

Commonwealth of Independent States (CIS)

Generally good harvests in 2003 mean that there are no food gaps this year for 8 CIS countries, but Tajikistan is expected to face nutritional food gaps over the next decade. Food aid has played an important role in several countries in buffering income and food consumption shocks. [Michael Trueblood]

There are no food gaps in 2003 for the 8 CIS countries monitored in this report in terms of meeting recent national average consumption or nutritional targets.⁵ For most countries, grain harvests will be near trend levels. Production is down from last year's highs in Azerbaijan and Kyrgyzstan, but still is close to recent averages. Tajikistan has had an above-average grain harvest for the second year in a row, while neighboring Uzbekistan has set an all-time record with its harvest. Kazakhstan continues to be a significant grain exporter in the region. In the longer run, only Tajikistan will have a nutrition-based food gap over the next decade (about 146,000 tons).

In terms of access to food, about 10 million people are estimated to be hungry in 2003 in the CIS region. The people in the lowest income quintile in Uzbekistan account for half of this total (5 million people). The remaining hungry people come from low-income groups in Armenia, Georgia, and Tajikistan. By 2013, ERS projects that the number of hungry people in the 8 CIS countries will increase to about 18 million people. Two-thirds of these people will be in Uzbekistan and the remainder will be in Tajikistan.

Many CIS countries have experienced a sharp decline in grain consumption over the past decade. For the 8 countries monitored in this report, the average decline in per capita grain utilization was 37 percent between 1990-92 and 1999-2001. For some countries, the decline was as high as 58-60 percent (Armenia and Kazakhstan). Most of this decline is accounted for by a drop in imported grains, which were mostly used as feed for livestock animals. This decrease can be explained largely by the removal of price subsidies for meat and reductions in per capita incomes. Most CIS countries have managed to keep food grain consumption levels relatively constant over this period. One notable exception to this general pattern is Tajikistan, where even food consumption declined by about 11 percent per year. This drop in

consumption is reflected by daily caloric intake, which dropped from about 2,300 calories per capita in 1992-94 to around 1,700 calories per capita in 1999-2001.

Food aid served as an important buffer for the CIS countries experiencing sharp declines in food consumption in the transition period following the dissolution of the Soviet Union, particularly in the early years (1992-95). At their peak, food aid imports accounted for about 71 percent of total grain consumption in Georgia in 1994 and 80 percent in Armenia in 1995. ERS estimates that the number of hungry people in the CIS region in the past decade would have been about 12-15 percent higher in most years than would have occurred had food aid not been available.

Since the mid-1990s, food aid imports as a share of total consumption have tapered off in most CIS countries. Armenia, Georgia, and Tajikistan still rely on food aid imports to a significant degree. Over 1999-2001, the ratio of food aid imports to total food supplies was between 9-13 percent in these three countries. In some recent years when harvests were poor, food aid accounted for as much as 22 percent of food supplies in Tajikistan (2001) and 26 percent in Armenia (2000). In other CIS countries, food aid imports accounted for less than 5 percent of food supplies in recent years.

A larger consideration is how well CIS countries have been able to rebound from the large negative economic shocks that most of them experienced in the early transition years. Food security is enhanced when economic growth is positive since it allows countries to invest in the productivity of their agricultural sector, import food commercially, and have greater access to food at the household level. For most food goods, consumption declines as incomes decline, and conversely, consumption rises as incomes rise. This relationship generally has been shown to be true for the CIS countries over the last decade. Countries like Georgia, Kazakhstan, and Turkmenistan have experienced an economic rebound, but other countries like Kyrgyzstan, Tajikistan, and Uzbekistan have continued to contract over this entire period.

⁵ The 8 CIS countries that are monitored in this report are Armenia, Azerbaijan, Georgia, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan.

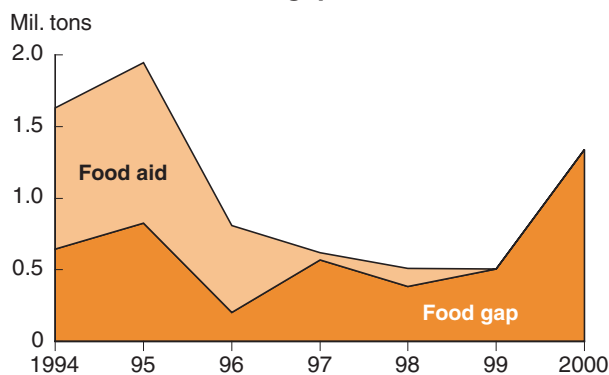
Table 6—Food availability and food gaps for Commonwealth Independent States (CIS)

Year	Grain production	Root production (grain equiv.)	Commercial imports (grains)	Food aid receipts (grain equiv.)	Aggregate availability of all food
			1,000 tons		
1994	22,462	767	5,169	1,613	21,097
1995	16,458	712	2,187	1,825	19,808
1996	18,788	735	3,598	730	20,308
1997	21,061	761	2,694	550	20,898
1998	15,752	782	2,506	454	20,534
1999	23,595	937	2,495	304	23,981
2000	20,356	943	3,157	348	19,345
2001	25,867	1,131	2,358	504	21,656
2002	28,678	1,192	2,277	535	24,784
Projections				Food gap	
				SQ	NR
2003	26,578	1,143	2,717	0	0
2008	26,343	1,246	2,957	0	118
2013	27,953	1,358	3,086	0	146

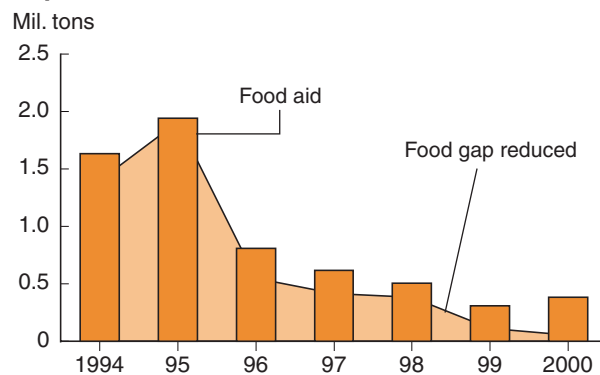
CIS (76 million people in 2003)

In the coming decade, the number of people who do not meet nutritional food requirements is expected to increase from about 10 million to 18 million. Two-thirds of these people will be in Uzbekistan and the remainder will be in Tajikistan.

Commonwealth of Independent States: Food aid versus food gap



Commonwealth of Independent States: Impact of food aid



Commonwealth of Independent States: Food aid

	Total food aid received 1988-2002	Food aid per capita 1989-91 1999-2001	Highest food aid amount received		Food aid as % of supply 1989-91 1999-2001	
	1,000 tons	Kg	1,000 tons	Year	Percent	
CIS	7,917	10.7			5.7	
Armenia	1,644	13.5	464	1995	6.2	
Azerbaijan	895	3.3	386	1995	1.1	
Georgia	2,752	16.0	828	1994	6.8	
Kyrgyzstan	920	16.0	137	1995	3.8	
Tajikistan	1,305	18.6	226	2001	12.3	

Source: World Food Program (WFP), ERS calculations.