

Integrated Sustainable Food Policy in Germany (德国的综合性食物政策)

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“3 Nong” policy vs. “3F” policy

- Transferring from “3 Nong” policy (三农政策) to “3F Policy”
 - “3 Nong”: agriculture, farmers, and rural
 - “3F” : Food, Farmer, and Future
- Traditional agricultural policy in China
 - Food security
 - Farmer income
 - Rural Development
- Two Pillars of Common agricultural policy in Europe (The 'Agenda 2000')
 - production support and direct payment
 - rural development

Common Agricultural Policy

- When food security and farm income are not problems any longer,
 - Farm is not poor any more
 - Over supply of food in Europe

Year	Annual Income per Worker for all Sectors	Annual Income per Worker in Agriculture
2013	31392	35200
2014	32316	28100
2015	33276	26100
2016	34104	31600
2017	34980	35900

Table 1.4 EU-28 overall cereal balance sheet (million t)

	EU-28					% variation			
	2015/16	2016/17	2017/18	2018/19	2019/20f	18/19 vs 17/18	18/19 vs 5-yr. av.*	19/20 vs 18/19	19/20 vs 5-yr. av.*
Beginning stocks	46.4	43.8	37.4	47.6	46.9	27.3	21.1	-1.4	10.4
Gross production	314.5	299.3	308.0	292.9	315.1	-4.9	-5.5	7.6	2.6
Usable production	311.7	296.7	305.3	290.4	312.3	-4.9	-5.5	7.6	2.6
Imports	20.8	19.3	24.5	31.0	23.4	26.3	56.8	-24.6	8.4
Availabilities	378.9	359.8	367.2	368.9	382.6	0.5	0.1	3.7	2.9
Total domestic uses	282.1	282.0	283.7	285.6	287.8	0.7	1.5	0.7	1.8
- Human	65.2	65.4	65.6	65.7	65.9	0.1	0.7	0.4	0.7
- Seed	9.5	9.5	9.3	9.3	9.7	-0.5	-2.2	4.4	2.8
- Industrial	34.0	34.2	34.8	34.8	35.4	0.1	2.7	1.8	3.2
<i>o.w. bioethanol</i>	12.0	12.2	12.6	12.6	13.3	0.4	6.2	5.1	8.5
- Animal feed	173.4	172.9	174.1	175.9	176.8	1.0	1.8	0.5	1.9
Losses (excl on-farm)	2.2	2.2	2.2	2.2	2.2	0.0	0.0	0.0	0.0
Exports	50.8	38.2	33.6	34.2	38.7	1.6	-22.7	13.3	-5.8
Total uses	335.1	322.4	319.6	322.0	328.7	0.8	-1.0	2.1	0.8
End stocks	43.8	37.4	47.6	46.9	54.0	-1.4	10.4	14.9	18.0
- Market	43.8	37.4	47.6	46.9	54.0	-1.4	10.4	14.9	18.0
- Intervention	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Self-sufficiency rate %	110.5	105.2	107.6	101.7	108.5	0.0	0.0	0.0	0.0



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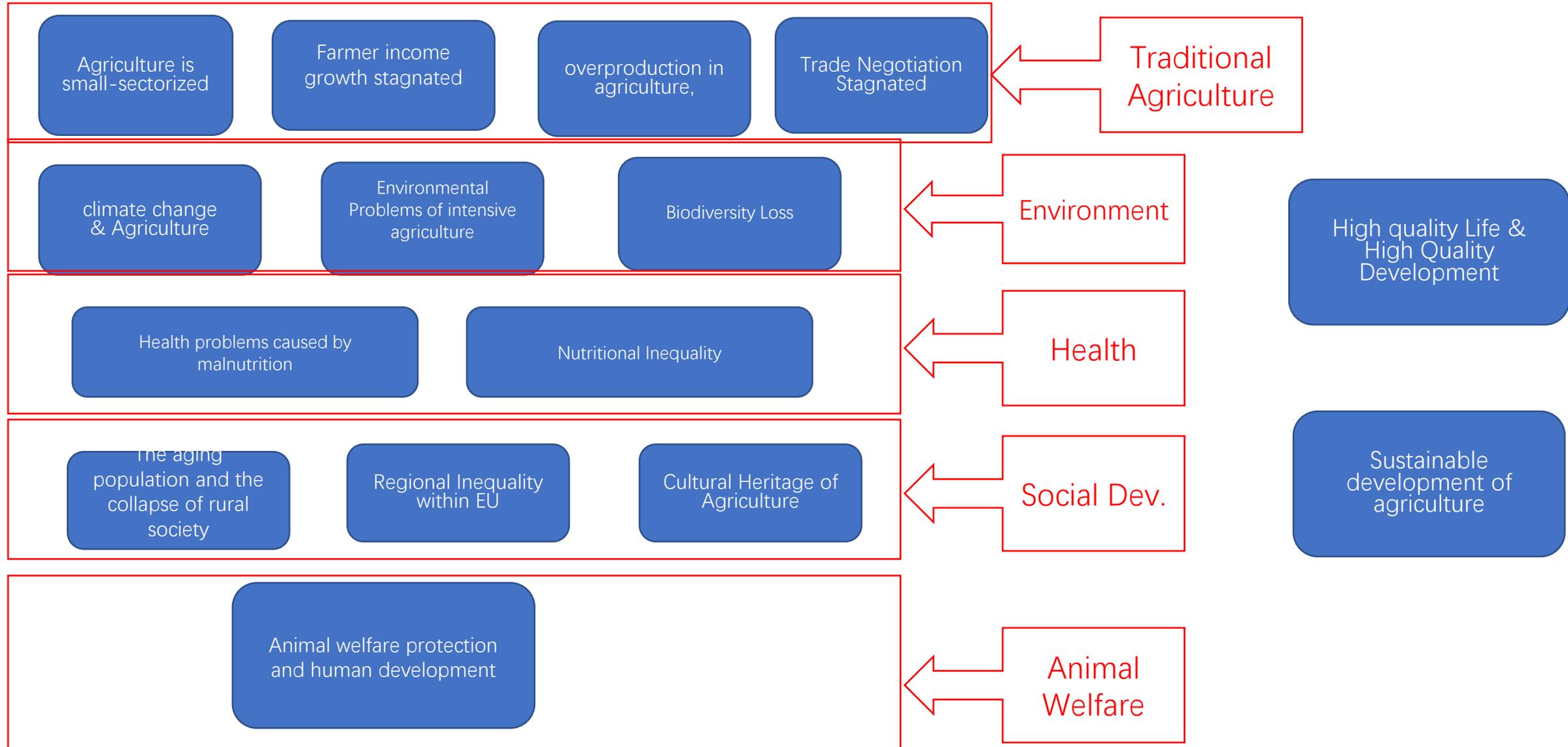
German farmers hit by oversupply in agriculture

The financial situation of German farmers has worsened as a result of steeply falling market prices. Russia's embargo also hit the sector, the farmers' association said, calling for an end to sanctions against Moscow.

New situations

- Share of Agriculture in total GDP is relatively small
 - The importance of agriculture as food supplier is lower
 - 0.8% GDP in Germany
- However, the general importance of agriculture still remains high
 - Multifunctionality
 - Externalities
- Agriculture in an new era
 - High quality growth
 - Sustainable development
- **Agricultural policies face a big transition**

New Dimensions of Agricultural Policies

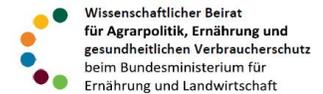


Recent policy developments in Germany

- “Since its 2003 reform, the CAP has basically been at a standstill. Due to insufficiently developed incentive systems as well as insufficient regulatory enforcement, **numerous important German and European agricultural objectives regarding climate, water and biodiversity conservation have not and cannot be achieved.** Incentive systems to improve animal welfare are almost non-existent, resulting in a considerable need for action”. (Oct. 2020, by WBAE)

- The report “Promoting more sustainable food consumption: Developing an integrated food policy and creating fair food environments”**

- The Scientific Advisory Board on Agricultural Policy, Food and Consumer Health Protection (WBAE) of the Federal Ministry of Food and Agriculture (BMEL) on Aug. 21, 2020
 - Changing from agricultural policy to Integrated sustainable Food Policy
- Germany is the presidency of the Council of European Union in the Second half of 2020
 - Leading the agricultural policy change



Politik für eine nachhaltigere Ernährung

Eine integrierte Ernährungspolitik entwickeln und
faire Ernährungsumgebungen gestalten

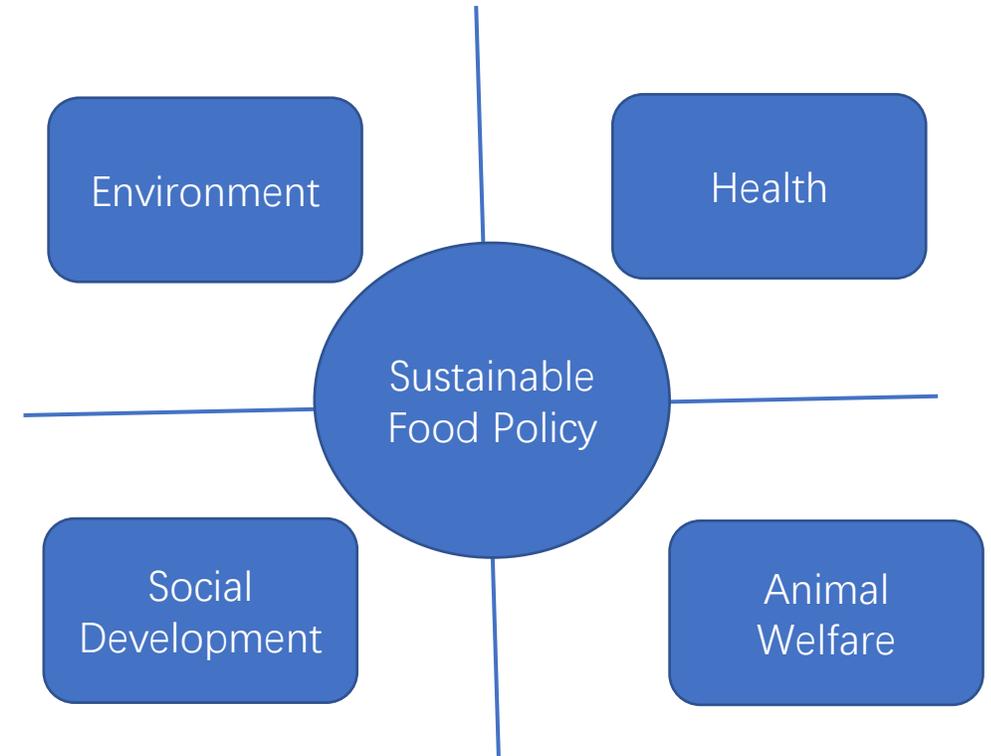
Gutachten

Juni 2020



Main Messages

- Transferring from **traditional agricultural policy** to an **integrated sustainable food policy**.
 - Making policies from the perspective of food supply chain
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 - Integrating: **Health, environment, social development, and animal welfare**



Main Policy Tools

1. Bring about a system change in day-care and school catering – “Focussing on children and young people”.
2. Make consumption of animal products globally compatible – “Less and better”.
3. Use price incentives – “Prices should tell the truth”.
4. Ensure health-promoting food consumption for all – “Reducing food poverty”.
5. Provide reliable information – “Enhancing choices”.
6. More sustainable food consumption as the “New normal” – “Calibrating social norms”.
7. Improve services in public institutions – “Making canteen kitchens more sustainable”.
8. Develop and label agricultural systems – “Organic and more”.
9. Strengthen and advance the policy field “More sustainable food consumption” – “Establishing an integrated food policy”.

Implications and conclusions

- Traditional Agricultural Policies with focus on “3 Nong” (Agriculture, Farmer, and Rural) face challenges
- Small-sectorized but importance remains : Externalities and multifunctionality
 - 3F policies: Food, Farmer, Future
- Germany proposed “Integrated Sustainable Food Policy” to replace traditional agricultural policy.
 - Making agricultural policies from the perspective of “Food Supply Chain”
 - Integrating **health, environmental, social development and animal welfare policies** into agricultural policies
 - It paves a way to the future though there is a long way.
- Provides important policy implications for ongoing agricultural policy reform in China for pursuing more “Green”.

- Thanks!