

## Foreword

This report updates and extends the FAO global study *World agriculture: towards 2010*, issued in 1995. It assesses the prospects, worldwide, for food and agriculture, including fisheries and forestry, over the years to 2015 and 2030. It presents the global long-term prospects for trade and sustainable development and discusses the issues at stake in these areas over the next 30 years.

In assessing the prospects for progress towards improved food security and sustainability, it was necessary to analyse many contributory factors. These range from issues pertaining to the overall economic and international trading conditions, and those affecting rural poverty, to issues concerning the status and future of agricultural resources and technology. Of the many issues reviewed, the report concludes that the development of local food production in the low-income countries with high dependence on agriculture for employment and income is the one factor that dominates all others in determining progress or failure in improving the food security of these countries.

The findings of the study aim to describe the future as it is likely to be, not as it ought to be. As such they should not be construed to represent goals of an FAO strategy. But the findings can make a vital contribution to an increased awareness of what needs to be done to cope with the problems likely to persist and to deal with new ones as they emerge. The study can help to guide corrective policies at both national and international levels, and to set priorities for the years ahead.

The world as a whole has been making progress towards improved food security and nutrition. This is clear from the substantial increases in per capita food supplies achieved globally and for a large proportion of the population of the developing world. But, as the 1995 study warned, progress has been slow and uneven. Indeed, many countries and population groups failed to make significant progress and some of them even suffered setbacks

in their already fragile food security and nutrition situation. As noted in the 2001 issue of *The State of Food Insecurity in the World*, humanity is still faced with the stark reality of chronic undernourishment affecting over 800 million people: 17 percent of the population of the developing countries, as many as 34 percent in sub-Saharan Africa and still more in some individual countries.

The present study predicts that this uneven path of progress is, unfortunately, likely to extend well into this century. Findings indicate that in spite of some significant enhancements in food security and nutrition by the year 2015, mainly resulting from increased domestic production but also from additional growth in food imports, the 1996 World Food Summit target of halving the number of undernourished persons by no later than 2015 is far from being reached, and may not be accomplished even by 2030.

By the year 2015 per capita food supplies will have increased and the incidence of undernourishment will have been further reduced in most developing regions. However, parts of South Asia may still be in a difficult position and much of sub-Saharan Africa will probably not be significantly better and may possibly be even worse off than at present in the absence of concerted action by all concerned. Therefore, the world must brace itself for continuing interventions to cope with the consequences of local food crises and for action to remove permanently their root causes. Nothing short of a significant upgrading of the overall development performance of the lagging countries, with emphasis on hunger and poverty reduction, will free the world of the most pressing food insecurity problems. Making progress towards this goal depends on many factors, not least among which the political will and additional resource mobilization required. The importance of these factors was reaffirmed in the Declaration of the World Food Summit: five years later, unanimously adopted at the Summit in June 2002 in Rome.

The study also foresees that agricultural trade will play a larger role in securing the food needs of developing countries as well as being a source of foreign exchange. Net cereal imports by developing countries will almost triple over the next 30 years while net meat imports might even increase by a factor of almost five. For other products such as sugar, coffee, fruit and vegetables the study foresees further export potential. How much of this export potential will materialize depends on many factors, not least on how much progress will be made during the ongoing round of multilateral trade negotiations. Developing countries' farmers could gain a lot from lower trade barriers in all areas, not only in agriculture. In many resource-rich but otherwise poor countries, a more export-oriented agriculture could provide an effective means to fight rural poverty and thus become a catalyst for overall growth. But the study also points at potentially large hardships for resource-poor countries, which may face higher prices for large import volumes without much capacity to step up production.

Numerous studies that assessed the impacts of freer trade conclude that lower trade barriers alone may not be sufficient for developing countries to benefit. In many developing countries, agriculture has suffered not only from trade barriers and subsidies abroad but has also been neglected by domestic policies. Developing countries' producers may therefore not benefit greatly from freer trade unless they can operate in an economic environment that enables them to respond to the incentives of higher and more stable international prices. A number of companion policies implemented alongside the measures to lower trade barriers can help. These include a removal of the domestic bias against agriculture; investment to lift product quality to the standards demanded abroad; and efforts to improve productivity and competitiveness in all markets. Investments in transportation and communication facilities, upgraded production infrastructure, improved marketing, storage and processing facilities as well as better food quality and safety schemes could be particularly important, the latter not only for the benefit of better access to export markets, but also for reducing food-borne diseases affecting the local population.

On the issue of sustainability, the study brings together the most recent evaluation of data on the developing countries' agricultural resources, how they are used now and what may be available for meeting future needs. It does the same for the

forestry and fisheries sectors. The study provides an assessment of the possible extent and intensity of use of resources over the years to 2030 and concludes that pressure on resources, including those that are associated with degradation, will continue to build up, albeit at a slower rate than in the past.

The main pressures threatening sustainability are likely to be those emanating from rural poverty, as more and more people attempt to extract a living out of dwindling resources. When these processes occur in an environment of fragile and limited resources and when the circumstances for introducing sustainable technologies and practices are not propitious, the risk grows that a vicious circle of poverty and resource degradation will set in. The poverty-related component of environmental degradation is unlikely to be eased before poverty reduction has advanced to the level where people and countries become significantly less dependent on the exploitation of agricultural resources. There is considerable scope for improvements in this direction and the study explores a range of technological and other policy options. Provided such improvements in sustainability are put in place, the prospects point to an easing of pressures on world agricultural resources in the longer term with minimal further buildup of pressures on the environment caused by agricultural practices.

I conclude by reiterating the importance of developing sustainable local food production and of rural development in the low-income countries. Past experience underlines the crucial role of agriculture in the process of overall national development, particularly where a large part of the population depends on the sector for employment and income, as is the case in most low-income countries. Agricultural development is and will be the critical component of any strategy to improve their levels of food security and alleviate poverty. It is for this reason that sustainable agricultural and rural development are given enhanced priority in *The Strategic Framework for FAO: 2000-2015*.



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