



A report summary from the Economic Research Service

Global Food Assessment, 2026–36

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Key Points

- Total grain demand (food and nonfood) in Global Food Assessment (GFA) countries is projected to rise from 1.1 billion tons in 2026 to 1.4 billion tons in 2036 (2.1 percent annual increase), driven by Asia and Sub-Saharan Africa. Grain production is projected to increase more slowly (1.6 percent annually), widening the demand-supply gap.
- In 2026, based on macroeconomic assumptions at the time, 19.5 percent of the population (884.4 million people) in the 83 GFA countries are estimated to be food insecure. By 2036, the number of food-insecure people is projected to decline by 33.4 percent, reaching 589 million individuals (11.4 percent of the GFA population).
- Between 2026 and 2036, food demand in GFA countries is projected to rise by nearly 25 percent. Sub-Saharan Africa (SSA) is projected to see the fastest food demand growth rate at 3.3 percent annually, leading to increased dependence on imported grains and higher-value foods.
- In the GFA countries, the Implied Additional Supply Required (IASR) is projected to rise from 325.6 million tons to 441.7 million tons over the decade, indicating a widening gap between total grain demand and domestic production.
- Asia's food supply gap is projected to grow due to income and population growth, leading to greater reliance on imports for feed ingredients and animal products. The Former Soviet Union's (FSU) expanding grain surplus will strengthen its position as a leading global supplier, potentially lowering prices and intensifying export competition.
- In GFA's Latin America and the Caribbean region, rising grain demand driven by income growth and urbanization is projected to increase reliance on imports. Similarly, the Middle East and North Africa region is projected to face a widening grain deficit due to slow production growth and high cereal dependence, making it more susceptible to global price shocks.

Why Does This Matter?

This report helps the U.S. Government, U.S. Department of Agriculture (USDA), U.S. farmers, ranchers and other stakeholders in assessing food demand and food security trends over the next decade in 83 low- and middle-income countries in 5 regions: Asia, Former Soviet Union, Latin America and the Caribbean, Middle East and North

Africa, and Sub-Saharan Africa. Understanding global food demand helps U.S. farmers and agribusinesses plan for future production and trade flows. The report also provides data and analysis for developing international markets for U.S. agricultural commodities.

Global food insecurity, defined by the lack of consistent access to sufficient, safe, and nutritious food for an active and healthy life, is a multifaceted challenge. Food security is assessed through four integrated pillars: availability, access, utilization, and stability. Factors such as nutritional knowledge and food safety (utilization) and long-term resilience to price and income shocks (stability) are critical but distinct analytical subsets.

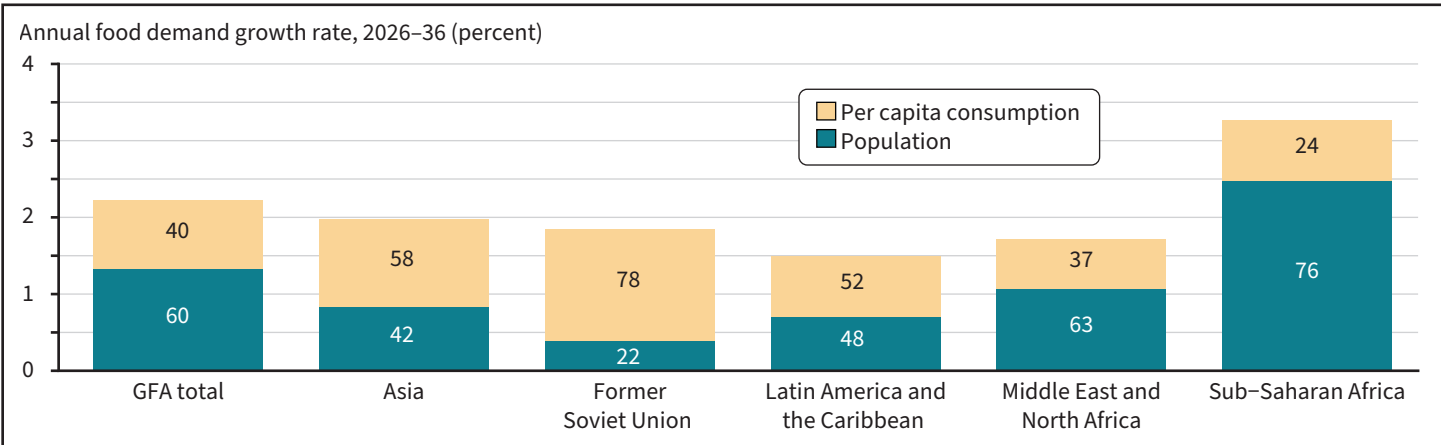
This report focuses specifically on the availability (agricultural production and market supply) and access (economic and physical ability to meet demand) dimensions of food security. Factors affecting food access include personal income, food prices, and economic inequality. Food security can be worsened by declining income levels, high food prices, and/or food supply shocks.

A Few More Details

The 2026 report is based on observed country-level domestic commodity prices through December 2025 and macro-economic projections from September 2025 to estimate and project the potential impact on food insecurity levels. It uses July 2025 assumptions for international prices for wheat, sorghum, corn, and vegetable oil, and January 2025 assumptions for the rice price.

The USDA, Economic Research Service (ERS) demand-driven GFA model projects food demand and food gaps through 2036. Food insecurity for each country is evaluated by estimating the share of the population that is unable to reach a caloric threshold of 2,100 kilocalories per person per day. The intensity of food insecurity for those falling below the minimum caloric target is measured by the gap between projected food demand and this caloric threshold. Food demand is expressed in grain equivalents based on caloric content, allowing aggregation across four food groups: the primary grain consumed, other grains, roots and tubers, and all other food. Average per capita food consumption data are from the Food and Agriculture Organization of the United Nations (FAO) Food Balance Sheets and FAO’s Global Information Early Warning System’s (GIEWS), Country Cereal Balance Sheet, January 2026 dataset. Observed domestic prices are from the FAO-GIEWS Food Price Monitoring and Analysis Tool. Tariff data are from the World Bank’s World Integrated Trade Solution. Incomes, exchange rates, and Consumer Price Indexes are from the USDA, ERS International Macroeconomic Data Set (USDA, ERS, 2025). New international price projections for wheat, sorghum, corn, and soybean oil were sourced from the University of Nevada Experiment Station in collaboration with the University of Missouri Food and Agricultural Policy Research Institute (FAPRI-NEV, 2025). Rice prices are from the University of Arkansas’ Agricultural Experiment Station (Durand-Morat & Mulimbi, 2025). Consequently, the 2025 food demand and food security results presented in this report were updated using these new international price projections.

Contrasting drivers of food demand growth (2026–36): Population in Sub-Saharan Africa, per capita consumption in other regions



Source: USDA, Economic Research Service estimation using the Global Food Assessment (GFA) model.

ERS is a primary source of economic research and analysis from the U.S. Department of Agriculture, providing timely information on economic and policy issues related to agriculture, food, the environment, and rural America.