



United States  
Department of  
Agriculture

Economic  
Research  
Service

GFA-11  
December 1999

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FAO  
Ecuador, by J. Bravo

Approved by the World  
Agricultural Outlook Board.  
Summary released December 7,  
1999. Summary and full report  
may be accessed electronically via  
the ERS web site at  
<http://www.econ.ag.gov>.

# ***FOOD SECURITY ASSESSMENT***



## Situation and Outlook Series

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# Preface

This report continues the series of food assessments begun in the late 1970s. Global Food Assessments were done from 1990 to 1992, hence the GFA series. In 1993, the title was changed to Food Aid Needs Assessment to more accurately reflect the contents of the report, which focuses on selected developing countries with past or continuing food deficits. In 1997, we widened our analysis beyond the assessment of aggregate food availability to include more aspects of food security. We therefore changed the title to Food Security Assessment.

## Acknowledgments

Appreciation is extended to Neil Conklin, Director of the Market and Trade Economics Division, for his support of the food security work and to Cheryl Christensen for valuable comments on the articles. We would also like to thank the reviewers, especially Mary Bohman, Fred Surls, Phil Abbott, Bob Thompson, Ron Trostle, Carol Goodloe, Jane Bardon, Amy Haught, and Sharon Sheffield for their comments. Special thanks are extended to Diane Decker, Wynnicce Pointer-Napper, and Victor Phillips, Jr. for editorial and design assistance.

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## ***Food Consumption in 30 of 67 Developing Countries Likely To Lag Nutritional Standards in 2009***

Broad trends in food production and prices indicate a decline in the share of people who do not have access to adequate food levels. However, the aggregate figure masks variation in food security among regions, countries, and income groups within countries. The food security position of low-income countries is evaluated by projecting the gaps between food consumption (domestic production, plus commercial imports, minus non-food use) and consumption targets through the next decade. The targets are: 1) maintaining per capita food consumption at 1996-98 levels (also referred to as status quo), and 2) meeting minimum recommended nutritional requirements.

In 1999, the food gap to maintain per capita consumption at 1996-98 levels in 67 low-income developing countries is estimated at nearly 13 million tons, about 2 million tons more than estimated for 1998. Around 400,000 tons of the increase arose from adding a new country, North Korea, to the analysis this year. The gap to meet minimum nutritional requirements is estimated to be higher at 15 million tons. Despite the increase in the gap, the share of people who do not have access to adequate food levels is projected to decline from 34 percent in 1999 to 32 percent in 2009. The 67 countries in the study either have been or may become food aid recipients. In the projections, however, the availability of food aid is excluded. Therefore, depending upon future food aid availabilities, some or all of the projected food gaps can be eliminated.

During the next decade, the food gaps with respect to both consumption targets are projected to widen. The gap to maintain per capita consumption increases 37 percent to 17.4 million tons in 2009, while the nutritional gap expands 54 percent to more than 23 million tons. Food consumption is projected to fall short of the nutritional requirement in 30 countries, while 45 countries are expected to face a decline in per capita consumption in 2009.

Unequal purchasing power exacerbates food insecurity in the 67 countries. As would be expected, the estimated results show food consumption in the lowest income quintile to be much lower than that of the highest income quintile. For example, food consumption by people in the lowest income quintile in the Latin American countries—the region with the most skewed income distribution—is estimated to equal only 79 percent of the minimum nutritional requirement in 1999, compared with 126 percent in the highest income quintile.

For the 67 countries as a whole, the “distribution gap” (the amount of food needed to raise consumption of each income group to the minimum nutritional requirement) is projected

to widen 17 percent over the next decade and exceed 33 million tons in 2009. The growth of this gap surpasses the growth in the number of people becoming food insecure. In fact, the number of people failing to meet nutritional requirements is projected to grow less than 13 percent to nearly 1 billion by 2009. This implies that the distribution-related problems will intensify more than they will spread.

Sub-Saharan Africa is projected to account for about 50 percent of the food gap to maintain consumption and 70 percent of the nutritional gap of the 67 countries in 2009. Despite significant growth in the region’s agricultural production, the relatively high population growth and limited financial resources that constrain imports will lead to declining per capita consumption.

The distribution gap, which incorporates the impact of skewed income distribution, is projected to be 33 percent higher than Sub-Saharan Africa’s average national nutritional gap. Based on the estimated distribution gap, the number of people who fail to meet their nutritional requirement is projected to jump 40 percent over the next decade to 438 million in 2009. This means that 60 percent of the region’s population will be food insecure.

Afghanistan, Bangladesh, and North Korea account for all of the nutritional food gaps in the Asian region. The number of people who can not meet their nutritional requirements is projected to decline 19 percent through 2009.

Per capita food consumption in the Latin American and Caribbean countries is expected to stagnate over the next decade. The projected distribution gap for the region is more than two times the average national nutritional gap in 2009. The number of people who can not meet their nutritional requirement is projected to increase 32 percent between 1999 and 2009. The region’s food import dependency is projected to rise to 47 percent by 2009, indicating that foreign exchange availability to support food imports will be crucial to the food security of Latin America and the Caribbean over the long term.

Per capita food consumption in North Africa, on average, is projected to remain above nutritional requirements during the next decade. However, a relatively small food gap to maintain base per capita consumption levels is projected, primarily in Algeria and to a lesser extent in Egypt.

Of the five New Independent States included in the study, only Tajikistan is projected to be vulnerable to food insecurity in the long term. Consumption in the other four countries is projected to rise, assuming continued peace.