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International Food Security Assessment, 2014-2024

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What Is the Issue?

This report assesses and projects food security of 76 low- and middle-income countries based on two key determinants: food production and import capacity. Domestic food production performance plays the most critical role in the food security of these countries, particularly for those in the Asia and Sub-Saharan Africa regions that depend primarily on locally produced grain supplies. Conversely, the capacity to pay for imports is significant in regions like Latin America and the Caribbean and North Africa that import a large share of their food supplies. To understand how food production and import capacity affect food security, ERS researchers estimated and projected the number of food-insecure people regionally and in each of the 76 developing countries covered in this report for 2014-24.

What Did the Study Find?

Between 2013 and 2014, ERS projects food insecurity for the 76 countries analyzed to improve. The number of food-insecure people is projected to fall 9 percent, from 539 million in 2013 to 490 million in 2014. The share of the population that is food insecure in these countries is expected to decrease from 15.5 percent in 2013 to 13.9 percent in 2014. The distribution gap (the amount of food needed to raise consumption in each income decile to the nutritional target of roughly 2,100 calories per person per day) is projected to decline nearly 23 percent in 2014 to 12.5 million tons, grain equivalent. The distribution gap is a measure of the intensity of food insecurity—the extent to which consumption falls below the nutritional target. The decline in this gap is projected to be much steeper than that of the number of food-insecure people, indicating that the intensity of food security in these countries will lessen in 2014.

The number of food-insecure people in *Sub-Saharan Africa (SSA)* is projected to fall by nearly 13 percent, the greatest decline of all the regions in the study. As a result, the share of population projected to be food insecure falls to 29.2 percent. The biggest changes are projected for Tanzania, Chad, and Madagascar, where 2014 grain production is expected to return to trend levels following below-average output in 2013.

After *North Africa (NA)*, *Asia* is the most food-secure region as 8.8 percent of the population, on average, was food insecure in 2013. The intensity of food insecurity is projected to decrease significantly in 2014 as the decline in the distribution gap, 40 percent, is projected to

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far outstrip the decline in the number of food-insecure people, 3 percent. This result is principally driven by Afghanistan and India.

The food security situation is expected to improve in the *Latin America and Caribbean (LAC)* region as the projected share of population that is food insecure declines from 25.5 percent in 2013 to 22 percent in 2014. Also, a 30-percent projected decline in the distribution gap indicates an improvement in the intensity of food insecurity. Gains in the LAC region are driven by continued strong economic growth, overall positive conditions for crop production, and declining food prices. The countries in the *North African (NA)* region are expected to remain mostly food secure.

Over the next decade, the number of food-insecure people in the 76 countries is projected to grow as the share of population that is food insecure moves from 13.9 percent in 2014 to 14.6 percent in 2024, primarily due to prospects for slow growth in supplies in a few countries. LAC's food security situation, on the whole, is projected to improve as the share of population considered food insecure falls from 22 percent in 2014 to less than 17 percent in 2024. In the LAC region, higher crop production and grain imports are projected to continue to allow more income groups to meet and/or exceed the nutritional target.

Asia's share of population that is food insecure is quite low, projected at 8.5 percent in 2024. However, food insecurity among the population that is considered food insecure is projected to intensify. The distribution gap is projected to jump 66 percent over the next decade. This result is principally driven by Yemen—where the combination of high population growth and import constraints lead to a projected decline in per capita grain availability—and India—where above trend supplies in the 2014 base period lead to slower projected growth through 2024.

The food security situation in SSA is projected to deteriorate, but not severely, as the share of population that is food insecure is projected to rise from 29.2 percent in 2014 to 31.2 percent in 2024. The increases in the number of food-insecure people and the distribution gap nearly match, meaning that there is little measurable intensification in food insecurity, on average. Most SSA countries are projected to continue their path of maintaining or improving food security because of strong growth in agricultural production, and the projected deterioration in the region's overall food security is driven by prospects for insufficient gains in production and import capacity in only a handful of countries.

How Was the Study Conducted?

The International Food Security Assessment model used in this report projects food consumption, food access, and food gaps in low- and middle-income countries through 2024. Food security of a country is evaluated based on the gap between projected domestic food consumption (domestic production plus imports minus nonfood uses) and a consumption target.

All historical and projected data are updated relative to the *International Food Security Assessment, 2013-23* report. Food production estimates for 2013 are based on data from FAO as of March 2014. Historical production data are from FAO and food aid data from the UN World Food Programme (WFP). Financial and macroeconomic data are based on World Bank data as of March 2014. Projected macroeconomic variables are either based on calculated growth rates for the 1990s through 2012 or are taken from International Monetary Fund (IMF) and World Bank projections. Projections of food availability include food aid, with the assumption that each country will receive the 2010-12 average level of food aid throughout the next decade.