (加沙：每天都有越来越多的人处于类似饥荒的边缘)

简介：The war in Ukraine… it's hard to believe that we've been navigating that for about two years. Before the conflict began and before hostilities broke out, FAO was firmly established and grounded in Ukraine. Despite the recognition of Ukraine as a global agricultural powerhouse before the war, one in four Ukrainians was considered acutely food insecure. There were a significant number of small-scale farmers and people living in rural areas who were still in need of support and assistance. So, it was fortunate that FAO had that kind of presence when the conflict began, serving as a starting point for other UN partners like the World Food Program (WFP), which was not present in Ukraine at the time, to use as a base for operations and collaboration. But here we are two years later, estimating about \$40 billion worth of damage to the Ukrainian agricultural infrastructure. This damage encompasses various aspects, from infrastructure such as grain silos, laboratories, and ports, to farms themselves, including contamination and destruction of land, livestock, and equipment like tractors and other machinery. Additionally, many farmers themselves transitioned into military service, abandoning their land and production. All this underscores the need for careful planning to envision the future of Ukraine's agricultural sector. Fortunately, Ukraine boasts an innovative agricultural economy, and we will need to collaborate closely with the Ministry of Agriculture and various agribusiness entities to rebuild this sector when the time comes. We may need to return to basics and focus on rebuilding much of this space. In Ukraine, we are also working to ensure that crop production can move. About a year ago, we collaborated with the ministry to provide temporary grain storage, successfully offering 6 million tonnes worth of capacity in plastic temporary grain sleeves supported by donors. Our focus has also been on de-mining agricultural farmland, as per the ministry's priorities for this year. We are working alongside WFP and another NGO specialized in de-mining to address the significant presence of IEDs and other devices in agricultural lands. Our work involves identifying farmland, knowing boundaries, and collaborating closely with farmers to prioritize this critical task.

来源：FAO

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全文链接：

http://agri.nais.net.cn/file1/M00/10/3E/CsgkOEGLSHmAQsHTADMISN3T_A4941.pdf

4. 红海危机扰乱粮食贸易秩序

简介：受红海危机影响最大的是欧盟和黑海地区的粮食出口。每年从欧盟和黑海地区经红海运往东非和亚洲的小麦约有 4200 万吨，占全球小麦贸易量的五分之一。在红海航运受阻的情况下，为了避免被袭击和劫持的危险，全球多家航运巨头的运粮船选择南非好望角航线，导致航运里程增加、运输成本增加、交货时间推迟等一系列问题。世贸组织 1 月 18 日发布的报告称，受红海危机影响，今年 1 月上半月，通过苏伊

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士运河的小麦运输量下降近 40%，小麦供给东非和亚洲市场的节奏明显减缓，但尚未对东非和亚洲的小麦交付总量产生重大影响。目前来看，红海危机主要是增加了粮食运输成本，对全球粮食市场供需的影响较小，对竞争格局的影响较大。从全球粮食供需看，预计 2023 至 2024 年度全球大豆、玉米产量分别达到 4 亿吨、12.2 亿吨，同比分别增产 2819 万吨、6371 万吨；小麦产量 7.82 亿吨，同比减少 751 万吨，但仍为历史次高水平。全球粮食增产，而全球经济恢复不及预期，粮食需求下降，全球粮食供需相对宽松，这也是 2023 年以来全球大豆、玉米和小麦价格下行的重要原因。值得注意的是，欧盟和黑海地区小麦航运成本增加、价格竞争力下降，美国、加拿大、澳大利亚等小麦出口国的小麦价格竞争力就会提升，未来世界小麦出口竞争会加剧。

来源：经济日报中央级

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全文链接：

<http://agri.nais.net.cn/file1/M00/10/3E/Csgk0EGLSpSAN9kSAAJhze SfsQ605.pdf>

5. 谨防粮食进口输入性风险

简介：作为世界粮食进口大国，牢牢掌握粮食进口主动权对我国至关重要。多年来，我国通过构建粮食进口多元化格局，不断增强在国际粮食贸易中的话语权和议价权。我国与世界各国加强粮食贸易合作，持续拓展粮食进口来源地，“朋友圈”不断扩大，“米袋子”越来越全球化。巴西、美国、阿根廷的大豆，加拿大、澳大利亚、法国、俄罗斯、美国的小麦，巴西、美国、乌克兰的玉米，越南、泰国、缅甸、印度、巴基斯坦等国的大米，源源不断流向中国。在保障谷物基本自给、口粮绝对安全的基础上，我国坚持从全球配置粮食资源，为世界粮食安全与自由贸易注入持久动力，为当前低迷的世界经济注入活力。从粮食进口金额看，2023 年我国粮食累计进口金额为 5780.5 亿元人民币，同比增长 6.6%，粮食进口金额增长幅度低于粮食进口量 11.7% 的增长幅度。这说明，过去一年我国粮食进口成本有所下降，根本原因是国际粮价下跌。“中国需求”在一定程度上可以影响全球粮食贸易流向，但无法左右国际粮价走势。2023 年国际粮价下跌，是全球经济复苏不及预期、粮食需求下降以及美元加息应对通胀等各种因素叠加作用的结果。美国是全球最大的粮食出口国，控制着全球一半以上的粮食市场，是世界第一玉米出口国、第二大豆出口国、第二小麦出口国，通过综合运用国际市场管理调控、数据发布和预期引导等手段，牢牢掌控全球粮食供应主导权和国际粮食贸易定价权，左右着国际粮食价格涨跌，粮食进口国只能被动接受定价。印度是世界第一大米出口国，掌握着国际大米供应主导权，印度限制大米出口导致全球大米价格暴涨，引发全球性大米危机。

来源：经济日报中央级

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全文链接：

<http://agri.nais.net.cn/file1/M00/10/3E/Csgk0EGLTZuABjNOAAHxdpD0rbU882.pdf>

➤ 学术文献

1. 大食物观下我国粮食安全保障路径研究

简介：大食物观蕴含的多元化食物消费需求对我国粮食安全保障能力提出了新要求。目

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前,消费结构升级与生产结构滞后矛盾、粮食进口依存度高且国际形势不乐观风险已对我国粮食安全形成挑战。远期来看,依据消费结构趋势匡算出的我国虚拟土地资源缺口越来越大,国内生产资源趋紧又将粮食安全带入深层困境。我国保障粮食安全应以加快供给结构调整,合理引导膳食需求结构,促进农产品进口的分散化、多样化,开发国内可利用资源与境外农业投资并行同步为主要方向。

来源: 中国知网

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全文链接:

http://agri.nais.net.cn/file1/M00/03/6B/Csgk0WXh_heAJ-dZAAbrm-xqEhA948.pdf

2. 国际粮食价格波动对中国粮食安全的影响分析

简介: 目前世界范围内粮食供求基本面相对脆弱,诸多粮食种类产需紧张,区域性结构性矛盾日益凸显,粮食价格一直相对偏高。此外,由于供需错配、区域性冲突、货币价格波动、能源价格变化等,致使国际粮食价格波动较大。近些年来,中国粮食供给稳定、库存丰盈,国际粮食价格变动对国内粮食安全影响程度相对较低,但大豆、食用植物油等对外依存度较高且市场化程度高的粮食往往会受到国际价格的影响,供应安全等易受影响。针对国际市场存在的不确定性与不稳定性,中国应从国内供应入手,着力提高粮食保供能力,全方位夯实粮食安全根基,同时防止国外的输入性风险,提升粮食市场的抗风险能力,扩大粮食领域的国际合作面,筑牢国家粮食安全防线。

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全文链接:

<http://agri.nais.net.cn/file1/M00/10/3E/Csgk0EGLTICAZQ19AApMQOpOHSE532.pdf>

3. 健全对外开放背景下的国家粮食安全保障体系研究

简介: 粮食安全是关系到国计民生的核心问题,随着新冠疫情的暴发,依托于两个市场、两种资源之下的粮食安全迎来了新的挑战。目前我国粮食安全已经迈向了一个新的发展阶段,不仅国内粮食供给得到了基本保障,粮食产业的对外开放也处于领先水平。现阶段通过分析我国粮食安全体系的发展历程,阐述我国粮食安全面临的一系列前所未有的困局和挑战,有助于为构建国家粮食安全保障体系提供方向指引。

来源: 中国知网

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全文链接:

<http://agri.nais.net.cn/file1/M00/10/3E/Csgk0EGLS6WAMgmLAB04KkYL6Vc191.pdf>

4. 数字经济赋能粮食供应链韧性的效应及区域分异研究

简介: 粮食供应链韧性决定粮食安全,数字经济以数据为核心,具有精准定位供应链韧性支撑点和障碍点的优势。本研究以2003—2021年为周期,通过动态熵权测度数字经济指数和粮食供应链韧性水平,分析了数字经济赋能我国粮食供应链韧性的效应及区域差异。在农业领域,数字经济主要贡献源于数字基础设施,但投入产出效率较低。粮食供应链韧性的关键在于抵抗力,生态环境脆弱区和技术制约导致恢复力和变革力成为短板。自然资源禀赋仍是主导因素,粮食供应链韧性和数字经济指数较高的区域基本重合,

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对粮食供应链水平的区域分布影响较小。通过提升基础设施完善度和匹配度，将农业数字化发展纳入城镇化规划，聚焦农业资源研发，培育新质生产力，可以有效提升数字经济赋能粮食供应链韧性。

来源：中国知网

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全文链接:

http://agri.nais.net.cn/file1/M00/03/6B/Csgk0WXh_RWASzpSAAhUu6tuKaQ734.pdf

5. 基于CiteSpace浅析国内粮食安全问题研究进展

简介：本文借助CiteSpace软件对粮食安全领域相关研究内容进行可视化分析，并对新冠疫情前后的研究热点进行梳理和对比，探讨2000-2022年关于粮食安全议题的研究内容与重点的演变，从而分析研究盲区、把握研究重点，以便更好地为新时代粮食安全保障提供参考建议。本文借助文献分析法和CiteSpace可视化，分析得到了三个结论：（1）我国粮食安全问题涉及多元学科，但目前跨学科的深入研究不足。（2）为牢牢守住粮食安全底线，未来粮食安全保障工作需进一步明确粮食安全的表理和机理。（3）新时代粮食安全的发展应注重满足人民差异化、多元化需求，以此考量基点完善粮食数量安全和粮食结构安全的保障政策。

来源：中国知网

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全文链接:

http://agri.nais.net.cn/file1/M00/03/6B/Csgk0WXh_AeAaA2XACV3pCDeIbk565.pdf

6. 中俄粮食产品贸易竞争性与互补性研究

简介：作为全球第一大粮食消费国，中国的粮食安全影响全球市场，俄罗斯作为中国陆上邻国，粮食贸易问题深刻影响其粮食安全。分析中俄两国粮食贸易发展现状，并对中俄粮食贸易竞争性与互补性进行研究。结果显示：中俄两国粮食贸易竞争性较小，互补性较大，且中俄粮食贸易逆差持续扩大；两国粮食贸易中，俄罗斯在谷类与豆类贸易中处于优势地位，中国在薯类处于相对优势地位。中国应强化中俄粮食双边合作交流，积极推进农业现代化建设，树立粮食安全世界观，为维护世界粮食安全做出中国贡献。

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全文链接:

<http://agri.nais.net.cn/file1/M00/10/3E/Csgk0EGLSZCAM-tqABYiVOjfgNw547.pdf>

7. 国际粮食体系的危机与重建

简介：粮食作为人类社会最基本的生活和生产资料，在国际政治经济秩序中起了至关重要的作用。本文梳理了世界近现代的粮食问题，利用多个角度的历史数据分析了19世纪末期以来的几次主要的世界粮食市场危机的成因和影响，并着重突出了国际粮食体系的概念。粮食体系包括粮食的生产、分配与交换关系，从属于总体资本主义生产关系。现代社会的发展伴随着国际粮食体系的危机与重建，这个过程过去没有，以后也难以真正解决全球的粮食问题。世界需要探索新的可持续的粮食方案，而中国可以提供自力更生的宝贵经验。

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8. 中国共产党运用辩证思维保障粮食安全考察的历史与价值

简介: 保障粮食安全是实现经济发展、社会稳定、国家安全的重要基础。百年来,中国共产党科学运用辩证思维方法,在处理粮食安全问题中牢牢把握了战略与策略、产量与产能、数量与质量、政府与市场、国际与国内的辩证关系,推动粮食安全发生历史性变革、取得历史性成就,展现出非凡价值。新时代新征程上,应对粮食安全外部风险挑战和内部短板制约,须进一步提高辩证思维能力,在“两点论”与“重点论”的辩证统一中夯实粮食安全根基。

来源: 中国知网

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http://agri.nais.net.cn/file1/M00/03/6B/Csgk0WXh-xCAD_S2AC8mVCdW6z0870.pdf

➤ 相关成果

1 . Gro's 2024 Watchlist: 3 Forces Shaping Global Climate Risk in the Year Ahead (2024年Gro的观察名单: 未来一年塑造全球气候风险的3大力量)

简介: Global average temperatures reached record highs in 2023, and are already exceeding those levels so far in 2024, according to Gro's Climate Risk Navigator. Climate scientists widely expect 2024 overall will be hotter than 2023. With that will likely come a continuation, and likely increase, of last year's record-setting number of climate-related disasters. 2023 global average temperatures fell just shy of exceeding the 1.5C of average temperature rise that was the focus of the 2015 Paris Accords. While it's uncertain when the 1.5C level will actually be breached, the World Meteorological Organization assigns a 27% chance that this will happen in 2024, and a 66% chance for it over the next five years. Impacts of a "greater than 1.5C" world are expected to include increased drought and wildfire risk as well as greater risk of vector-borne diseases such as malaria and dengue fever, among other effects. These impacts were detailed in the IPCC's 2018 Special Report on Global Warming of 1.5°C. 2023 brought a growing number of extreme weather and climate events, a trend that is likely to continue in 2024 as global temperatures warm further. The US experienced a record number of billion-dollar-plus climate-related disasters in 2023 — 28 of them last year, versus 22 in 2022 and an average of 9 for 1980-2023.

来源: Gro intelligence

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<http://agri.nais.net.cn/file1/M00/03/6B/Csgk0WXh-KyAc1ZfABnHoamj95c581.pdf>

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2 . Improved Conditions Boost Prospects for India's Upcoming Wheat Harvest (条件改善提振了印度即将到来的小麦收获前景)

简介: Growing conditions have improved since late 2023, when erratic monsoon rains drove down soil moisture levels. Cooler temperatures in January helped recharge soil moisture, especially in Uttar Pradesh, the top wheat producing state, as seen in this display from Gro's Climate Risk Navigator for Agriculture. Gro's vegetative health index, weighted for India's wheat growing areas, began rising steadily on January 24 and is currently close to the highest levels seen since at least 2000, as shown in this Navigator display. That has pushed Gro's India Wheat Yield Forecast Model higher by about 4% since the start of 2024. Growing conditions bear close monitoring ahead of the wheat harvest, which begins in March, as conditions can change. Currently, temperatures in India's major wheat growing states are forecasted to run slightly above normal through June, according to Gro's Climate Indicator Forecast. However, forecasts made months in advance contain a high degree of uncertainty.

来源: Gro intelligence

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<http://agri.nais.net.cn/file1/M00/10/3E/Csgk0EGLRXGaf4oyAAvzRaNu-xc449.pdf>

3 . Fungal disease endangers wheat production (真菌病害危及小麦生产)

简介: According to the researchers, South America, southern Africa and Asia will be the regions most affected by the future spread of the disease. Up to 75 per cent of the area under wheat cultivation in Africa and South America could be at risk in the future. According to the predictions, wheat blast will also continue to spread in countries that were previously only slightly impacted, including Argentina, Zambia and Bangladesh. Furthermore, the fungus is penetrating countries that were previously untouched. These include Uruguay, Central America, the south-eastern USA, East Africa, India and eastern Australia. According to the model, the risk is low in Europe and East Asia with the exception of Italy, southern France, Spain and the warm and humid regions of south-east China. Conversely, where climate change leads to drier conditions with more frequent periods of heat above 35 °C, the risk of wheat blast may also decrease. However, in these cases, heat stress decreases the yield potential. The affected regions are among the areas most severely impacted by the direct consequences of climate change. Food insecurity is already a significant challenge in these areas, and the demand for wheat continues to rise, especially in urban areas. In many regions, farmers will have to switch to more robust crops to avoid crop failures and financial losses. In the Midwest of Brazil, for example, wheat is increasingly being replaced by maize. Another important strategy against future yield losses is breeding resistant wheat varieties. CIMMYT in collaboration with National Agricultural Research Systems (NARs) partners have released several wheat blast-resistant varieties which have been helpful in mitigating the effect of the disease. With the right sowing date, wheat blast-promoting conditions can be avoided during the ear emergence phase. Combined with

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other measures, this has proven to be successful. In more specific terms, this means avoiding early sowing in central Brazil and late sowing in Bangladesh.

来源: rural 21

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http://agri.nais.net.cn/file1/M00/03/6B/Csgk0WXh6u6ALiiZAAtFfI_jCQI571.pdf

4 . USDA Further Trims Brazil Corn and Soybean Production

Forecasts (美国农业部进一步下调巴西玉米和大豆产量预测)

简介: Despite the reduced outlook, the USDA estimates that Brazil's corn and soybean harvests will be the country's second highest ever, after last year's records. The USDA's estimates are in line with Gro's own machine learning-based model predictions for Brazil corn and soybeans. The USDA forecast Brazil will produce 156 million tonnes of soybeans, down 0.6% from last month's estimate. Corn is projected to be 124 million tonnes, down 2.4% from last month. South America production will affect US farmers' spring planting decisions in the coming weeks. Early forecasts generated by Gro's 2024 US Corn and US Soybean Planting Intentions Model show a large year-on-year increase in US acres planted to soybeans and a decline in corn acres.

来源: Gro intelligence

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<http://agri.nais.net.cn/file1/M00/03/6B/Csgk0WXh9diAK5gtAA39sX8ksN8319.pdf>

5 . Record North African Drought to Drive Wheat Imports Higher (创纪录的北非干旱将推动小麦进口增加)

简介: A third consecutive year of drought conditions could push Algeria, Morocco, and Tunisia to increase their wheat imports again in 2024/25 to meet demand and bolster wheat stocks. North Africa is the largest wheat-importing region in the world. Wheat imports to the area rose in 2023/24 to the highest level in seven years amid record-setting drought. Now, Gro's Drought Index for the North African countries has increased further to reach the highest point for this time of year since at least 2003, as seen in this display from Gro's Climate Risk Navigator for Agriculture. The most recent rainy season, which typically runs from August through December, brought little relief to the region: accumulated precipitation was 50% below the 10-year average in Algeria, 55% below average in Morocco, and 63% below average in Tunisia.

来源: Gro intelligence

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6 . Transforming food systems could create multi-trillion dollars of

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economic benefits (粮食系统转型可以创造数万亿美元的经济效益)

简介：Transforming food systems around the world would lead to socio-economic benefits summing up to trillions of US dollars a year, a new global policy report produced by economists and scientists of the Food System Economics Commission (FSEC) shows. The study so far underlines that food systems are currently destroying more value than they create. On the other hand, the cost of transformation would be much lower than the potential benefits, offering a better life to hundreds of millions of people. A new global policy report produced by leading economists and scientists of the Food System Economics Commission (FSEC) reveals that food systems are destroying more value than they produce and that an overhaul of food system policies is urgently needed. The costs of inaction to transform the broken food system will probably exceed the estimates in this assessment, given that the world continues to rapidly move along an extremely dangerous path. “It is likely that we will not only breach the 1.5°C limit, but also face decades of overshoot,” states Johan Rockström, Director of the German Potsdam Institute for Climate Impact Research (PIK) and FSEC Principal. “The only way to return to 1.5°C is to phase out fossil-fuels, keep nature intact and transform food systems from source to sink of greenhouse gases. The global food system thereby holds the future of humanity on Earth in its hand,” he adds.

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➤ 专业会议

1 .Berlin conference of agriculture ministers at the GFFA sends a strong signal for the right to food (在GFFA举行的柏林农业部长会议为食物权发出了强烈的信号)

简介：The final communiqué clearly shows that strengthening vulnerable groups is one of the priority issues. Thus the communiqué creates a new context to make the right to food a new, central point of reference in the FAO and the other Rome-based UN organisations. During the last two years, Germany’s Federal Ministry of Food and Agriculture (BMEL) has also demonstrated the steps required to achieve this in an internal reorganisation of its international department and its event formats, such as the GFFA and Policies against Hunger. The right to food is no longer a concept evolving alongside others but is the central approach to considerations and efforts regarding action to eliminate hunger and improve international cooperation. This new seriousness is reflected in a special department for the right to food at the BMEL, involving the La Via Campesina Youth in the GFFA, new cooperation with Brazil and the Brazilian food council (the most inclusive body to involve vulnerable groups in political decision-making at national level world-wide), and a determined strengthening of CFS, especially also with CFS’ new Chair Nosipho Nausca-Jean Jezile.

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