

New Independent States (NIS)

Tajikistan's harvest is down for the second year in a row, leading to an estimated food gap of about 300,000 tons to meet recent per capita consumption levels. ERS estimates that the number of hungry people in the region has declined from about 17 million people in 1995 to 10 million people today, mostly due to improvements in Azerbaijan. The remaining number of hungry people is projected to remain at similar levels in the next decade, primarily in Tajikistan and Armenia, due to a combination of both inadequate food supplies and access to food.

[Michael Trueblood]

With the exception of Tajikistan, food production for the five NIS countries covered in this report (Armenia, Azerbaijan, Georgia, Kyrgyzstan, and Tajikistan) has recovered somewhat from last year's drought. Tajikistan's harvest is down again for the second year in a row. ERS estimates that about 300,000 tons of grain—about 24 percent of the overall food supply requirement—are needed to meet recent average per capita consumption levels. Meeting a nutritional standard would entail about 495,000 tons, or 34 percent of requirements. This analysis excludes considerations of refugee movements that may arise from political instability in the region.

ERS estimates that the number of people in the region who fail to meet nutritional requirements has been declining since the mid-1990s and will continue to do so over the next decade. The number has declined from about 17 million people in 1995 to 10 million people today. Most of that improvement occurred in Azerbaijan, which had about 6 million people with inadequate diets in 1995 compared with very few today. The total number of hungry people in the region is projected to decline further to about 8 million people by 2011, with most of the decreases coming in Armenia and Georgia.

For the most part, these positive trends reflect a continuation of political stability and economic recovery, which has helped attract foreign investment. All five countries have shown positive real per capita economic growth since 1996 after early contractions following the breakup of the Soviet Union. Armenia and Georgia have shown the highest growth rates at around 5 and 8 percent, respectively. Azerbaijan has been affected positively by a surge in its oil and gas exports, which has supported increased food imports and improved access to food for all income groups.

Tajikistan is projected to have longrun hunger problems related to both inadequate food supplies and access to food. Over the next decade, Tajikistan will face food supply deficits. To meet present per capita consumption levels, food supplies are estimated to be about 5 percent below requirements in 2001; to meet nutritional requirements, the deficit is about 18 percent. With very limited food supplies and low incomes, all segments of the Tajikistan population are estimated to consume nutritionally inadequate diets in 2001, accounting for about 5 million hungry people. That situation is expected to remain the same, and there are projected to be 6 million hungry people by the end of the next decade.

Although Armenia has shown robust economic growth, grain supplies in the country have continued to contract. Grain imports, which previously accounted for about 80 percent of total supplies, have been hurt by a trade embargo from neighboring countries and have recently averaged about 25 percent of total supplies. Grain production in the country has stagnated and therefore has not been able to make up the difference. ERS estimates that Armenia presently faces a food supply deficit of about 187,000 tons to meet nutritional requirements, but this deficit should fade away over the next decade. Most of the improvement is expected to come from other food sources as the country continues to diversify its diet. Like Tajikistan, it is estimated that all segments of the population consume inadequate diets, resulting in an estimated 3 million hungry people. However, over time it is projected that the top two income quintiles will be able to reach nutritional requirements, reducing the number of hungry people to 2 million people.

The longrun situation continues to be threatened by political and military instability in the region. The situation in Afghanistan could lead to large refugee move-

ments, which could spill over to other countries, including Tajikistan. Also, tensions have been rising recently between Georgia and Russia over the break-away region of Abkhazian, which could lead to further

problems for Georgia. However, on the positive side, recent peace negotiations between Armenia and Azerbaijan over Nagorno-Karabakh seem to be moving toward a lasting settlement.

Table 6—Food availability and food gaps for New Independent States (NIS)

Year	Grain production	Root production	Commercial imports	Food aid receipts (grains)	Aggregate availability of all food
			---1,000 tons---		
1992	2,539	---	---	---	---
1993	2,451	---	1,333	---	---
1994	1,913	224	846	1,102	4,567
1995	1,944	256	430	929	4,473
1996	2,895	266	772	347	4,533
1997	3,491	294	840	511	5,174
1998	3,127	336	845	148	4,870
1999	3,155	397	1,086	290	5,371
2000	2,349	403	968	245	4,770
Projections				Food gap	
				SQ	NR (w/o food aid)
2001	2,869	398	967	299	682
2006	3,453	443	941	44	279
2011	3,713	492	976	78	305

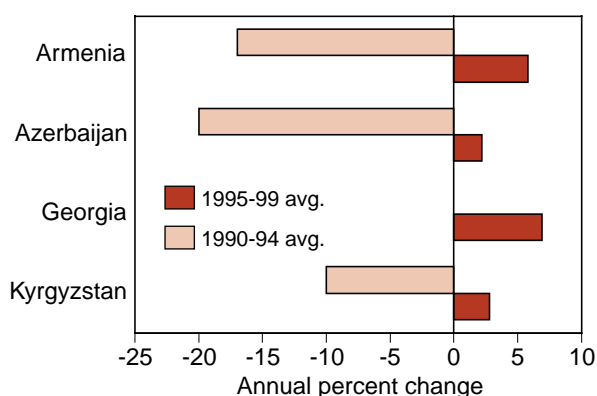
NIS

27 million people

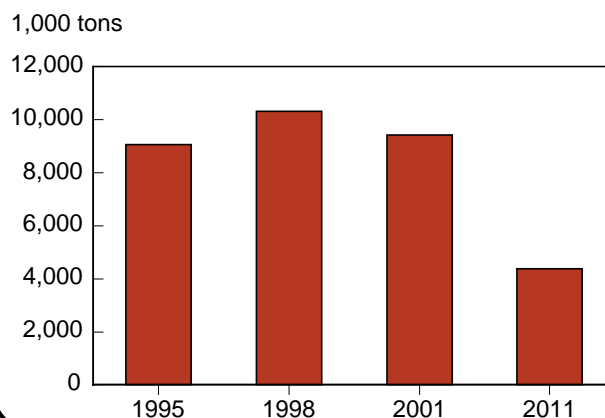
Tajikistan faces another food gap this year of about 300,000 tons. The country will continue to confront chronic food problems over the next decade, both in terms of food supply and economic access.

The number of hungry people in the region has been declining and will continue to do so over the next decade. Most of the improvements to date have occurred in Azerbaijan. Future decreases will come from Armenia and Georgia. These positive trends reflect a continuation of political stability and economic recovery in recent years.

Per capita incomes are rebounding



Distribution gaps in NIS



NIS: Calorie consumption

	Calories per capita per day		Per capita grain consumption growth	Gini coefficient	GNP per capita
	1994-95	1998-99	1990-2000		
	Number		Percent	U.S. dollars	
NIS	2,110	2,379	-0.7	40.5	490
Armenia	2,004	2,171	-9.5	--	490
Azerbaijan	2,050	2,163	1.9	--	550
Georgia	2,140	2,381	-0.3	--	620
Kyrgyzstan	2,246	2,800	3.9	40.5	300
Tajikistan	2,288	1,939	-4.0	--	290

-- = Not available.

Source: FAO, 2001. World Development Indicators, 2000/1, World Bank.