

Sub-Saharan Africa (SSA)

The food security situation is not expected to change significantly during the next decade. The number of hungry people is projected to rise, reaching 490 million by 2013, but the share of hungry people is projected to plateau at 59 percent through the next decade. [Stacey Rosen]

Sub-Saharan Africa's per capita consumption is projected to remain stagnant through 2013. Production growth is projected at 2.5 percent for the next decade, fairly close to the population growth rate. As a result, the number of hungry people (those who cannot meet the nutritional target) in the region is projected to increase from an estimated 381 million in 2003 to 490 million in 2013. This rate of increase basically matches the region's population growth rate, meaning that the share of hungry people in the region will remain the same over the next decade—59 percent. While the situation is not deteriorating, this number is still alarmingly high—with more than half the population undernourished. Reviewing the results at a more disaggregated level reveals the countries that are most vulnerable. Ten of the 37 countries included in this region are estimated to have consumption falling below the nutritional target across all income quintiles in 2003. A common factor among these countries is that they have recently been involved in some kind of internal conflict. Among the countries in this group are the Democratic Republic of Congo, Burundi, Somalia, Liberia, and Sierra Leone.

While food aid's role in the region's import picture has diminished over time, it is still significant. In the early 1990s, the food aid share of grain imports averaged about 35 percent per year. In more recent years, this average has declined to around 16 percent. To examine the impact of food aid on the region's food security, we ran the Food Security Assessment model under the assumption of zero food aid. In the case of the late 1990s, the distribution gap—the amount of food needed to raise consumption in each income group to the nutritional target—averaged more than 14 million tons per year. In the base scenario (with food aid) this gap averaged just over 12 million tons. In other words, the gap was about 2.2 million tons lower (on an annual basis) than it would have been without the food aid. While this is a positive finding, it does raise questions about the allocation of food aid. During these years under review, food aid averaged nearly 3 million tons annually. This means that nearly 700,000 tons of food aid was directed at countries without distribution gaps. In other words, more targeted allocations could have resulted in an even

larger food aid impact. However, food aid is still found to be effective. For example, during the 1992 southern African drought, food aid receipts jumped to more than 6 million tons, resulting in a 30-percent drop in the distribution gap and a nearly 12-percent drop in the number of hungry people (compared with a zero food aid scenario).

Adverse weather conditions and civil strife have hindered agricultural output in many countries throughout the region and are expected to continue. Given the importance of agriculture in these economies, overall economic growth is expected to be minimal. Tourism, an important foreign exchange earner in several countries, has been adversely affected by slow income growth in Europe and security concerns. Travel to the region fell 25 percent between March 2002 and March 2003. Low savings and investment rates, poor infrastructure, and the continuing burden of HIV/AIDS also limit economic growth. On a more positive note, prices for non-energy commodities (important exports for this region) are up from their historically low levels of the late 1990s. Since 2000, the price of copper has risen 13 percent, cotton is up 24 percent, and cocoa has doubled. Also, the continued strength of organizations such as the African Union, the New Partnership for Africa's Development, and the East African Community provides hope. Another impressive development is the growth of nontraditional exports under the U.S. African Growth and Opportunity Act, which provides preferential access to U.S. markets for eligible products from designated countries. This Act was signed into law in May 2000. While most of the benefits have been concentrated in only a few countries—Nigeria, South Africa, Gabon, Lesotho, and Kenya—and the prominent export has been oil, there have been some noteworthy gains. Textiles and apparel exports more than doubled, while exports of transportation equipment rose 80 percent and exports of agricultural products increased 38 percent between 2001 and 2002. Therefore, continued efforts to resolve conflicts and encourage investment will raise productivity and growth and ultimately improve food security.

Table 3—Food availability and food gaps for Sub-Saharan Africa (SSA)

Year	Grain production	Root production (grain equiv.)	Commercial imports (grains)	Food aid receipts (grain equiv.)	Aggregate availability of all food
			1,000 tons		
1994	60,862	39,687	10,211	2,564	130,317
1995	65,049	40,111	8,862	3,180	135,274
1996	65,825	40,441	8,052	2,531	136,944
1997	68,978	41,434	9,440	2,073	141,036
1998	64,653	42,877	10,333	1,788	141,014
1999	67,860	45,454	12,598	2,546	147,821
2000	68,838	47,134	11,206	2,169	151,025
2001	68,416	48,238	12,800	2,697	156,090
2002	72,706	48,608	15,628	2,642	166,025
Projections				Food gap	
				SQ NR	
2003	68,395	49,820	14,296	6,582 17,001	156,415
2008	85,912	54,372	15,617	3,883 11,760	184,489
2013	97,897	59,273	17,293	8,276 12,467	206,388

Sub-Saharan Africa (663 million people in 2003)

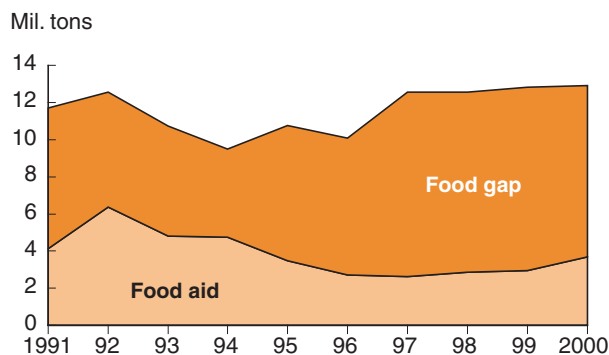
At the regional level, per capita consumption is projected to virtually hold steady through the next decade; however, it will decline in 21 of the 37 countries.

Growth in food crop production will nearly match that of population.

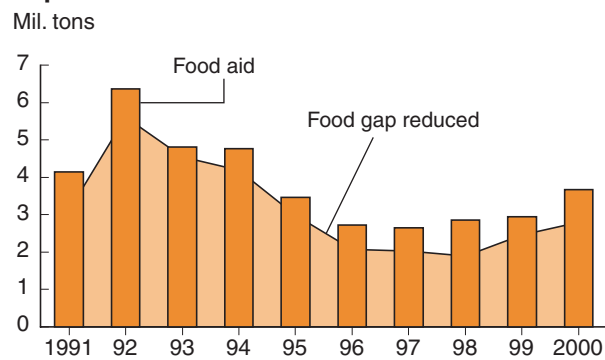
Imports will continue to play a minor role in total food supplies.

The number of hungry people in the region is projected to rise during the next decade. However, the share of total population that is hungry will stay constant.

Sub-Saharan Africa: Food aid versus food gap



Sub-Saharan Africa: Impact of food aid



Sub-Saharan Africa: Food aid

	Total food aid received 1988-2002	Food aid per capita		Highest food aid amount received		Food aid as % of supply	
	1,000 tons	1989-91	1999-2001	1,000 tons	Year	1989-91	1999-2001
		Kg				Percent	
SSA	56,468	14.5	10.5			5.5	5.0
Ethiopia	12,616	16.2	18.3	1554	2000	13.6	11.6
Mauritania	673	34.3	10.8	93	1991	13.7	4.3
Rwanda	2,803	2.0	25.8	542	1996	1.3	14.3
Sierra Leone	755	9.5	9.6	94	2002	6.6	8.2
Zambia	1,554	5.5	3.7	504	1992	2.5	2.4

Source: FAOSTAT, ERS calculations.