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Global Food Assessment, 2026–36

Yacob Abrehe Zereyesus, Lila Cardell, Jarrad Farris, Kayode Ajewole, Michael E. Johnson, William Johnson, Jessie Lin, Constanza Valdes, and Wendy Zeng

Abstract

This annual report is published by the U.S. Department of Agriculture, Economic Research Service before September 30 each year as required by section 408(b) of Public Law 480 and 7 U.S.C. 1736b of Public Law 95–98. Based on macroeconomic assumptions completed in September 2025, this report uses the Global Food Assessment (GFA) model to evaluate food demand in 83 low- and middle-income countries and monitor each country's ability to meet this demand (food and non-food) through its production and local sources. The gap between local food availability and food demand helps identify potential markets for U.S. agricultural products. Grain demand in GFA countries is projected to rise from 1.1 billion tons in 2026 to 1.4 billion tons by 2036, driven mainly by increased needs in Asia and Sub-Saharan Africa (SSA). However, with grain production growing at only 1.6 percent annually, it will not meet the 2.1 percent annual increase in demand, widening the supply gap. In 2026, 19.5 percent of the population (or 884.4 million people) across 83 of the GFA countries are estimated to be food insecure, measured by the percentage of people consuming less than 2,100 kilocalories per person per day. By 2036, the number of food-insecure people in these countries is projected to decline by 33.4 percent, reaching 589 million individuals (or 11.4 percent of the GFA population), due to sustained income growth and stable commodity prices. While the Former Soviet Union (FSU) is projected to maintain a surplus in grain production, other regions are expected to face widening deficits. This situation will necessitate a 36-percent rise in the Implied Additional Supply Required from 325.6 million tons in 2026 to 441.7 million tons in 2036. Asia's food supply gap is projected to grow due to income growth, population expansion, and increased demand for animal products. In Latin America and the Caribbean, rising grain demand driven by income growth and urbanization is projected to result in increasing reliance on imports. Similarly, the Middle East and North Africa (MENA) region is projected to experience a widening grain deficit due to slow production growth and high cereal import dependence. Sub-Saharan Africa is projected to face rising food demand driven by population growth, leading to increased dependence on imported grains and higher-value foods. These broad economic trends do not account for localized shocks which may continue to exacerbate food insecurity in vulnerable regions of SSA, MENA, and the Caribbean (e.g., Haiti), regardless of global averages. The projections do not consider the impacts of unforeseen future events—such as weather shocks, armed conflict, and political and economic instability—that may have occurred after the projections were completed.

Keywords: Calories, food demand, food insecurity, food prices, trade



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Preface

This annual report is published by the U.S. Department of Agriculture, Economic Research Service before the end of each fiscal year as required by section 408 (b) of Public Law 480 and 7 U.S.C. 1736b of Public Law 95–98. The report continues the series of Global Food Assessments (GFA) in low- and middle-income countries, initiated in the late 1970s by Congressional request. The report focuses on assessing food demand in 83 low- and middle-income countries and monitors each country's ability to meet this demand from its own production and local sources. The resulting gap between local food availability and food demand helps identify potential markets for U.S. agricultural products.

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A report summary from the Economic Research Service

Global Food Assessment, 2026–36

Yacob Abrehe Zereyesus, Lila Cardell, Jarrad Farris, Kayode Ajewole, Michael E. Johnson, William Johnson, Jessie Lin, Constanza Valdes, and Wendy Zeng



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.

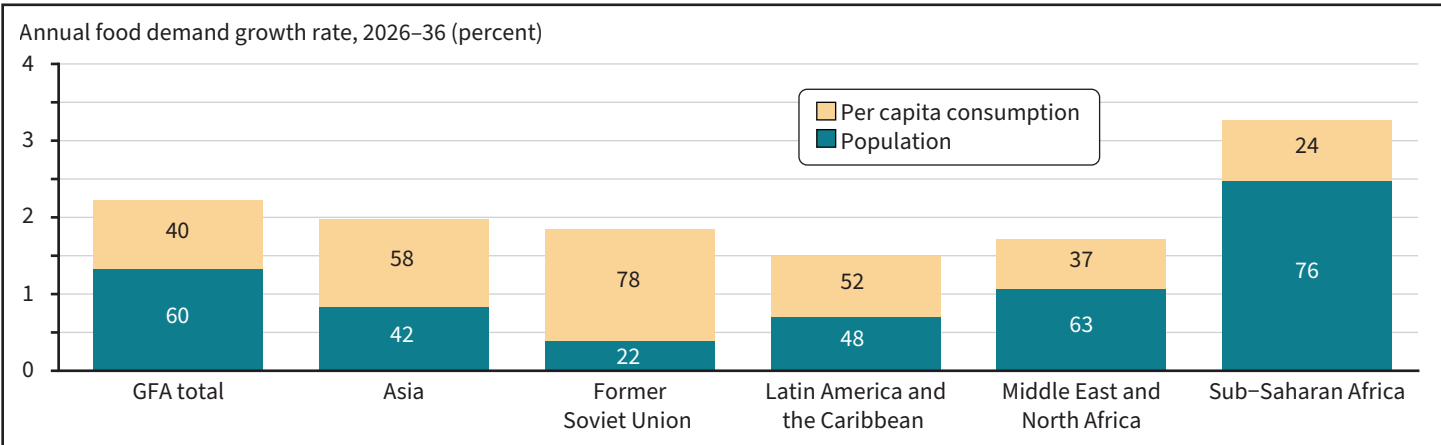
This report focuses specifically on the availability (agricultural production and market supply) and access (economic and physical ability to meet demand) dimensions of food security. Factors affecting food access include personal income, food prices, and economic inequality. Food security can be worsened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

Global Food Assessment, 2026–36

Introduction

The U.S. Department of Agriculture, Economic Research Service (ERS), Global Food Assessment (GFA)¹ projects food demand and food security trends in 83 low- and middle-income countries² for the current year and the next 10 years.³ GFA estimates total and per capita food demand and compares the estimations against a global caloric threshold of 2,100 kilocalories⁴ (kcal) per person per day. This threshold, set by the United Nations,⁵ represents the average calorie level necessary to sustain a healthy and active lifestyle. 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 and is based on caloric content to allow aggregation across four separate food groups: the primary grain consumed in the country, other grains, roots and tubers, and all other food.

By understanding global food demand and markets, U.S. farmers and agribusinesses can understand global trends, risks, and opportunities and be able to strategically plan for future markets and trade. This report relies on assumptions about key macroeconomic variables (e.g., income growth, Consumer Price Indexes, and exchange rates) and population figures from the USDA, ERS's International Macroeconomic Data Set (USDA, ERS, 2025). 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. 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

¹ The results from the GFA model are not directly comparable with other analyses, such as the Food and Agriculture Organization of the United Nations' (FAO) modeling work for its report on the State of Food Insecurity (SOFI), which has a broader country coverage and different methodology. Because GFA also uses aggregate data, GFA cannot be directly compared with evaluations using household-level surveys. For a more in-depth discussion and comparison of USDA's GFA model with other modeling approaches, see Tandon et al. (2017). It is also difficult to extrapolate results to the Food Security Information Network's (FSIN) report on global crises. That report uses the five-phase food insecurity measure, which is a consensus approach across international organizations and development practitioners directly responding to major crises. Nevertheless, this assessment highlights regions and populations at risk of food insecurity and provides country- and regional-level drivers of food insecurity that are comparable with other analyses.

² The GFA countries are Afghanistan, Algeria, Angola, Armenia, Azerbaijan, Bangladesh, Benin, Bolivia, Burkina Faso, Burma, Burundi, Cabo Verde, Cambodia, Cameroon, Central African Republic, Chad, Colombia, Congo, Cote d'Ivoire, Democratic People's Republic of Korea, Democratic Republic of the Congo, Djibouti, Dominican Republic, Ecuador, Egypt, El Salvador, Eritrea, Eswatini, Ethiopia, Gambia, Georgia, Ghana, Guatemala, Guinea, Guinea-Bissau, Haiti, Honduras, India, Indonesia, Iran, Jamaica, Kenya, Kyrgyzstan, Laos, Lebanon, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Moldova, Mongolia, Morocco, Mozambique, Namibia, Nepal, Nicaragua, Niger, Nigeria, Pakistan, Peru, Philippines, Rwanda, Senegal, Sierra Leone, Somalia, South Sudan, Sri Lanka, Sudan, Syria, Tajikistan, Tanzania, Togo, Tunisia, Turkmenistan, Uganda, Ukraine, Uzbekistan, Vietnam, Yemen, Zambia, and Zimbabwe.

³ Not all low- and middle-income countries with significant food deficits are included in the assessment due to a lack of data on key metrics, such as average caloric consumption, prices, or macroeconomic figures.

⁴ A kilocalorie is the same as 1 Calorie. A kilocalorie is the amount of heat required to raise the temperature of 1 kilogram of water 1 degree Celsius.

⁵ The 2,100-kilocalorie per capita per day threshold was an internationally agreed upon level set by the United Nations as the recommended level of dietary energy intake for a healthy, well-nourished individual and is an average across sex, age, region, and activity level (FAO, 2004).

Research Institute (FAPRI-NEV, 2025). Rice prices are from the University of Arkansas' Agricultural Experiment Station (Durand-Morat & Mulimbi, 2025).⁶

The macroeconomic, trade, consumption, and production assumptions, as well as domestic and international price projections, were completed in 2025. Consequently, these projections do not account for the recent geopolitical and economic developments in the Middle East. Furthermore, the projections do not consider the impacts of unforeseen future events—such as weather shocks, armed conflict, and political and economic instability that may have occurred after the projections were completed. Over the next decade, food security is projected to improve for most countries covered by the assessment, although regional and subregional disparities remain. Key findings for GFA countries include:

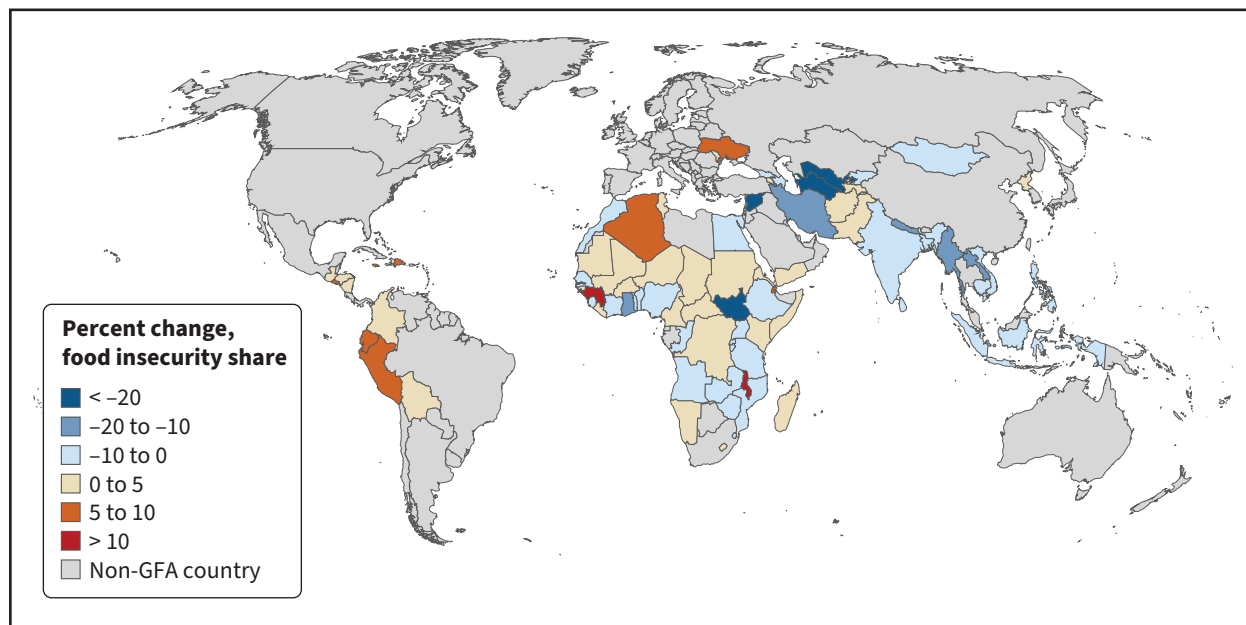
- Total grain demand (food and nonfood) in GFA countries is projected to grow from about 1.1 billion tons in 2026 to 1.4 billion tons in 2036 (2.1 percent annually), with Asia and Sub-Saharan Africa driving most of the increase. Production grows more slowly (1.6 percent annually), widening the demand-supply gap.
- In 2026, 19.5 percent of the population (884.4 million people) across 83 countries are estimated to be food insecure. The majority of food insecure people are in Asia (359.4 million) and Sub-Saharan Africa (412.6 million), making up 87.3 percent of the total.
- Between 2026 and 2036, food demand across GFA countries is projected to increase by nearly 25 percent, with the growth driven by rising per capita food consumption (40 percent of total growth) and population increase (60 percent of total growth), and Sub-Saharan Africa experiencing the fastest growth rate at 3.3 percent annually.
- By 2036, the number of food-insecure people is projected to decline by 33.4 percent, reaching 589 million individuals (or 11.4 percent of the GFA population).
- While the Former Soviet Union⁷ is expected to maintain a grain surplus due to production growth, all other regions are projected to face increasing food availability deficits because production growth lags behind demand. The Implied Additional Supply Required (IASR), a proxy for import needs and other sources, is projected to rise by 36 percent, from 325.6 million tons in 2026 to 441.7 million tons in 2036.
- Asia's food supply gap is projected to grow due to income growth, population expansion, and increased demand for animal products, leading to a greater reliance on imports. Concurrently, the Former Soviet Union's expanding grain surplus will solidify its role as a leading global supplier, which is expected to lower prices and intensify export competition.
- In the Latin America and the Caribbean region, rising grain demand driven by income growth and urbanization is projected to result in increasing reliance on imports. Similarly, the Middle East and North Africa region is projected to experience a widening grain deficit due to slow production growth and high cereal dependence, making it more susceptible to global price shocks. Sub-Saharan Africa is projected to face rising food demand driven by population growth, leading to an increased dependence on imported grains and higher-value foods.

⁶ Long term international commodity prices are from FAPRI-NEV (2025) and Durand-Morat & Mulimbi (2025). These projections are used to project medium-term domestic price trends, using data from Food Price Monitoring and Analysis (FPMA) dataset of the Global Information and Early Warning System (GIEWS) of the Food and Agriculture Organization of the United Nations (FAO).

⁷ The term Former Soviet Union (FSU) is used for consistency with other USDA dataset aggregations including the USDA, Foreign Agricultural Service's Production, Supply and Distribution estimates which is used as an input in this report.

Figure 1

Reduced food insecurity rates in most Global Food Assessment (GFA) countries in 2026, relative to 2025, are associated with an increase in per capita Gross Domestic Product and a decrease in food price inflation

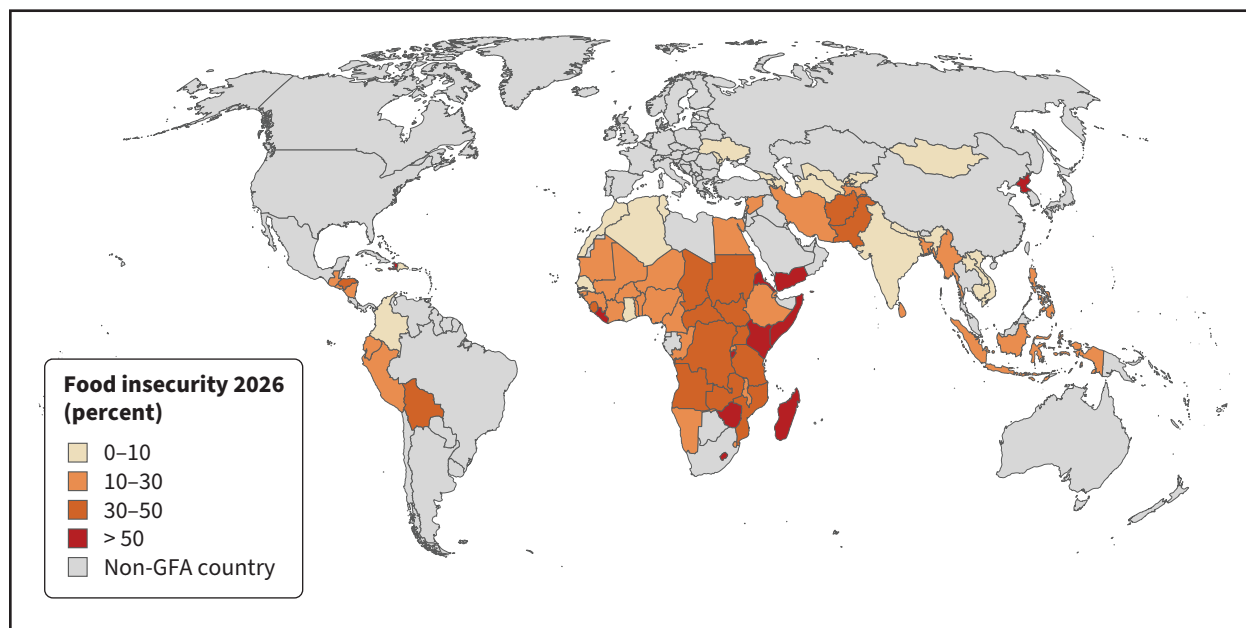


Note: The 2026 food insecurity shares are compared to re-estimated 2025 values using the same updated 2025 data as used to estimate 2026.

Source: USDA, Economic Research Service based on results from the Global Food Assessment model.

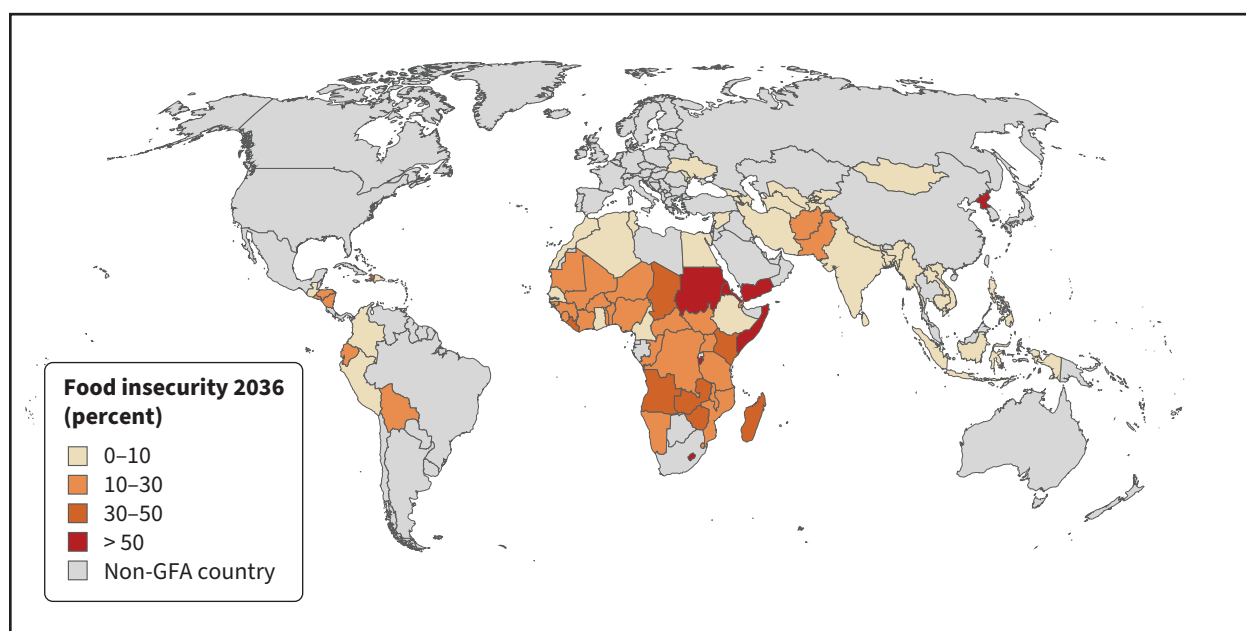
Figure 2

Share of Global Food Assessment (GFA) population estimated to be food insecure, 2026



Source: USDA, Economic Research Service based on results from the Global Food Assessment model.

Figure 3

Share of Global Food Assessment (GFA) population projected to be food insecure, 2036

Source: USDA, Economic Research Service based on results from the Global Food Assessment model.

Gross Domestic Product Expectations in the Global Food Assessment Countries

The macroeconomic projections for the countries covered in this report⁸ show a stable outlook for real Gross Domestic Product (GDP)⁹ growth in 2026 and for the rest of the decade. Global disinflation continues, meaning that prices are no longer rising as rapidly as during the inflation peak in 2022, while central banks in many economies have continued easing monetary policy to help encourage economic growth, although monetary policies in developing countries have remained more cautious (IMF, 2025b). However, fiscal support, lending, and debt relief continue to support low- and middle-income economies, such as from the International Monetary Fund (IMF) and the International Development Association (IDA) (IDA, 2025; IMF, 2025a).

Aggregate GDP for the countries included in the GFA report is projected to reach 12.6 trillion in 2026 and further increase to 19.9 trillion by the end of 2036 (appendix C). GDP growth is estimated at 4.8 percent in 2026, slightly greater than the 4.7 percent average during 2023–25, and eases slightly to a 4.6 percent annual average for the rest of the decade.¹⁰

⁸ A full list of the GFA countries and respective macroeconomic variables is provided in appendix C.

⁹ GDP and per capita GDP are expressed in real terms, specifically in 2017 U.S. dollars, throughout the GFA report. Values are obtained by rebasing GDP with a consumer price index (CPI) and real exchange rates adjusted to the 2017 base year.

¹⁰ All growth estimates over the decade or past 2-year periods are calculated using the compound annual growth rate (CAGR) to provide a smoothed annual rate of return throughout the period.

Regionally, GDP growth rates in two of the five GFA regions are estimated to increase in 2026 compared to 2023–25. The Sub-Saharan Africa region will see GDP growth rise to 4.3 percent in 2026, up from 3.9 percent during the previous 2 years, with the strongest gains in the East Africa subregion, which is projected to grow 5.0 percent in 2026 compared to 2.9 percent in 2023–25. Over the next decade, Sub-Saharan African growth moderates to a 3.8 percent annual average. The Latin America and the Caribbean region also shows a modest increase to 2.7 percent GDP growth in 2026, compared to 2.5 percent in 2023–25. Within the Latin America and the Caribbean region, the Central America subregion leads at 3.3 percent growth in 2026, a slight increase from 3.1 percent in 2023–25. The South America subregion picks up to 2.6 percent growth in 2026 from 2.2 percent, with Colombia expected to grow 3.2 percent, up from 2.1 percent during 2023–25. The Caribbean subregion, however, shows a decline to 2.8 percent growth in 2026 from 3.3 percent in 2023–25 (appendix C).

GDP growth in the other three regions is expected to remain largely steady or moderate slightly in 2026 compared to the prior 2 years. The Asia region shows stable growth at 5.7 percent in 2026, unchanged from the 2023–25 average. Over the next decade, growth eases to a 5.4 percent annual average. The Former Soviet Union region shows a more notable decrease to 4.1 percent growth in 2026 compared to the 4.7 percent average during 2023–25. Over the next decade, growth stabilizes at 4.2 percent annual average, with Moldova, Ukraine, and Uzbekistan all projected to see higher growth rates over the decade than in 2026. Ukraine is expected to grow 2.5 percent in 2026, with projected growth rising to a 2.9 percent annual average from 2026 to 2036. Finally, the Middle East and North Africa region is expected to experience a slight increase in growth at 2.6 percent in 2026, compared to 2.5 percent in 2023–25, before stabilizing at a 2.7 percent annual average from 2026 to 2036 (appendix C).

Population for all the GFA countries is estimated at 4.5 billion in 2026, with a 1.3 percent annual average growth rate for the next decade. The total population is projected to reach 5.2 billion in 2036. Ukraine continues to foresee one of the largest drops in population totals from 2026 to 2036 due to the Russian military invasion and outward migration (Operation Data Portal, 2026). Other countries estimated to have negative population growth rates over the next decade are also located in the Former Soviet Union region, including Moldova, Armenia, and Georgia (appendix C).

In 2026, per capita GDP across the GFA countries will reach \$2,785. Per capita GDP growth holds steady at 3.3 percent in 2026, in line with growth during 2023–25, and is projected to remain stable at 3.3 percent annually over the next decade, with an estimated per capita GDP of \$3,844 in 2036 (table 1 and appendix C).

In the Asia region, per capita GDP is estimated above the average level of all GFA countries at \$3,063 in 2026, with the highest growth rate among all regions of 4.7 percent, unchanged from the previous 2-year average. This is driven by the South Asia subregion's growth of 4.9 percent in 2026. The Asia region's per capita GDP growth will ease slightly over the next decade to 4.5 percent annually. In the Former Soviet Union region, which is comprised primarily of middle-income countries, per capita GDP is slightly higher at \$3,402 in 2026. Growth dips to 2.8 percent in 2026 before recovering to 3.7 percent annually for the rest of the decade, reflecting strengthening long-term prospects across several Former Soviet Union economies. The Latin America and Caribbean region has the highest per capita GDP among the GFA regions at \$6,167, with a modest per capita GDP growth of 1.9 percent in 2026 that increases slightly to 2.1 percent on average annually over the next decade. In the Middle East and North Africa region, per capita GDP remains above the GFA average at \$3,884 in 2026, but its projected growth rate is the lowest among the GFA regions: 1.3 percent in 2026 and 1.6 percent over the next decade. Finally, the Sub-Saharan Africa region continues to show the lowest per capita GDP levels at \$1,350 in 2026. Per capita GDP growth picks up to 1.6 percent in 2026, an improvement from 1.2 percent over the previous 2 years, though it is projected to moderate to 1.3 percent over the next decade (appendix C).

The macroeconomic projections for GDP, inflation, and exchange rates are developed using several forecasting services, including the publicly available projections from the World Bank’s World Development Indicators and the IMF’s World Economic Outlook. Additional sources of data include U.S. Government and international agency projections, USDA, Economic Research Service regional and country experts, and private forecast services. The projections do not consider the impacts of certain types of possible unknown events in the future, such as production shocks, armed conflict, and economic instability. These macroeconomic projections were completed using data from September 2025 based on expectations at that time.

Table 1

Inflation-adjusted per capita Gross Domestic Product (GDP) in Global Food Assessment (GFA) regions, 2026 and 2036

Region				Annual growth rate	
	2023–25 (average)	2026	2036	(2025–26)	(2026–36)
	U.S. dollars, 2017			Percent	
GFA total	2,611	2,785	3,844	3.3	3.3
Asia	2,796	3,063	4,764	4.7	4.5
Former Soviet Union	3,208	3,402	4,912	2.8	3.7
Latin America and the Caribbean	5,947	6,167	7,558	1.9	2.1
Middle East and North Africa	3,793	3,884	4,549	1.3	1.6
Sub-Saharan Africa	1,313	1,350	1,534	1.6	1.3

Note: Regions include only countries covered by the Global Food Assessment.

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

International Food Price Projections and Trends

International agricultural commodity prices for staple grains are estimated to remain stable in 2026, due to ample global supplies (as a result of favorable weather conditions), long-term productivity growth, and increased supply chain diversification (Agricultural Market Information System (AMIS), 2026). This stability is in contrast to record high prices between 2021 and 2023 associated with the Russian military invasion of Ukraine and Coronavirus (COVID-19) pandemic-era supply chain disruptions. However, vegetable oil prices, which spiked in 2022 and then declined in 2024, are estimated to rise in 2026 as consumption outpaces production (FAO, 2025; figure 4).

Over the next 10 years, international commodity prices are projected to remain relatively stable due to abundant supplies and lower food and feed costs (figure 4). The international price projections for wheat, sorghum, corn, and vegetable oil are based on macroeconomic assumptions as of July 2025

(FAPRI, 2025), while the price projections for rice are based on macroeconomic assumptions as of January 2025 (Durand-Morat & Mulimbi, 2025).^{11 12}

Wheat prices are estimated to decline slightly in 2026 due to abundant supplies, with record production of 819.2 million metric tons projected for the 2025/26 marketing year due to higher yields in the European Union, Russia, and India (FAO, 2025). Corn prices are estimated to continue declining in 2026 due to a record harvest in the United States. Global production of coarse grains, which includes corn, barley, and sorghum, is projected to be 1,614 million metric tons for the 2025/26 marketing year (FAO, 2025). In 2026, rice prices are projected to continue declining from the 2023 high, which was associated with export restrictions by the Indian Government and production shortfalls due to El Niño, and remain stable over the next 10 years (figure 4). Vegetable oil prices, which peaked in 2022, are projected to rise in 2026 and then slowly decline over the next 10 years to pre-COVID-19 pandemic levels. While global vegetable oil production is projected to increase, driven by record harvests in Brazil, global vegetable oil consumption is also rising, resulting in higher prices in 2026 (FAO, 2025; figure 4).

International and domestic food prices are connected in the GFA model through trade.¹³ In 2026, the domestic price of the primary grain consumed is projected to change between -9 percent and 3 percent, after large price decreases during 2023–25 (following the 2022 Russia-Ukraine war price spike) (appendix D). The largest increases in the domestic major grain price in 2026 are projected in net-importing countries in the Middle East and North Africa (e.g., Syria and Iran) and Former Soviet Union (e.g., Uzbekistan and Turkmenistan) regions. Major grain prices are projected to remain stable throughout the next 10 years, which contributes to improvements in food security as consumers can afford staple grains which comprise a large portion of their diet (appendix D).

In 2026, the domestic price for vegetable oils which represents all other foods in the GFA model¹⁴ is projected to stay flat or increase in 76 of the 83 GFA countries. However, a sharp decline in the domestic price of vegetable oils is projected in Syria, where the real exchange rate is estimated to decrease by 42.2 percent between 2025 and 2026, implying that imported goods, such as vegetable oil, are projected to be relatively cheaper in 2026. Conversely, in Malawi, vegetable oil prices are projected to rise 19 percent in 2026, associate with double-digit increases in both the real exchange rate and consumer price index (appendix D). Overall inflation growth, measured by the consumer price index, is projected to remain under 10 percent in 66 of the 83 GFA countries. Lower inflation is associated with better food security outcomes in 2026 due to improved food affordability (appendix D).

¹¹ Previous GFA reports have relied on international price projections from the USDA, ERS International Baseline Projections, which were not conducted for 2026. For this report, two new sources of international price projections were used: wheat, sorghum, corn, and soybean oil prices from the University of Nevada Experiment Station in collaboration with the University of Missouri's Food and Agricultural Policy Research Institute (FAPRI-NEV, 2025) and rice prices from the University of Arkansas' Agricultural Experiment Station (Durand-Morat & Mulimbi, 2025).

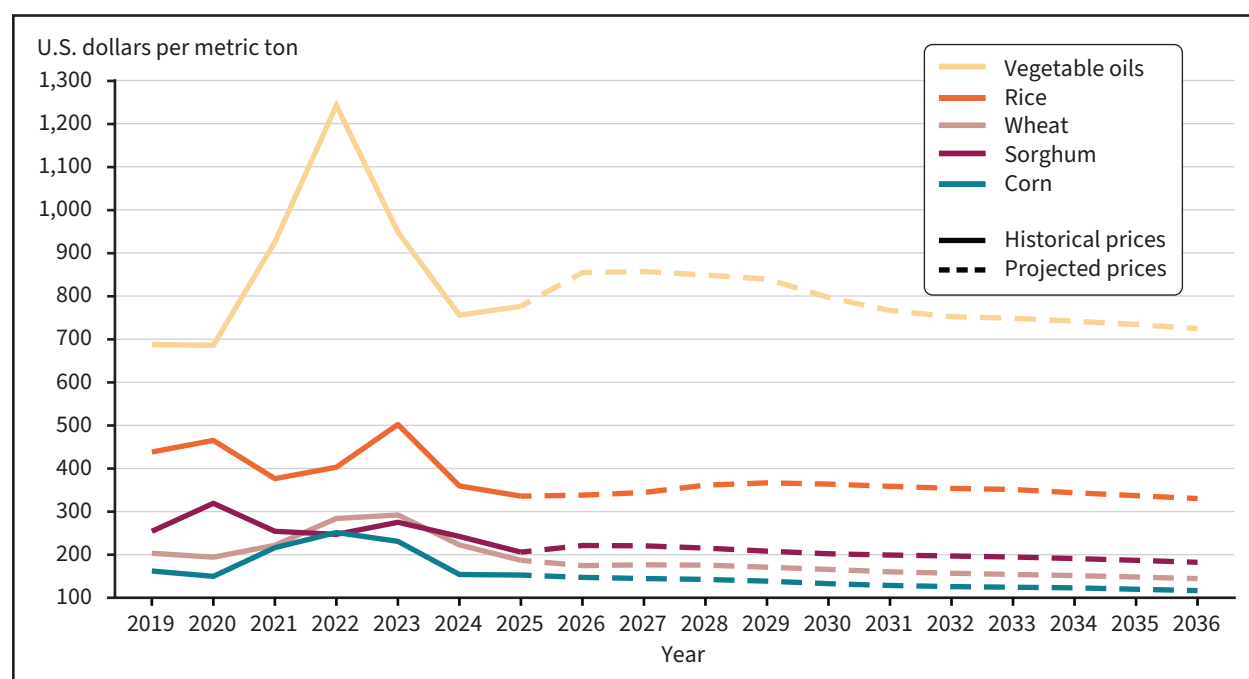
¹² The international price projections do not incorporate any events after the aforementioned dates, including the conflict in the Middle East and North Africa region.

¹³ See appendix A for details about the international price transmission equations used for GFA countries in the GFA demand model.

¹⁴ See the box "How Food Security is Assessed: Method and Definitions" for more on the four food group categories and grain equivalent conversions and prices.

Figure 4

International food prices in 2026 are estimated to have fallen to near pre-COVID-19 pandemic levels



Note: Value in 2017 U.S. dollars.

Source: USDA, Economic Research Service estimation using the Global Food Assessment model and long-term international commodity prices from FAPRI-NEV (2025) and Durand-Morat & Mulimbi (2025).

Grain Demand, Production Trends, and the Implied Additional Supply Required

The difference between total grain demand and grain production by the GFA countries represents an estimate of the shortfall/surplus in food and feed availability, which is referred to as the Implied Additional Supply Required (IASR).¹⁵ Total grain demand comprises food demand and other uses (seed, feed, processing, and waste).

In 2026, total grain demand for these countries is estimated at nearly 1.1 billion metric tons. This is projected to increase by 2.1 percent annually, reaching 1.4 billion metric tons by 2036. Regional growth rates vary. Asia's total grain demand is projected to rise from 693.3 million tons in 2026 to 845.8 million tons in 2036 (2 percent annual growth). Sub-Saharan Africa's total grain demand is projected to grow from 218.8 million tons to 295.7 million tons over the same period (3.1 percent annually). The Former Soviet Union and Middle East and North Africa regions are projected to have the lowest growth rates, at 0.6 percent and 1.2 percent per year, respectively. Specifically, the Former Soviet Union's total grain demand is projected to increase from 49.4 million tons to 52.6 million tons, while the Middle East and North Africa's is projected to grow from 136.7 million tons to 154.2 million tons. The Latin America and the Caribbean region's total grain demand is projected to grow from

¹⁵ IASR is different from the Food Gap measure. Unlike the IASR, which refers to the volume of grain needed beyond a country's domestic production to satisfy total grain demand (both feed and non-feed) for the entire population, the Food Gap measure focuses on the caloric deficit required to bring undernourished populations up to the 2,100-calorie threshold.

55.2 million tons to 67.7 million tons. Food demand, the largest component of total grain demand, is projected to grow at 2.2 percent per year for the GFA countries, while demand for other uses (seed, feed, processing, and waste) is projected to grow at 1.6 percent per year (table 2).

Grain production is also projected to grow, but at a slower pace—up 18 percent from 826.2 million tons in 2026 to 972.3 million tons in 2036 (an average of 1.6 percent annually). The projected growth in grain supply is influenced by both yield and area dynamics. Yield growth stems mainly from long-term technological and agronomic advancements. Additionally, farmers respond to the profitability of grain relative to fertilizer costs, which affects short- and medium-term fertilizer returns. Area expansion, on the other hand, occurs at a slower rate. This slow growth is due to the slow response to historical land use, the limited availability of suitable cropland, and the modest responsiveness to profitability signals.

Regional grain production trends vary considerably. While the Former Soviet Union is expected to see a 0.7 percent annual growth in grain production (from 72.9 million tons in 2026 to 78.2 million tons in 2036), this increase will contribute to a surplus in food availability within the region.

However, other regions face significant challenges in food availability. Asia's grain production is projected to grow by 1.6 percent annually, from 542.1 million tons in 2026 to 637.5 million tons in 2036. This increase, however, is projected to fall significantly short of the region's total grain demand, leading to food availability shortfalls. Similarly, Sub-Saharan Africa's grain production is projected to increase from 141.4 million tons in 2026 to 176.1 million tons in 2036 (2.2 percent annually), but this increase will still fall far short of the region's total grain demand. The Middle East and North Africa region is projected to see a 1.6 percent annual growth rate in grain production, increasing from 51.0 million tons in 2026 to 59.8 million tons in 2036. The Latin America and the Caribbean region is projected to experience a 1 percent annual growth rate in grain production, rising from 18.7 million tons in 2026 to 20.7 million tons in 2036. Despite these relatively higher growth rates, both the Middle East and North Africa and Latin America and the Caribbean regions are still projected to face food availability shortages (table 2).

Over the next decade, most regions are projected to see a growing gap between domestic grain production and demand, except for the Former Soviet Union. The global IASR—which provides an estimate of the gap between demand and supply for grains—is projected to increase by 3.1 percent annually, from 325.6 million tons in 2026 to 441.7 million tons in 2036 (a 36 percent total increase). This increase is primarily driven by substantial grain shortfalls in Asia (3.3 percent annual growth) and Sub-Saharan Africa (4.5 percent annual growth) (table 2).

Table 2

Demand for grain is projected to outpace grain production over the 2026–36 period

Region	Food demand		Other demand		Grain production		Implied Additional Supply Required ¹	
	2026	2036	2026	2036	2026	2036	2026	2036
	Million metric tons							
GFA total	858.5	1,070.2	293.3	343.8	826.2	972.3	325.6	441.7
Asia	552.4	672.3	140.8	173.5	542.1	637.5	151.1	208.4
Former Soviet Union	21.6	25.9	27.8	26.6	72.9	78.2	-23.5	-25.6
Latin America and the Caribbean	26.5	30.8	28.7	37.0	18.7	20.7	36.5	47.0
Middle East and North Africa	78.7	93.4	58.0	60.8	51.0	59.8	85.7	94.4
Sub-Saharan Africa	179.3	247.8	39.5	47.9	141.4	176.1	77.3	119.6

GFA = Global Food Assessment.

¹ The implied additional supply required is the gap between total grain demand (food demand plus other demand) and domestic grain production. It represents an estimate of the shortfall/surplus in food and feed availability.

Note: Other grain demand includes seed, feed, waste, and processing.

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

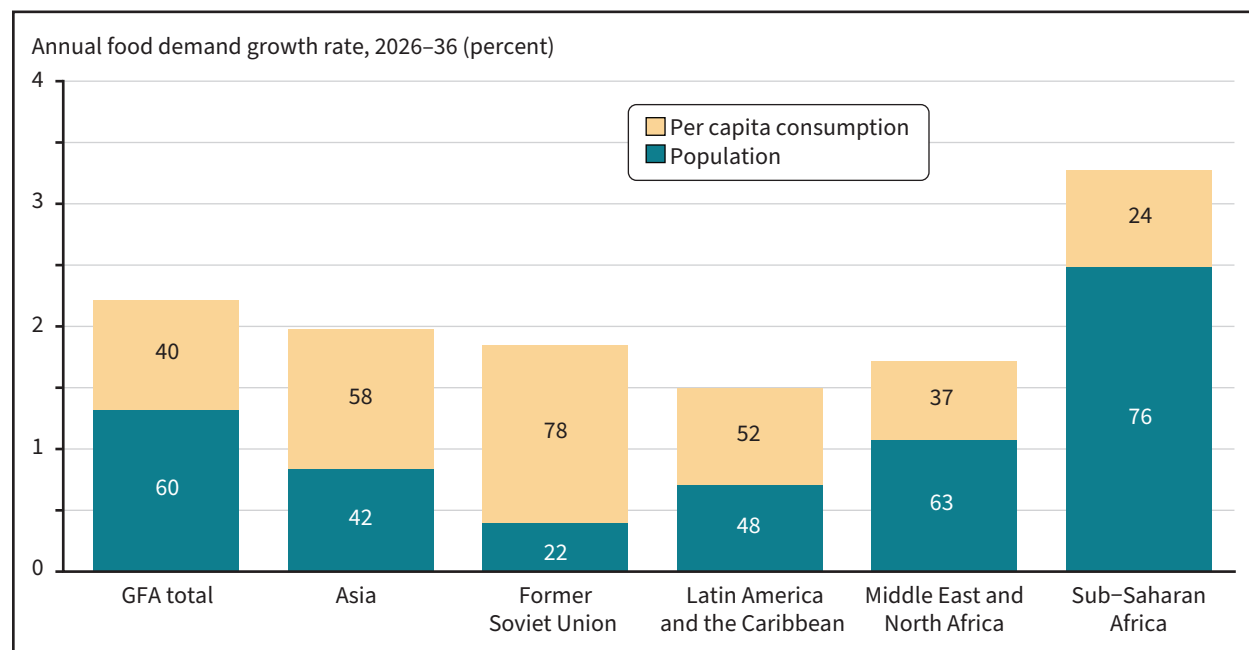
Decomposition of Regional Food Demand Growth

Between 2026 and 2036, food demand across the GFA countries is projected to increase by nearly 25 percent, from 858.5 million tons to 1,070.2 million tons, averaging 2.2 percent annually. Sub-Saharan Africa is projected to experience the fastest growth with food demand increasing at 3.3 percent per year, from 179.3 million tons in 2026 to 247.8 million tons in 2036. The Middle East and North Africa and Former Soviet Union regions are projected to grow at 1.7 percent and 1.9 percent annually, respectively. Asia, despite a projected growth rate of 2.0 percent annually, will see the largest absolute increase in demand, from 552.4 million tons in 2026 to 672.3 million tons in 2036. The Latin America and the Caribbean region is projected to have the lowest growth in food demand among all regions at 1.5 percent annually (table 2).

Of the projected 2.2 percent annual food demand growth in GFA countries, 0.9 percent (40 percent of the total growth) is attributed to rising per capita food consumption, with the remaining 1.3 percent due to population increase (60 percent of the total growth). Overall, except for Sub-Saharan Africa and the Middle East and North Africa regions, rising per capita food consumption is the primary driver of increased food demand. This is particularly pronounced in the Former Soviet Union region, with 78 percent of the projected food demand growth stemming from higher per capita consumption due to significant income growth that outpaces population growth. Sub-Saharan Africa is a key exception. While it has the highest projected annual food demand growth rate at 3.3 percent, population growth accounts for 76 percent of this increase (figure 5).

Figure 5

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 model.

How Food Security Is Assessed: Method and Definitions

The Global Food Assessment (GFA) projects food demand for 83 low- and middle-income countries—14 in Asia, 9 in the Former Soviet Union, 11 in Latin America and the Caribbean, 8 in the Middle East and North Africa, and 41 in Sub-Saharan Africa. Food is divided into four groups: (1) the major grain consumed in the country; (2) other grains; (3) root crops; and (4) all other food. The GFA model's projections of food demand are expressed in grain equivalents, based on the caloric content of food items to allow for aggregation across food groups. A grain equivalent may be expressed in either kilograms or kilocalories. For example, grains have roughly 3.5 kilocalories per gram, and tubers have about 1 calorie per gram. One ton of tubers is therefore equivalent to 0.29 tons of grain.

The real domestic price in a grain equivalent (expressed per kilocalories) is used to generate price indices for the four food groups: price for the major grain is the same as its own price, whereas the prices of 'other grains', and 'roots and tubers' are the weighted average prices expressed in grain equivalents of each of the food items consumed in the food groups. Prices for 'all other foods' (in grain equivalents) are obtained by using vegetable oil prices as a proxy.

The GFA model analyzes the gap between projected food demand and a caloric threshold of 2,100 kilocalories per capita per day. While food demand is projected for each individual per day, it is assumed to be constant over the given projection year. Food demand is modeled as a function of per capita income, income equality, food prices, observed food consumption, and income and price elasticities.

The following terms are commonly used in the report:

Food consumption—if we assume individuals can meet projected food demand, then food consumption is equal to food demand.

Food access—the facet of food security that reflects economic and physical access to food, relating to consumer income and prices.

Food insecurity—this report identifies food insecurity as when per capita food consumption for an individual is estimated to be less than the caloric threshold of 2,100 kilocalories per person per day. An individual is considered to be food secure if they do not experience food insecurity.

Based on these definitions, this report uses three indicators of food insecurity:

The **share of the population** that is food insecure is defined as the proportion of the population that falls below the caloric threshold of 2,100 kilocalories per capita per day, based on the distribution of food consumption.

The **number of food insecure** people—those who cannot meet the caloric threshold—is based on the total population and the share of the population that is projected to consume less than the caloric threshold.

The **food gap** measures the food needed to raise consumption at every income level to the caloric threshold. In many countries, per capita consumption in the lower income deciles is significantly less than the per capita consumption for the country. In these countries, the distribution gap provides a measure of the intensity of hunger—the extent to which the food security of already hungry people deteriorates because of income declines or other negative economic conditions. This measure can be expressed on a per capita basis (in kilocalories per day) or as an aggregate measure (the total tons of food needed to fill the gap in each country). For more detailed information on the model, see appendix A.

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Regional Coverage and Estimated Food Security Trends

Despite projected growth in Gross Domestic Product (GDP) and lower prices for staple grains in 2026, not all individuals in the countries covered by the Global Food Assessment (GFA) report are able to afford or access sufficient food to meet caloric needs. The GFA model projects food demand as a function of per capita income, income inequality, food prices, observed food consumption, and income and price elasticities and then defines food insecurity by comparing food demand to a caloric threshold of 2,100 kilocalories per capita per day (see box, “How Food Security Is Assessed: Method and Definitions”). In 2026, across all 83 countries covered by the GFA report, 19.5 percent of the total population is estimated to be food insecure in 2026, equivalent to 884.4 million people (table 3).¹⁶

The estimated prevalence of food insecurity varies across the five GFA regions and reflects macro-economic conditions, demographic changes, and domestic food supply. In 2026, Asia (359.4 million people) and Sub-Saharan Africa (412.6 million people) account for 87.3 percent of the total number of food insecure people (884.4 million) covered by the GFA report (figure 6). Latin America and the Caribbean (36.1 million people), the Middle East and North Africa (70.7 million people), and the Former Soviet Union (5.6 million people) account for the remaining 12.7 percent of food insecure people in the 2026 assessment. In 2026, Sub-Saharan Africa has the highest estimated share of the population that is food insecure at 32.5 percent. Sub-Saharan Africa is followed by Latin America and the Caribbean (19.8 percent), the Middle East and North Africa (19.2 percent), and Asia (13.8 percent). In 2026, the lowest prevalence of food insecurity across the five regions is projected in the Former Soviet Union (4.7 percent), which is comprised primarily of middle-income countries (figure 6; table 3).

By 2036, the number of food insecure people is projected to decline in 71 of the 83 countries included in the GFA report. GDP growth is projected to outpace population growth over the next decade, resulting in a 33.4 percent decrease in the number of food insecure people. However, the number of food insecure people in Sub-Saharan Africa is projected to decline by only 6.9 percent due to slower growth in per capita GDP (1.3 percent) associated with higher population growth (2.5 percent) (table 1; appendix C). The number of food insecure people is projected to rise by 2036 for 11 countries in Sub-Saharan Africa and 1 country in the Middle East and North Africa region (Yemen) (appendix B).

The daily caloric food gap measures the intensity of food insecurity for the population that is estimated to be food insecure. In 2026, the food gap ranges from an average of 203 kilocalories per capita per day in the Former Soviet Union to 415 kilocalories per capita per day in Sub-Saharan Africa (appendix B). The median food gap is projected to decline in all regions by 2036, however many countries in Sub-Saharan Africa are projected to maintain caloric deficits above 300 calories per capita per day (figure 7).

¹⁶ The projections are based on macroeconomic assumptions as of September 2025 and do not consider the impacts of certain types of possible unknown events in the future, such as production shocks, armed conflict, and economic instability.

Table 3

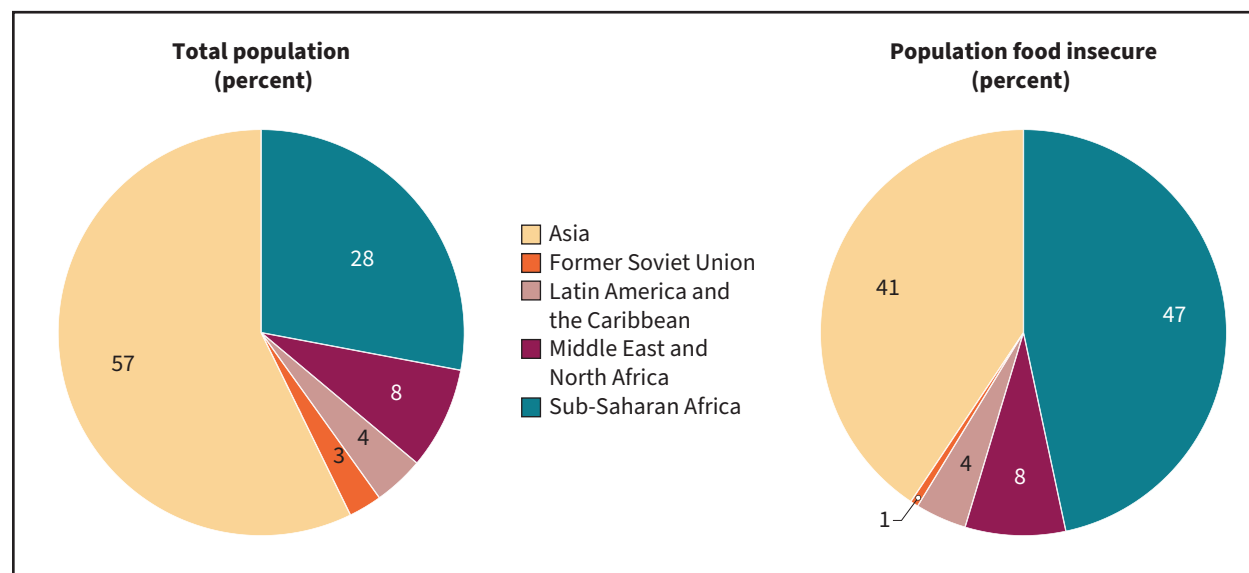
Food insecurity results in Global Food Assessment (GFA) countries, 2026 and 2036

Region	Population		Population food insecure		Share of population food insecure	
	2026	2036	2026	2036	2026	2036
	Million	Million	Million	Million	Percent	Percent
GFA total	4,536.1	5,173.8	884.4	589.0	19.5	11.4
Asia	2,596.8	2,822.0	359.4	130.3	13.8	4.6
Former Soviet Union	119.8	124.6	5.6	0.7	4.7	0.6
Latin America and the Caribbean	182.4	195.8	36.1	20.2	19.8	10.3
Middle East and North Africa	368.5	410.1	70.7	53.7	19.2	13.1
Sub-Saharan Africa	1,268.7	1,621.4	412.6	384.1	32.5	23.7

Note: Regions only include countries that are in the Global Food Assessment.

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

Figure 6

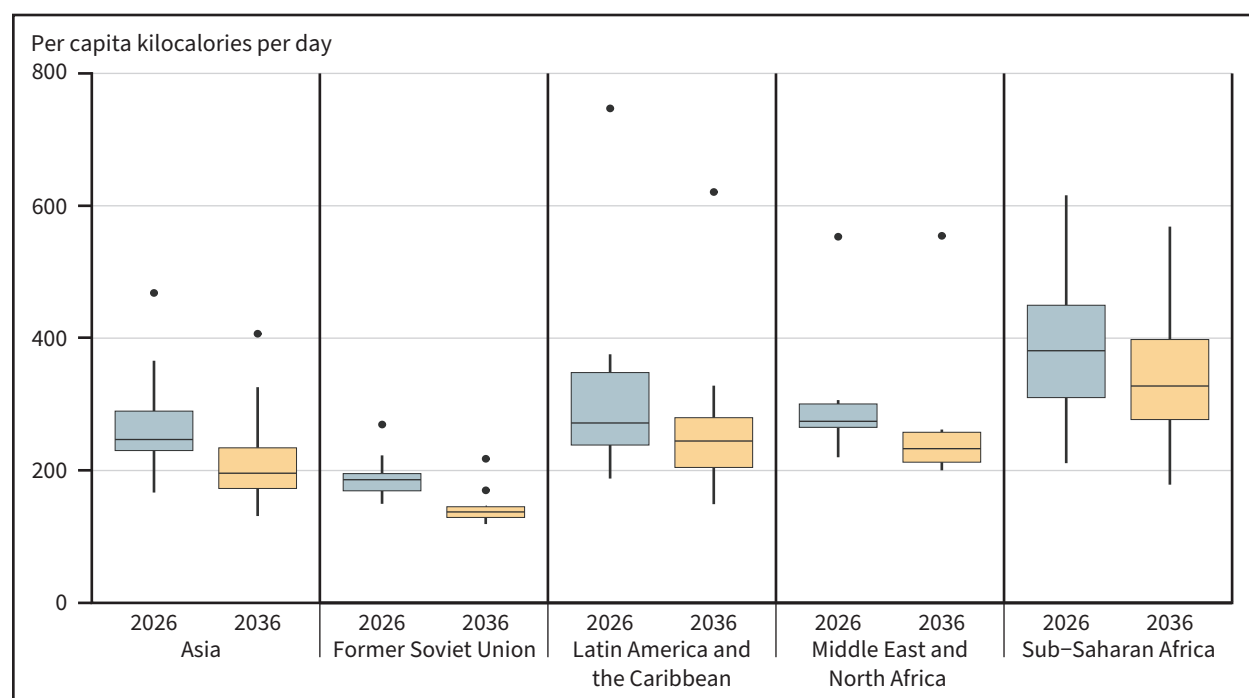
Sub-Saharan Africa comprised 28 percent of the total GFA population, but 47 percent of the number of food insecure people

Note: Regions only include countries that are in the Global Food Assessment.

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

Figure 7

The highest median food gap is in Sub-Saharan Africa



Note: Regions only include countries that are in the Global Food Assessment. The boxplot shows the distribution of the food gap in each region, where the black line represents the median food gap and the points show any countries in the region above the interquartile range (25–75 percent of the distribution). A kilocalorie is the same as 1 calorie. A kilocalorie is the amount of heat required to raise the temperature of 1 kilogram of water 1 degree Celsius.

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

Asia

The Asia region has the highest rate of Gross Domestic Product (GDP) per capita growth of all regions included in this report. Asia's per capita GDP is estimated to grow by 4.7 percent between 2025 and 2026, consistent with its average growth rate from 2023 to 2025. Over the next decade, it is projected to maintain an average annual growth rate of 4.5 percent. India, notable for its large population within the Asia region, is a major contributor to this economic growth. It is estimated that India will achieve 5.8 percent growth in per capita GDP between 2025 and 2026, positioning it as the country with the highest GDP growth rate in the Asia region. India's substantial population underscores its pivotal role in driving economic expansion. Furthermore, India is expected to sustain the highest average per capita GDP growth rate over the next decade, 5.2 percent, which is the second-highest rate among all Global Food Assessment (GFA) countries. Other populous countries in the Asia region, such as Vietnam, Cambodia, Indonesia, and Bangladesh, are also projected to significantly contribute to high per capita GDP growth in the Asia region.

Despite projected economic growth, the Asia region is projected to experience an increasing food supply gap by 2036. On average, the gap is expected to rise from 151.1 million tons in 2026 to 208.4 million tons in 2036 (table 2). This trend indicates that food demand is accelerating more rapidly than domestic production, primarily due to population growth, higher incomes, and urbanization. Consistent with previous research examining the relationship between income growth and animal

protein consumption (Beckman et al., 2025; Drewnowski & Hooker, 2025; OECD-FAO, 2025), rising average income levels combined with population expansion in Asia are expected to lead to a shift towards animal-based proteins in the region. This shift necessitates a multi-sectoral approach to closing the food supply gap, including importing feed ingredients to scale domestic poultry and pork production, as well as importing high-value red meats to meet premium consumer demand.

Among the regions analyzed in this report, Asia ranks second in population growth, following Sub-Saharan Africa. Population growth serves as a primary factor driving the projected increase in grain demand throughout the Asia region. As the population expands, the number of individuals requiring food rises accordingly. The region is expected to experience an average population growth rate of 0.8 percent between 2026 and 2036, resulting in an estimated increase of approximately 225 million people over the next decade. Even in the absence of shifts in production practices or dietary preferences, population growth alone is likely to substantially raise food demand (Sands et al., 2023). Furthermore, higher rates of urbanization correlate with increased food consumption, as urban residents generally have higher incomes and more varied diets than their rural counterparts (Hafi et al., 2023).

Apart from demand for animal source foods such as poultry, pork, and dairy, feed grain demand is also expected to grow due to the increase in domestic livestock production, which requires large quantities of feed (Beckman et al., 2025; Lee & Hansen, 2019). The expansion of livestock and aquaculture industries will also likely translate into substantially increased demand for coarse grains and oilseeds intended for animal feed (Beckman et al., 2025; OECD-FAO, 2025).

In 2026, 13.8 percent of the population in the Asia region is classified as food insecure. This figure is projected to decrease to 4.6 percent by 2036 (table 4; appendix B). While food insecurity rates are expected to decline overall, significant challenges remain in South Asia where countries in the region are projected to contribute substantially to the Asia region's food supply gap. India's extensive food subsidy program and anticipated increases in grain production are expected to help reduce food insecurity. Afghanistan is projected to continue to struggle with high food insecurity due to drought, conflict, and economic issues. Although the average price of major grains is anticipated to decline by 4 percent between 2025 and 2026, Pakistan is expected to continue experiencing high levels of food insecurity. This outcome is attributed in part to domestic wheat flour prices remaining near record highs; wheat, the primary staple food in Pakistan, plays a significant role in this trend (FAO, 2026).

The South Asia subregion is expected to experience the most significant population growth in Asia. India alone is projected to contribute more than 102 million to the anticipated increase of 177 million in the subregion's population by 2036. Because of its high population, the South Asia subregion continues to be a major contributor to food insecurity within the Asia region, estimated to comprise approximately 75.8 percent of the total food-insecure population in Asia by 2026. The subregion ranks among the world's most economically disadvantaged areas, with more than half its population living below the \$3.65 per day poverty threshold for lower-middle-income countries (International Food Policy Research Institute, 2024). The percentage of food-insecure individuals is projected to decline from 14.6 percent in 2025 to 14.3 percent in 2026. By 2036, an estimated 99.2 million people, representing 4.6 percent of the subregional population, are projected to experience food insecurity—a 64.8-percent decrease compared to the 2026 figure of 281.7 million individuals.

While food insecurity in South Asia is projected to decline, the regional per capita food gap is projected to increase from 281 kilocalories (kcal) per capita per day in 2026 to 292 kcal per capita per day in 2036. This rise is driven by Pakistan's disproportionately high food gap of 326 kcal per capita per day in 2036, contributing to 69 percent of the subregion's food-insecure population.

India, the most populous country in South Asia and the world, is anticipated to significantly contribute to reducing food insecurity in Asia by 2036. The number of food-insecure individuals in India is estimated to fall by approximately 8 million by 2026, leaving 141 million people of its 1.43 billion population classified as food insecure. Although India will account for 39 percent of Asia's food-insecure population in 2026, this number is projected to drop to just 7 percent by 2036. Despite the challenges faced by vulnerable rural and urban households due to income disparity and limited access to nutritious food, India's Government operates the world's largest food subsidy program, the Public Distribution System (PDS), which supports more than 800 million people (KPMG, 2025). Additionally, with favorable sowing conditions compared to both the previous year and the 5-year average, rice, maize, wheat, and soybean production is forecasted to increase in the 2025/26 crop seasons (Agricultural Market Information System, 2026).

Afghanistan remains significantly food insecure. By 2026, it is estimated that 33.9 percent of Afghanistan's population, or 60 million people, will be food insecure. This reflects an increase from last year's figure of 32.5 percent but shows an improvement compared to the average of 37.9 percent between 2023 and 2025. Among all Asian nations in the GFA, Afghanistan is one of the few projected to have more than 20 percent of its population classified as food insecure by 2036. Ongoing drought, conflict, and low economic activity continue to impede improvements in the country's food security (World Food Programme (WFP), 2025).

Key factors contributing to food insecurity in Afghanistan are weather irregularities, high food prices, economic stagnation, unemployment, and displacement (Zahir & Hamdard, 2025). The country relies heavily on cereal and fuel imports, making it vulnerable to international commodity price fluctuations (WFP, 2025). Additionally, Afghanistan faces a structural wheat deficit of 2–3 million metric tons annually, with the 2025 wheat harvest projected to be below the average of 2019–23 (WFP, 2025).

Pakistan (32.3 percent of its population), Bangladesh (19.4 percent), and Sri Lanka (14.5 percent) are other countries in the South Asia subregion with a significant proportion of their populations estimated to be food insecure by 2026. While food security is expected to improve significantly by 2036, Pakistan is projected to still have high levels of food insecurity, with 22.1 percent of its population affected. The population of food-insecure individuals in Pakistan is estimated to slightly increase due to near-record levels of wheat flour prices. Domestic wheat prices increased by about 50–90 percent in most markets in Pakistan between July 2025 and January 2026 (FAO, 2026). To address the prevalence of food insecurity, the Bangladesh Government operates a food distribution system for its citizens called the Vulnerable Group Development (VGD) Programme (KPMG, 2025).

The most significant improvement in food security within Asia is projected to occur in the Southeast Asia subregion. This subregion is estimated to experience a reduction of 72.4 percent in the number of food-insecure individuals between 2026 and 2036. By 2036, only 2.5 percent of the population in this subregion is projected to be food insecure, compared to 9.9 percent in 2026. Within the Southeast Asia region, the Philippines is estimated to have the highest number of food insecure individuals. Of the estimated 59.6 million food insecure people in this subregion in 2026, 15.4 million are estimated to be in the Philippines.

Table 4

Food insecurity results in the Asia region, 2026 and 2036

Region/subregion	Country	Population		Population food insecure		Share of population food insecure		Food gap (per capita)	
		2026	2036	2026	2036	2026	2036	2026	2036
		Million		Million		Percent		Kilocalories/day	
Asia	Region total	2,596.8	2,822.0	359.4	130.3	13.8	4.6	288	296
East Asia	Subregion total	30.2	30.6	18.2	14.6	60.3	47.8	465	406
	Democratic People's Republic of Korea	26.6	26.7	18.0	14.6	67.4	54.6	468	407
	Mongolia	3.6	3.9	0.3	0.0	7.2	0.6	233	173
South Asia	Subregion total	1,967.6	2,145.0	281.7	99.2	14.3	4.6	281	292
	Afghanistan	50.9	65.5	17.3	14.3	33.9	21.8	306	266
	Bangladesh	171.6	184.2	33.3	6.8	19.4	3.7	277	204
	India	1,429.7	1,531.9	140.9	9.0	9.9	0.6	230	160
	Nepal	31.5	33.4	2.5	0.3	7.9	1.0	229	174
	Pakistan	261.7	307.5	84.5	68.0	32.3	22.1	366	326
	Sri Lanka	22.1	22.4	3.2	0.8	14.5	3.5	241	188
Southeast Asia	Subregion total	599.0	646.4	59.6	16.4	9.9	2.5	266	220
	Burma	58.3	61.6	6.5	2.0	11.2	3.3	253	208
	Cambodia	17.4	18.8	0.8	0.1	4.6	0.5	217	169
	Indonesia	285.6	303.2	32.1	8.2	11.2	2.7	262	209
	Laos	8.2	9.0	0.1	0.0	1.3	0.1	167	131
	Philippines	121.9	138.7	15.4	5.7	12.6	4.1	294	243
	Vietnam	107.6	115.1	4.6	0.4	4.3	0.3	230	174

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

Table 5

Inflation-adjusted per capita Gross Domestic Product (GDP) in the Asia region, 2026 and 2036

Region/subregion	Per capita GDP 2023–25 (average)	Per capita GDP 2026	Per capita GDP 2036	Per capita GDP annual growth rate (2025–26)	Per capita GDP annual growth rate (2026–36)
Region total	2,796	3,063	4,764	4.7	4.5
East Asia	1,061	1,129	1,573	3.3	3.4
South Asia	2,488	2,736	4,367	4.9	4.8
Southeast Asia	3,899	4,237	6,232	4.3	3.9

Note: Values are expressed in 2017 U.S. dollars. Regions include only countries covered by the Global Food Assessment. For full country statistics, see appendix C.

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

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Former Soviet Union

The Former Soviet Union (FSU) region is one of the most significant regions in the world for food supply, exports, and imports. Many countries within the region are experiencing income increases and a growing middle class, shifting dietary preferences and demands. Despite being dependent on imports to satisfy domestic supply, the region is a major net exporter of food supply, including grains and is projected to remain so during the next 10 years. Furthermore, the region will remain a net exporter of agricultural commodities, with its food surplus increasing from 23.5 million tons in 2026 to 25.6 million tons in 2036 (table 2), reinforcing the region's status as a net grain exporter. Ukraine continues to be a net exporter of bulk agricultural commodities, including major grains and oilseeds (USDA, Foreign Agricultural Service (FAS), 2025a). Food demand in the region is estimated to increase from 21.6 million tons in 2026 to 25.9 million tons in 2036.

The population of the FSU region is estimated to increase at an annual rate of 0.4 percent, from 119.8 million in 2026 to 124.6 million people in 2036. This regional population growth is the lowest among the regions covered in this report. A few countries are projected to see their population decrease between 2026 and 2036 (namely, Armenia, Georgia, Moldova, and Ukraine). Per capita Gross Domestic Product (GDP) is one of the highest amongst regions covered in this report. Per capita GDP in the FSU region is estimated to increase at an annual rate of 3.7 percent, from \$3,402 in 2026 to \$4,912 in 2036 (table 11). By 2036, the FSU region is projected to have the lowest food insecurity level among the five GFA regions, with 0.6 percent of the population in the region considered to be unable to consume 2,100 kilocalories per capita per day (table 6).

In 2026, the estimated prevalence of food insecurity in the FSU region is 4.7 percent, equivalent to 5.6 million people, compared with an average of 6.9 percent from 2023 to 2025 (8.1 million people). This is associated with an estimated 6-percent decrease in the average price of major grains in the region and an estimated growth in average per capita GDP of 2.8 percent in 2026 (table 7; appendix D). FSU countries depend on wheat as the major grain in their diet; hence, the continuous price fluctuations of wheat will affect the food consumption and import patterns of many in the region.

In 2026, Tajikistan is estimated to have the highest share of food insecurity in the FSU region, with 11 percent of its population (1.2 million people) estimated to be food insecure (table 6). Per capita GDP increased by 5.4 percent between 2023 and 2025 and is projected to further increase by almost 3 percent in 2026. The real domestic price of major grains is projected to decrease by 2 percent in 2026 (appendix C; appendix D). At the same time, Tajikistan's food security and nutrition remains highly dependent on imports, as only 20 percent of food needs are domestically produced (International Fund for Agricultural Development, 2025). In the past decade, Tajikistan's wheat imports continue to exceed domestic production (USDA, FAS, 2026).

Georgia is the country with the second-highest share of its population estimated to be food insecure in the FSU region. The share of population estimated to be food insecure in 2026 is 8.2 percent (0.4 million people), down from 8.9 percent in 2025 (table 10). In 2026, Georgia is estimated to have one of the largest per capita GDP increases (5.9 percent) relative to 2025, although lower than the increases observed between 2023 and 2025 (8.1 percent). Georgia is not a major agriculture producer and thus predominantly imports commodities from neighboring countries to satisfy its needs (USDA, FAS, 2025b). Income increases are expected to shift the population towards higher quality products (USDA, FAS, 2025a). Georgia is largely dependent on remittances due to the surge in emigration that has persisted since the collapse of the Soviet Union (International Monetary Fund, 2025). By 2036, 1.1 percent of the population in Georgia is projected to be food insecure.

Ukraine remains a net exporter of grains despite its ongoing military conflict with Russia that has caused supply and export route disruptions. The incidence of food insecurity in Ukraine is estimated to increase in 2026 to 7.4 percent (2.8 million), compared with 6.8 percent (2.5 million) in 2025. The price of the major grain (wheat) is projected to decrease by 7 percent in 2026 (appendix D). The annual GDP growth rate is estimated to be 2.9 percent from 2026 to 2036, and per capita GDP is projected to grow by 3.5 percent from 2026 to 2036. The consumer price index (CPI) in Ukraine is estimated to increase by 8.5 percent in 2026, the highest among countries in the FSU region. The ongoing conflict with Russia has reduced agricultural output, a major source of income for agricultural households, due to loss of land, rising production costs, and labor shortages (World Food Programme (WFP) et al., 2025). Eighty-six percent of Ukrainian households are now producing grain for their own consumption, making the country dependent on global imports (WFP et al., 2025). Despite the trade disruptions caused by the conflict with Russia, Ukraine remains a large and increasing market for U.S. agricultural products (USDA, FAS, 2026b) such as frozen seafood, nuts, cereals, beef, and prepared food products (USDA, FAS, 2025c).

Uzbekistan, the country with the largest population in the FSU region (37.5 million people in 2026), is one of the fastest growing markets in the region. The country is estimated to have the lowest number of food insecure people in 2026 within the region (300,000 people) and the lowest percentage of food insecure people at 0.7 percent of the population (table 10). Uzbekistan has the third-lowest per capita GDP (\$3,081 U.S. dollars) in the region as of 2026. However, its per capita GDP is projected to grow at an annual rate of 4.5 percent from 2026 to 2036. Prices of the major grain in Uzbekistan decreased by 7 percent in 2026 (appendix D). Uzbekistan has seen expansion in recent years in its agricultural import sector, particularly in fruits and vegetables, vegetable oils, and processed foods (USDA, FAS, 2025d). Imports of staple commodities such as wheat, rice, and other cereals continue to be important as domestic production has been unable to meet demand (USDA, FAS, 2025d).

Table 6

Food insecurity results in the Former Soviet Union region, 2026 and 2036

Region/subregion	Country	Population		Population food insecure		Share of population food insecure		Food gap (per capita)	
		2026	2036	2026	2036	2026	2036	2026	2036
		Million	Million	Million	Million	Percent	Percent	Kilocalories/day	Kilocalories/day
Former Soviet Union	Region total	119.8	124.6	5.6	0.7	4.7	0.6	203	180
Former Soviet Union	Armenia	3.0	2.8	0.1	0.0	2.1	0.3	169	137
	Azerbaijan	10.7	11.1	0.4	0.1	3.5	1.2	166	145
	Georgia	4.9	4.7	0.4	0.1	8.2	1.1	223	170
	Kyrgyzstan	6.3	6.7	0.2	0.0	3.5	0.2	195	143
	Moldova	3.6	3.4	0.2	0.0	4.4	0.2	171	123
	Tajikistan	10.8	12.9	1.2	0.4	11.0	2.9	269	218
	Turkmenistan	5.8	6.3	0.2	0.0	3.8	0.1	190	129
	Ukraine	37.3	35.3	2.8	0.1	7.4	0.4	186	130
	Uzbekistan	37.5	41.5	0.3	0.0	0.7	0.0	150	119

Note: Countries with relatively small food insecure populations may appear as zero due to rounding.

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

Table 7

Inflation-adjusted per capita Gross Domestic Product (GDP) in the Former Soviet Union region, 2026 and 2036

Subregion	Per capita GDP 2023–25 (average)	Per capita GDP 2026	Per capita GDP 2036	Per capita GDP annual growth rate (2025–26)	Per capita GDP annual growth rate (2026–36)
Region total	3,208	3,402	4,912	2.8	3.7

Note: Values are expressed in 2017 U.S. dollars. Regions include only countries covered by the Global Food Assessment. For full country statistics, see appendix C.

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

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Latin America and the Caribbean

The Latin America and the Caribbean (LAC) countries are experiencing notable shifts in food demand and market dynamics, moving away from primarily population-driven growth to one more heavily influenced by income, urbanization, and dietary shifts, coupled with rising food prices (World Bank, 2025; Popkin & Reardon, 2018). Food demand in the LAC region is projected to increase 16.1 percent, from 26.5 million metric tons in 2026 to 30.8 million metric tons by 2036 of cereal grain equivalent (table 2). This rise in food demand represents the lowest increase among all GFA regions from 2026 to 2036, but one countered by a more rapid 29-percent increase in other (feed and other uses) grain demand, reflecting the transformation of its food sector (table 2).

Grain production in LAC is projected to reach 20.7 million metric tons in 2036—a 10.8-percent increase over the projected grain production level in 2026 (table 2). Despite the anticipated increase in LAC’s grain production over the next decade, output growth still lags that of other GFA regions except the Former Soviet Union (table 2). Given the projected gap between domestic production and total grain demand, the region’s Implied Additional Supply Required (IASR) is projected to reach 47 million metric tons by 2036, up 28.9 percent from 2026 (table 2). Food imports from the United States have played an important role for most LAC countries included in GFA, complementing domestic food production and improving food security (Trade Data Monitor (TDM), 2026). In 2021–23, agricultural imports from the United States accounted for 25 percent (1.2 million metric tons) of total agricultural imports by these countries (TDM, 2026). At the country level, grain import volumes will be primarily driven by economic growth, population numbers, per capita income levels, demand for animal protein, and the extent of food insecurity during the 2026 to 2036 period.

Over the next decade, the LAC region faces slower economic growth compared to last year’s projections, with regional Gross Domestic Product (GDP) projected to reach 2.7 percent in 2026 and rising to 2.8 percent by 2036, with significant subregional differences (appendix C). This GDP trajectory reflects LAC’s persistent bottlenecks of high labor informality, weak investment, low productivity, high income inequality, and internal conflict (Economic Commission for Latin America and the Caribbean (ECLAC), 2026). This trajectory is also influenced by slower economic growth in Colombia—the largest economy in the subregion, where GDP is now projected to settle back at around 2.3 percent per year from 2026 to 2036, driven by a rising fiscal deficit, low investment, and lower non-agricultural exports (ECLAC, 2026; appendix C). In 2026, countries leading regional economic growth include Colombia, Peru, Guatemala, and Honduras, where favorable global commodities demand, a coffee export boom, and currency depreciation benefit their agricultural exports. Increased exports of tourism services in the Dominican Republic and Jamaica also contribute to near-term LAC economic growth (ECLAC, 2026).

Real per capita GDP in LAC is projected to reach \$6,167 in 2026, more than double the GFA total average of \$2,785 (appendix C). Over the next decade, per capita GDP in LAC is projected to grow by 2.1 percent per year, to reach \$7,558 in 2036 (appendix C). This increase in per capita incomes is projected to continue to drive food demand growth for grains and animal protein, particularly imported food products from the United States, as some GFA LAC countries (e.g., Colombia and Peru) represent major markets for U.S. agricultural products. In 2025, U.S. agricultural exports to LAC reached \$15.4 billion, up from \$5.8 billion in 2010, yielding a 5.9 percent annual rate of expansion (TDM, 2026).

Food security in the LAC region also shows a slight deterioration in 2026, as the combined effects of sluggish advances in some countries’ economic recovery and higher inflation are partially countered by higher remittances and domestic food assistance programs in selected countries, which contributes to lower the prevalence of food insecurity. In 2026, the prevalence of food insecurity in LAC is esti-

mated to reach 19.8 percent, 3.7 percent higher than the prevalence of food insecurity in 2025 (table 8). The estimated food insecurity prevalence for 2026 ranges from a high of 64.4 percent in Haiti, 41.2 percent in Bolivia, and 32.3 percent in Honduras to a low of 7.3 percent in Colombia and 3.5 percent in the Dominican Republic (table 12; appendix B). Over the next decade, food insecurity in the LAC region is projected to fall to 10.3 percent in 2036 (table 12). The number of food insecure people is projected to decline from an estimated 36.1 million in 2026 to 20.2 million in 2036 (table 8). The total population in the LAC region is estimated at 182.4 million in 2026 and is projected to reach 195.8 million by 2036. Population growth varies across the region, with higher income countries associated with lower population growth rates than those with lower incomes (table 8; appendix C).

Consumer price indexes (CPI) in the LAC economies show a downward trend, with the average regional inflation rate dropping in nearly all countries (appendix D). The effects of food inflation across LAC countries differ according to the type of major grains, roots, and tubers prevalent in the diet. Domestic main staple grain prices are projected to fall from 2026 to 2036 across all countries in the region (appendix D).

The Central America subregion (El Salvador, Guatemala, Honduras, and Nicaragua), with about 23 percent of the LAC population (42.3 million people) in 2026, is projected to have the fastest population growth rate in LAC (1.0 percent) in 2026–36 and the lowest per capita GDP in LAC at \$4,140 in 2026 and \$5,042 in 2036 (appendix C). In 2025, the subregion faced adverse weather conditions, with droughts and excessive rain affecting grain crops (corn, rice, and sorghum) in Guatemala and Honduras—and to a lesser extent in El Salvador (Food and Agriculture Organization of the United Nations, Global Information Early Warning Systems (GIEWS), 2026). Grain production in El Salvador increased 2.3 percent in 2025 in response to higher prices and a rebound from crop losses in 2024 (GIEWS, 2026). The total population in El Salvador is estimated at 6.9 million and is projected to continue to increase at a rate of more than 0.6 percent annually from 2026 to 2036 (appendix C). The prevalence of food insecurity is projected to reach 17.6 percent of the population in 2026 and decline to 11.1 percent by 2036. Over the next decade, the daily caloric food gap is projected to decline 9.5 percent from 270 kilocalories (kcal) in 2026 to 245 kcal in 2036. The country’s small size leaves little room for expanding agriculture and despite gains in yields, food production remains well below domestic demand (USDA, Foreign Agricultural Service (FAS), 2026). Historically, grain imports in El Salvador account for half of the country’s total consumption needs (GIEWS, 2026). Since the removal of the tariffs on imports of food commodities and farm inputs in March 2022, imports of white and yellow corn, wheat, and red beans have been on the rise, contributing to lower food inflation and increased food availability to meet domestic demand (TDM, 2026). The United States supplies about one-third of El Salvador’s agricultural imports, principally corn and wheat (TDM, 2026). Recent industrialization efforts in El Salvador since 2022 to process raw commodities and gains in purchasing power may result in increased imports of feeds in which the United States may be expected to share (Organization for Economic Co-operation and Development et al., 2025).

The Caribbean subregion (Haiti, Dominican Republic, and Jamaica) is expected to make the least progress among LAC countries in its food security metrics. This subregion is widely diverse in terms of economic performance and the prevalence of food insecurity. The prevalence of food insecurity is projected to reach 32.1 percent of the population in 2026 (62 percent above the average LAC total) and decline to 22 percent by 2036. Over the next decade, the daily caloric food gap is projected to decline by 13.6 percent from 711 kcal in 2026 to 614 kcal in 2036. These results reflect the extreme food insecurity in Haiti—the poorest country in the LAC region—and one of the most critically food-insecure nations in the world (Food and Agriculture Organization of the United Nations, World Food Program (WFP), 2026). The country continues to see high levels of acute food insecurity resulting from

extreme weather events, food shortages, soaring inflation, challenges in financing food imports, and armed conflicts driving displacement and restricting access to food and assistance (WFP, 2024). The economy has been sustained by increased inflows of remittances and international aid. In 2024, remittances accounted for 16.3 percent of GDP—equivalent to \$5.5 billion, a 14-percent increase over a year earlier—which further increased the food insecurity situation in the country (World Bank, 2026). Haiti is the largest recipient of U.S. foreign aid in LAC (\$591 million in 2025) (U.S. Department of State, 2025). The country’s per capita GDP has been declining for the past 10 years and is projected to further decline 1.2 percent in 2025–26 and to increase to 3.2 percent from 2026 to 2036 (appendix C). In 2026, Haiti’s per capita GDP is estimated at \$1,074, with 7.8 million people (65 percent of the country’s total population) considered food insecure (appendix B). Haiti is the country to make the least progress in terms of its food security metrics in the LAC region, with a projected 29.8-percent decrease in the prevalence of food insecurity between 2026 and 2036. Haiti also has the highest estimated per capita food gap of 747 kcal per capita per day in 2026 (table 12). In contrast, strong tourism-based revenue drove an estimated 3.2-percent GDP growth in the Dominican Republic and a 2.1-percent GDP growth in Jamaica from 2025 to 2026. These countries also exhibited the lowest levels of food insecurity in the LAC region, with the prevalence of food insecurity estimated at 3.5 percent in the Dominican Republic and 5.2 percent in Jamaica (table 8). Driven by the Dominican Republic-Central America Free Trade Agreement (DR-CAFTA) and strong tourism food demand, U.S. agricultural exports to the Dominican Republic reached a record \$2.4 billion in 2025—triple their 2007 level (TDM, 2026; USDA, FAS, 2025). The United States is a top supplier accounting for about 35 percent of the import market with key imports including corn, rice, soybeans, wheat, meats, dairy, and fruits (TDM, 2026). The Dominican Republic’s economy and food industry are projected to continue to grow, boosting demand for imported agricultural products, particularly for consumer-oriented products like fresh fruit and dairy products (USDA, FAS, 2025).

In South America, economic growth improved in 2026, compared to a year earlier, and the subregion remains the region’s absolute GDP leader, accounting for nearly three-quarters of LAC’s GDP (appendix C). Wide heterogeneity across countries characterizes the subregion, reflecting differences in income inequality, informal employment, internal conflict, domestic support programs, exposure to foreign markets, and success in combating high inflation. Colombia, the largest economy in the subregion, registered the most rapid economic growth in 2025–26 but is projected to slow its growth through 2036 (appendix C). The large number of migrants, refugees, and internally displaced nationals impacted by domestic conflict continues to limit income generation and affects the economy and increases food insecurity. Colombia has one of the world’s highest levels of internal displacement, with an estimated 7.3 million people displaced by conflict and violence and vulnerable to food insecurity in 2025, while forced confinement affects more than 115,000 people (European Commission, 2025). About 3 million Venezuelan migrants, equivalent to 37.5 percent of all Venezuelans displaced globally, reside in Colombia (United Nations High Commissioner for Refugees (UNHCR), 2025). Colombia’s per capita GDP is projected to grow 2.6 percent from 2025 to 2026 and decelerates to 1.9 percent per year from 2026 to 2036 (appendix C). In 2026, Colombia reduced its food and cash transfer programs to households living in extreme poverty in urban and rural areas due to its reduced availability of financial resources (GIEWS, 2026). In 2026, 7.4 percent of Colombia’s population is estimated to be food insecure (table 8; appendix B). Extreme rain weather conditions affected corn and rice production, which registered a 3.2-percent decrease in 2025 (GIEWS, 2026). The prevalence of food insecurity is estimated to decrease to 2.7 percent in 2036—the lowest in South America and second lowest across the LAC region (appendix B). About 85 percent of the country’s grain consumption needs are met with imports, with agricultural imports from the United States representing 33 percent of that total (TDM, 2026). U.S. food and agricultural exports to Colombia reached a record \$4.5 billion in 2025, a 14.6-percent increase from 2024, driven by the U.S.-Colombia Trade Promotion Agreement (CTPA). Top U.S. agricultural exports to Colombia include corn, soybean meal, pork, ethanol, dairy, and wheat, with increasing demand for consumer-oriented products. More than 70 percent of U.S. agricultural goods enter Colombia duty-free. A continuing

increase in imports is projected due to the rising domestic demand for maize by the feed sector, exacerbated by a below-average domestic production. Wheat imports for human consumption are also expected to rise, in line with demographic and economic growth (USDA, FAS, 2026).

Table 8

Food insecurity results in the Latin America and Caribbean region, 2026 and 2036

Region/subregion	Country	Population		Population food insecure		Share of population food insecure		Food gap (per capita)	
		2026	2036	2026	2036	2026	2036	2026	2036
		Million		Million		Percent		(kilocalories/day)	
Latin America and the Caribbean	Region total	182.4	195.8	36.1	20.2	19.8	10.3	390	360
Caribbean	Subregion total	25.9	28.0	8.3	6.1	32.1	22.0	711	614
	Dominican Republic	11.0	11.7	0.4	0.0	3.5	0.4	188	149
	Haiti	12.0	13.4	7.8	6.0	64.4	45.2	747	621
	Jamaica	2.8	2.9	0.1	0.0	5.2	1.5	191	162
Central America	Subregion total	42.3	46.9	9.1	4.9	21.6	10.4	334	282
	El Salvador	6.9	7.3	1.2	0.8	17.6	11.1	270	245
	Guatemala	18.8	21.3	2.9	1.3	15.6	6.1	299	250
	Honduras	9.8	10.9	3.2	1.5	32.3	14.2	366	293
	Nicaragua	6.8	7.3	1.8	1.2	27.2	16.3	376	328
South America	Subregion total	114.3	120.9	18.7	9.2	16.3	7.6	275	232
	Bolivia	12.6	13.6	5.2	3.0	41.2	22.1	330	267
	Colombia	50.1	51.6	3.7	1.4	7.3	2.7	234	202
	Ecuador	18.6	20.3	3.9	2.1	20.9	10.5	243	207
	Peru	33.0	35.4	5.9	2.7	17.9	7.6	272	228

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

Table 9

Inflation-adjusted per capita Gross Domestic Product (GDP) in the Latin America and Caribbean region, 2026 and 2036

Subregion	Per capita GDP			Per capita GDP annual growth rate	
	2023–25 (average)	2026	2036	(2025–26)	(2026–36)
Region total	5,947	6,167	7,558	1.9	2.1
Caribbean	5,274	5,500	7,605	1.8	3.3
Central America	3,989	4,140	5,042	2.0	2.0
South America	6,814	7,067	8,524	2.0	1.9

Note: Values are expressed in 2017 U.S. dollars. Regions include only countries covered by the Global Food Assessment. For full country statistics, see appendix C.

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

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Middle East and North Africa

Food demand in the Middle East and North Africa (MENA) region is projected to grow 18.6 percent over the coming decade, increasing from 78.7 million metric tons in 2026 to 93.4 million metric tons in 2036 (table 2). This projected relative increase in MENA's food demand through 2036 is the second lowest of all Global Food Assessment (GFA) regions. Other demand growth in the region is also projected to increase at a slow rate relative to most other GFA regions; growth in MENA's demand for seed, feed, and processing (as well as waste) is estimated to increase by 4.8 percent over the 2026–36 period, the second-lowest rate of all GFA regions. Even with MENA's relatively slow grain demand growth, the projected rate of increase in grain production in the region over the coming decade (17.2 percent) is estimated to be insufficient to cover the region's growing grain demand. As a result, the Implied Additional Supply Required (IASR) to meet MENA's grain demand is estimated to rise from 85.7 million metric tons in 2026 to 94.4 million metric tons in 2036, an increase of 10.1 percent (table 2).¹⁷

In conjunction with its slow grain demand growth, MENA is estimated to experience the lowest improvement in real per capita Gross Domestic Product (GDP) growth between 2025 and 2026 among all GFA regions. Growing at only 1.3 percent, it is only a small gain from the 1.1 percent per year growth rate in the previous 3 years, 2023–25 (table 11 and appendix C). Due to the slow overall economic growth prospects in the region, only 37 percent of MENA's projected annual food demand growth over the coming decade is expected to come from increases in per capita consumption, with the rest attributed to increases in the region's overall population (figure 5). Nevertheless, the lackluster overall economic growth hides two bright spots in the region. Faster GDP growth is expected for two of North Africa's leading economies, Egypt and Morocco, which are projected to grow at 4.5 and 3.6 percent between 2025 and 2026, respectively. Both countries have seen a rebound in agriculture, tourism, and construction, as well as more stable exchange rates during this period.

Given the mixed economic performance among some of the more heavily populated economies in the MENA region, the percentage of the population projected to be food insecure in the region is estimated to only marginally fall to 19.2 percent in 2026 (table 10) from 20.5 percent in 2025 (appendix B). Aside from the low growth in real per capita GDP, overall inflation is projected to remain high for all GFA countries in the Middle East subregion and Egypt in the North Africa subregion (appendix D). Currency exchange rates are expected to marginally improve over time by gaining some strength from high current depreciated rates, especially in Iran and Lebanon (appendix C). This will likely increase the region's dependency on cereals imports given the moderate growth in population and incomes, especially for wheat and corn. As one of the leading importers in the region, Egypt is projected to continue relying heavily on cereals imports as domestic production has typically met only 50–55 percent of its consumption needs for wheat, for example (USDA, Foreign Agricultural Service, 2025; appendix C). The country's dependence on large volumes of wheat imports implies a high import bill, worth about \$4.14 billion in 2024 alone, according to the most recent data available.¹⁸

In the Middle East subregion, protracted conflicts in Yemen, Syria, Lebanon, and the Gaza strip have continued to affect the overall food insecurity situation, notwithstanding the growing number of internally displaced people facing acute food insecurity among the affected GFA countries.¹⁹ Adverse

¹⁷ GFA results are based on macroeconomic assumptions completed in September 2025. They do not account for ongoing events in the MENA region since that period.

¹⁸ Trade Data Monitor, accessed on March 17, 2026.

¹⁹ See the box “How Food Security is Assessed: Method and Definitions” for more on the four food group categories and grain equivalent conversions and prices.

weather conditions for the most recent 2025 growing season also plagued countries such as Syria and Yemen, leading to larger than normal forecasts for cereals imports in 2026 (Food and Agriculture Organization of the United Nations (FAO), 2025b; FAO, 2025c).

Overall, the prevalence of food insecurity in MENA is projected to further decline from 19.2 percent in 2026 to 13.1 percent by 2036 (appendix B). This decline is due to the combination of a moderate population growth of 1.1 percent per year and a moderate projected growth of 1.6 percent per year of real per capita GDP (appendix C). The per capita food gap is projected to rise, nevertheless, from 387 kilocalories (kcal) per day in 2026 to 433 kcal per day by 2036 (appendix B). This is primarily due to the large food insecure population in conflict areas of the Middle East subregion, especially in Yemen. Harsh economic conditions, displacement, agricultural production shortfalls, and general food price inflation are projected to result in a higher per capita food gap for Yemen and an increase in the food insecure population compared to other countries in the region (appendix B). Already, more than half of the population in Yemen has been projected by the Integrated Food Security Phase Classification (IPC) to be potentially facing high levels of acute food insecurity (IPC, Phase 3) in the early part of 2026 (FAO, 2025a). The prevalence of food insecurity in Yemen is the highest among all GFA countries in the MENA region and is projected to change little by 2036, with more than three quarters of the population projected to be food insecure (appendix B).

Like Yemen, Syria also has a large food insecure population, 10.4 million in 2025 (table 10), due to years of internal conflict and displacement. However, projected 3.4 percent GDP growth in 2026 is an improvement from negative growth between 2023 and 2025 (appendix C), including a currency appreciation (appendix D), following the fall of the Assad regime. This is projected to help stabilize the economy and reduce the country's high prevalence of food insecurity and the per capita food gap by 2036, from 306 kcal per day in 2026 to 214 kcal per day by 2036 (appendix B). The economic recovery is occurring due to a combination of factors such as the easing of international sanctions, the economic contribution from returning Syrian refugees, increased electricity supply, and stronger international engagement to rebuild disrupted ties with international trade and banking services partners (Gatti et al., 2025).

The uncertainties surrounding food availability among the most affected GFA countries in the Middle East subregion are in sharp contrast to the situation in the North Africa subregion. Countries in this region are projected to have some of the lowest food insecurity prevalence rates in 2026, all below 10 percent with exception of Egypt at 11.9 percent (appendix B). Algeria, Morocco, and Tunisia have traditionally accounted for the least number of food insecure people in the region compared with Egypt. The favorable outlook for these countries can also be explained by their stable macroeconomic environments given lower domestic inflation and exchange rate movements relative to Egypt. The annual consumer price index (CPI) growth rate in Morocco, for example, has remained below 5 percent since 2022 while its real exchange rate has only marginally depreciated over time (appendix D). Tunisia and Algeria have also experienced similar trends.

As the exception among the North African countries covered by the GFA report, the higher prevalence of food insecurity in Egypt, combined with its large population of 114.4 million in 2026 (appendix C), implies that many of the food insecure people in the subregion reside in this country alone. Meanwhile, the country's heavy reliance on wheat imports makes it especially vulnerable to surges in global prices, exchange rate volatility, and changes in global supplies. Global wheat prices have trended downwards while the country's exchange rate stabilized in 2025, contributing to an estimated 4.7 percent drop in domestic prices among major cereal grains (appendix D). Combined with a projected 3 percent increase in real per capita GDP (appendix C), the number of food insecure people

in Egypt is projected to marginally fall from 14.2 million in 2025 to 13.6 million in 2026. This results in a lower prevalence rate of food insecurity overall, from 12.5 to 11.9 percent, respectively, over the same period (appendix B). The number of food insecure people could potentially rise above GFA estimates given a growing number of refugees entering Egypt from the Sudan conflict, estimated to be about 1.5 million as of early October 2025 (FAO, 2025a).

Overall, the food security outlook for the MENA region in 2025 remains mixed, with bright spots in North Africa contrasted with uncertainties surrounding ongoing conflicts, economic instability, cross-border refugee movements, and internal displacements in the Middle East and from Sudan that impact many of the GFA countries in the region.

Table 10

Food insecurity results in the Middle East and North Africa region, 2026 and 2036

Region/subregion	Country	Population		Population food insecure		Share of population food insecure		Food gap (per capita)	
		2026	2036	2026	2036	2026	2036	2026	2036
		Million	Million	Million	Million	Percent	Percent	Kilocalories/day	Kilocalories/day
Middle East and North Africa	Region total	368.5	410.1	70.7	53.7	19.2	13.1	387	433
Middle East	Subregion total	155.5	172.7	48.4	41.0	31.2	23.7	432	488
	Iran	89.9	95.7	14.2	6.7	15.8	7.0	273	232
	Lebanon	5.7	5.7	0.6	0.3	11.4	4.5	246	209
	Syria	24.7	28.5	6.8	1.5	27.6	5.1	306	214
	Yemen	35.3	42.9	26.8	32.6	75.9	76.1	553	555
North Africa	Subregion total	213.0	237.3	22.3	12.7	10.5	5.3	288	257
	Algeria	48.4	54.9	4.8	3.9	9.9	7.1	272	256
	Egypt	114.4	129.2	13.6	7.3	11.9	5.7	299	262
	Morocco	38.0	40.6	3.5	1.3	9.1	3.1	276	234
	Tunisia	12.2	12.6	0.4	0.2	3.1	1.4	220	200

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

Table 11

Inflation-adjusted per capita Gross Domestic Product (GDP) in the Middle East and North Africa region, 2026 and 2036

Subregion	Per capita GDP			Per capita GDP annual growth rate	
	2023–25 (average)	2026	2036	(2025–26)	(2026–36)
Region total	3,793	3,884	4,549	1.3	1.6
Middle East	4,167	4,175	4,609	0.2	1.0
North Africa	3,520	3,672	4,505	2.2	2.1

Note: Values are expressed in 2017 U.S. dollars. Regions include only countries covered by the Global Food Assessment. For full country statistics, see appendix C.

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

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Sub-Saharan Africa

Food demand in Sub-Saharan Africa (SSA) is expected to rise from 179.3 million metric tons in 2026 to 247.8 million metric tons in 2036 (table 2). This 38.2-percent increase in food demand in the region over the coming decade is nearly double the rate of increase of the second-fastest growing Global Food Assessment (GFA) region (Asia). Grain production in SSA is also expected to rise at a faster rate than all other GFA regions from 2026 to 2036. However, the growth in SSA's grain demand (which is composed of both food demand and demand for seed, feed, processing, and waste) continues to outpace the region's grain production increases (table 2). As a result, the gap between grain demand and supply in SSA is widening faster than all other GFA regions. In 2036, the Implied Additional Supply Required (IASR) to meet SSA's grain demand is projected to be 119.6 million metric tons, a 54.7-percent increase from the estimated gap in 2026.

These overall domestic food demand and supply trends in SSA are further reflected in the region's food security outlook. An estimated 412.6 million people in SSA are projected to be food insecure in 2026, representing 32.5 percent of the region's population (table 12). SSA's regional food security outlook is lower than that of the other GFA regions, leading SSA to have the highest estimated food insecure population—in terms of number of people and relative share—in both the short term (2026) and long term (2036) (table 3). Moreover, the region's food gap per capita is estimated to remain elevated at 415 kilocalories per capita per day in 2026, indicating that food insecurity intensity is expected to persist among the share of the regional population unable to meet its food needs (table 12).

The regional food demand and food security outlooks in SSA are related to the region's macroeconomic and population trends. SSA's population is expected to grow by 2.5 percent annually over the coming decade, more than two times faster than that of any other GFA region (appendix C). As a result, the population of SSA is projected to increase by 27.8 percent by 2036, surpassing 1.6 billion (table 12). In addition to growing food demand from population increases, economies in SSA are further expected to increase substantially by 2036. Gross Domestic Product (GDP) in SSA is estimated to grow by 4.3 percent in 2026 and by an average of 3.8 percent annually through 2036 (appendix C). Of the five GFA regions, only Asia is expected to have a faster overall GDP growth rate than SSA in 2026. The strong anticipated overall population and economic growth in the SSA region is likely to further enhance agricultural export opportunities for the United States and other major food producing countries. For instance, this growth has begun to change dietary trends in the region (and in Africa more generally), shifting the region's agricultural imports towards higher-value, consumer-oriented products such as meat (Johnson et al., 2022).

Despite the expected strong economic growth in SSA over the coming decade, population growth remains the largest contributor to the region's food demand trends. Population growth is expected to account for more than three quarters of the growth in food demand in SSA through 2036 (figure 5). In contrast, less than 25 percent of food demand growth in SSA in the next decade is expected to come from increases in per capita consumption (figure 5). Due in part to these population pressures, average income growth per capita is estimated to be relatively low in SSA compared to other GFA regions. Per capita GDP in the SSA region is projected to be \$1,350 in 2026, a marginal (1.6 percent) increase over 2025 (table 13). Over the next 10 years, per capita GDP in the region is projected to grow at an average annual rate of 1.3 percent, the lowest of the five GFA regions (table 1). As a result, the projected per capita GDP in 2036 for the SSA region (\$1,534) is at least 50 percent lower than the current year (2026) estimates of per capita GDP for each of the other GFA regions, implying that average economic output per person in SSA over the next decade is anticipated to be lower than that of other regions (table 1).

Aside from macroeconomic factors, political instability and violent conflict risks remain potential barriers to growth in food demand and food security in the region. SSA consistently experiences the highest number of deaths from terrorism of any world region, with SSA countries in the Sahel disproportionately affected (Institute for Economics and Peace (IEP), 2025).²⁰ Moreover, violent conflict risks persist in the region, hampering food demand growth and increasing food insecurity in affected areas (Food and Agriculture Organization of the United Nations (FAO) & World Food Programme (WFP), 2025). Additionally, natural hazard risks including droughts, flooding, and other extreme weather events are drivers of the region's food demand and food security trends (FAO & WFP, 2025). While food demand and food security in SSA are estimated to improve in 2026 compared to 2025, each varies widely across SSA subregions as well as across and within SSA countries, depending on the presence and frequency of these and other drivers.

The food demand and food security outlook in the Central Africa subregion is hampered by relatively low anticipated economic growth. Central Africa is the slowest growing of the four SSA subregions covered in the GFA report, with a projected 2026 per capita GDP growth rate of 0.8 percent (table 13). This is due in part to population pressures, as the Central Africa subregion's annual population growth rate of 2.9 percent over the coming decade is the highest among the four SSA subregions (appendix C). Violent conflict and political instability risks further hinder growth prospects in the subregion, with the eastern provinces of the Democratic Republic of the Congo (DRC), northern Cameroon, and southwest Chad particularly affected (Institute for Economics and Peace (IEP), 2025; Famine Early Warning Systems Network (FEWS NET), 2025a; FAO & WFP, 2025; United Nations, 2026). Ongoing violence in the DRC is especially impactful to total food demand and food insecure population trends in the Central Africa subregion, as the country accounts for an estimated 60.7 percent of the subregion's total population and 59.3 percent of the subregion's food insecure population (table 12). Despite these challenges, food security in the Central Africa subregion is estimated to remain relatively stable. The food insecure population in Central Africa is projected to increase to 70.2 million in 2026. However, due to overall population growth in the subregion, this represents a similar percent of the subregion's population (34.7 percent) as in 2025 (table 12; appendix B). Over the next decade, GDP growth is projected to outpace population growth in the Central Africa subregion, resulting in a decline in food insecurity prevalence in the subregion to 28.7 percent in 2036 (appendix C; table 12).

In contrast to the Central Africa subregion, the food demand and food security outlook in the East Africa subregion is buoyed by strong overall economic growth projections. However, East Africa also faces substantial downside risks from ongoing political instability and violent conflict (United Nations, 2026). The East Africa subregion's projected GDP per capita annual growth rate over the 2026–36 period is 2.4 percent, more than double that of each of the other SSA subregions (table 13). This strong anticipated economic growth is further reflected in the subregion's food security outlook, as food insecurity in East Africa in 2026 is projected to fall by 3.6 percent relative to 2025 (appendix B). Despite this improvement, an estimated 171.5 million people in East Africa are projected to be food insecure in 2026, representing 38.7 percent of the subregion's population (table 12). Much of the overall food demand growth and food security trends in the subregion are driven by Ethiopia, the largest East African country covered in the GFA report in terms of GDP and population (appendix C). The food insecure share of Ethiopia's population is projected to fall to 27.7 percent in 2026 in conjunction with projected 2026 GDP per capita growth of 4.2 percent, as the resource-intensive country benefits from robust agricultural, gold, and electricity production (table 12; appendix C; International Monetary Fund (IMF), 2025; United Nations, 2026; World Bank, 2026). The overall food demand and food security

²⁰ The Sahel is a semi-arid region immediately south of the Sahara Desert. While the region has varying definitions, the IEP (2025) report defines the Sahel as including parts of Burkina Faso, Cameroon, Chad, The Gambia, Guinea, Mali, Mauritania, Niger, Nigeria, and Senegal.

outlook in East Africa is further improved by macroeconomic projections in Uganda and Rwanda. Per capita GDP in 2026 is estimated to grow by 7.3 percent and 5.6 percent in Uganda and Rwanda, respectively, due in part to strong anticipated investment growth in each country (appendix C; World Bank, 2026). These economic growth projections are estimated to drive food demand and food security. Relative to 2025, the food-insecure shares of Uganda's and Rwanda's populations are projected to fall by 8.7 percent and 6.6 percent, respectively, in 2026 (appendix B). Over the next decade, the food-insecure share of the East Africa subregion's population is projected to fall to 27.5 percent, driven by strong overall economic growth prospects (table 12, appendix C).

Despite strong overall economic growth projections, protracted conflict and political instability present substantial downside risks to East Africa's improved food demand and food security outlook, particularly amidst Sudan's ongoing civil conflict (FEWS NET, 2025c). An estimated 36.2 percent of Sudan's population is projected to be food insecure in 2026, however, famine risks persist and food insecurity outcomes remain highly variable within the country depending on the frequency and intensity of conflict events (table 12; FAO & WFP, 2025; FEWS NET, 2025c). Related to the ongoing conflict, Sudan's 2026 GDP per capita is estimated to decline by 4.5 percent (appendix C). Moreover, despite an expected weakening of inflationary pressures compared to the 2023–25 period, Sudan's consumer price index (CPI) is estimated to increase by 42.6 percent in 2026 (appendix D). The spillovers from the Sudan conflict also present ongoing risks to the food demand and food security outlook in the rest of the East Africa subregion (FEWS NET, 2025c; FAO & WFP, 2025). For instance, the significant 2026 economic recovery projected in South Sudan is contingent on the return of South Sudan's oil export revenues, which remain vulnerable to escalations in the neighboring Sudan conflict (FEWS NET, 2025b; World Bank, 2026). Additionally, more than 70 percent of Somalia's population is estimated to be food insecure in 2026, the third-highest rate of all countries covered in the GFA report. High food insecurity in Somalia is related to ongoing drought and persistent political instability (FEWS NET, 2026b; FAO & WFP, 2025).

Of the four SSA subregions covered in the GFA report, Southern Africa has the highest prevalence of food insecurity (table 12). An estimated 40.7 percent of the subregion's population is considered to be food insecure in 2026, a less than 1-percent change from the 2025 estimate (appendix B). Relative to 2025, Malawi is projected to experience the largest increase in food insecurity in 2026 in the Southern Africa subregion (appendix B). Malawi's food insecurity prevalence is estimated to be 28.0 percent in 2026, a 15.6-percent increase from 2025 (table 12; appendix B). Malawi's increasing food insecurity is related to rising food prices amidst weak consumer income growth (appendix C, appendix D; FEWS NET, 2026a). Malawi's CPI is projected to grow by 31.2 percent in 2026, following 30.5 percent annual average growth over the 2023–25 period (appendix D). Moreover, the real domestic prices of each of the four food groups tracked by the GFA report (major grains, other grains, roots and tubers, and other foods) are also expected to rise in Malawi in 2026, with other foods (vegetable oils) prices increasing by 19 percent (appendix D). Over the next decade, GDP growth is projected to outpace population growth in Southern Africa, resulting in a fall in food insecurity prevalence in the subregion to 29.8 percent in 2036 (table 12, appendix C).

Of the four SSA subregions in the GFA report, the West Africa subregion is the most food secure and is projected to experience the largest reduction in food insecurity in 2026, relative to 2025. Approximately 23.4 percent of the subregion's population is estimated to be food insecure in 2026, a decrease of 5.4 percent from the 2025 estimate (table 12; appendix B). The food demand and food security outlook in West Africa is strengthened by the subregion's estimated average 2026 per capita GDP of \$1,711, which is the highest among SSA's four subregions (table 13). West Africa's subregional trends are primarily driven by Nigeria, the most populous country and largest economy among the

SSA countries covered in the GFA report (appendix C). Nigeria's food insecurity prevalence in 2026 is projected to be 27.9 percent, a decrease of 7.8 percent compared to 2025 (table 12; appendix B). Decreasing food insecurity in Nigeria is related to easing, albeit still elevated, inflation (United Nations, 2026). Nigeria's CPI is expected to grow by 18.1 percent in 2026, compared to 27.5 percent annual average growth over the 2023–25 period (appendix D). Nigeria's real domestic food prices are also expected to fall in 2026 amidst a rebound in agricultural output (appendix D; World Bank, 2026). Despite these anticipated improvements, conflict risks remain an impediment to further food demand and food security increases in the West Africa subregion, as northern Nigeria continues to experience ongoing violence and Burkina Faso persistently experiences the most deaths from terrorism in the world (IEP, 2025; FAO & WFP, 2025). Over the next decade, the food insecure share of the population in the West Africa subregion is projected to decline to 16.2 percent, as annual GDP growth of 3.4 percent outpaces population growth (table 12; appendix C).

Table 12

Food insecurity results in the Sub-Saharan Africa region, 2026 and 2036

Region/subregion	Country	Population		Population food insecure		Share of population food insecure		Food gap (per capita)	
		2026	2036	2026	2036	2026	2036	2026	2036
		Million		Million		Percent		(kilocalories/day)	
Sub-Saharan Africa	Region total	1,268.7	1,621.4	412.6	384.1	32.5	23.7	415	399
Central Africa	Subregion total	202.3	268.2	70.2	77.0	34.7	28.7	508	484
	Burundi	14.4	18.8	10.8	12.5	75.0	66.4	547	493
	Cameroon	32.7	42.1	4.0	3.1	12.1	7.3	266	242
	Central African Republic	5.9	6.9	2.7	1.6	46.6	23.1	412	320
	Chad	20.3	26.9	9.5	11.4	46.9	42.4	495	474
	Congo	6.4	8.0	1.6	1.1	25.0	13.8	287	247
	Democratic Republic of the Congo	122.8	165.6	41.6	47.3	33.9	28.6	539	511
East Africa	Subregion total	443.1	556.3	171.5	153.1	38.7	27.5	413	412
	Djibouti	1.0	1.2	0.2	0.2	18.3	12.5	310	285
	Eritrea	6.5	7.5	3.7	3.9	56.3	52.5	414	398
	Ethiopia	124.2	153.8	34.4	14.3	27.7	9.3	317	244
	Kenya	57.0	69.1	30.8	23.3	54.1	33.8	404	328
	Madagascar	30.7	37.0	17.5	14.6	56.8	39.4	444	371
	Rwanda	14.1	16.3	3.8	1.5	26.7	9.3	354	277
	Somalia	20.3	27.0	14.6	17.5	71.9	64.9	616	569
	South Sudan	12.4	15.1	6.2	4.1	49.6	26.9	437	345
	Sudan	53.3	66.5	19.3	42.6	36.2	64.2	381	509
	Tanzania	71.1	93.1	23.7	18.0	33.4	19.4	452	386
	Uganda	52.5	69.8	17.4	13.0	33.3	18.7	401	339

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Region/subregion	Country	Population		Population food insecure		Share of population food insecure		Food gap (per capita)	
		2026	2036	2026	2036	2026	2036	2026	2036
		Million		Million		Percent		(kilocalories/day)	
Southern Africa	Subregion total	144.2	184.7	58.7	55.1	40.7	29.8	439	397
	Angola	40.3	55.3	15.1	20.4	37.4	36.9	386	384
	Eswatini	1.2	1.2	0.3	0.2	23.6	14.0	282	248
	Lesotho	2.3	2.4	1.5	1.2	68.2	50.3	488	402
	Malawi	22.7	27.5	6.4	3.6	28.0	13.1	359	296
	Mozambique	35.1	45.3	15.6	10.3	44.5	22.6	450	356
	Namibia	2.9	3.4	0.6	0.4	20.5	10.4	252	216
	Zambia	22.0	28.5	9.9	9.1	45.1	31.9	530	465
	Zimbabwe	17.8	21.0	9.3	10.0	52.3	47.5	474	451
West Africa	Subregion total	479.0	612.1	112.2	99.0	23.4	16.2	346	315
	Benin	15.7	21.4	3.0	3.0	19.0	13.8	313	291
	Burkina Faso	24.1	29.8	6.2	5.1	25.9	17.3	436	392
	Cabo Verde	0.6	0.7	0.0	0.0	4.7	1.3	211	179
	Cote d'Ivoire	32.6	40.5	6.1	4.3	18.8	10.7	392	347
	Gambia	2.6	3.2	0.4	0.2	16.0	7.2	274	234
	Ghana	36.1	43.9	1.8	0.8	5.1	1.9	228	200
	Guinea	14.8	19.3	2.1	2.4	14.4	12.2	319	308
	Guinea-Bissau	2.2	2.9	0.4	0.5	20.0	17.4	298	288
	Liberia	5.7	7.0	2.9	2.7	51.0	39.1	572	510
	Mali	23.3	30.4	4.8	4.0	20.5	13.0	329	296
	Mauritania	5.4	7.1	1.3	1.1	25.0	15.9	337	300
	Niger	28.3	40.3	6.0	5.7	21.2	14.3	378	344
	Nigeria	249.0	318.0	69.5	63.4	27.9	19.9	328	298
	Senegal	19.8	24.4	1.9	0.8	9.6	3.4	229	195
	Sierra Leone	9.5	11.6	3.4	3.3	36.0	28.3	454	419
	Togo	9.4	11.7	2.1	1.6	23.0	13.3	310	271

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

Table 13

Inflation-adjusted per capita Gross Domestic Product (GDP) in the Sub-Saharan Africa region, 2026 and 2036

Subregion	Per capita GDP			Per capita GDP Annual growth rate	
	2023-25 (average)	2026	2036	(2025-26)	(2026-36)
Region total	1,313	1,350	1,534	1.6	1.3
Central Africa	718	731	780	0.8	0.7
Eastern Africa	1,131	1,164	1,480	2.4	2.4
Southern Africa	1,558	1,587	1,663	1.1	0.5
Western Africa	1,657	1,711	1,874	1.5	0.9

Note: Values are expressed in 2017 U.S. dollars. Regions include only countries covered by the Global Food Assessment. For full country statistics, see appendix C.

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

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Appendix A: Food Security Assessment Model–Definitions and Methodology

The Global Food Assessment (GFA) model²¹ used in this report projects food consumption (food demand), food access, and food gaps in 83 low- and middle-income countries. Each country's food security metrics are estimated for 2026 and projected to 2036. Food is divided into four groups, covering 100 percent of food consumption: the major grain (determined by calorie share), other grains, root crops, and all other food.

The food security of a country is evaluated based on the gap between estimated domestic food consumption (food demand) and a caloric threshold necessary to sustain life at a moderate level of activity, set at 2,100 kilocalories (kcal) per capita per day. The modeling projections of food demand are expressed in a grain equivalent based on each food group's caloric content to allow aggregation across food groups, which allows this grain equivalent to be easily expressed in kilograms (kg).

Three food security indicators are provided: (1) the share of food insecure, which is the share of the total population unable to reach the caloric threshold; (2) the number of food insecure people; and (3) the food gap, which is the amount of food needed to allow each individual consuming below the threshold level to reach the caloric target. This caloric threshold indicates the relative well-being of a country's population and helps to quantify unequal food access within a country. Projection results provide a baseline for the food security situation in each country, and the results depend on the model's specification and underlying assumptions. The simulation framework used to project food demand is based on partial-equilibrium models for each country in the assessment. Beghin et al. (2015) introduced the methodology and Beghin et al. (2017) provided more detail on price transmission and food security projections.

Each country model comprises a price-independent generalized log-linear (PIGLOG)²² demand system for each of the four food groups (Deaton & Muellbauer, 1980; Muellbauer, 1975). The demand system is calibrated on a 3-year average of prices and incomes (2023–25), observed consumption levels, a measure of inequality, and income and price elasticities. Demand projections are based on projected prices and incomes; the model implicitly assumes that the demand system represents preferences and that the projections are constant over time.

The distribution of consumption used to calculate food security measures is described by a constant coefficient of variation, which implies an increasing standard deviation of consumption as consumption rises over the projection period. The income distribution is also assumed to be constant over the projection period. The implied price and income elasticities evolve over the projection period as prices and incomes change; generally, food groups become more income-inelastic because incomes rise.

²¹ The methodology used to estimate the GFA model indicators was replaced in 2016. To understand the changes to the model and their impact on food security estimates, see Rosen et al. (2016).

²² PIGLOG refers to a class of demand systems that provide a flexible structure with a nonlinear income response and exact aggregation of individual demand into a representative consumer demand function of per capita income and, as shown later, the Theil entropy measure of income inequality.

Structural Framework for Estimating and Projecting Food Demand in the Aggregate Demand System

Definition and Calibration

The demand q_i^h for a given food group i , for income-decile h is specified as:

$$(1) \quad q_i^h = \left(\frac{x^h}{p_i}\right)(A_i(p_i) + B_i(p_i)\ln(x^h))$$

Where p_i is the price (expressed in real local currency), and x^h is the decile-level income.²³ $A_i(p_i) = a_{i0} + a_{i1}p_i$ and $B_i(p_i) = b_{i0} + b_{i1}p_i$.

The PIGLOG demand formulation allows for aggregation of income decile-level demands in (1) into average per capita market demand for each food group i , as shown in (2).

$$(2) \quad \bar{q}_i = \left(\frac{\bar{x}}{\bar{p}_i}\right)\left((a_{i0} + a_{i1}\bar{p}_i) + (b_{i0} + b_{i1}\bar{p}_i)(\ln(\bar{x}) + \ln(\frac{10}{z}))\right)$$

The latter in equation (2) is a function of average per capita income $\bar{x}$ and Theil's entropy measure of income inequality z .

The average expenditure share for good category i is also defined as:

$$(3) \quad \bar{w}_i = (a_{i0} + a_{i1}\bar{p}_i) + ((b_{i0} + b_{i1}\bar{p}_i)(\ln(\bar{x}) + \ln(\frac{10}{z})))$$

The elasticity of average demand for good i , with respect to average income (or total expenditure), is:

$$(4) \quad \varepsilon_{\bar{q}_i, \bar{x}} = 1 + \frac{(b_{i0} + b_{i1})}{\bar{w}_i}.$$

The own-price elasticity of the average demand is:

$$(5) \quad \varepsilon_{\bar{q}_i, p_i} = -1 + \left(\frac{p_i}{\bar{w}_i}\right)(a_{i1} + b_{i1}(\ln(\bar{x}) + \ln(\frac{10}{z})))$$

In each country, consumers at different income levels have similar underlying preferences over good i , as embodied in parameters a_{i0} , a_{i1} , b_{i0} , b_{i1} , but their respective consumptions vary because their respective incomes vary.

With a system of three linear equations (equations 3, 4, and 5), with four unknown variables, one parameter remains free. The free parameter (chosen to be b_{i0}) is used to ensure that decile demands behave consistently with stylized facts of food security as follows: price sensitivity and income responsiveness decline with income levels, own-price elasticities must be negative, and food expenditure shares tend to fall with increasing income. A range of values of the free parameters allows can ensure these stylized facts are satisfied by the calibrated demand system. Here b_{i0} is pinned down such that the ratio of price elasticities for the bottom and top deciles is equal to the ratio of the natural logarithm of their national income shares.

For any given free parameter value, the system of equations is solved for parameters b_{i1} , a_{i1} , and a_{i0} as a function of the free parameter. Once these three parameters are recovered, parameters $\tilde{a}_{i0}$, $\tilde{a}_{i1}$, $\tilde{b}_{i0}$, and $\tilde{b}_{i1}$, along with income x^h and price p_i , are used to generate the consumption level of good i for each decile specified in equation (1). In this initial calibration, the quality of any good i is assumed to be constant across the income distribution.

²³ The combined impacts of supply side factors (such as input and fertilizer prices, weather, and uncertainties with agricultural production) are expected to drive prices and income.

For each country, a demand system is calibrated for each of the four food groups—based on income, consumption levels, and prices from the 3 years preceding the projection period (2023–25). The major grain (which varies across countries) is determined, based on caloric share in the diet. The other grains food group contains all other grains; the prices for this food group are weighted by its components' caloric shares. At the calibration stage, domestic food prices are either observed (including the components of a price index for other grains that is weighted by caloric share), or synthetic prices are created.

For the food prices not observed in the calibration stage, a synthetic domestic price, p_i^{ds} , that is linked to the world price, p_i^w , is created and expressed in local currency. The parameter θ is the price transmission slope, which is assumed 0.7. The parameter trc^{int} represents international transportation and market costs (e.g., cost, insurance and freight (CIF) and free on board (FOB)), which are assumed 10 percent, and trc^{dom} are domestic trade costs, which are assumed \$20 per ton in real terms:

$$(6) \quad p_i^{ds} = \theta * p_i^w * (1 + trc^{int} / \theta) * (1 + tariff / \theta) + trc^{dom}$$

At this stage, the calibration also includes a price transmission equation that links the domestic price p_i^{dom} (either observed or synthetic) to the world price. The generic price transmission equation is:

$$(7) \quad p_i^{dom} = \theta * p_i^w + \hat{I}$$

During the calibration stage, the intercept, I , is solved in real terms and is held constant during the projection period.

Projection of Food Demand Calculation and Food Security Indicators

The GFA food security indicators (share of food insecure population, number of food insecure people, and food-gap) are derived from the levels of food demand projected, using the calibrated demand system.

For each country, the demand parameters and projected income, x_t , and prices, p_{it} , are used to project food demand, q_{it} , for each of the four food groups i in each year t so that $q_{it} = \hat{A}_i (x_t / P_{it}) ((P_{it}) + B_i (P_{it}) \ln(x_t))$. The demand for the four food groups is aggregated into total food demand expressed in calories, so that $\sum q_{it} = Q_t$, which is also referred as food or calorie consumption. This measure of total demand is used to calculate food security indicators.

Data from the Food and Agriculture Organization of the United Nations (FAO) (2019) are used to estimate the distribution of calorie consumption—beginning with a coefficient of variation (CV) of food availability—which characterizes consumption distributed with a mean m and variance v , so that $CV = (\sqrt{v} / m)$.²⁴ Given the CV and the projected mean caloric consumption (Q_t), the variance (v) of the empirical distribution for a given year t can be recovered.

Assuming food consumption Q_t is distributed lognormal, then $\ln(Q_t)$ is distributed $N(\mu, \sigma^2)$ with $\mu = \ln(\frac{m^2}{\sqrt{v + m^2}})$ and $\sigma^2 = \ln(1 + v/m^2)$. Once μ and σ^2 are computed, the proportion of the population

that falls below the calorie threshold (2,100 kilocalories (kcal) per capita per day) is recovered using the standard normal CDF, Φ : $\Phi^{insecure} = \Phi(\frac{\ln(2,100 - \mu)}{\sigma})$. Here, $\Phi^{insecure}$ indicates the share of the

population that is food insecure. Using this share and total population in the respective country, the total number of food insecure people in this country is calculated.

²⁴ See the appendix of Beghin et al. (2015b) for more detail.

Next, the expected average food intake of food insecure people, $q_{cal\ average}^{food\ insecure}$, can be recovered using the partial mean of the calorie availability below the threshold (2,100 kcal), which is calculated as $q_{cal}^{food} = e^{\mu - \sigma / \Phi(2100)} [\phi((\ln(2100) - \mu) / \sigma)]$, where ϕ is the standard normal density function.

The food gap is the difference between the caloric threshold of 2,100 kcal and the average calorie availability for food insecure people. This gap provides a measure of the food gap in kcal per day per food insecure person. The latter, multiplied by the number of food insecure people and converted into grain equivalent per year, yields a food-gap measure based on annual grain volume.

Data

The model is calibrated for each of the four food groups based on average prices and income from 2023 to 2025. Prices are expressed in real local currency units. Quantities are expressed in grain-equivalent units.

Calibrated Parameters and Variables:

Demand parameters ($\tilde{a}_{i0}$, $\tilde{a}_{i1}$, $\tilde{b}_{i0}$, and $\tilde{b}_{i1}$), price intercepts, and domestic prices (synthetic)

projections are based on data from: the USDA, Economic Research Service (ERS) International Macroeconomic Data Set, Oxford Economics, the University of Nevada Experiment Station in collaboration with the University of Missouri Food and Agricultural Policy Research Institute (FAPRI-NEV, 2025), University of Arkansas' Agricultural Experiment Station (Durand-Morat & Mulimbi, 2025), and World Bank Commodity Markets Price Forecasts. They utilize the calibrated demand parameters and price transmission between world and domestic prices.

Endogenous Projection Variables:

- Food demand, domestic prices

Exogenous Variables Used in Calibration and Projection:

- Average consumption per capita—Food and Agriculture Organization (FAO) of the United Nations Food Balance Sheet (most recent available)²⁵
- Grain shares: FAO Food Balance Sheet²⁶
- Elasticities of price and income calculations: 2011 International Comparison Program (ICP) data, following the methodology in Muhammad et al. (2011)²⁷
- Domestic prices (observed): FAO Global Information and Early Warning System (GIEWS), annual average; market depends on reporting

²⁵ Food Balance Sheets (FBS) are from 2023. In order to generate per capita consumption for each food group, grain consumption levels and share of grains in total calories were used, as reported in the Food Agriculture Organization of the United Nation' (FAO) Global Information Early Warning Systems (GIEWS) Cereal Supply and Demand Balance for Sub-Saharan African Countries from January 2026. The reported consumption of all food groups uses information from FAO's grain supply data and changes in caloric intake.

²⁶ There are no current FBS for Eritrea. The FBS of Ethiopia was used to approximate the shares of grains and roots and tubers in total calories for Eritrea.

²⁷ Elasticities are not available for all countries. Estimates are used from neighboring countries (Somalia, Eritrea, Djibouti, and South Sudan—Ethiopia; Lebanon—Jordan; Syria—Iraq; Algeria—average Tunisia and Morocco; Afghanistan—average Tajikistan and Pakistan; Turkmenistan—average Tajikistan, Kyrgyzstan, and Kazakhstan; Uzbekistan—average Tajikistan, Kyrgyzstan, and Kazakhstan).

- Tariffs: World Bank’s World Integrated Trade Solution (WITS)²⁸
- Exchange Rates and Consumer Price Indices (CPIs): USDA, ERS’s International Macroeconomic Data Set²⁹
- Population: U.S. Department of Commerce, Bureau of the Census
- World prices: the University of Nevada Experiment Station in collaboration with the University of Missouri Food and Agricultural Policy Research Institute (FAPRI-NEV, 2025), University of Arkansas’ Agricultural Experiment Station (Durand-Morat & Mulimbi, 2025), and World Bank Commodity Markets Price Forecasts³⁰
- Per capita income: generated using GDP and population from USDA, ERS’s International Macroeconomic Data Set³¹
- Income distribution: World Bank Data Bank.³²
- Coefficient of variation (CV) of food consumption: FAO State of Food Insecurity (FAO, 2019)³³

Modeling Staple Cereal Production

The current production module of the GFA model aggregates a panel of agricultural production data for all 83 countries in the assessment to provide a model-based estimation for the current year and a projection for 10 years out for yield and area dynamics. Agricultural production is decomposed into yield (production per hectare) and area for grains. Production (PR) for a given country c in year t is obtained by multiplying projected yield (YL) and area (AR).

$$PR_{ct} = AR_{ct} * YL_{ct}$$

The projections cover the period 2026–36, based on producer price projections in local currency units and long-term international commodity prices from FAPRI-NEV (2025) and Durand-Morat and Mulimbi (2025).

²⁸ Tariff rates are available through 2023. Tariff rates are not available for Djibouti, South Sudan, Somalia, Turkmenistan, Eritrea, and North Korea. For Djibouti, Somalia, South Sudan, and Eritrea, the Common Market for Eastern and Southern Africa (COMESA) average was used. Turkmenistan has no tariffs. North Korea does not import on the open market, so calculations assume there are zero tariffs and do not quantify other trade frictions.

²⁹ Ecuador and El Salvador are modeled in the currency of U.S. dollars (instead of local currency), as in the USDA, ERS International Macroeconomic Data Set, which is based on data from the International Monetary Fund (IMF) and Oxford Economics. Projections are constructed for South Sudan, Sudan, Somalia, and North Korea using data from the Oxford Economics.

³⁰ The world price series include the following: corn (U.S. gulf #2 yellow); rice (Thai, B, freight on board (FOB) Bangkok, Thailand); sorghum (U.S. Gulf, #2 yellow); wheat (U.S. Gulf, #2 Hard Red Wheat); barley (E.C., Rouen, France); Oats (U.S. farm); other food (represented by soybean oil, U.S. all exports, FAS GATS, calculated). World price projections are not available for all cereals represented in the FAO Food Balance Sheets and the FAO Global Information Early Warning System (GIEWS) price database. The world price of wheat to represent rye; and sorghum to represent all other cereals (e.g., millet, teff, fonio) was used. The world price for cassava (tapioca, hard pellets, FOB, Rotterdam, Netherlands)—representing roots and tubers—was predicted based on historical trends for corn.

³¹ Projections were constructed using information from Oxford Economics for South Sudan, Sudan, Somalia, and North Korea.

³² Income distributions are not available for all countries. Report used Djibouti, Eritrea, South Sudan, and Somalia-Ethiopia; Zimbabwe–Zambia; North Korea–Mongolia; and Afghanistan—average Uzbekistan, Pakistan, and Tajikistan.

³³ The coefficient of variation and the income distribution parameters are assumed to be constant throughout the projection period.

Yield

Yield parameters are estimated econometrically using panel data consisting of observations for each country and are calibrated to observed yields for the immediate past 3 years (e.g., 2023–25 yields). The calibration procedure involves in-sample prediction using observed yield data and consensus estimates for the expected return ratio, an indicator of the relative profitability of fertilizer use. Yields respond to expected relative return ratios per hectare (RR), autonomous technical change over time (T), and include a country-specific effect.

$$YL_{ct} = f(RR_{ct}, T_{ct})$$

The return ratios are the ratio of the return per hectare—revenue from yield divided by the price of fertilizer— $RR_{ct} = (yp_{ct} * Y_{ct}) / fp_{ct}$, where yp and fp are yield and fertilizer prices, respectively. The expected return ratios include a current-year component and a long-term expectation component, expressed in the real local currency unit. In these calculations, the long term international commodity prices from FAPRI-NEV (2025) and Durand-Morat and Mulimbi (2025) for the major grain by production volume (for grain) were used.

The domestic price for each grain is linked to its world reference price, expressed in real local currency unit, through the following price transmission equation:

$$p^{domestic} = 0.7 \times p^{world} + 0.3 \times I$$

The expected domestic price is a weighted average of 70 percent of the current-year world price (p^{world}) and 30 percent of the mean domestic price (I) over the analysis time period. The grain production data used in the estimation come from USDA, Foreign Agricultural Service's *Production, Supply, and Distribution* (PSD) database and from the Food and Agriculture Organization of the United Nations (FAO). The intercept, I , is the mean of the price over the regression time period (2016–24).

Modeling Area

Crop area, AR_{ct} , is modeled with the widely used Nerlovian specification—in which lagged area, expected crop and fertilizer prices, and a time trend—enter into the equation as follows:

$$AR_{ct} = f(yp_{ct}, fp_{ct}, AR_{ct-1}, T)$$

The expected prices are averages of contemporaneous and lagged relative prices. A time trend is included in the area equation to capture non-price factors in area, and a country fixed effect. The area equation is numerically calibrated to the base-year average of the preceding 3 years of the report (e.g., 2023–25), using consensus estimates for price and lagged acreage responses. Regional and subregional models are fitted to allow for heterogeneity among diverse countries included in the GFA model. The regional specification disaggregates the estimation of area and yield by the five regional classifications of the GFA countries: Sub-Saharan Africa (SSA), Asia, Latin America and the Caribbean (LAC), Middle East and North Africa (MENA), and the Former Soviet Union (FSU). The subregional specification disaggregates the model to 13 subregions of the GFA countries: Central Africa, East Africa, Southern Africa, West Africa, North Africa, Middle East, Central America, South America, the Caribbean, the Former Soviet Union, South Asia, Southeast Asia, and East Asia.

A model-based projection performance is assessed in terms of how well the specified model can be expected to perform on an independent (out-of-sample) data set, often assessed by the actual estimate of the out-of-sample mean squared error (MSE). When an independent out-of-sample dataset

is not available, a cross-validation (CV) approach (used in this report) can be used to choose the best model by estimating the out-of-sample MSE using an in-sample dataset. The out-of-sample error (often referred to as the test error) is the average error that results from using the regression method to predict the response on a new observation that was not used in regression estimation. Given an in-sample dataset, the choice of a particular specification (e.g., in this report, the regional and subregional model specifications) is warranted if the model results in a low test error (James et al., 2017). The models are assessed with a “leave-one-out-cross-validation” (LOOCV) to simulate their out-of-sample prediction performance (James et al., 2017). The performances of regional and subregional model specifications are assessed using the overall out-of-sample MSE scores. The model with the smallest out-of-sample MSE is selected for estimation (Zereyesus et al., 2022).

Modeling Implied Additional Supply Required

The Implied Additional Supply Required (IASR) quantifies the total grain demand in each country that is not projected to be met through domestic production. Total grain demand (TD) is comprised of food demand (FD) generated by our demand-driven model and nonfood use (NFD), which is comprised of seed, feed, processing, and other uses. The IASR for grains thus can be expressed as: $IASR = TD - PR$.

The demand for grain for processing, seed, and other uses is assumed to grow at the same rate as production. The demand for grain feed grows at the average rate was observed during 2006–23.

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Appendix B: Food Insecurity Measures for the Global Food Assessment (GFA) Countries, 2026–36

Country	Food insecure (percent)				Population insecure (million)				Food gap (kcal per capita per day)				Food gap (thousand metric tons)			
	2023–25	2025	2026	2036	2023–25	2025	2026	2036	2023–25	2025	2026	2036	2023–25	2025	2026	2036
GFA total	23.5	20.0	19.5	11.4	1,037.5	892.5	884.4	589.0	368	358	359	378	50,535	42,068	41,771	28,770
Asia region	18.3	14.1	13.8	4.6	466.1	364.1	359.4	130.3	299	285	288	296	18,941	14,092	13,976	4,894
East Asia subregion	65.1	59.7	60.3	47.8	19.5	18.0	18.2	14.6	492	460	465	406	1,334	1,147	1,175	824
Democratic People's Republic of Korea	72.3	66.6	67.4	54.6	19.2	17.7	18.0	14.6	497	464	468	407	1,321	1,138	1,167	823
Mongolia	10.8	7.6	7.2	0.6	0.4	0.3	0.3	0.0	252	236	233	173	13	9	8	1
South Asia subregion	19.2	14.6	14.3	4.6	370.8	284.3	281.7	99.2	293	278	281	292	14,204	10,281	10,252	3,492
Afghanistan	37.9	32.5	33.9	21.8	18.2	16.1	17.3	14.3	319	301	306	266	718	600	654	472
Bangladesh	26.0	20.0	19.4	3.7	43.8	34.0	33.3	6.8	301	279	277	204	1,966	1,418	1,379	207
India	14.8	10.5	9.9	0.6	208.7	149.1	140.9	9.0	251	233	230	160	7,109	4,724	4,409	196
Nepal	12.2	9.0	7.9	1.0	3.8	2.8	2.5	0.3	249	235	229	174	137	96	82	8
Pakistan	36.5	30.8	32.3	22.1	92.2	79.1	84.5	68.0	382	360	366	326	4,114	3,323	3,611	2,586
Sri Lanka	18.6	14.7	14.5	3.5	4.1	3.2	3.2	0.8	255	241	241	188	160	120	118	23
Southeast Asia subregion	12.9	10.4	9.9	2.5	75.8	61.8	59.6	16.4	279	268	266	220	3,403	2,664	2,548	579
Burma	17.2	12.8	11.2	3.3	9.9	7.4	6.5	2.0	278	260	253	208	452	316	270	70
Cambodia	7.5	4.9	4.6	0.5	1.3	0.8	0.8	0.1	235	220	217	169	52	32	30	3
Indonesia	13.6	11.5	11.2	2.7	38.4	32.7	32.1	8.2	273	263	262	209	1,688	1,389	1,355	276
Laos	4.3	1.5	1.3	0.1	0.3	0.1	0.1	0.0	193	170	167	131	11	3	3	0
Philippines	15.8	13.1	12.6	4.1	18.7	15.7	15.4	5.7	309	296	294	243	917	739	719	220
Vietnam	6.8	4.6	4.3	0.3	7.1	4.9	4.6	0.4	247	232	230	174	283	184	172	10
Former Soviet Union region	6.9	4.7	4.7	0.6	8.1	5.5	5.6	0.7	215	202	203	180	240	154	158	18
Armenia	3.1	2.1	2.1	0.3	0.1	0.1	0.1	0.0	178	169	169	137	3	2	2	0
Azerbaijan	5.0	3.6	3.5	1.2	0.5	0.4	0.4	0.1	175	166	166	145	13	9	9	3
Georgia	12.2	8.9	8.2	1.1	0.6	0.4	0.4	0.1	240	226	223	170	20	13	12	1
Kyrgyzstan	7.2	3.9	3.5	0.2	0.4	0.2	0.2	0.0	218	198	195	143	14	7	6	0
Moldova	5.8	4.3	4.4	0.2	0.2	0.2	0.2	0.0	179	171	171	123	6	4	4	0

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Country	Food insecure (percent)				Population insecure (million)				Food gap (kcal per capita per day)				Food gap (thousand metric tons)			
	2023–25	2025	2026	2036	2023–25	2025	2026	2036	2023–25	2025	2026	2036	2023–25	2025	2026	2036
Tajikistan	15.5	10.9	11.0	2.9	1.6	1.2	1.2	0.4	289	269	269	218	62	41	43	11
Turkmenistan	8.8	4.8	3.8	0.1	0.5	0.3	0.2	0.0	217	197	190	129	15	8	6	0
Ukraine	9.5	6.8	7.4	0.4	3.4	2.5	2.8	0.1	195	184	186	130	91	63	71	2
Uzbekistan	1.9	0.9	0.7	0.0	0.7	0.3	0.3	0.0	167	153	150	119	16	7	5	0
Latin America and the Caribbean region	21.8	19.1	19.8	10.3	39.1	34.5	36.1	20.2	394	390	390	360	2,136	1,867	1,951	1,013
Caribbean subregion	33.5	31.7	32.1	22.0	8.5	8.1	8.3	6.1	726	712	711	614	880	825	840	537
Dominican Republic	4.0	3.2	3.5	0.4	0.4	0.3	0.4	0.0	192	186	188	149	13	10	11	1
Haiti	67.1	64.2	64.4	45.2	7.9	7.6	7.8	6.0	768	746	747	621	862	811	825	535
Jamaica	6.6	4.9	5.2	1.5	0.2	0.1	0.1	0.0	199	189	191	162	5	4	4	1
Central America subregion	23.8	20.9	21.6	10.4	9.8	8.7	9.1	4.9	343	330	334	282	417	356	377	172
El Salvador	18.4	16.1	17.6	11.1	1.3	1.1	1.2	0.8	274	265	270	245	42	36	40	24
Guatemala	18.0	15.5	15.6	6.1	3.3	2.9	2.9	1.3	309	299	299	250	117	100	101	38
Honduras	34.8	30.9	32.3	14.2	3.3	3.0	3.2	1.5	376	361	366	293	147	127	137	54
Nicaragua	29.8	26.1	27.2	16.3	2.0	1.8	1.8	1.2	387	371	376	328	110	94	99	56
South America subregion	18.4	15.5	16.3	7.6	20.8	17.6	18.7	9.2	282	272	275	232	839	686	733	304
Bolivia	44.2	40.8	41.2	22.1	5.4	5.1	5.2	3.0	340	329	330	267	255	230	235	111
Colombia	9.2	7.1	7.3	2.7	4.6	3.5	3.7	1.4	244	233	234	202	163	120	125	41
Ecuador	22.6	19.4	20.9	10.5	4.1	3.6	3.9	2.1	248	238	243	207	147	122	136	63
Peru	20.3	16.6	17.9	7.6	6.6	5.4	5.9	2.7	281	267	272	228	274	214	237	90
Middle East and North Africa region	21.2	20.5	19.2	13.1	76.2	74.7	70.7	53.7	397	381	387	433	3,938	3,708	3,559	3,020
Middle East subregion	33.3	34.0	31.2	23.7	50.5	52.3	48.4	41.0	448	420	432	488	2,950	2,866	2,728	2,597
Iran	13.3	17.6	15.8	7.0	11.8	15.7	14.2	6.7	263	280	273	232	410	582	515	206
Lebanon	13.9	13.7	11.4	4.5	0.8	0.8	0.6	0.3	256	255	246	209	28	27	22	7
Syria	50.1	42.9	27.6	5.1	11.9	10.4	6.8	1.5	388	360	306	214	603	492	274	41
Yemen	77.4	73.5	75.9	76.1	26.1	25.4	26.8	32.6	565	537	553	555	1,909	1,764	1,918	2,343

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Country	Food insecure (percent)				Population insecure (million)				Food gap (kcal per capita per day)				Food gap (thousand metric tons)			
	2023–25	2025	2026	2036	2023–25	2025	2026	2036	2023–25	2025	2026	2036	2023–25	2025	2026	2036
North Africa subregion	12.3	10.7	10.5	5.3	25.6	22.4	22.3	12.7	297	290	288	257	989	843	831	423
Algeria	11.4	9.2	9.9	7.1	5.3	4.4	4.8	3.9	279	268	272	256	202	160	176	135
Egypt	13.7	12.5	11.9	5.7	15.2	14.2	13.6	7.3	307	302	299	262	592	541	515	243
Morocco	12.1	9.3	9.1	3.1	4.5	3.5	3.5	1.3	291	277	276	234	178	131	129	40
Tunisia	4.6	3.1	3.1	1.4	0.6	0.4	0.4	0.2	232	220	220	200	17	11	11	5
Sub-Saharan Africa region	37.2	33.5	32.5	23.7	448.0	413.7	412.6	384.1	436	417	415	399	25,279	22,247	22,128	19,825
Central Africa subregion	38.0	34.5	34.7	28.7	72.4	67.8	70.2	77.0	522	508	508	484	4,936	4,491	4,653	4,859
Burundi	79.1	76.2	75.0	66.4	10.7	10.6	10.8	12.5	579	556	547	493	789	751	749	779
Cameroon	14.3	12.0	12.1	7.3	4.4	3.8	4.0	3.1	276	266	266	242	164	137	142	101
Central African Republic	49.1	45.9	46.6	23.1	2.8	2.6	2.7	1.6	422	409	412	320	142	131	136	62
Chad	50.0	46.3	46.9	42.4	9.5	9.1	9.5	11.4	510	492	495	474	624	575	603	691
Congo	48.1	25.4	25.0	13.8	2.9	1.6	1.6	1.1	367	288	287	247	155	66	66	39
Democratic Republic of the Congo	36.4	33.6	33.9	28.6	42.0	39.9	41.6	47.3	553	538	539	511	3,062	2,833	2,957	3,188
East Africa subregion	44.9	40.1	38.7	27.5	189.4	173.4	171.5	153.1	444	417	413	412	10,535	9,043	8,897	7,910
Djibouti	20.4	17.2	18.3	12.5	0.2	0.2	0.2	0.2	319	306	310	285	9	7	8	6
Eritrea	63.7	54.9	56.3	52.5	4.0	3.5	3.7	3.9	449	408	414	398	225	178	188	194
Ethiopia	27.5	30.1	27.7	9.3	32.7	36.5	34.4	14.3	317	326	317	244	1,182	1,359	1,248	399
Kenya	62.1	53.5	54.1	33.8	33.9	29.8	30.8	23.3	440	402	404	328	1,936	1,556	1,615	992
Madagascar	65.0	56.7	56.8	39.4	19.1	17.1	17.5	14.6	485	443	444	371	1,221	997	1,021	713
Rwanda	33.5	28.6	26.7	9.3	4.6	4.0	3.8	1.5	381	362	354	277	217	179	166	53
Somalia	71.3	69.6	71.9	64.9	13.5	13.7	14.6	17.5	611	599	616	569	1,142	1,130	1,242	1,377
South Sudan	54.2	67.7	49.6	26.9	6.4	8.3	6.2	4.1	458	530	437	345	341	507	312	162
Sudan	57.9	36.1	36.2	64.2	29.4	18.7	19.3	42.6	476	381	381	509	1,666	848	875	2,587
Tanzania	37.2	33.6	33.4	19.4	25.0	23.2	23.7	18.0	470	453	452	386	1,496	1,339	1,363	886
Uganda	41.6	36.4	33.3	18.7	20.5	18.5	17.4	13.0	437	415	401	339	1,100	942	859	542
Southern Africa subregion	45.0	40.5	40.7	29.8	61.7	56.9	58.7	55.1	468	441	439	397	3,678	3,193	3,275	2,798
Angola	38.6	37.7	37.4	36.9	14.6	14.7	15.1	20.4	391	387	386	384	737	737	753	1,013

Country	Food insecure (percent)				Population insecure (million)				Food gap (kcal per capita per day)				Food gap (thousand metric tons)			
	2023–25	2025	2026	2036	2023–25	2025	2026	2036	2023–25	2025	2026	2036	2023–25	2025	2026	2036
Eswatini	28.4	24.0	23.6	14.0	0.3	0.3	0.3	0.2	298	284	282	248	12	10	10	5
Lesotho	71.8	67.2	68.2	50.3	1.6	1.5	1.5	1.2	510	482	488	402	99	88	91	60
Malawi	29.0	24.2	28.0	13.1	6.3	5.4	6.4	3.6	363	344	359	296	269	217	268	124
Mozambique	48.3	44.5	44.5	22.6	16.1	15.2	15.6	10.3	467	450	450	356	976	888	910	474
Namibia	24.1	19.7	20.5	10.4	0.7	0.6	0.6	0.4	263	249	252	216	23	18	20	10
Zambia	51.2	46.3	45.1	31.9	10.6	9.9	9.9	9.1	562	536	530	465	723	642	636	510
Zimbabwe	66.6	53.3	52.3	47.5	11.4	9.3	9.3	10.0	551	479	474	451	838	593	588	600
West Africa subregion	27.4	24.8	23.4	16.2	124.6	115.7	112.2	99.0	359	351	346	315	6,130	5,519	5,303	4,258
Benin	23.7	19.4	19.0	13.8	3.5	3.0	3.0	3.0	332	315	313	291	167	134	135	124
Burkina Faso	30.5	25.8	25.9	17.3	7.0	6.1	6.2	5.1	458	435	436	392	429	353	364	270
Cabo Verde	11.4	4.6	4.7	1.3	0.1	0.0	0.0	0.0	246	211	211	179	3	1	1	0
Cote d'Ivoire	23.9	20.0	18.8	10.7	7.4	6.4	6.1	4.3	417	398	392	347	460	376	356	223
Gambia	30.5	15.5	16.0	7.2	0.8	0.4	0.4	0.2	327	272	274	234	67	29	31	14
Ghana	11.0	5.8	5.1	1.9	3.8	2.0	1.8	0.8	261	233	228	200	141	68	60	23
Guinea	15.9	13.0	14.4	12.2	2.2	1.9	2.1	2.4	326	312	319	308	120	96	113	120
Guinea-Bissau	24.8	19.5	20.0	17.4	0.5	0.4	0.4	0.5	317	297	298	288	32	25	26	28
Liberia	53.8	50.0	51.0	39.1	2.9	2.8	2.9	2.7	588	567	572	510	309	284	298	249
Mali	25.5	20.3	20.5	13.0	5.6	4.6	4.8	4.0	349	328	329	296	260	200	209	156
Mauritania	26.6	24.3	25.0	15.9	1.3	1.3	1.3	1.1	344	335	337	300	68	62	66	49
Niger	27.5	20.8	21.2	14.3	7.3	5.7	6.0	5.7	406	376	378	344	383	277	295	256
Nigeria	30.9	30.3	27.9	19.9	73.2	73.5	69.5	63.4	339	337	328	298	3,200	3,194	2,941	2,436
Senegal	15.4	10.4	9.6	3.4	2.9	2.0	1.9	0.8	253	233	229	195	106	68	64	24
Sierra Leone	38.4	36.8	36.0	28.3	3.5	3.4	3.4	3.3	465	458	454	419	268	260	257	227
Togo	29.1	24.2	23.0	13.3	2.6	2.2	2.1	1.6	333	315	310	271	116	93	89	57

Kcal = Kilocalories.

The 2025 results are re-estimated values using the same updated 2025 data as used to estimate the 2026 and 2036 results.

Source: USDA, Economic Research Service based on results from the Global Food Assessment model.

Appendix C: Macroeconomic Measures for the Global Food Assessment (GFA) Countries, 2026–36

Country	Population (million)		Population annual growth rate (percent)	GDP (million 2017 U.S. dollars)			GDP: Annual growth rate (percent)			Per capita GDP (2017 U.S. dollars)			Per capita GDP: Annual growth rate (percent)		
	2026	2036		2023–25	2026	2036	2023–25	2025–26	2026–36	2023–25	2026	2036	2023–25	2025–26	2026–36
GFA total	4,536.1	5,173.8	1.3	11,514,096	12,631,043	19,887,264	4.7	4.8	4.6	2,611	2,785	3,844	3.2	3.3	3.3
Asia region	2,596.8	2,822.0	0.8	7,129,149	7,955,055	13,442,813	5.7	5.7	5.4	2,796	3,063	4,764	4.7	4.7	4.5
East Asia subregion	30.2	30.6	0.1	31,827	34,105	48,091	3.5	3.7	3.5	1,061	1,129	1,573	3.1	3.3	3.4
Democratic People's Republic of Korea	26.6	26.7	0.0	16,799	17,304	19,047	2.1	1.2	1.0	634	650	713	1.8	0.9	0.9
Mongolia	3.6	3.9	0.7	15,029	16,801	29,045	5.1	6.4	5.6	4,288	4,692	7,536	3.9	5.3	4.9
South Asia subregion	1,967.6	2,145.0	0.9	4,804,472	5,383,334	9,366,558	5.9	5.9	5.7	2,488	2,736	4,367	4.9	4.9	4.8
Afghanistan	50.9	65.5	2.6	15,730	16,751	22,728	6.0	2.0	3.1	328	329	347	2.7	-0.9	0.5
Bangladesh	171.6	184.2	0.7	444,079	484,362	901,365	4.1	4.9	6.4	2,632	2,822	4,893	3.2	4.0	5.7
India	1,429.7	1,531.9	0.7	3,796,352	4,302,083	7,682,862	6.5	6.6	6.0	2,693	3,009	5,015	5.7	5.8	5.2
Nepal	31.5	33.4	0.6	38,175	41,882	62,431	4.2	5.1	4.1	1,227	1,328	1,868	3.5	4.4	3.5
Pakistan	261.7	307.5	1.6	419,546	441,055	555,325	3.2	2.0	2.3	1,662	1,685	1,806	1.3	0.2	0.7
Sri Lanka	22.1	22.4	0.1	90,590	97,202	141,846	4.2	3.2	3.9	4,123	4,399	6,331	3.8	3.0	3.7
Southeast Asia subregion	599.0	646.4	0.8	2,292,849	2,537,615	4,028,164	5.3	5.2	4.7	3,899	4,237	6,232	4.3	4.3	3.9
Burma	58.3	61.6	0.6	62,686	64,155	87,065	0.0	2.0	3.1	1,090	1,100	1,412	-0.7	1.3	2.5
Cambodia	17.4	18.8	0.8	40,046	44,309	72,341	5.6	5.0	5.0	2,346	2,548	3,853	4.6	4.0	4.2
Indonesia	285.6	303.2	0.6	1,323,998	1,454,690	2,223,360	4.9	4.8	4.3	4,702	5,094	7,334	4.2	4.1	3.7
Laos	8.2	9.0	1.0	21,854	23,396	36,016	3.9	3.2	4.4	2,747	2,870	3,997	2.6	2.0	3.4
Philippines	121.9	138.7	1.3	425,628	475,396	789,489	5.6	5.9	5.2	3,597	3,899	5,691	4.0	4.3	3.9
Vietnam	107.6	115.1	0.7	418,638	475,670	819,893	7.0	6.4	5.6	3,957	4,421	7,125	6.1	5.5	4.9

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Country	Population (million)		Population annual growth rate (percent)	GDP (million 2017 U.S. dollars)			GDP: Annual growth rate (percent)			Per capita GDP (2017 U.S. dollars)			Per capita GDP: Annual growth rate (percent)		
	2026	2036		2023–25	2026	2036	2023–25	2025– 26	2026– 36	2023–25	2026	2036	2023– 25	2025– 26	2026–36
Former Soviet Union region	119.8	124.6	0.4	374,048	407,362	612,154	4.7	4.1	4.2	3,208	3,402	4,912	3.2	2.8	3.7
Armenia	3.0	2.8	-0.5	16,515	18,134	25,192	5.5	4.4	3.3	5,549	6,147	9,007	5.9	4.8	3.9
Azerbaijan	10.7	11.1	0.4	47,341	50,351	62,840	3.5	3.0	2.2	4,445	4,690	5,645	3.0	2.6	1.9
Georgia	4.9	4.7	-0.3	24,758	27,883	42,660	7.6	5.5	4.3	5,052	5,741	9,022	8.1	5.9	4.6
Kyrgyzstan	6.3	6.7	0.6	10,616	12,168	18,428	8.8	5.7	4.2	1,719	1,942	2,761	7.9	4.9	3.6
Moldova	3.6	3.4	-0.6	10,389	10,763	15,257	0.6	2.8	3.6	2,886	3,025	4,553	1.2	3.4	4.2
Tajikistan	10.8	12.9	1.8	12,559	14,091	22,247	7.4	4.9	4.7	1,207	1,305	1,727	5.4	3.0	2.8
Turkmenistan	5.8	6.3	0.7	56,255	62,026	98,048	4.0	5.5	4.7	9,792	10,610	15,687	3.1	4.6	4.0
Ukraine	37.3	35.3	-0.5	91,993	96,498	128,284	2.5	2.5	2.9	2,579	2,589	3,636	0.1	0.5	3.5
Uzbekistan	37.5	41.5	1.0	103,623	115,448	199,197	6.6	4.7	5.6	2,837	3,081	4,796	5.1	3.4	4.5
Latin America and the Caribbean region	182.4	195.8	0.7	1,067,189	1,124,683	1,479,885	2.5	2.7	2.8	5,947	6,167	7,558	1.6	1.9	2.1
Caribbean subregion	25.9	28.0	0.8	133,946	142,210	212,717	3.3	2.8	4.1	5,274	5,500	7,605	2.4	1.8	3.3
Dominican Republic	11.0	11.7	0.6	105,037	113,058	172,940	4.5	3.2	4.3	9,709	10,293	14,772	3.8	2.4	3.7
Haiti	12.0	13.4	1.1	13,332	12,941	19,632	-3.2	0.0	4.3	1,135	1,074	1,466	-4.4	-1.2	3.2
Jamaica	2.8	2.9	0.2	15,578	16,212	20,145	1.2	2.1	2.2	5,517	5,728	7,009	1.1	2.0	2.0
Central America subregion	42.3	46.9	1.0	164,538	174,949	236,516	3.1	3.3	3.1	3,989	4,140	5,042	1.9	2.0	2.0
El Salvador	6.9	7.3	0.6	29,452	30,318	34,951	2.1	1.0	1.4	4,338	4,401	4,768	1.4	0.3	0.8
Guatemala	18.8	21.3	1.3	91,309	98,534	137,231	3.4	4.5	3.4	5,001	5,243	6,431	1.8	3.0	2.1
Honduras	9.8	10.9	1.1	28,206	30,046	43,768	3.5	3.0	3.8	2,959	3,074	4,010	2.2	1.7	2.7
Nicaragua	6.8	7.3	0.7	15,570	16,051	20,567	2.8	0.6	2.5	2,332	2,360	2,810	1.8	-0.3	1.8

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Country	Population (million)		Population annual growth rate (percent)	GDP (million 2017 U.S. dollars)			GDP: Annual growth rate (percent)			Per capita GDP (2017 U.S. dollars)			Per capita GDP: Annual growth rate (percent)		
	2026	2036		2023–25	2026	2036	2023–25	2025– 26	2026– 36	2023–25	2026	2036	2023– 25	2025– 26	2026–36
South America subregion	114.3	120.9	0.6	768,704	807,524	1,030,652	2.2	2.6	2.5	6,814	7,067	8,524	1.5	2.0	1.9
Bolivia	12.6	13.6	0.8	41,857	43,075	56,422	1.2	1.7	2.7	3,400	3,430	4,150	0.2	0.7	1.9
Colombia	50.1	51.6	0.3	374,341	394,941	493,470	2.1	3.2	2.3	7,548	7,883	9,560	1.6	2.6	1.9
Ecuador	18.6	20.3	0.9	113,242	117,349	143,172	0.8	1.8	2.0	6,185	6,293	7,049	-0.1	0.9	1.1
Peru	33.0	35.4	0.7	239,264	252,159	337,589	3.1	2.4	3.0	7,338	7,651	9,538	2.6	1.8	2.2
Middle East and North Africa region	368.5	410.1	1.1	1,362,499	1,431,393	1,865,250	2.5	2.6	2.7	3,793	3,884	4,549	1.1	1.3	1.6
Middle East subregion	155.5	172.7	1.1	631,504	649,020	796,159	1.6	1.4	2.1	4,167	4,175	4,609	0.2	0.2	1.0
Iran	89.9	95.7	0.6	561,547	577,172	705,516	1.9	1.3	2.0	6,354	6,422	7,375	1.0	0.5	1.4
Lebanon	5.7	5.7	0.1	34,648	36,312	47,438	-0.1	4.3	2.7	6,015	6,406	8,267	0.8	5.0	2.6
Syria	24.7	28.5	1.4	16,690	17,257	22,483	-0.7	3.4	2.7	705	700	790	-3.4	1.8	1.2
Yemen	35.3	42.9	2.0	18,618	18,279	20,721	-1.2	-0.7	1.3	552	518	483	-3.4	-2.9	-0.7
North Africa subregion	213.0	237.3	1.1	730,996	782,373	1,069,092	3.3	3.5	3.2	3,520	3,672	4,505	1.9	2.2	2.1
Algeria	48.4	54.9	1.3	213,838	226,366	277,892	3.5	2.2	2.1	4,547	4,674	5,066	2.0	0.7	0.8
Egypt	114.4	129.2	1.2	336,598	364,310	526,084	3.3	4.5	3.7	3,026	3,183	4,071	1.8	3.0	2.5
Morocco	38.0	40.6	0.7	136,911	146,596	209,118	3.3	3.6	3.6	3,662	3,858	5,146	2.5	2.8	2.9
Tunisia	12.2	12.6	0.3	43,649	45,101	55,997	1.5	1.8	2.2	3,623	3,704	4,449	0.9	1.3	1.8
Sub-Saharan Africa region	1,268.7	1,621.4	2.5	1,581,211	1,712,550	2,487,161	3.9	4.3	3.8	1,313	1,350	1,534	1.2	1.6	1.3
Central Africa subregion	202.3	268.2	2.9	136,935	147,884	209,252	4.3	3.8	3.5	718	731	780	1.3	0.8	0.7
Burundi	14.4	18.8	2.7	3,159	3,402	4,804	3.7	3.8	3.5	233	237	256	0.6	0.9	0.8
Cameroon	32.7	42.1	2.6	44,686	47,946	66,949	3.7	3.6	3.4	1,443	1,467	1,592	0.9	0.8	0.8

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Country	Population (million)		Population annual growth rate (percent)	GDP (million 2017 U.S. dollars)			GDP: Annual growth rate (percent)			Per capita GDP (2017 U.S. dollars)			Per capita GDP: Annual growth rate (percent)		
	2026	2036		2023–25	2026	2036	2023–25	2025– 26	2026– 36	2023–25	2026	2036	2023– 25	2025– 26	2026–36
Central African Republic	5.9	6.9	1.6	2,320	2,401	3,570	1.4	2.1	4.0	410	410	519	-0.3	0.3	2.4
Chad	20.3	26.9	2.9	18,054	19,172	25,769	3.2	3.1	3.0	945	946	959	0.1	0.1	0.1
Congo	6.4	8.0	2.2	11,757	12,398	16,831	2.7	2.6	3.1	1,928	1,939	2,109	0.3	0.2	0.8
Democratic Republic of the Congo	122.8	165.6	3.0	56,959	62,566	91,330	5.7	4.4	3.9	493	510	551	2.4	1.2	0.8
East Africa subregion	443.1	556.3	2.3	476,727	516,024	823,532	2.9	5.0	4.8	1,131	1,164	1,480	0.5	2.4	2.4
Djibouti	1.0	1.2	1.6	3,824	4,067	5,003	4.3	2.6	2.1	3,842	3,940	4,150	2.3	0.7	0.5
Eritrea	6.5	7.5	1.4	2,470	2,564	2,993	2.2	1.7	1.6	389	395	401	1.1	0.5	0.1
Ethiopia	124.2	153.8	2.2	127,645	145,112	233,333	6.9	6.6	4.9	1,076	1,168	1,517	4.4	4.2	2.6
Kenya	57.0	69.1	2.0	113,203	123,289	181,730	4.6	4.2	4.0	2,073	2,165	2,629	2.4	2.0	2.0
Madagascar	30.7	37.0	1.9	15,598	16,905	24,973	4.1	4.2	4.0	529	550	674	1.8	2.1	2.1
Rwanda	14.1	16.3	1.5	14,961	17,274	26,485	8.1	7.3	4.4	1,097	1,227	1,627	6.3	5.6	2.9
Somalia	20.3	27.0	2.9	8,920	9,452	13,113	3.3	2.9	3.3	469	465	485	-0.2	-0.4	0.4
South Sudan	12.4	15.1	1.9	993	1,026	1,648	-16.4	19.3	4.9	84	82	109	-18.8	16.9	2.9
Sudan	53.3	66.5	2.2	72,440	64,112	125,057	-10.7	-1.5	6.9	1,430	1,203	1,881	-12.1	-4.5	4.6
Tanzania	71.1	93.1	2.7	73,420	81,795	129,602	5.6	5.6	4.7	1,092	1,150	1,393	2.6	2.7	1.9
Uganda	52.5	69.8	2.9	43,251	50,429	79,596	5.6	10.7	4.7	877	961	1,141	2.3	7.3	1.7
Southern Africa subregion	144.2	184.7	2.5	213,332	228,796	307,161	3.4	3.7	3.0	1,558	1,587	1,663	0.8	1.1	0.5
Angola	40.3	55.3	3.2	74,419	79,047	107,030	3.2	3.4	3.1	1,973	1,962	1,935	-0.2	0.0	-0.1
Eswatini	1.2	1.2	0.6	5,135	5,486	6,665	3.0	3.6	2.0	4,512	4,756	5,450	2.3	2.9	1.4
Lesotho	2.3	2.4	0.8	2,238	2,290	2,863	1.6	1.1	2.3	1,005	1,012	1,173	0.8	0.3	1.5
Malawi	22.7	27.5	1.9	10,910	11,571	16,874	2.1	3.8	3.8	501	509	614	-0.1	1.6	1.9

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Country	Population (million)		Population annual growth rate (percent)	GDP (million 2017 U.S. dollars)			GDP: Annual growth rate (percent)			Per capita GDP (2017 U.S. dollars)			Per capita GDP: Annual growth rate (percent)		
	2026	2036	2026–36	2023–25	2026	2036	2023–25	2025– 26	2026– 36	2023–25	2026	2036	2023– 25	2025– 26	2026–36
Mozambique	35.1	45.3	2.6	15,929	16,941	28,881	1.9	4.3	5.5	478	483	637	-0.6	1.7	2.8
Namibia	2.9	3.4	1.6	14,018	14,860	19,712	3.3	2.7	2.9	4,998	5,119	5,790	1.6	1.0	1.2
Zambia	22.0	28.5	2.6	32,710	36,031	52,828	4.8	4.9	3.9	1,572	1,638	1,854	1.9	2.1	1.2
Zimbabwe	17.8	21.0	1.7	57,973	62,569	72,309	3.8	3.5	1.5	3,380	3,517	3,438	1.8	1.6	-0.2
West Africa subregion	479.0	612.1	2.5	754,217	819,846	1,147,216	4.5	4.1	3.4	1,657	1,711	1,874	1.8	1.5	0.9
Benin	15.7	21.4	3.2	19,521	21,853	31,726	6.8	5.2	3.8	1,327	1,393	1,481	3.4	1.8	0.6
Burkina Faso	24.1	29.8	2.2	18,984	20,422	27,858	4.3	3.5	3.2	828	849	936	1.8	1.0	1.0
Cabo Verde	0.6	0.7	0.9	2,442	2,665	3,657	6.0	3.4	3.2	3,996	4,264	5,331	4.8	2.3	2.3
Cote d'Ivoire	32.6	40.5	2.2	76,095	84,850	128,482	5.9	5.4	4.2	2,444	2,602	3,170	3.4	3.0	2.0
Gambia	2.6	3.2	1.8	2,118	2,318	3,225	5.3	4.2	3.4	839	881	1,023	3.1	2.1	1.5
Ghana	36.1	43.9	2.0	81,437	89,354	135,468	5.2	4.6	4.2	2,353	2,476	3,087	2.9	2.4	2.2
Guinea	14.8	19.3	2.7	14,811	16,149	22,941	4.9	4.2	3.6	1,058	1,093	1,188	2.1	1.4	0.8
Guinea-Bissau	2.2	2.9	2.6	1,998	2,147	2,730	4.5	3.0	2.4	936	957	945	1.9	0.4	-0.1
Liberia	5.7	7.0	2.0	3,924	4,319	6,148	4.9	4.9	3.6	721	759	884	2.5	2.6	1.5
Mali	23.3	30.4	2.7	23,349	25,321	35,521	4.7	3.8	3.4	1,061	1,087	1,167	1.7	0.8	0.7
Mauritania	5.4	7.1	2.8	8,805	9,616	14,380	4.7	4.6	4.1	1,741	1,796	2,033	1.7	1.6	1.2
Niger	28.3	40.3	3.6	16,450	18,586	28,319	8.1	4.8	4.3	624	656	702	4.2	1.1	0.7
Nigeria	249.0	318.0	2.5	438,396	470,901	632,091	3.6	3.6	3.0	1,851	1,891	1,988	1.0	1.1	0.5
Senegal	19.8	24.4	2.1	29,327	33,329	49,353	7.6	5.6	4.0	1,555	1,685	2,023	5.0	3.1	1.8
Sierra Leone	9.5	11.6	2.0	7,548	8,108	11,094	3.7	3.7	3.2	827	850	956	1.4	1.4	1.2
Togo	9.4	11.7	2.3	9,012	9,908	14,223	5.4	4.4	3.7	1,010	1,059	1,216	2.9	1.9	1.4

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GDP = Gross Domestic Product.

Source: USDA, Economic Research Service, International Macroeconomic Data Set.

Appendix D: Exchange Rate and Price Measures for the Global Food Assessment (GFA) Countries, 2026–36

Country	Consumer Price Index: Annual growth rate (percent)			Real exchange rate: Annual growth rate (percent)			Real domestic price of major grain: Annual growth rate (percent)		Real domestic price of food groups: 2025–26 growth rate (percent)*			
	2023–25	2025–26	2026–36	2023–25	2025–26	2026–36	2023–25	2026–36	MG	OG	RT	OF
GFA total									-2	-2	-7	1
Asia region									0	-2	-3	4
East Asia subregion									-2	0	-1	7
Democratic People's Republic of Korea	1.8	2.4	3.1	2.1	1.0	0.1	-13.9	-0.1	1	-2	-2	9
Mongolia	7.4	6.4	6.0	-3.7	-0.3	0.0	-7.7	-0.4	-2	0	-1	7
South Asia subregion									0	-1	-2	6
Afghanistan	-2.4	3.3	3.8	1.1	-0.1	-1.0	-9.4	-1.0	-3	0	-2	8
Bangladesh	9.4	6.4	6.0	1.0	1.6	0.1	-13.6	-0.1	2	-2	-1	6
India	4.0	4.2	4.2	1.4	0.3	-1.5	-12.6	-1.2	1	-2	-1	7
Nepal	4.6	4.5	4.7	0.5	-0.1	-2.0	-11.0	-1.2	0	-1	-1	4
Pakistan	7.5	5.9	6.4	-4.0	-0.4	-0.3	-14.2	-1.0	-4	0	-3	7
Sri Lanka	0.4	5.0	5.0	-1.9	-0.1	-0.6	-11.1	-0.4	0	-2	-2	6
Southeast Asia subregion									0	-3	-3	4
Burma	27.9	18.7	4.4	-19.6	-13.5	-2.0	-16.2	-0.6	-4	-10	-11	-1
Cambodia	1.9	2.5	3.2	-0.7	0.4	-0.9	-12.0	-0.6	1	-3	-2	6
Indonesia	2.0	2.7	2.8	4.6	0.1	-0.6	-6.1	-0.3	0	-1	-2	6
Laos	16.1	7.2	5.1	-2.2	-4.0	-2.4	-7.8	-0.7	-1	-3	-4	1
Philippines	2.4	2.6	3.0	1.7	0.2	-0.4	-7.9	-0.2	0	-3	-2	6
Vietnam	3.5	3.6	4.0	3.5	-0.8	-0.9	-12.0	-0.8	0	-4	-3	7
Former Soviet Union region									-6	-1	-2	4
Armenia	2.0	3.1	3.7	1.3	4.6	1.4	-5.2	-0.1	0	3	0	10
Azerbaijan	4.3	5.3	4.7	-1.3	-2.4	0.5	-5.4	-0.2	-2	-2	-1	6
Georgia	2.0	3.1	3.0	4.4	0.6	0.4	-2.7	-0.2	-1	0	-1	9
Kyrgyzstan	5.7	5.1	5.0	-2.2	0.4	-2.3	-8.2	-1.0	-2	-1	-1	7
Moldova	5.7	5.0	5.3	-1.1	1.3	0.0	-7.8	-0.5	-2	0	0	7
Tajikistan	4.0	5.8	6.0	-0.4	0.9	0.6	-9.5	-0.5	-2	1	-1	9
Turkmenistan	4.9	6.2	5.2	-1.9	-3.3	-2.8	-17.4	-3.2	-7	-2	-6	5
Ukraine	10.0	8.5	5.4	0.2	0.3	-1.6	-20.5	-3.7	-7	-1	-3	7
Uzbekistan	8.9	7.4	5.1	-1.3	-4.5	3.1	-15.4	0.8	-7	-1	-3	4

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Country	Consumer Price Index: Annual growth rate (percent)			Real exchange rate: Annual growth rate (percent)			Real domestic price of major grain: Annual growth rate (percent)		Real domestic price of food groups: 2025–26 growth rate (percent)*			
	2023–25	2025–26	2026–36	2023–25	2025–26	2026–36	2023–25	2026–36	MG	OG	RT	OF
Latin America and the Caribbean region									0	0	-3	7
Caribbean subregion									0	0	-3	6
Dominican Republic	3.6	3.9	4.0	4.8	0.8	0.3	-4.7	0.0	0	-4	-2	8
Haiti	24.6	15.1	5.6	-19.6	-10.1	-0.7	-0.2	0.0	0	0	-8	-1
Jamaica	5.1	5.2	5.1	0.1	3.2	0.7	-16.1	-0.9	-3	2	0	7
Central America subregion									0	-1	-2	7
El Salvador	1.0	1.8	1.5	0.0	0.0	0.0	-4.4	-0.4	-1	0	-3	7
Guatemala	2.4	2.7	4.0	-0.3	-0.1	-1.0	-5.9	-0.7	-1	-2	-3	6
Honduras	4.7	4.6	4.1	0.9	2.0	0.4	-6.8	-0.6	-1	0	-1	8
Nicaragua	4.4	4.2	3.9	-1.2	-1.2	0.3	-6.2	0.0	0	-3	-3	5
South America subregion									-1	0	-3	7
Bolivia	8.6	5.0	4.1	-5.3	-0.3	-0.6	-5.6	-0.2	0	-1	-1	3
Colombia	5.8	3.5	3.1	-4.7	0.5	0.3	-8.6	-0.5	-1	0	-3	7
Ecuador	1.4	2.5	2.0	0.0	0.0	0.0	-4.8	0.0	0	-2	-1	6
Peru	1.9	2.8	2.6	-0.3	3.5	0.3	-9.4	0.0	2	-1	0	11
Middle East and North Africa region									-8	-2	-14	-3
Middle East subregion									-8	-2	-14	-3
Iran	35.4	26.5	8.9	181.4	-17.0	-4.8	17.7	-1.5	-8	-2	-16	-3
Lebanon	29.5	17.4	4.8	101.8	-12.5	-2.0	7.8	-0.6	-4	-3	-3	0
Syria	33.7	15.6	3.1	-7.7	-42.2	-10.4	-7.2	-0.9	-9	-11	-11	-25
Yemen	22.6	15.6	11.6	-2.6	-2.7	0.3	-15.2	-0.9	-5	-2	-1	5
North Africa subregion									-1	-1	-1	7
Algeria	4.3	6.0	6.2	-2.6	0.6	1.2	-6.0	-0.1	-1	0	-1	7
Egypt	21.4	11.6	8.1	8.3	-4.5	-1.1	-4.7	-0.7	-3	-3	-3	4
Morocco	1.3	1.8	1.9	-1.5	0.4	0.1	-10.4	-0.6	-2	-2	-3	8
Tunisia	6.4	5.5	5.1	-4.3	-0.4	1.6	-19.0	-0.2	-5	-1	-1	6
Sub-Saharan Africa region									0	0	-1	5
Central Africa subregion									-1	-1	-1	2
Burundi	22.4	18.8	10.8	-8.6	-6.1	-0.1	-6.5	-0.4	-2	-2	-2	1
Cameroon	4.1	2.4	2.0	-3.1	-2.7	-0.1	-5.4	-0.4	-1	0	-1	4
Central African Republic	2.1	2.0	1.1	-1.2	-2.4	0.8	-8.6	-0.5	-2	0	-2	3
Chad	5.8	2.7	2.0	-4.7	-3.0	-0.1	-11.7	-1.2	3	0	-4	2
Congo	3.7	2.4	2.0	-2.9	-2.6	-0.1	-14.7	-1.0	-5	-1	-3	3
Democratic Republic of the Congo	13.3	7.8	8.1	0.7	0.8	1.1	-5.7	-0.3	-1	0	-1	7

Country	Consumer Price Index: Annual growth rate (percent)			Real exchange rate: Annual growth rate (percent)			Real domestic price of major grain: Annual growth rate (percent)		Real domestic price of food groups: 2025–26 growth rate (percent)*			
	2023–25	2025–26	2026–36	2023–25	2025–26	2026–36	2023–25	2026–36	MG	OG	RT	OF
East Africa subregion									0	0	-2	7
Djibouti	1.9	2.0	2.3	1.0	0.6	0.0	-6.5	-0.5	-2	1	-2	7
Eritrea	5.4	4.8	4.0	-2.3	-0.1	1.4	-15.4	-0.3	-4	4	-2	6
Ethiopia	17.8	14.2	9.9	38.0	-1.1	-0.3	2.8	-0.6	-2	1	-4	7
Kenya	4.2	4.4	5.8	-5.1	1.1	0.8	-8.0	-0.4	-1	0	-2	7
Madagascar	7.2	6.7	6.1	-0.4	2.0	0.5	-15.6	0.2	2	-2	-1	8
Rwanda	4.3	5.0	4.9	9.9	2.5	0.5	-4.0	-0.6	0	1	-1	9
Somalia	4.7	3.5	2.0	-1.6	-1.0	0.2	-0.3	0.0	0	0	-3	6
South Sudan	105.2	45.1	7.9	10.8	-23.3	1.3	-0.9	-0.1	-4	-5	-17	-10
Sudan	131.5	42.6	14.9	-55.3	-17.6	29.6	-11.7	3.7	-1	-3	-13	-3
Tanzania	3.1	3.8	5.5	3.9	0.8	-0.2	-7.8	-1.0	-1	0	-2	8
Uganda	3.5	5.0	5.4	-1.2	1.3	0.3	-8.8	-0.7	-1	0	-1	7
Southern Africa subregion									1	2	1	6
Angola	24.4	13.3	7.8	-4.3	-6.7	-0.5	-3.7	-0.3	-1	-1	-1	0
Eswatini	4.0	5.1	5.1	-1.8	-1.2	0.1	-4.6	-0.3	-1	-1	-4	7
Lesotho	5.3	5.0	5.0	-3.0	-1.2	0.2	-7.5	-0.5	-1	-1	-4	7
Malawi	30.5	31.2	9.3	-3.5	15.3	-0.2	-6.7	-0.6	3	6	2	19
Mozambique	4.2	6.9	7.2	-1.3	1.8	0.2	-6.1	-0.5	0	0	-2	9
Namibia	4.4	5.1	5.0	-2.2	-1.3	0.2	-4.0	-0.3	-1	-1	-4	7
Zambia	14.7	10.2	8.0	2.9	-2.3	-0.3	-9.1	-1.2	-3	-3	-4	6
Zimbabwe	34.7	7.5	2.4	-23.6	-4.5	-0.2	-0.8	0.0	0	0	-6	4
West Africa subregion									1	1	0	5
Benin	1.2	1.7	1.6	-0.4	-2.0	0.4	-7.1	0.0	0	-2	-1	5
Burkina Faso	3.2	2.0	2.0	-2.3	-2.3	0.0	-15.7	-1.6	-4	0	-4	5
Cabo Verde	1.5	1.9	2.0	-0.5	-2.3	0.0	-5.1	-0.1	0	-1	-1	5
Cote d'Ivoire	2.2	2.2	1.7	-1.4	-2.5	0.3	-9.9	0.0	-1	-4	-2	5
Gambia	9.4	3.3	4.8	2.0	1.7	0.0	-8.9	-0.1	1	0	-1	6
Ghana	19.4	9.0	8.9	-11.0	-3.4	1.7	-13.3	0.6	-1	-3	-4	4
Guinea	7.8	7.5	7.3	-3.7	9.3	2.5	-9.2	0.9	3	1	1	12
Guinea-Bissau	3.4	2.2	2.1	-2.5	-2.6	-0.1	-10.6	-0.1	-1	0	-4	5
Liberia	7.7	7.2	6.5	4.5	6.0	0.5	-7.8	0.1	3	9	1	10
Mali	2.7	2.0	2.1	-1.8	-2.4	-0.1	-9.9	-0.1	-1	0	-4	5
Mauritania	2.4	3.5	4.1	5.1	2.3	0.4	-4.8	-0.3	-1	1	-1	8
Niger	6.3	3.5	1.9	-5.2	-3.7	0.1	-8.0	-0.7	1	0	-5	4

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Country	Consumer Price Index: Annual growth rate (percent)			Real exchange rate: Annual growth rate (percent)			Real domestic price of major grain: Annual growth rate (percent)		Real domestic price of food groups: 2025–26 growth rate (percent)*			
	2023–25	2025–26	2026–36	2023–25	2025–26	2026–36	2023–25	2026–36	MG	OG	RT	OF
Nigeria	27.5	18.1	10.3	24.8	-12.1	-0.5	0.5	-0.2	-3	-3	-3	-2
Senegal	1.0	1.5	1.6	-0.2	-1.9	0.3	-9.6	0.0	-1	-1	-2	5
Sierra Leone	21.1	13.4	10.2	-10.2	1.5	0.6	0.0	0.0	0	1	0	0
Togo	2.4	1.3	1.6	-1.5	-1.7	0.3	-8.2	-0.6	-2	0	-1	3

MG = Major grain. OG = Other grains. RT = Roots and tubers. OF = Other foods.

*Real domestic price in grain equivalents is expressed per kilocalories is used to generate price indices for the four food groups (i.e., major grains, other grains, other food, and roots and tubers) used in the GFA demand model.

Source: USDA, Economic Research Service, International Macroeconomic Data Set.