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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.

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Summary

Fewer Hungry People by 2010; More Intense Poverty for Poorest

USDA's Economic Research Service (ERS) projects that average per capita food consumption for 67 low-income countries will increase in the next decade. ERS also projects that the number of people failing to meet their nutritional requirements will decline from 774 million in 2000 to 694 million in 2010, providing an improved outlook for global food security. But the gains are not uniform across countries and in many food insecurity will probably intensify. Sub-Saharan Africa, as the most vulnerable region, accounts for only 24 percent of the population of these 67 countries, but it is projected to account for 63 percent of these "hungry" people in 2010. HIV/AIDS is expected to reduce the region's agricultural productivity, and constraints in financial resources will limit commercial imports, thus leading to declining per capita consumption.

ERS evaluated the food security position of low-income countries by projecting the gaps between food consumption (domestic production, plus commercial imports, minus non-food use) and consumption targets through the next decade. The consumption targets are (1) maintaining per capita food consumption at 1997-99 levels (also referred to as "status quo") and (2) meeting minimum recommended nutritional requirements.

In 2000, the food gap to maintain per capita consumption at 1997-99 levels in 67 low-income developing countries is estimated at about 7 million tons. The gap to meet minimum nutritional requirements is estimated to be higher at 17 million tons. The food gaps with respect to both consumption targets are projected to widen during the next decade. The gap to maintain per capita consumption will increase 80 per-

cent to 12.7 million tons in 2010, while the nutritional gap will expand 30 percent to more than 22 million tons. 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 expected to widen by 21 percent and exceed 31 million tons in 2010. The growth of food gaps stands in contrast to the projected trend in the number of hungry people. In fact, the number of people failing to meet nutritional requirements is projected to decline in the next decade, implying that hunger in the food insecure and lower income groups will intensify.

ERS has identified Sub-Saharan Africa as the region most vulnerable to food insecurity. The high incidence of HIV/AIDS in Sub-Saharan Africa is expected to reduce agricultural productivity, and constraints in financial resources will limit commercial imports, thus leading to declining per capita consumption. Sub-Saharan Africa is the only region that shows increases in all indicators of food insecurity, such as food gaps and growth in the number of hungry people.

Depending upon the future availability of food aid, a portion or all of the projected food gaps can be eliminated. For example, in 1999 roughly 12 million tons of food aid was distributed globally. If the same amount were provided in 2000, it would fill the entire calculated gap to maintain per capita consumption (status quo) and about 66 percent of the nutritional gap. However, all of the available food aid is not going to low-income, food-deficit countries. In 1999, only 7.5 million tons of food aid, or 63 percent of the total, was given to the study countries, and that is about 40 percent of the estimated nutritional gap in 2000.