

《“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. 巴基斯坦走廊事务局主席：“一带一路”倡议提出8周年 开花结果深入发展

【国际在线】2021年，是“一带一路”倡议提出8周年，巴基斯坦外交部长库雷希在今年3月曾表示中巴经济走廊作为“一带一路”的旗舰项目，对于巴基斯坦战略转型具有重要意义。同时，库雷希还表示，中巴经济走廊强调的区域经济发展和互联互通将刺激整个地区实现广泛的经济增长，为地区带来繁荣。近期新上任的巴基斯坦走廊事务局主席哈立德·曼苏尔日前在接受记者采访时也表示，中巴经济走廊是巴基斯坦经济增长最重要的项目之一，也是和中国可以一起双赢的项目。巴基斯坦走廊事务局主席哈立德·曼苏尔在接受记者采访时表示，目前中巴经济走廊项目从第一阶段的合作进入了第二阶段。“目前（走廊项目）第一阶段已经非常成功地完成了。接下来我们将很快进入第二阶段，第二阶段计划是在农业、纺织、制药和信息技术等各个领域邀请更多中国公司入驻到我们的经济特区。我相信这将帮助巴基斯坦建设工业中心和制造业中心，并同时为进入巴基斯坦的中国投资者提供机会。”中国能建葛洲坝集团海外投资有限公司苏吉吉纳里水电站项目是中巴经济走廊第一批优先项目清单中的重点项目，是中巴经济走廊第一阶段能源类代表项目，也是中国企业在境外绿地投资的最大水电项目。作为中方管理人员，该项目公司董事长兼总经理，何雄飞在采访中介绍了项目的进展。“截至目前，SK水电站工程进度已完成70%左右。主体工程进入全面建设阶段，首部枢纽二期截流顺利完成，大坝填筑有序推进，引水隧洞开挖支护将于年底基本完成，厂房土建工作已进入收尾阶段，（发电机）机电安装工作已全面展开。”作为合作方的外方管理人员，该项目水电力有限公司副总经理丹麦在接受采访时表示，项目给当地民众及经济发展带来的好处一目了然，“苏吉吉纳里水电站项目对当地民生起到积极的作用，项目给当地百姓提供了重要的就业机会。除了工程师外，我们在项目所在地先后雇佣了超过5000名熟练技术工人和非熟练工人。此外，有上千名中国人在这里工作，带来了显著的经济影响。一

且建成，苏吉吉纳里水电站不仅将为巴基斯坦人民提供可靠、清洁的能源，该项目还将为该地区的经济发展做出巨大贡献。”尽管疫情带来影响，但是建设者们抱着积极的心态来应对。该项目公司董事长兼总经理何雄飞说，“当前，我们面临着疫情防控、施工生产的双重压力。我们始终坚守项目一线，创新管理思路，克服不同地理地域、风俗文化、信仰理念的困难，坚持疫情防控和生产经营“两手抓、两手硬”原则，发挥联防联控机制，带领水电站全体员工凝心聚力，克难奋进，做实“网格化”“封闭化”管理，加强物资储备、防疫措施、防疫宣贯、筛查检测、应急管理、关心关爱，推进全员疫苗接种，确保了严峻疫情形势下的项目持续生产。”对目前阿富汗面临重建的机会，巴基斯坦走廊事务局主席哈立德·曼苏尔表示随着“一带一路”取得的成就和深入发展，“一带一路”倡议具有的连通性功能或许会给其带来机会。“阿富汗是一个内陆国家，他们将不得不依赖巴基斯坦来满足他们在进出口方面的需求。因此我们相信这种区域连通性将给我们和阿富汗兄弟国家提供深入联络及发展的机会，提供实现经济共同增长的机会。”巴基斯坦外交部长库雷希曾强调，中巴经济走廊的能源项目直接创造了26795个工作岗位，显著促进了当地电力行业的发展。走廊的基础设施项目创造了近5万个就业岗位。这证明了中巴经济走廊对巴基斯坦经济发展的贡献是真实和实质性的。

链接:

<https://www.yidaiyilu.gov.cn/xwzx/hwxw/187661.htm>

2. 中国正式提出申请加入CPTPP

【新华网】据商务部16日消息，中国正式提出申请加入《全面与进步跨太平洋伙伴关系协定》（CPTPP）。商务部部长王文涛当日向CPTPP保存方新西兰贸易与出口增长部长奥康纳提交了中国正式申请加入CPTPP的书面信函。两国部长还举行了电话会议，就中方正式申请加入的有关后续工作进行了沟通。

链接:

<https://www.yidaiyilu.gov.cn/xwzx/gnxw/187611.htm>

3. Institute questions AIP sustainability

【The Nation】This means that the value of the AIP, which is the Tonse Alliance administration’s flagship programme, would increase from the current K142 billion to K212 billion. In its August 2021 paper titled Why Are Fertiliser Prices in Malawi High, Ifpri said reducing the price of fertiliser is beyond government in the short-term. Ifpri said it will be necessary to reduce the number of beneficiaries, increase the subsidised price, increase the cost of the programme or implement a combination of these measures. According to Ifpri,

fertiliser prices are likely to increase further in the coming weeks necessitating harder compromises. The institute says any delay will endanger timely distribution of the commodity to smallholder farmers as it takes on average eight weeks for fertiliser to arrive to Malawi. Reads the paper in part: “As of August 2021, only about 130 000 tonnes of fertiliser [30 percent of the amount planned for the AIP] is in Malawi—75 000 tonnes with SFFRFM [Smallholder Farmers Fertiliser Revolving Fund of Malawi] and 55 000 tonnes with private suppliers.” Both types of fertiliser supplied through the AIP [NPK and Urea] are currently being sold for as much as K38 000 per 50 kg bag in Malawi. This is 73 percent higher than last year’s price of around K22 000 per bag.” World Bank figures show that globally, US dollar-denominated fertiliser prices increased on average by 82 percent in the 12 months ending July 2021 due to a combination of strong demand and high input costs. A poor 2020 harvest of maize and soya beans in South America drove up global prices of these commodities and major growers have reacted by increasing acreage and fertiliser use. During the same period, the kwacha depreciated against the dollar by nine percent from K756 to K821. “In kwacha terms, global fertiliser prices, therefore, increased by 98 percent, that is even sharper than retail prices in Malawi,” reads the Ifpri statement. In July, the Ministry of Agriculture announced that it would reduce the number of AIP beneficiaries from 3.7 million in the previous growing season to 2.7 million. Weeks later, President Lazarus Chakwera said in a national address that no one would be removed from the list. He vowed not to leave one million poor families behind in the race for household food security. In an earlier interview, Civil Society Agriculture Network executive director Pamela Kuwali noted that the Ministry of Agriculture should provide clarity on the number of AIP beneficiaries this season. Under the programme last season, beneficiary farmers were paying a fixed price of K4 495 per 50 kg bag of fertiliser and K2 000 for five-kg cereal seed coupon (either five kg maize hybrid seed or seven kg sorghum seed or seven kg rice seed).

链接:

<https://www.mwnation.com/institute-questions-aip-sustainability/>

4. 中国市场成跨国公司业绩复苏重要动力

【经济日报】跨国公司今年上半年报陆续发布完毕，梳理多家公司财报可以发现，中国市场已经成为众多跨国公司业绩复苏的重要动力。同时，面对中国市场的快速变化，在华外企更加积极主动进行转型与探索，以期更好适应中国市场的变化和趋势。松下中国东北亚公司延续了去年的增长态势，今年二季度业绩再次实现两位数增长。松下电器中

国东北亚公司总裁CEO本间哲朗表示，疫情没有阻止松下加快布局中国市场的脚步，为了实现资源优化配置，松下正加速由周边国家生产转向中国生产的进程。疫情发生后，松下已在中国设立和扩充了4家工厂。今年上半年，宝马集团共向中国客户交付超46万辆汽车，同比增长41.9%，创下历年同期销量新高。同时，宝马品牌新能源车型销量实现了56%的同比增长。资生堂集团上半年财报显示，中国市场业务表现格外亮眼，比去年同期增长44.1%，与2019年相比也实现了加速增长。资生堂方面表示，旅游零售业务受全球游客减少等因素影响较大，但是由于中国海南的游客数量持续增加，资生堂增加了柜台数量并加强了数字传播，其亚洲销售额实现增长，且增幅超过上年同期。中国市场的良好业绩帮助众多跨国公司实现了复苏，其展现出的广阔发展前景，给众多跨国公司以及他们以巨大信心，吸引他们不断加码投资。根据宝马的规划，到2025年，公司将在中国推出12款纯电动BMW和MINI车型，覆盖所有主流细分市场。宝马集团大中华区总裁兼首席执行官高乐表示：“我们对中国市场的长期发展充满信心。宝马集团将在电动化、数字化和可持续道路上加速前进，不断拓展中国市场。”本间哲朗表示，松下集团制定了“环境愿景2050”，将通过更加环保绿色的方式在中国开展各项业务活动。本间哲朗说，“中国提出的碳达峰、碳中和目标，彰显了在绿色发展和碳减排方面的坚定决心。我们在中国推进二氧化碳零排放工厂，并将示范工厂的技术在全国范围内推广，希望能为中国的‘双碳’目标贡献力量”。霍尼韦尔中国总裁林世伟表示，中国是霍尼韦尔在美国以外最大的单一市场，也是公司最大的增长型市场。“中国在数字经济和低碳发展等领域的光明前景给霍尼韦尔带来了巨大机遇。在数字化领域，霍尼韦尔正通过一系列创新的数字化解决方案回应客户需求，助力城市智慧运行、飞机高效飞行、工厂卓越运营、工人安全作业。在低碳发展领域，霍尼韦尔将通过不断开发满足中国客户能源和环境需求的产品与技术，与中国合作伙伴共同塑造可持续发展的未来。”林世伟介绍。尽管中国市场的巨大潜力显而易见，但众多外企没有选择在中国市场“躺赢”，而是紧跟中国市场的快速变化，不断进行新的探索。今年第二季度，可口可乐公司在中国市场首次推出了含酒精饮料——托帕客硬苏打气泡酒。可口可乐公司表示，托帕客硬苏打气泡酒低糖、低酒精度的特点吸引了中国众多年轻消费者的关注。佳能（中国）有限公司为进一步拓展中国市场，加大了创新力度，研发更加适合中国市场的新产品。佳能（中国）表示，将强化公司在集团内的位置，让集团总部充分了解中国市场，同时引入更多的优秀本地人才，进一步强化本地化管理。星巴克的财报显示，公司移动端业务已占整体销售额的34%，为疫情前的2倍多。这一重要变化，离不开星巴克在中国不断深化的数字化业务。继2017年推出社交礼品体验“用星说”、2020年发布微信小程序后，今年5月份，全新的“星咖号”功能在星巴克微信小程序、App上线，这些功能吸引了更多消费者。疫情阴霾仍未散去，全球经济复苏前景依然不明朗。在此背景下，中国市场已经成为跨国公司业绩复苏的重要动力，坚定看好中国经济、积极融入中国市场也成为众多公司的选择。中国欧盟商会

发布的《2021年商业信心调查》显示，受调查的欧洲企业中有近60%计划在2021年扩大在华业务，高于去年的51%。正如戴尔全球副总裁周兵所说，中国拥有完整的供应链、良好的政策环境和高效的政府，“处在国际化不同阶段的跨国企业，在中国都可以找到自己的发展空间”。

链接:

<https://www.yidaiyilu.gov.cn/xwzx/gnxw/187161.htm>

5. 第二届“一带一路”税收征管合作论坛上达成超20项共识

【央视新闻】第二届“一带一路”税收征管合作论坛昨天（9日）闭幕，与会各方发布《联合声明》，达成超过20项共识。根据《联合声明》，与会各方在税收信息化发展、合作机制发展与未来行动三大方面达成23项共识。与此同时，为进一步推动共建“一带一路”国家（地区）在税收征管领域的友好互利合作，全体成员共同制定并一致通过了《努尔苏丹行动计划（2022—2024）》，明确将在提高税收确定性、推动税收征管信息化等七个重点领域开展28项行动，持续推进协同发展。作为国际税收领域第一个由中国发起建立的国际税收征管合作平台，“一带一路”税收征管合作机制为跨境投资创造了确定、有利、合作共赢的税收环境。国家税务总局发布数据显示，截至目前，“一带一路”税收征管合作机制理事会成员已增加至36个，观察员增加至30个。按照规定，第三届论坛将由阿尔及利亚税务部门主办。

链接:

<https://www.yidaiyilu.gov.cn/xwzx/gnxw/186758.htm>

6. CGIAR scientists and research collaborators from Côte d'Ivoire discuss new One Health initiative

【AgHealth】The world's largest publicly-funded agricultural research partnership, CGIAR, is currently developing a series of initiatives to implement its 2030 research and innovation strategy that was launched in early 2021. One of these research initiatives, Protecting human health through a One Health approach, aims to improve the prevention and control of antimicrobial resistance, foodborne diseases and zoonoses in seven target countries: Bangladesh, Côte d'Ivoire, Ethiopia, India, Kenya, Uganda and Vietnam. The development of the One Health initiative is being led by a team of scientists from four CGIAR research centres — the International Food Policy Research Institute (IFPRI), the International Livestock Research Institute (ILRI), the International Water Management Institute (IWMI) and WorldFish — in collaboration with external research partners from

Centre Suisse de Recherches Scientifiques en Côte d'Ivoire, EcoHealth Alliance and the University of Liverpool. To ensure alignment of the proposed initiative with national priorities, the team convened a series of online consultative meetings with research collaborators to gain insights on the main One Health priorities, challenges, interventions and partner organizations in the respective countries. The Côte d'Ivoire meeting, hosted by ILRI, took place on Thursday 12 August 2021, bringing together some 35 participants from government ministries, universities as well as national and international research organizations. Dieter Schillinger, ILRI's deputy director general for biosciences research and development, opened the meeting with a word of welcome and an overview of CGIAR's 2030 research and innovation strategy that will guide the implementation of the 33 new research initiatives, including that on One Health—the focus of the online consultation. He mentioned that the development of the One Health research initiative is a collaborative process and ILRI is working closely with other CGIAR research centres as well as external partners from research and academia, including those represented at the meeting. He therefore welcomed feedback and suggestions from the participants to ensure the research of the One Health initiative is relevant and impactful. Hung Nguyen, co-leader of ILRI's Animal and Human Health program, followed with an overview of the rationale of the One Health initiative, citing the need for a One Health approach to tackle the complexity of the global public health challenges posed by the rising incidence of antimicrobial resistance, foodborne diseases and zoonoses. He then outlined the three main objectives of the One Health initiative, namely, to generate evidence for decision-making; evaluate impacts of One Health approaches; and scale up innovations into national policies and programs. He further highlighted the initiative's Theory of Change, explaining how the research outputs are expected to lead to specific development outcomes and impact by 2030, in line with the United Nations Sustainable Development Goals. The team estimates that between 4 million and 41 million cases of disease will be averted annually through the initiative's efforts.

链接:

<https://aghealth.wordpress.com/2021/09/09/cgiar-scientists-and-research-collaborators-from-cote-divoire-discuss-new-one-health-initiative/>

7. Agriculture a post-pandemic priority for Africa

【 China Daily 】 Participants at this year's Africa Green Revolution Forum have identified

investment, collaboration and inclusivity in agriculture as a post-pandemic priority to tackle hunger and grow the value of Africa's agricultural sector. The AGRF 2021 Summit kicked off on Tuesday in Nairobi, Kenya, convening close to 7,000 participants virtually, including African presidents, agriculture ministers, agricultural stakeholders and experts to discuss ways the continent can transform food systems and accelerate progress to eradicating hunger and poverty. Hosted by the government of Kenya through its ministry of agriculture, the online summit will run until Friday under the theme of "Pathways to recovery and resilient food systems". Speaking during the summit on Wednesday, Kenya's president Uhuru Kenyatta decried the perception among African youth that agriculture was an outdated occupation, saying Kenya had put in place aggressive measures to attract young people back to farming. "In order to overcome these negative perceptions and to show our children and youth the nobility and profitability of agriculture, we are elevating the place of agriculture in our schools by revitalizing agricultural clubs to widen inclusivity among the youth," Kenyatta said. "We are doing this because Kenya's 31,200 primary schools and their enrollment of close to 10 million school-going children offers a vast network through which knowledge about food and nutrition security can be boosted." Speaking on the second day of the summit during a panel discussion, agri-food experts from Africa and China said collaboration between governments and the private sector are key if Africa is to learn from China's response to COVID-19 in building resilience within its agri-food sector. Mbelwa Kaikuri, Tanzanian ambassador to China and the session's keynote speaker, highlighted the opportunity for Africa to learn from China's proven competence and resilience in food and agriculture. With the Forum for China-Africa Cooperation on the horizon, Kaikuri mentioned the need to align Africa's priorities with China's development policies, as well as the need for China to widen its involvement in supporting agriculture in Africa beyond government and regional economic communities. Chen Zhigang, China program leader at the International Food Policy Research Institute, agreed, pointing out COVID-19 is one of many risks facing the agri-food sector. "COVID-19 is an example of a single event cascading into multiple risks. This means when you have all those risks together, it's going to have a compounded effect on everyone involved in agri-food," Chen said. He added the key to building food security and agriculture resilience in a post COVID-19 world lies in public and private partnership, in which private sector businesses and local communities work together to ensure adequate food supply during and after the pandemic.

链接:

<http://global.chinadaily.com.cn/a/202109/09/WS613a027fa310efa1bd66e779.html>

8. Food Security: Can the global decline be reversed?

【Taxpayers for Common Sense】 Food insecurity, which the United Nations defines as the lack of regular access to enough safe and nutritious food for normal development and a healthy lifestyle, is on the rise worldwide. This lack of access to food can be either severe or acute, according to the U.N. In 2020, for example, 928 million people — 12 percent of the world's population — were “severely” food insecure, meaning they may have gone without food for a day or more. That figure was up by 148 million over 2019, according to a report released in July by five U.N. agencies. Another 155 million people were in a crisis situation in terms of their access to food, experiencing acute food insecurity, which can include malnutrition, starvation or famine. “The number of people facing acute food insecurity and requiring urgent food, nutrition and livelihood assistance is on the rise,” said U.N. Secretary-General António Guterres in the 2021 Global Report on Food Crises, compiled by 16 international organizations. “Conflict is the main reason,” he said, “combined with climate disruption and economic shocks, aggravated by the COVID-19 pandemic.” Issuing a “wake up call” at a U.N. Food Systems Pre-Summit in late July, David Beasley, executive director of the U.N. World Food Programme, said, “There are 2,755 billionaires who [had] an average net worth increase last year of \$5.2 billion. And shame on planet Earth that we have a single child going to bed hungry.” While COVID-19 has exacerbated world hunger, experts in food security acknowledge that, even before the pandemic struck, the world was not on track to eliminate hunger by 2030 — one of the 17 major “sustainable development” goals established by the United Nations in 2015. Debates, often divisive, flare up over issues such as whether smallholder farms or large agribusinesses are better positioned to supply the world's nutritional needs going forward. But with overall food demand projected to increase by more than 50 percent by 2050 in a more climate-stressed world, all stakeholders will likely be needed to solve the problem. Equity is part of the equation, too. Unemployment and rising food prices can be much more devastating in developing countries than in higher-income nations. “While most middle-class families in the United States spend around 10 percent of their income on food, that number is closer to 50 percent in many low-income countries,” said Chase Sova, a senior associate with the Global Food Security Program at the Center for Strategic and International Studies in Washington. “Women, children, displaced people, informal workers and disadvantaged groups are bearing the brunt of this food crisis,” said Emily Farr, an emergency food security adviser with Oxfam, a nongovernmental organization focused on

global poverty. Technically speaking, malnutrition is defined as being undernourished, which includes people not getting enough calories for minimum energy requirements, including children whose growth may be stunted due to nutrient deficiencies. Ironically, it can also include those who are overweight or obese. As high-sugar, high-fat Western diets spread globally, obesity is increasing, as are diet-related conditions such as heart disease and diabetes. Almost 40 percent of adults worldwide were overweight in 2016, according to the most recent data from the World Health Organization. In countries hit hard by the pandemic — such as Brazil — millions of people are vulnerable to food insecurity, which often has meant eating cheaper, less healthy options. Those who are moderately food insecure, according to the U.N.'s Food and Agriculture Organization (FAO), may not have regular access to safe and nutritious food. Another irony is that the world already produces plenty of food to feed its people. “The current food system (including production, transport, processing, packaging, storage, retail and consumption, loss and waste) feeds the great majority of world population and supports the livelihoods of over 1 billion people,” according to a recent U.N. report, “Since 1961, food supply per capita has increased more than 30 percent.” Even during the pandemic, experts say, food production has been resilient, including record grain harvests in 2020, despite temporary shortages that arose early on due to localized supply chain bottlenecks and panic buying. “People thought there would be shortages and new food price spikes and volatility [during the pandemic], but it didn’t happen because there were plenty of stocks of the basic staple crops,” says Robert Vos, director of markets, trade and institutions at the International Food Policy Research Institute, an agricultural research center. Even so, hunger has been on the rise since 2015, he says, “due to conflict, compounded by weather shocks and climate change and economic crises that have [caused] the number of hungry people in severe food crisis situations to go up.” “The number of climate change-related disasters, like extreme heat, droughts and floods, has doubled since the early 1990s,” said a video feature on food security from the Thompson Reuters Foundation, the charitable arm of the Reuters news agency. That will cause fewer harvests, more unpredictable plant diseases and the declining nutritional value of crops, it predicted. And the problems are interrelated: According to the video, agriculture generates about a quarter of global greenhouse gas emissions and uses about 70 percent of the world’s fresh water. Other studies have found that agriculture, particularly as practiced by large industrial farming operations, can degrade soils and cause deforestation, biodiversity loss and pollution from chemical runoff. While some critics of agribusiness say the solution is to rely more on local, small farming operations, others say industrial

agriculture must be part of the solution. “U.S. farmers and ranchers have long been at the forefront of climate-smart farming,” including efforts to protect soil and water, produce clean and renewable energy, capture carbon emissions and improve sustainability, Zippy Duvall, president of the American Farm Bureau Federation, which represents U.S. farms of all sizes, told a Senate Agriculture Committee hearing in June 2020. Experts also debate the benefits of producing food domestically instead of relying on globalized systems. The latter entails more risk because of longer supply chains, but consumers’ food choices would be less diverse without global trade. Some Western governments provide subsidies to support farmers in general and to encourage them to adopt environmentally sustainable practices. But critics of subsidies say they are no longer needed and are inequitable. “Price distortions negatively impact very small-scale producers in low-income countries,” says Eric Munoz, a senior policy adviser for agriculture at Oxfam. Misperceptions exist too about the global food system. About 80 percent of food consumed in any country is already produced domestically, says Vos. Insisting on more domestic production “would make local food more expensive [because] everything you produce may not be efficiently produced at home,” he says, “and it may also not be possible to produce all foods year round.” The United States, for example, typically imports about two-thirds of its fresh fruit. But, as COVID-19 has demonstrated, the global food supply chain is vulnerable to disruption. Sidhartha Bhandari, director of food and agribusiness at Publicis Sapient, a digital consulting company in Massachusetts, wrote: “Our global food supply chain design is predicated on the assumption that commodities can flow freely globally. This allows products to be sourced, produced and distributed at low cost anywhere in the world.” But situations such as the pandemic, he continued, highlight “the vulnerability in this model and the need for redesigning the food supply chain.” Some call for more regional agricultural trading hubs, which can shorten supply chains, provide more accountability, produce less waste, respect local ecological conditions and connect farmers to more local markets, says Amanda Starbuck, senior food researcher and policy analyst at the advocacy group Food & Water Watch.

链接:

<https://www.taxpayer.net/agriculture/food-security-can-the-global-decline-be-reversed/>

9. 高质量发展带来新机遇 外资持续涌入中国市场

【新华社】香港联合交易所最新数据显示，自去年11月以来，外国投资者每月都通过“沪港通”“深港通”等机制增持沪深两市股票。与今年7月相比，8月外资买入规模增加一倍多，“买入中国”正成为主流趋势。一些海外媒体和机构人士认为，中国经济保持稳健增长，并在新冠疫情中展现出强大韧性，令投资者更加坚定对中国市场的长期投资信心，越发期待中国经济高质量发展带来的市场机遇。美国有线电视新闻网日前报道，贝莱德公司、高盛公司、富达国际公司等知名金融机构正建议客户继续“买入中国”。彭博社认为，包括股市、债市在内，全球投资资金持续流入中国市场，凸显中国的“市场引力”以及全球投资者对中国经济发展的信心。一方面，中国经济的稳健基本面正焕发长期投资吸引力。在疫情严重冲击世界经济的背景下，中国经济展现出的韧性难能可贵。2020年，中国经济仅在一季度出现下滑，随后逆势上扬且增速加快，成为当年全球唯一实现正增长的主要经济体。管理7460亿美元资产的瑞士百达资产管理公司首席策略师卢卡·保利尼认为，长期来看，投资中国的基本面良好。人民币汇率走势强于其他主要货币，国债收益率表现不俗。“对外国投资者来说，中国显然完全‘值得投资’。”彭博社数据显示，与标准普尔500种股票指数相比，沪深300指数平均市盈率接近2007年以来最具吸引力的水平，这对外资进一步买入构成支撑。人民币走强进一步提升了中国股票和债券的吸引力，外国买家持有的中国主权债务规模也不断增长。富达国际亚洲证券事务负责人维多利亚·米奥认为，中国中等收入群体购买力不断增加，预计未来十年中国经济将保持稳健增长。斯里兰卡智库探路者基金会前执行主任拉克什曼·西里瓦德纳认为，庞大的国内市场对中国经济从疫情中恢复至关重要。这一市场及不断发展的小康社会持续创造需求，为全球跨国企业提供投资机会。位于法国巴黎的ESCP高等商学院副校长、欧洲商务孔子学院外方院长莱昂·劳鲁萨认为，法国企业看好中国投资、营商环境，对中国经济发展充满信心。他表示，中国企业在制造业、通信科技、电子商务、人工智能、大数据等领域具有领先优势，外企投资这些行业可以获得高回报。另一方面，中国经济优化增长结构带来长期投资机遇。今年以来，中国主要经济指标保持稳定增长，经济运行稳中加固，高质量发展取得新成效。一些市场人士注意到，中国政府近期强化市场监管力度，旨在优化未来经济增长结构，实现更高质量和更均衡的增长。负责管理2.1万亿美元资产的法国东方汇理资产管理公司首席投资官帕斯卡尔·勃朗认为，近期中国对一些行业的监管调整正打开新的投资大门。该机构本月发布报告，对中国市场保持长期积极的看法，认为近期市场波动为投资者带来机会，“增加他们在全球投资组合中对中国股票的配置”。贝莱德公司旗下的贝莱德智库7月发布中期投资展望报告认为，中国推动高质量发展将产生积极影响。比如，正当发达经济体通过前所未有的宽松财政和货币政策应对疫情冲击之时，中国避免“大水漫灌”，寻求降低金融风险。这些举措可能短期影响经济增速，但长期看有望提高中国经济发展的质量。该机构建议，从战略角度“大

幅加码中国”。贝莱德智库一名投资策略负责人接受英国《金融时报》采访时表示，中国在全球投资者资产配置中的占比并未达到应有水平，建议投资者把对中国市场的资产配置提高两到三倍。

链接:

<https://www.yidaiyilu.gov.cn/xwzx/gnxw/186414.htm>

10. Boosting livestock trade

【Hindu Business Line】 Livestock and its produce constitute one of the most promising commodities in the primary and processed food sector. Worldwide consumption has doubled since 1995; trade grew from \$77.18 billion in 2000 to \$233.7 billion in 2020. But exports from South Asia are about \$3.66 billion, only 1.8 percent of the total global trade value; and the export of frozen bovine meat, that too mainly by India, is worth \$3.10 billion. Until these challenges are addressed and combined with aggressive policy formation for expanding and upscaling the technology and capacity-building routes to come up with quality products, South Asian trade — intra-regional or with the world — will continue to be enervated.

链接:<https://www.ifpri.org/news-release/boosting-livestock-trade-hindu-business-line-0>

【文献速递】

1. 统筹开放发展和经济安全的内在逻辑与路径选择——学习习近平总书记在庆祝中国共产党成立100周年大会上的重要讲话

作者: 王跃生

文献源: 新视野,2021-09-10

摘要: 在开放发展理念引领下,我国掀起了又一次对外开放新浪潮,但同时也带来了经济主权、金融、产业技术、能源资源等领域的经济安全风险,统筹好开放发展和经济安全对我国经济行稳致远至关重要。开放发展和经济安全互为条件、时有矛盾,又彼此支撑、相辅相成。“十四五”和更长时期,要以习近平总书记系列重要讲话为指引,以辩证思维统筹好开放发展和经济安全,其基本思路和路径是:一方面,围绕自由贸易试验区建设、“一带一路”高质量发展和高标准自由贸易区网络构建等三大平台,进一步提升对外开放的广度、深度和力度,以开放促发展、以发展保安全;另一方面,从经济主权、金融、产业技术、能源资源等四大领域重点防控风险,积极应对开放发展中各种可能的风险挑战,确保开放发展中的经济安全。

链接:http://agri.ckcest.cn/file1/M00/02/F7/Csgk0WFEmu-AWujPAB0ci7b_um8456.caj

2. OECD支柱二方案：挑战与应对

作者：崔晓静；刘渊

文献源：国际税收,2021-09-09

摘要：2021年7月1日,130个包容性框架成员就支柱二方案达成一致意见。支柱二旨在构建一项公平的国际税收体系,要求跨国公司就其全球所得至少承担15%税负。对于中国而言,支柱二将影响中国"双循环"新发展格局的形成,阻碍"一带一路"建设,抑制海南自贸港的国际税制改革,并减缓粤港澳大湾区的一体化进程。面对这一挑战,建议中国积极推动达成更加包容、平衡、完善的支柱二最终共识方案,同时为维护中国利益,建议在全面、系统审视国内税收优惠政策的基础上,倡议相互匹配式的排除适用机制,保留现行税收协定下的预提税优惠与税收饶让,并坚持海南自贸港的"参股豁免"制度,主张使其成为支柱二的例外条款。

链接:

<http://agri.ckcest.cn/file1/M00/02/F7/Csgk0WFEIN6AdNXcABljhXo5wJQ135.pdf>

3. 中国企业对中亚农业投资的模式选择——基于“一带一路”投资环境的对比分析

作者：赵捷；陈秧分

文献源：世界农业,2021-09-08

摘要：投资模式优化对于提高中国企业海外农业投资成功率、完善投资网络布局、掌握市场主动权具有重要意义。本文尝试建立东道国宏观环境特征与微观企业投资动机的内在关联,立足中亚与"一带一路"沿线农业投资环境的对比分析,探究中国企业投资中亚农业的进入方式与产业链布局模式。结果表明,哈萨克斯坦和塔吉克斯坦两国农业投资环境较好,吉尔吉斯斯坦和乌兹别克斯坦次之,土库曼斯坦较差,2015年以来仅哈萨克斯坦环境水平趋好;中亚地区政治形势较为复杂,金融货币体系不稳定,但市场发展潜力大,农业资源丰富;相较于沿线其他国家,中亚五国农业综合投资环境属一般或较差类别,各子系统环境处于失调状态。结合中亚投资环境与发展实际,市场寻求型、互补资源利用型投资企业宜选择绿地新建或独资经营方式开展投资活动,规避投资风险;战略资产获取型投资企业适宜采取并购或合资参股的方式,减弱外来者劣势,获得并购企业资源优势,在此基础上,中国企业可采取全产业链+核心业务、技术转移的模式在中亚地区进行产业链布局。

链接:

<http://agri.ckcest.cn/file1/M00/02/F7/Csgk0WFEIZGAA8K8ABQ2b309bT0207.pdf>

4. 欧盟应对中美博弈的策略选择与美欧对华政策协调

作者: 赵怀普

文献源: 国际展望,2021-09-08

摘要: 中美欧是特殊的三边关系。在中美竞争日趋激烈的背景下,欧洲是影响中美博弈和中美欧三边关系走向的关键变量。欧盟将中美竞争视为难以回避的重大挑战,并基于战略自主采取"不选边"的策略,同时谋求在中、美间发挥调节作用,以期降低风险并最大限度维护自身利益。但欧盟对待中、美并非不偏不倚,其调节作用更多体现在与美国共同加强对华政策协调,这正是三边关系的特殊性。经过数年的磨合,美欧对华政策协调与合作的基本框架已初步形成,大致可概括为经贸与科技竞争、对投资与出口管制及设限、军事威慑与防范、人权施压与对抗、围绕"一带一路"进行地缘战略协调。拜登执政后美欧关系得到一定程度的修复,加上双方共同的短期利益等因素,使得美欧对华协调联动的可能性上升。今后美欧联手应对中国的战略会更加清晰,双方在诸多领域的对华协调联动将会进一步增强。然而,美欧结构性矛盾以及涉华利益不对称将使双方的合作具有局限性。归根结底,欧盟在中美博弈中采取平衡策略的根本目的是避免使自己"选边站队"。此外,对欧盟而言,美欧协调主要是手段而非目的,并不意味着双方要建立"反华联盟"。

链接:

<http://agri.ckcest.cn/file1/M00/02/F7/Csgk0WFEIlgKAMIR7ABOCKnxH-bM499.pdf>

5. 全球公共产品视角下新冠疫苗供给分配的困境、成因与应对

作者: 喻小勇; 田侃

文献源: 南京社会科学,2021-09-06

摘要: 由于美国全球公共产品供给的霸权地位相对下降,联合国、世界卫生组织等国际组织难以有效协调处理全球卫生事务,以金砖国家为代表的新兴经济体提供全球公共产品的能力尚显不足,新冠疫苗全球供给不足、分配不公等问题凸显,全球卫生治理体系陷入"金德尔伯格陷阱"。为此,可采取以下策略:一是推进人类卫生健康共同体的构建,实现全球健康权的保障;二是推进中美双边谈判,避免陷入"修昔底德陷阱"和"金德尔伯格陷阱";三是以"一带一路"倡议等为契机,通过新冠疫苗区域供给逐步实现全球共享;四是加强与联合国、世界卫生组织等合作,推进全球卫生治理。

链接:

<http://agri.ckcest.cn/file1/M00/02/F7/Csgk0WFEImqABt6VAAV5KsTr8eM092.pdf>

6. Do BRI policy and institutional quality influence economic growth and environmental quality? An empirical analysis from South Asian countries affiliated with the Belt and Road

Initiative.

文献源: Environmental Science and Pollution Research,2021-09-06

摘要: The effect of quality institutions on growth-environmental nexus is a generally ignored topic, especially in South Asia economies affiliated with the belt and road initiatives (BRIs). To fill this gap, we have examined the effect of BRI policy, economic freedom (EF), and institutional quality (IQ) on growth-environmental nexus in the South Asian region from 1984 to 2019. We have used CO₂ emission as a proxy for the environment in this study. To prevent variable bias, we also included energy consumption (EN) and trade openness (TO) as key factors in the model. To solve the problem of cross-sectional dependence, we have used the second-generational unit root test. The results of unit root tests indicate that the variable IQ is stationary at the level and other variables are stationary at the first difference. Furthermore, all of the variables are cointegrated, according to the panel cointegration test. Thus, we have used the panel autoregressive distributed lag (ARDL) method to estimate the long-run (LR) and short-run (SR) impact of response factors on economic growth. Furthermore, this research utilized the Granger causality test among the selected variables to inquire into the causalities. The basic findings are as follows: (i) A significantly positive interaction variable (CO₂IQ) among CO₂ and IQ suggests that effective and fair political institutions are critical for increasing economic development and decreasing CO₂ emissions simultaneously. (ii) Economic growth is invigorated by energy consumption, trade, economic freedom, and institutional quality. (iii) Since 2013, more significant economic growth has been stimulated by BRI policy in BRI-associated countries; thus, both the SR and LR results are significantly positive. Hence, it is essential to improve the quality of institutions to reduce carbon emissions during economic growth.

链接:

<http://agri.ckcest.cn/file1/M00/0F/C9/Csgk0GFEngKAPogzAAtmjk-yQMg671.pdf>

7. Women's empowerment and gender equality in agricultural value chains: evidence from four countries in Asia and Africa

文献源: Food Security,2021-09-03

摘要: Women play important roles at different nodes of both agricultural and off-farm value chains, but in many countries their contributions are either underestimated or limited by prevailing societal norms or gender-specific barriers. We use primary data collected in Asia (Bangladesh, Philippines) and Africa (Benin, Malawi) to examine the relationships between

women's empowerment, gender equality, and participation in a variety of local agricultural value chains that comprise the food system. We find that the value chain and the specific node of engagement matter, as do other individual and household characteristics, but in different ways depending on country context. Entrepreneurship—often engaged in by wealthier households with greater ability to take risks—is not necessarily empowering for women; nor is household wealth, as proxied by their asset ownership. Increased involvement in the market is not necessarily correlated with greater gender equality. Education is positively correlated with higher empowerment of both men and women, but the strength of this association varies. Training and extension services are generally positively associated with empowerment but could also exacerbate the inequality in empowerment between men and women in the same household. All in all, culture and context determine whether participation in value chains—and which node of the value chain—is empowering. In designing food systems interventions, care should be taken to consider the social and cultural contexts in which these food systems operate, so that interventions do not exacerbate existing gender inequalities.

链接:

<http://agri.ckcest.cn/file1/M00/0F/C9/Csgk0GFEpeeAeQcqABJFpYfNuNk536.pdf>

8. Driving Factors and Future Prediction of Carbon Emissions in the 'Belt and Road Initiative' Countries

文献源: Energies,2021-09-01

摘要: 'Belt and Road Initiative' (B&R) countries play critical roles in mitigating global carbon emission under the Paris agreement, but their driving factors and feasibility to reduce carbon emissions remain unclear. This paper aims to identify the main driving factors (MDFs) behind carbon emissions and predict the future emissions trajectories of the B&R countries under different social-economic pathways based on the extended STIRPAT (stochastic impacts by regression on population, affluence, and technology) model. The empirical results indicate that GDP per capita and energy consumption structure are the MDFs that promote carbon emission, while energy intensity improvement is the MDF that inhibits carbon emission. Population, as another MDF, has a dual impact across countries. The carbon emissions in all B&R countries are predicted to increase from SSP1 to SSP3, but emissions trajectories vary across countries. Under the SSP1 scenario, carbon emissions in over 60% of B&R countries can peak or decline, and the aggregated peak emissions will

amount to 21.97 Gt in 2030. Under the SSP2 scenario, about half of the countries can peak or decline, while their peak emissions and peak time are both higher and later than SSP1, the highest emission of 25.35 Gt is observed in 2050. Conversely, over 65% of B&R countries are incapable of either peaking or declining under the SSP3 scenario, with the highest aggregated emission of 33.10 Gt in 2050. It is further suggested that decline of carbon emission occurs when the inhibiting effects of energy intensity exceed the positive impacts of other MDFs in most B&R countries.

链接:

<http://agri.ckcest.cn/file1/M00/0F/C9/Csgk0GFEoI6AKW0IAE7P1hsROBw788.pdf>

9. Income, consumer preferences, and the future of livestock-derived food demand

文献源: Global Environmental Change,2021-08-23

摘要: In recent decades there has been a sustained and substantial shift in human diets across the globe towards including more livestock-derived foods. Continuing debates scrutinize how these dietary shifts affect human health, the natural environment, and livelihoods. However, amidst these debates there remain unanswered questions about how demand for livestock-derived foods may evolve over the upcoming decades for a range of scenarios for key drivers of change including human population, income, and consumer preferences. Future trends in human population and income in our scenarios were sourced from three of the shared socioeconomic pathways. We used scenario-based modeling to show that average protein demand for red meat (beef, sheep, goats, and pork), poultry, dairy milk, and eggs across the globe would increase by 14% per person and 38% in total between the year 2020 and the year 2050 if trends in income and population continue along a mid-range trajectory. The fastest per person rates of increase were 49% in South Asia and 55% in sub-Saharan Africa. We show that per person demand for red meat in high-income countries would decline by 2.8% if income elasticities of demand (a partial proxy for consumer preferences, based on the responsiveness of demand to income changes) in high-income countries decline by 100% by 2050 under a mid-range trajectory for per person income growth, compared to their current trajectory. Prices are an important driver of demand, and our results demonstrate that the result of a decline in red meat demand in high-income countries is strongly related to rising red meat prices, as projected by our scenario-based modeling. If the decline in the income elasticity of demand occurred in all countries rather than only in high-income countries, then per person red meat demand in

high-income countries would actually increase in 2050 by 8.9% because the income elasticity-driven decline in global demand reduces prices, and the effect of lower prices outweighs the effect of a decline in the income elasticity of demand. Our results demonstrate the importance of interactions between income, prices, and the income elasticity of demand in projecting future demand for livestock-derived foods. We complement the existing literature on food systems and global change by providing quantitative evidence about the possible space for the future demand of livestock-derived foods, which has important implications for human health and the natural environment.

链接:

http://agri.ckcest.cn/file1/M00/0F/C9/Csgk0GFEoqWAer_dABlrN9H2qKc649.pdf

10. Impact of Market Reforms on Technology Adoption and Profitability: The Case of Tomato Farmers in India

文献源: Applied Economics Journal,2021-07-27

摘要: Market reforms affect the development of agribusiness and remain contentious in many developing countries. This study contributes to the debate and the lack of evidence on the impact of marketing reforms on the welfare of farmers. It focused on the impact of direct marketing in tomato cultivating farmers with Super Markets (SMs) on the adoption of modern production technologies and the realization of net returns in India. Primary data was collected from 500 sample farmers and applied to the Seemingly Unrelated Regression (SUR) model to analyze the impact of SMs participation on the adoption of modern production technologies and the realization of net income. The findings revealed that SMs participation decisions, interactions with SMs personnel, land holding size and lucrative prices offered by SMs are influential factors in the use of modern inputs viz., organic manures, drip irrigation, micronutrients and for the realization of higher net income from tomato cultivation. Reduced transaction costs, assured marketing, the mitigation of both production and marketing risks, enhancing the commercial outlook of farmers, etc., are the other benefits due to market linkages of tomato farmers with corporate firms.

链接:

<http://agri.ckcest.cn/file1/M00/0F/C9/Csgk0GFEpKSAVDX1AATQSTnhSa4847.pdf>

【行业报告】

1. IMPROVING DIETS IN RURAL GHANA: Food system analysis to identify opportunities for

nutrition-sensitive small and medium enterprises

发布源：国际食品政策研究所IFPRI

发布时间：2021-09-14

摘要： This publication presents an in-depth analysis of the food system in Ghana with the dual purpose of providing an overview of the current situation, and identifying opportunities for leveraging the role of small and medium-sized enterprises for nutrition-sensitive food systems. The data collected and the results of the analysis enhance the understanding of some of the challenges that, in the Ghanaian context, contribute to determining diet-related issues; more importantly, the analysis identifies opportunities and entry points for improving diets by overcoming some of the challenges faced by small and medium-sized enterprises. The information provided could be of support not only for further analyses, but also for planning interventions and designing policies to improve nutrition in Ghana and in other contexts.

链接:

<http://agri.ckcest.cn/file1/M00/0F/C9/Csgk0GFEGqLGAEQAVAC0RSNodVk0621.pdf>

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