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FAO REGIONAL CONFERENCE FOR AFRICA

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Global and regional Food Security Outlook

Executive Summary

After rising sharply after the COVID-19-pandemic, global hunger remained relatively unchanged from 2021 to 2022, affecting about 9.2 percent of the world population in 2022 – between 691 and 783 million people. More than 280 million people in Africa, equivalent to 19.7 percent of the population, were among them – an increase of 57 million compared to 2019, before the pandemic.

An estimated 29.6 percent of the global population – 2.4 billion people – did not have access to adequate food in 2022, including around 868 million people in Africa (61 percent of the population). Approximately 146 million people across 36 countries of Africa may have faced high levels of acute food insecurity (IPC Phase 3 or higher) in 2022. As much as three fourths of the population of Africa may not have been able to afford a healthy diet in 2021.

The latest short-term analyses point to favourable production outlooks and supply across most basic foodstuffs globally. However, food production systems remain vulnerable to risks from extreme weather events, rising geopolitical tensions and policy changes, potentially tipping the delicate demand-supply balances and jeopardizing prospects for global food security. To improve food security, Africa would need to close agricultural productivity gaps, improve market access, reduce the costs of transportation, and operationalize the intra-African free trade agreement.

Suggested action by the Regional Conference

The Regional Conference is invited to:

- a) Take note of the information presented in this document, in particular regarding the deteriorating food security situation in Africa.
- b) Recognize the urgent need to work together to address the main drivers of undernourishment and food insecurity in the world: conflicts and geopolitical tensions, extreme and more frequent climatic events, economic slowdowns and downturns and persistent inequalities.
- c) Address the need for continued urgent humanitarian assistance, including the scaling up of actions that build resilience.
- d) Acknowledge FAO's statistical work as the leading agency producing data on food and agriculture, relevant for monitoring food security, and urge governments to provide up-to-date

This document can be consulted at www.fao.org

and complete data and statistics to FAO to allow timely assessments and analyses to inform policy decisions.

- e) Provide guidance on FAO's future support to the region, as deemed appropriate.

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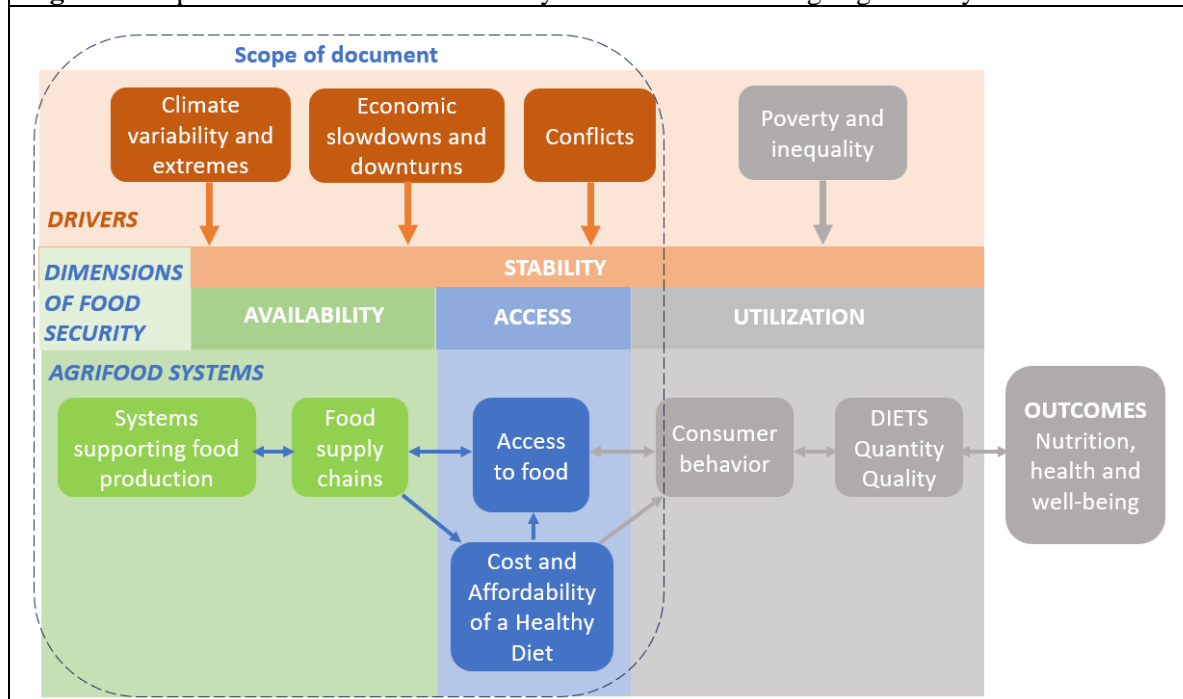
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I. Introduction

1. The assessment of the global and regional food security situation presented in this document reflects a world that was beginning to recover from the COVID-19 pandemic when the war erupted in Ukraine in early 2022, involving two major producers of agricultural commodities in the world and sending shockwaves through commodity and energy markets. The pandemic, the ensuing economic rebound, the war in Ukraine, and the soaring prices of food, agricultural inputs and energy due in part to the war have all played out differently across regions and populations, with differing impacts on hunger and food insecurity. Many countries were hit hard by higher food and energy import bills, while others benefitted from the higher prices. Many population groups were not buoyed up by the economic recovery or were bearing the brunt of higher food and energy prices – or both.
2. This document presents an overview of the current food security situation in the world and in Africa as well as the short- and medium-term outlook for food security. As widely recognized, food security can be conceptualized by four dimensions: availability, access, stability and utilization of food (Figure 1). This document focuses on the dimensions of availability, access and stability as reflected by the indicators used to describe the food security situation and, more importantly, by the elements that influence the outlook of food security presented in the document, which are based on the analysis of aggregate supply and demand for food. At the same time, this analysis is influenced by the impact of drivers such as climate variability and extremes, economic slowdowns and downturns, and conflicts. In this sense, the dimension of utilization and other key drivers, such as poverty and inequality, are beyond the scope of the document.
3. Following this conceptual framework, section II presents the global and regional trends in chronic food insecurity followed by an assessment of the acute food insecurity situation in food crisis countries. Global and regional indicators of the cost and affordability of a healthy diet are also presented. Section III discusses the agricultural outlook for the major food commodities in both the short- and medium-term and highlights emerging issues in the region.

Figure 1. Impacts of drivers on food security are transmitted through agrifood systems



Source: Adapted from FAO, IFAD, UNICEF, WFP & WHO. 2020. *The State of Food Security and Nutrition in the World 2020. Transforming food systems for affordable healthy diets*. Rome, FAO; and from HLPE. 2017. *Nutrition and food systems*. A report by the High-Level Panel of Experts on Food Security and Nutrition of the Committee on World Food Security. Rome.

II. Global and regional food security situation

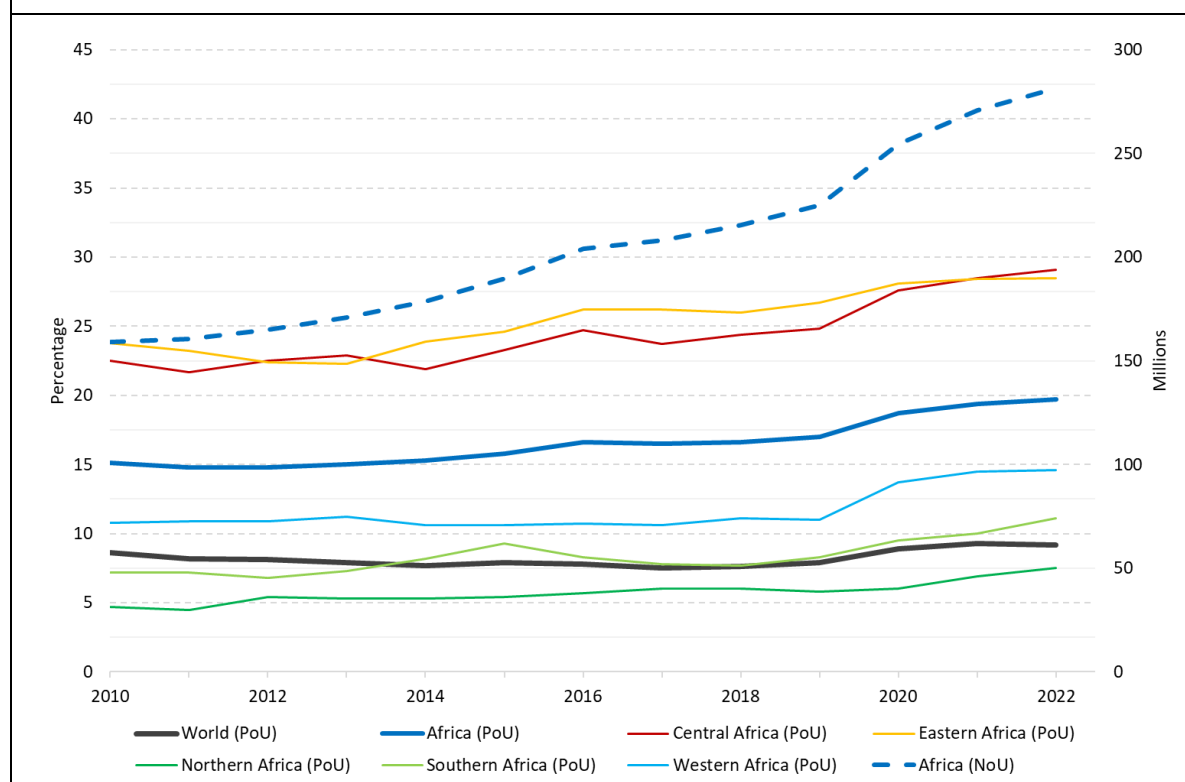
A. Trends in chronic food insecurity¹

4. After rising sharply in the wake of the COVID-19 pandemic, global hunger, measured by the prevalence of undernourishment (PoU), remained relatively unchanged from 2021 to 2022, affecting around 9.2 percent of the world population in 2022. It is estimated that between 691 and 783 million people in the world faced hunger in 2022. Considering the midrange (about 735 million), 122 million more people faced hunger in 2022 than in 2019, before the global pandemic, when the prevalence was 7.9 percent.

5. However, undernourishment in Africa continued to rise in 2022, reaching 19.7 percent, well above the global average, and equivalent to more than 280 million people (Figure 2).

6. Among the subregions of Africa, hunger in 2022 was the lowest in Northern Africa, where the PoU was 7.5 percent (below the global average), followed by Southern Africa, where an estimated 11.1 percent of the population was undernourished. The PoU was highest in Central and Eastern Africa (about 29 percent in both cases), which is twice the prevalence in Western Africa (14.6 percent).

Figure 2. Prevalence of undernourishment in the world, Africa and subregions, and the number of undernourished in Africa



Source: Based on FAO. 2023. Suite of Food Security Indicators. In: *FAOSTAT*. Rome. [Cited July 2023]. <https://www.fao.org/faostat/en/#data/FS>

7. Hunger in Africa reached its lowest historical level in 2011 and 2012, when an estimated 14.8 percent of the region's population was facing hunger. Considering recent trends, hunger increased in the region from 17.0 percent in 2019, before the COVID-19 pandemic and the war in Ukraine, to 19.7 percent in 2022. Hunger rose in all subregions in this period, with the largest increases in Central Africa and Western Africa of 4.3 and 3.6 percentage points, respectively,

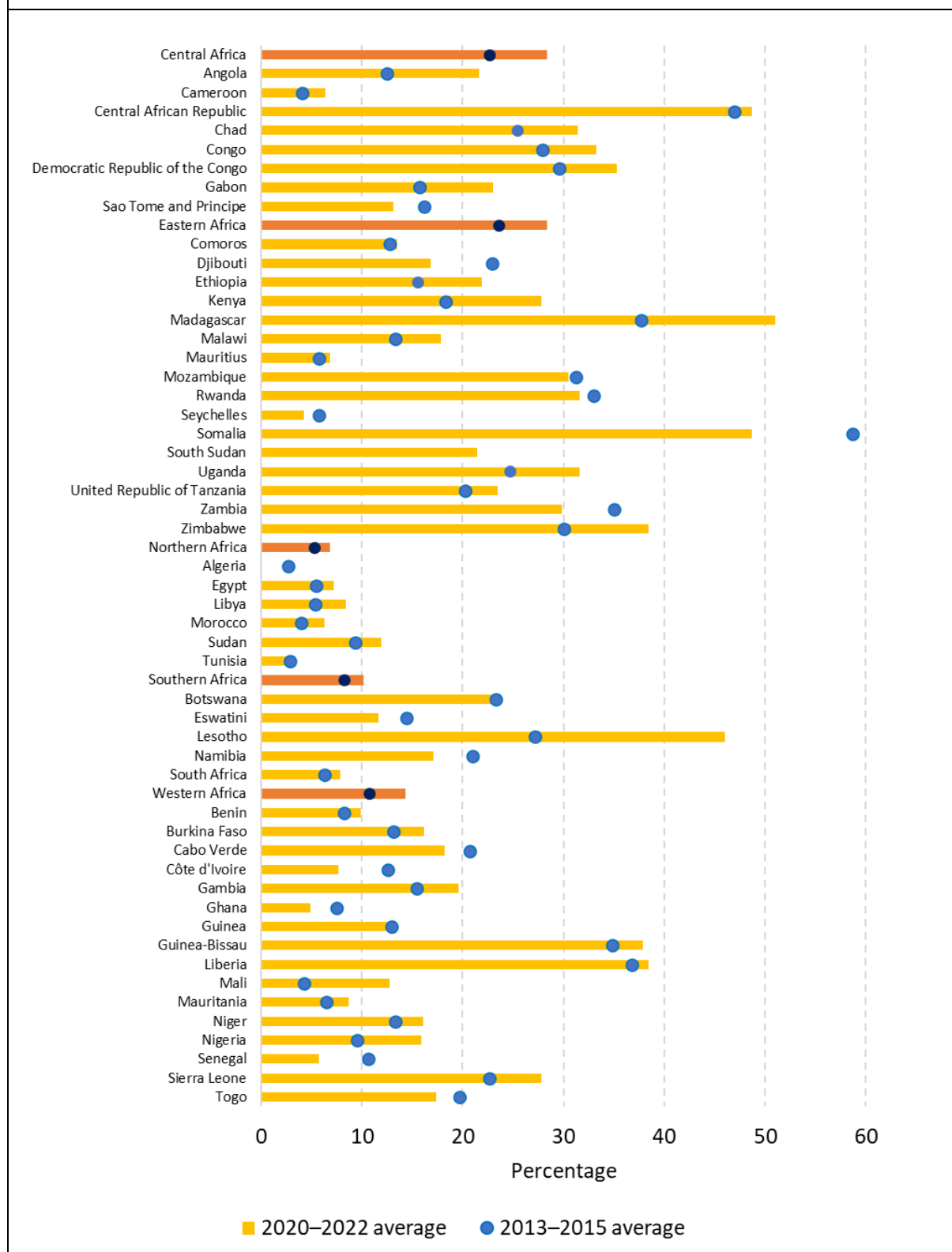
¹ This section is largely based on FAO, IFAD, UNICEF, WFP and WHO. 2023. *The State of Food Security and Nutrition in the World 2023. Urbanization, agrifood systems transformation and healthy diets across the rural–urban continuum*. Rome, FAO. <https://doi.org/10.4060/cc3017en>

compared to increases of 2.4 percentage points in Southern Africa and less than two percentage points in Eastern and Northern Africa.

8. The number of undernourished people in Africa reached 281.6 million in 2022, up from 270.6 million in 2021 and from 225.1 million in 2019, before the pandemic. In 2022, nearly one in four of the world's undernourished people lived in Africa. Projections to 2030 point to some improvement globally but a significant increase for Africa, where it is projected that close to 300 million people may be facing hunger in 2030.

9. The estimated PoU varies significantly among countries in Africa, ranging from less than 2.5 percent in Algeria to 51.0 percent in Madagascar (Figure 3). Between 46 and 49 percent of the populations of the Central African Republic, Lesotho, and Somalia were undernourished, and about 38 percent in Guinea-Bissau, Liberia, and Zimbabwe. It was estimated that approximately one-third of the populations of Chad, Congo, the Democratic Republic of the Congo, Mozambique, Rwanda, and Uganda were facing hunger in 2022 (ranging from 30.5 Mozambique to 35.3 in the Democratic Republic of the Congo). Algeria, Ghana, Tunisia, and Seychelles all had PoU below 5.0 percent.

10. The PoU nearly doubled in Mali since 2013-2015, and large increases were also seen of about 70 percent in Angola and Lesotho, and around 50 percent in Kenya and Gabon. On the other hand, significant improvements were achieved in Somalia, Djibouti, and Senegal, with decreases of 17, 27 and 46 percent, respectively.

Figure 3. Prevalence of undernourishment in Africa by country (2013-2015 and 2020-2022)

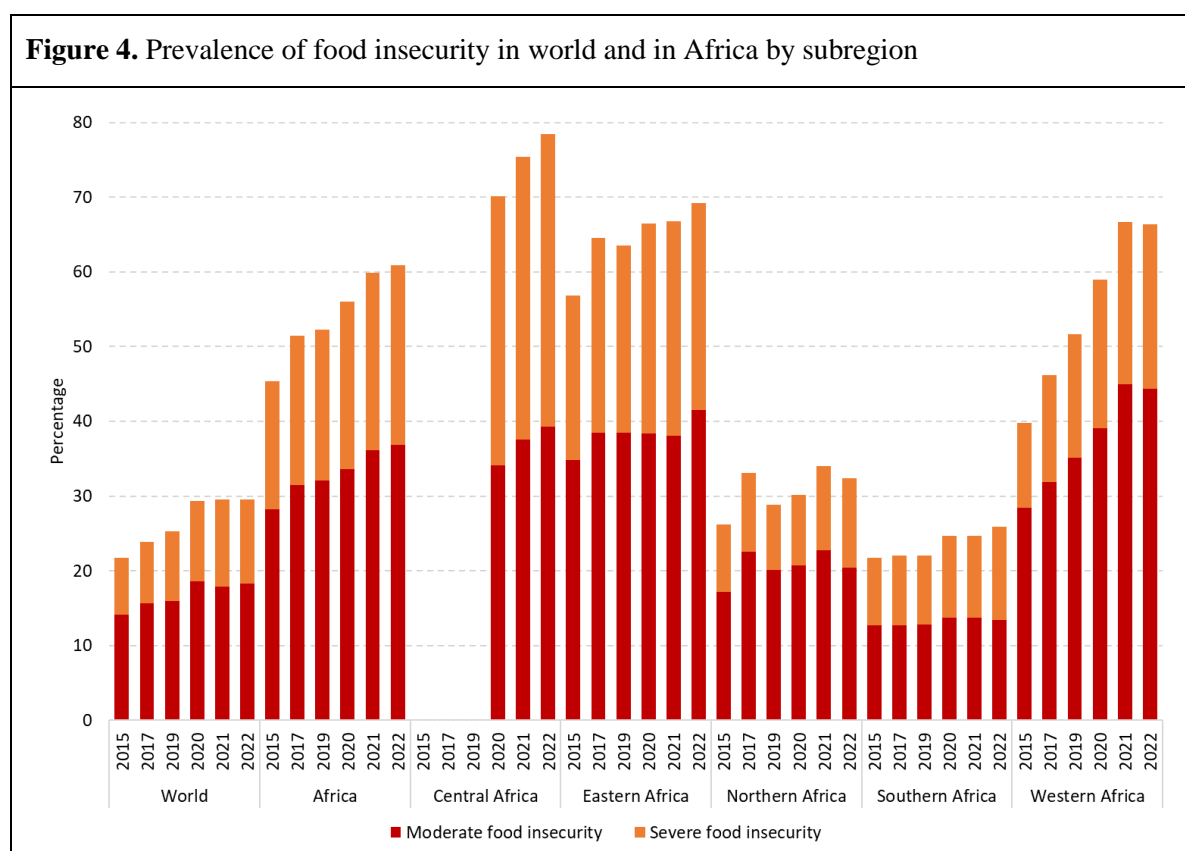
Note: The PoU is less than 2.5 percent for Algeria in 2020-2022. The 2013-2015 average is not available for South Sudan.

Source: Based on FAO. 2023. Suite of Food Security Indicators. In: *FAOSTAT*. Rome. [Cited July 2023]. <https://www.fao.org/faostat/en/#data/FS>

11. The prevalence of moderate or severe food insecurity based on the Food Insecurity Experience Scale (FIES) is an estimate of the proportion of the population facing moderate or severe constraints on their ability to obtain sufficient food over the course of a year. People face moderate food insecurity when they are uncertain of their ability to obtain food and have been forced to reduce, at times over the year, the quality and/or quantity of food they consume due to lack of money or other resources. Severe food insecurity means that individuals have likely run out of food, experienced hunger and, at the most extreme, have gone for days without eating, putting their health and well-being at serious risk.

12. The prevalence of moderate or severe food insecurity in the world remained unchanged for the second year in a row after increasing sharply from 2019 to 2020 (Figure 4). About 29.6 percent of the global population – 2.4 billion people – were moderately or severely food insecure in 2022, of which about 900 million (11.3 percent of people in the world) were severely food insecure.

Figure 4. Prevalence of food insecurity in world and in Africa by subregion



Source: FAO. 2023. Suite of Food Security Indicators. In: *FAOSTAT*. Rome. [Cited July 2023].

<https://www.fao.org/faostat/en/#data/FS>

13. In Africa, the prevalence of moderate or severe food insecurity increased by one percentage point in one year to 60.9 percent in 2022 – double the global estimate. The increase is significantly smaller compared to the previous year, when it rose by 4 percentage points. From 2021 to 2022, the prevalence of moderate or severe food insecurity rose in Eastern Africa, Middle Africa and Southern Africa by 2.4, 3.0 and 1.2 percentage points, respectively.

14. The prevalence in 2022 ranged from 25.9 percent in Southern Africa to 78.4 percent in Middle Africa. Of the 2.4 billion people in the world facing either moderate or severe food insecurity in 2022, 868 million (about 37 percent) live in Africa.

15. The prevalence of moderate or severe food insecurity was higher among women than among men, both globally and, to a lesser extent, in Africa. Worldwide, the gender gap in 2022 was 2.5 percentage points. In Africa, the gender gap was smaller: 1.2 percentage points.

16. Larger differences in food insecurity are noted when comparing people living in rural, peri-urban and urban areas in Africa in 2022. The prevalence of moderate or severe food insecurity was 64.5 percent in rural areas, 60.3 percent in peri-urban areas, and 54.2 percent in urban areas, and similar differences were seen for severe food insecurity.

B. Acute food insecurity situation in selected food crisis countries²

17. When considering all countries covered in the 2023 edition of the Global Report on Food Crises (GRFC), 258 million people in the world were estimated to be facing “high levels”³ of acute food insecurity in 2022. This includes 35 million people facing emergency levels and 376 thousand in catastrophe.

18. Though it is not possible to compile consistent series of comparable figures over time, we note that the total number of people facing high levels of acute food insecurity reported in the various editions of the GRFC has increased for three years in a row, from 155 million in 2020 to 193 million in 2021, to 258 million in 2022, partly due to the evolving scope and changed/increased coverage of the reports.

19. Region-wide, approximately 146 million people may have faced high levels of acute food insecurity (IPC Phase 3 or higher), across 36 countries in 2022. Of these, 47.4 million were in thirteen countries in Central and Southern Africa, 56.85 million in eight countries in East Africa and 41.45 in fifteen countries in West Africa and the Sahel (including Cameroon). In Northern Africa, the 2022 analysis conducted on Libya on IDPs, returnees, refugees and migrants estimated that 0.3 million people were in IPC Phase 3 or higher.

20. In Central and Southern Africa, 22 percent of the population analyzed was estimated to be in IPC phase 3 or above in 2022. The estimated number of people facing high levels of acute food insecurity in this population has increased since 2016, reflecting multiple interconnected shocks, including disastrous weather events, protracted conflicts, and sharp increases in food prices. The Democratic Republic of the Congo has consistently been among the countries with the highest numbers of people facing high levels of acute food insecurity; in 2022, the number was estimated to be 26.43 million.

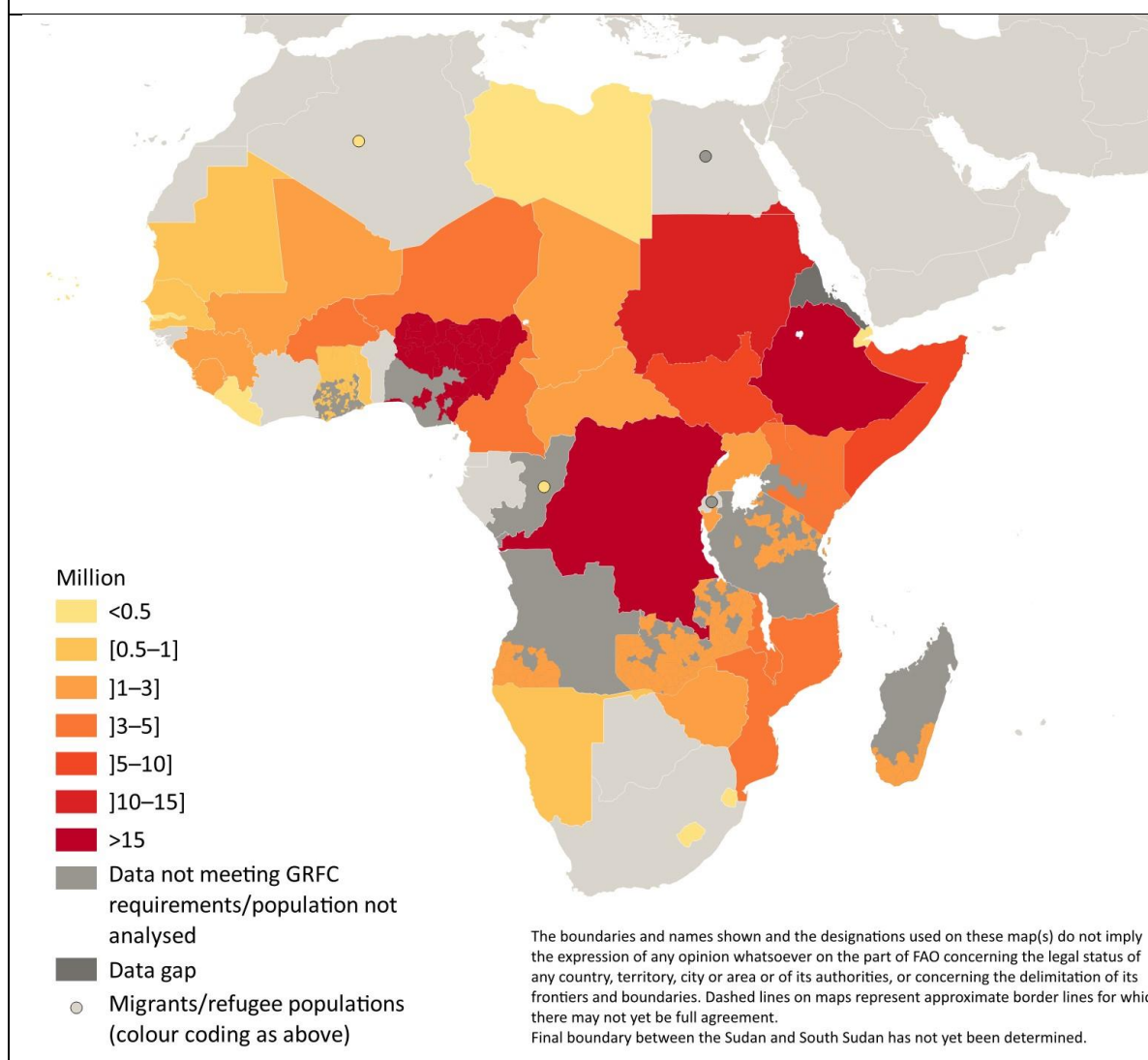
21. In Eastern Africa, weather extremes, economic challenges, and conflict continue to drive high levels of acute food insecurity. Prolonged drought in the Horn of Africa has intensified the food insecurity crisis. Extremely severe levels of acute food insecurity affected specific areas, with around 9 million people in Emergency (spread across six countries) and 0.3 million people in Catastrophe (South Sudan and Somalia). Ethiopia and Sudan are among the ten countries with the largest number of people facing high levels of acute food insecurity – 23.6 million and 11.7 million, respectively.

22. Approximately 41 million individuals faced heightened levels of acute food insecurity (IPC Phase 3 or higher) across fifteen countries in West Africa and the Sahel, including Cameroon, in 2022. The Central Sahel region, comprising Mali, Burkina Faso, and western Niger, has been profoundly impacted over the past three years. This impact is rooted in the intricate interplay between conflict and weather shocks, set against a backdrop of elevated socioeconomic vulnerability, severely impinging on household food availability and access. At the peak of the crisis in 2022, a record 7.34 million people were estimated to face Crisis or more severe levels of acute food insecurity, encompassing 1.03 million people in Emergency (CH Phase 4). In the Lake Chad Basin, spanning the Extrême Nord region of Cameroon, western Chad, northeastern Nigeria and eastern Niger, the number of people estimated to be in Crisis or worse reached approximately 5.3 million, including about 700 000 people in Emergency (CH Phase 4), as of 2022.

² This section is based on the Global Report on Food Crises (GRFC) 2023 published in May and on the GRFC 2023 Mid-year update published in September. Additional information on Hunger hotspots of highest concern is derived from the FAO/WFP Hunger hotspot report published in end-October.

³ Acute food insecurity is considered to have reached “High levels” when it corresponds to phase 3 (“crisis”) or more according to the definitions set by the Integrated food security Phase Classification (IPC) and Cadre Harmonisé (CH) analytic approaches. See <https://www.ipcinfo.org>.

Figure 5. Number of people facing high levels of acute food insecurity in 2022 in Africa affected by major food crises and among displaced/refugee populations



Source: FSIN (Food Security Information Network) & Global Network Against Food Crises. 2023. *Global Report on Food Crises (GRFC) 2023*. Rome. www.fsinplatform.org/globalreport-food-crises-2023

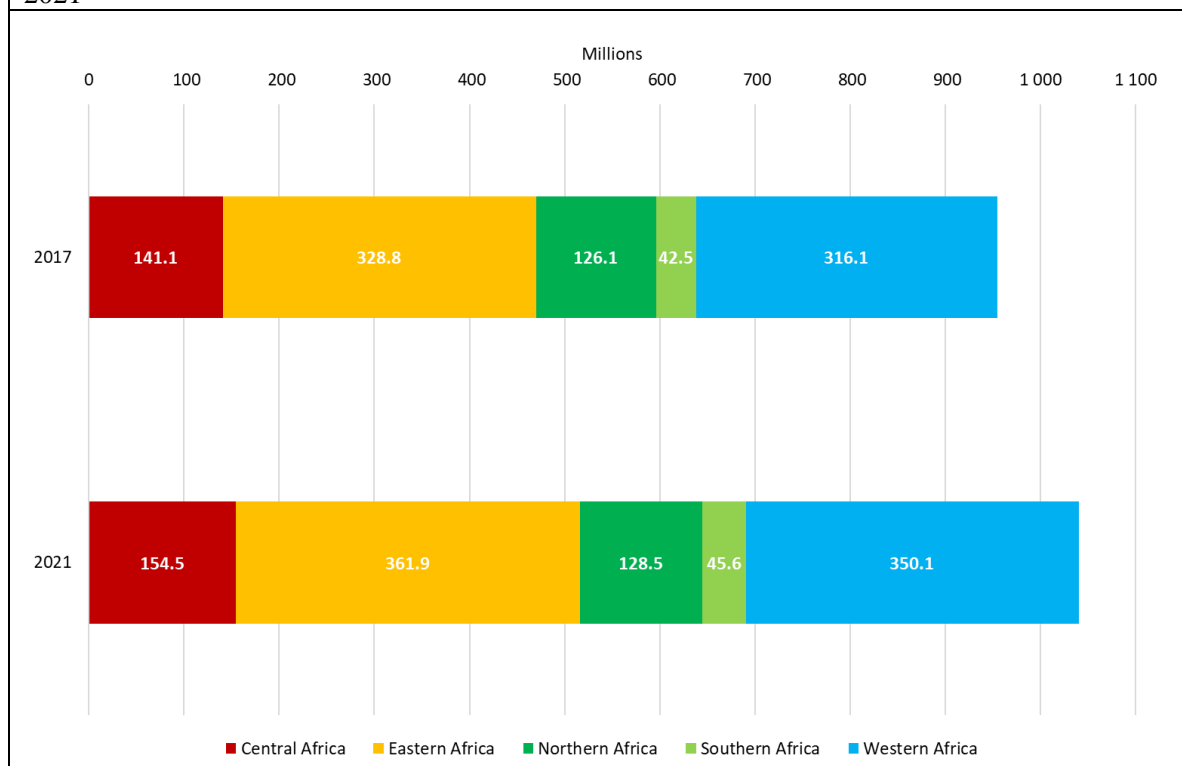
C. Evolution in the Cost and Affordability of a Healthy Diet

23. In 2021, the average cost of a healthy diet in Africa was 3.57 PPP dollars per person per day, below the global estimate of 3.66 PPP dollars. Over the years since 2017, the cost of a healthy diet in the region has steadily increased, with a notable 5.6 percent rise between 2020 and 2021, surpassing the global level increase of 4.3 percent. Across the subregions and since 2019, Western and Eastern Africa witnessed the highest cumulative cost increase of 10.3 and 9.6 percent, respectively, followed by Southern Africa (9.3 percent) and Central Africa (7.6 percent). Conversely, Northern Africa saw a decline of 3.4 percent in the cost of a healthy diet over the two consecutive years.

24. In 2021, up to more than three-quarters of the African population (77.5 percent) – around 1,040.5 million people – might have been unable to afford a healthy diet. At the subregional level, the diet was out of reach for up to 362 million people (84.6 percent of the population) in Eastern Africa, and up to 350 million people (85.4 percent of the population) in Western Africa. Relatively

fewer people were affected in Southern Africa (46 million, or 67 percent of the population), Northern Africa (up to 128.5 million, or 51.7 percent of the population) and Central Africa (up to 154.5 million, or 81.9 percent of the population). In 2021, 85.9 million more people were unable to afford a healthy diet than in 2017, and 51 million more people compared to 2019. The surge in Africa is driven by Western and Eastern Africa, where the diet became unaffordable for 22.5 and 20.6 million more people from 2019 to 2021, respectively, while Northern Africa witnessed a reduction by 2.8 million people.

Figure 6. Number of people unable to afford a healthy diet in Africa by subregion in 2017 and 2021



Source: Based on FAO. 2023. Cost and Affordability of a Healthy Diet (CoAHD). In: *FAOSTAT*. Rome. [Cited July 2023]. <https://www.fao.org/faostat/en/#data/CAHD>

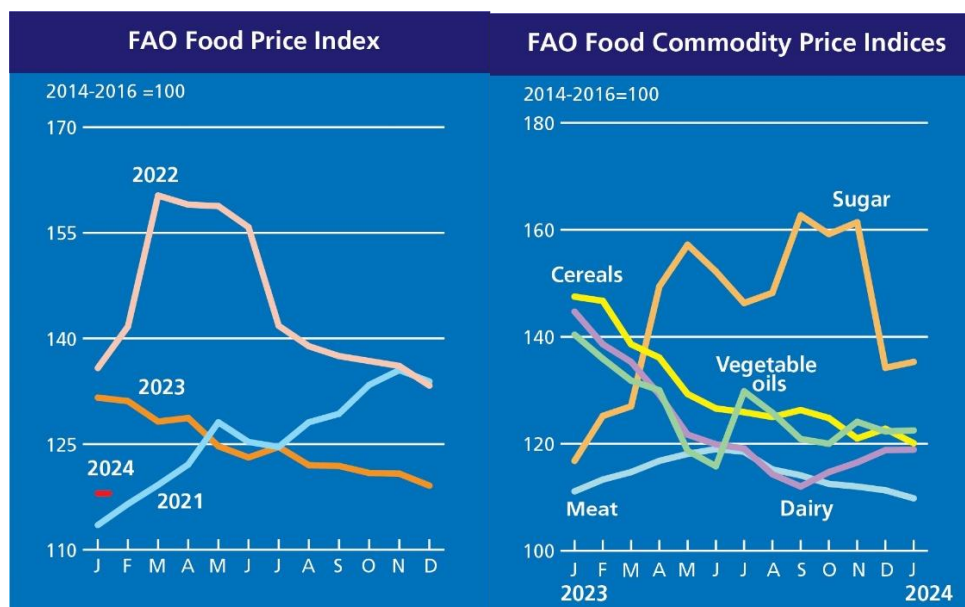
III. Global and Regional Agricultural Outlook

D.

E. III.1. Global Outlook

F. Current market situation and short-term outlook

25. In 2023, the FAO Food Price Index continued to trend downward, albeit slowly, reflecting drops in the world prices of wheat and coarse grains, vegetable oils, dairy products and meat due to ample export availabilities, coupled with subdued global import demand. Meanwhile, the FAO Sugar Price Index was up 26.7 percent from 2022, reaching its highest value since 2011, driven by concerns over a tighter global supply in the 2023/24 season (Figure 7).

Figure 7. FAO Food Price Index (left) and price indices for commodity groups (right)

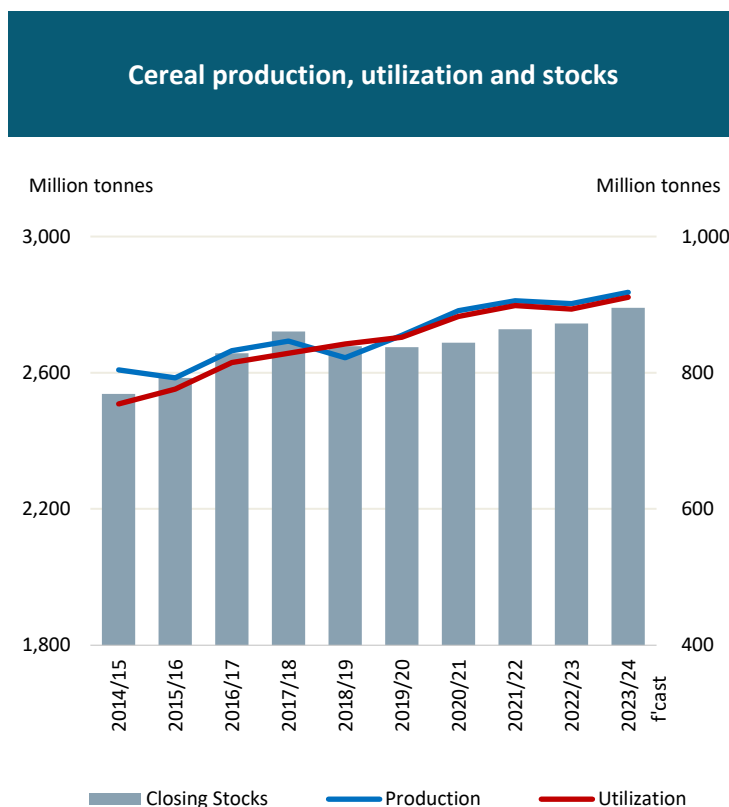
Source: FAO. 2024. Food Price Index. <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>

26. FAO forecasts indicate that world wheat supply will remain comfortable in the 2023/24 seasons, mainly reflecting large carry-over stocks, despite an expected downturn in global production from the previous year's record level. As for coarse grains, an anticipated rebound in maize production is expected to boost global supplies, utilization and stocks.

27. In the 2023/24 marketing seasons, global rice production is forecast to recover, with expectations for utilization to stagnate, on subdued import demand and export restrictions (most notably by India), and a recovery in reserves, concentrated in a few countries. International trade in rice in 2024 is forecast to remain stable at the 2023 level.

28. World oilseeds production is anticipated to expand in 2023/24, reaching a new record high, propelled by soybean and sunflower seeds, while trade in vegetable oils and oil meals is forecast to stagnate due to ample stocks in importing countries, notwithstanding potentially higher consumer demand for vegetable oils and feed industry demand for oil meals.

29. Regarding livestock products, global production of milk and meat is forecast to expand in 2023, reflecting favourable production conditions in leading producing countries. However, international trade in dairy products and meat will likely contract due to lower purchasing power, caused by high inflation and sluggish economic growth.

Figure 8. Global cereal production, utilization and stocks

Source: FAO. January 2024. Cereal Supply and Demand Brief.

<https://www.fao.org/worldfoodsituation/fao-cereal-supply-and-demand-brief/en>

30. Elevated national food prices, weak currencies and lower economic growth prospects continue to constrain access to food for many net-food importing developing countries and vulnerable communities. Policy-induced uncertainties, especially export restrictions, have further affected prices and hindered availability and access to food for the most vulnerable.

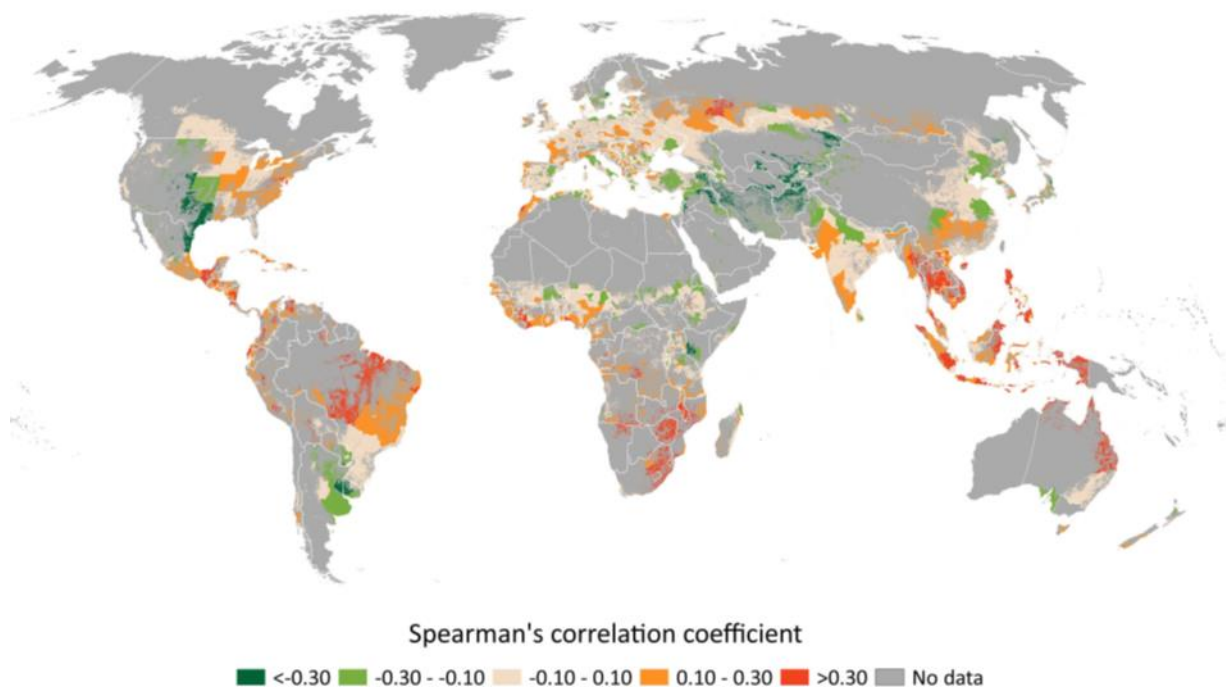
31. Adverse weather conditions, especially associated with the ongoing El Niño event, are expected to intensify the lingering impacts of droughts, excessive rainfall and floods, lowering yields and constraining food production growth worldwide (Figure 9).

32. Conflicts, wars and geopolitical tensions undermine food production, further aggravating concerns over food availability and access in many countries. In Ukraine, although active fighting is geographically limited, the economic implications of the war, including high input costs and low farmgate prices, has altered the product mix, with implications for global supplies.

33. Challenging logistics at some prominent points of origin, including low water levels in key inland waterways and marine passages, such as the Mississippi River in the United States of America, the Tapajos River in Brazil and the Panama Canal, affected food trade. Recent developments in the Middle East have also raised concerns about potential trade disruptions at major commercial chokepoints, especially in the Red Sea.

34. Transboundary animal diseases, especially African swine fever and avian influenza, continue to constrain livestock activities worldwide despite implementation of measures to control their spread and minimize impacts on trade by using the regionalization approach (continue to accept products from non-affected regions of a country even after a disease outbreak).

Figure 9. Correlation between vegetation conditions in croplands and El Niño events (Spearman correlation coefficient)



Source: FAO, El Niño to return in 2023 following a three-year La Niña phase, GIEWS update, 26 April 2023.

G.

H. Medium-term outlook

35. Over the upcoming decade, the evolving energy and nutrition requirements of a growing and increasingly affluent global population are expected to be the key drivers of demand for agricultural commodities. The macroeconomic assumptions underlying the projections suggest a slowdown in global population growth alongside a decline in the population of China. Meanwhile, most parts of the world are projected to register a growth in per capita income. Rates of inflation are expected to slow down over the next 10 years.

36. Globally, food is projected to remain the primary use for basic agricultural commodities, accounting for 49 percent of quantities consumed at the global level. Global food consumption is projected to increase by 1.3 percent per year. Population growth will continue to be the main factor shaping food demand at the global level, driven predominantly by the increasing consumption requirements of rising populations in Sub-Saharan Africa, India and the Near East and Northern Africa region (Figure 10).

37. Globally, staple foods are expected to remain the most significant source of calories. Consumption of higher value foods will primarily expand in response to rising incomes in emerging markets. Particularly in Asia and the Latin America and Caribbean region, the share of animal proteins in total protein consumption is expected to increase.

38. Growth in global consumption of animal products necessitates a higher feed use of crops. Low- and middle-income countries are expected to account for the bulk of this increase, as they move to more commercialised and feed-intensive livestock production systems.

39. Based on ongoing investments in technology, infrastructure and training, global agricultural production is projected to grow by 1.1 percent per year. Most of this growth will occur in middle- and low-income countries. Global crop production growth will mainly be driven by increased productivity rather than increased land use (Figure 11).

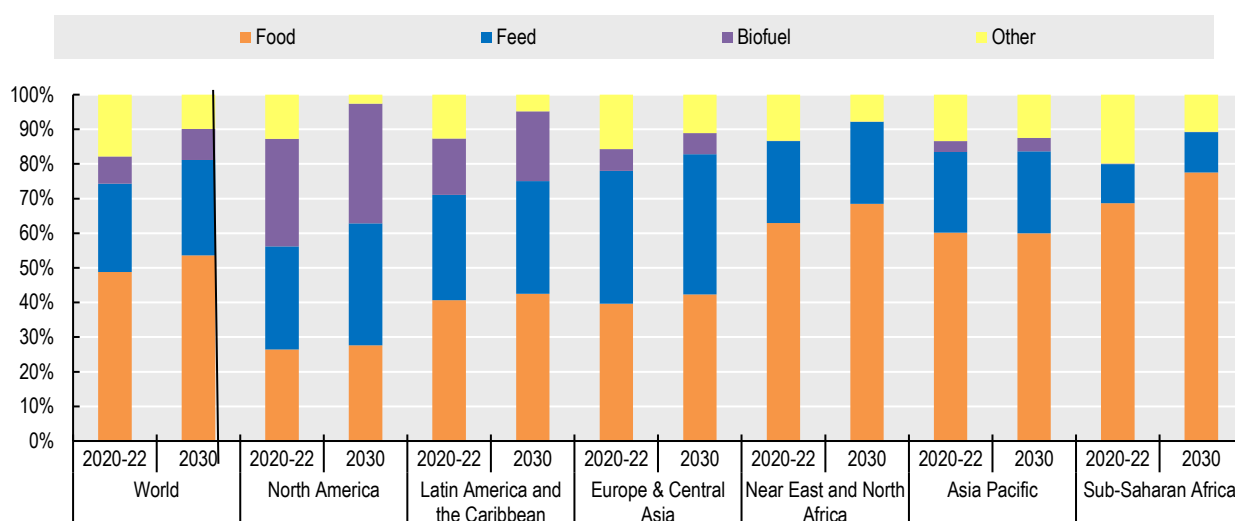
40. Like crop production, a large share of the projected growth in livestock and fish production will result from improvements in per animal productivity, owing to more efficient herd management and higher feed intensity.

41. Trade in primary agricultural commodities and processed products is projected to grow in line with production over the next decade. While the COVID-19 pandemic led to worldwide disruptions, trade in agricultural commodities has proven to be resilient (Figure 12).

42. Aside from conflict and geopolitical tensions, a major threat to food consumption is posed by the economic repercussions of persistently high inflation rates and a potential global recession.

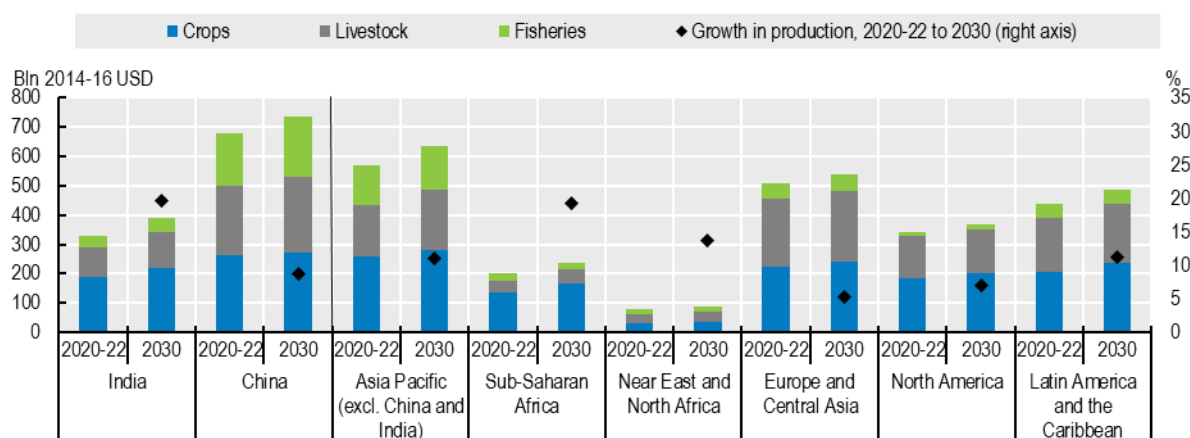
43. Despite recent easing, the risk of continued uncertainties could alter production decisions, limit input use, and subsequently depress yield growth, threatening global food security. The production of agricultural commodities remains also vulnerable to plant and animal diseases. Moreover, in the longer-term, climate change and environmental policies may cause market disruptions and reshape the global production patterns.

Figure 10. Use of agricultural commodities by type and region

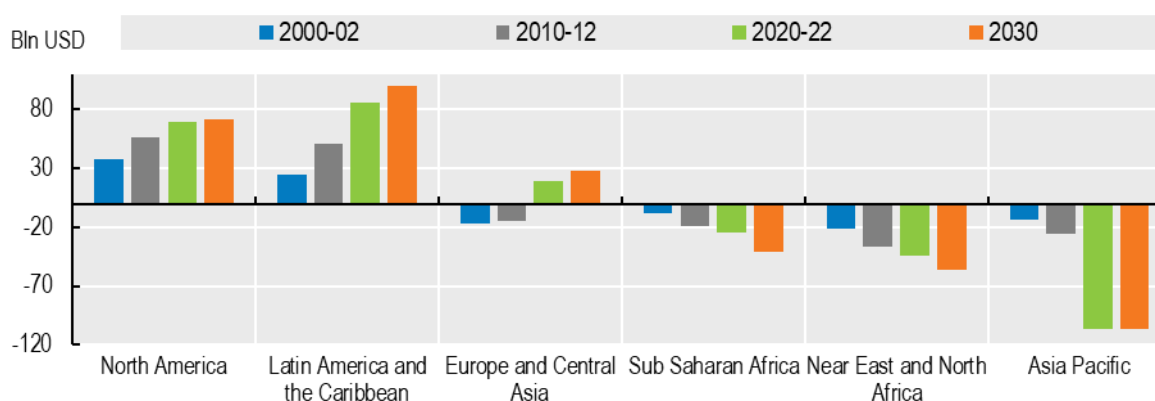


Source: OECD/FAO. 2023. *OECD-FAO Agricultural Outlook 2023-2032*. Paris, OECD Publishing.

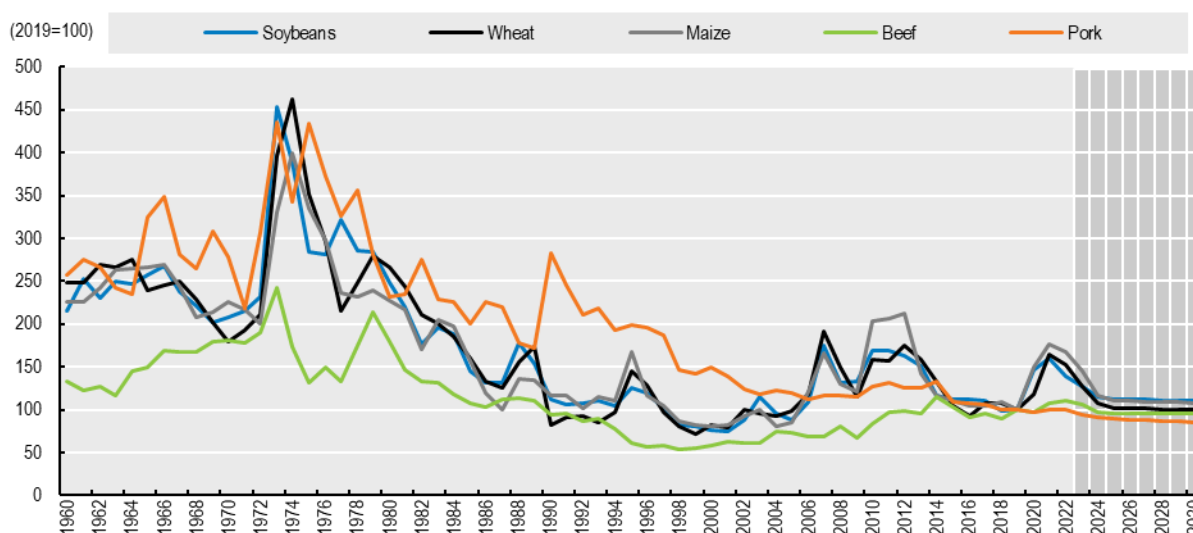
Figure 11. Trends in global agricultural production



Source: OECD/FAO. 2023. *OECD-FAO Agricultural Outlook 2023-2032*. Paris, OECD Publishing.

Figure 12. Net trade by region, in constant value

Source: OECD/FAO. 2023. *OECD-FAO Agricultural Outlook 2023-2032*. Paris, OECD Publishing.

Figure 13. Long-term evolution of commodity prices, in real terms

Source: OECD/FAO. 2023. *OECD-FAO Agricultural Outlook 2023-2032*. Paris, OECD Publishing.

I. III.3. Regional Outlook

J. Current market situation and short-term outlook

44. Africa's total grain production (wheat and coarse grains) in 2023 is forecast at 172 million tonnes, 1.6 percent below last year's average output. Conditions varied greatly across the continent. Substantial rainfall deficits curbed 2023 wheat harvests in Northern Africa, whilst aggregate cereal production in Southern Africa is pegged at an above-average level, despite the impact of cyclones and dryness. Erratic rains have impaired production in East Africa, following two successive years of widespread drought. Across most of West Africa, beneficial weather conditions underpinned an upturn in production.

45. Rice production in Africa is forecast to reach 27.2 million tonnes (milled basis) in 2023/24, up 3.3 percent from 2022/23 and marking an all-time high. Much of this increase reflects expectations of bumper harvests in West African countries, including Cote d'Ivoire, Guinea, Mali, Nigeria and Senegal, thanks to generally conducive weather conditions, attractive prices and government support.

Elsewhere, a larger crop is also estimated to have been harvested in Egypt, where domestic price increases stimulated planting expansions despite government efforts to curb rice cultivation to preserve scarce water resources. These expansions, coupled with output growth in Madagascar, would more than compensate for contractions registered in various East African countries, particularly the United Republic of Tanzania, where La Niña-induced dryness between late 2022 and early 2023 hampered crops.

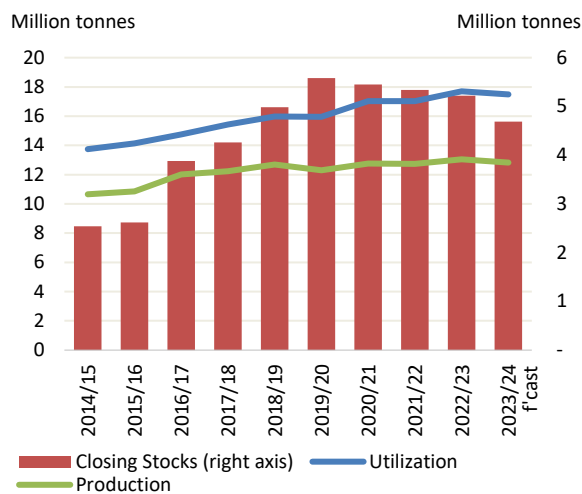
46. Oilseed production in the region is forecast to continue growing in the 2023/24 season, due to further expansion in plantings and conducive weather conditions. The oilmeal and vegetable oil outputs are also forecast to increase from the previous season. As domestic utilization is expected to recover amid lower international prices, Africa's imports of oilseeds is forecast to rebound markedly, although it will likely remain below the five-year average level. Meanwhile, the imports of oilmeals and vegetable oils are anticipated to stagnate in the 2023/24 season.

47. Meat production in Africa was negatively affected in 2023, with much of the decline stemming from poultry meat, primarily attributed to the high cost of production, impacts of avian influenza and logistical challenges. Meat imports also fell due to the foreign currency challenges faced by leading importers and declined consumer purchasing power.

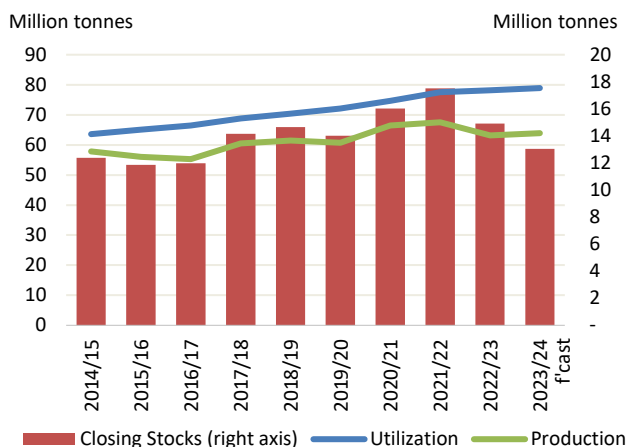
48. Milk production in Africa remained stable in 2023, as production increases in some leading producing countries due to favourable weather conditions offset decreases elsewhere stemming from droughts, smaller herd sizes, below-normal fodder availabilities and ongoing conflicts. Dairy product imports declined marginally, reflecting lower consumer purchasing power in some leading importing countries.

Figure 14. Cereal production, utilization and stocks in subregions of Africa

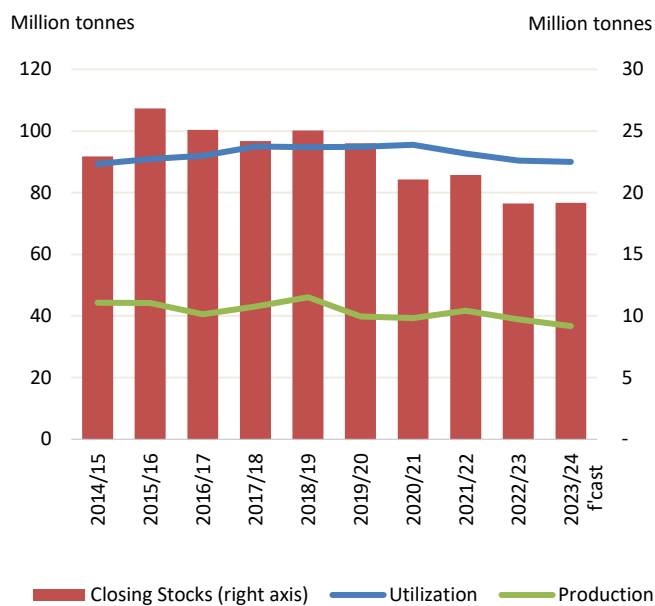
Cereal production, utilization and stocks Central Africa



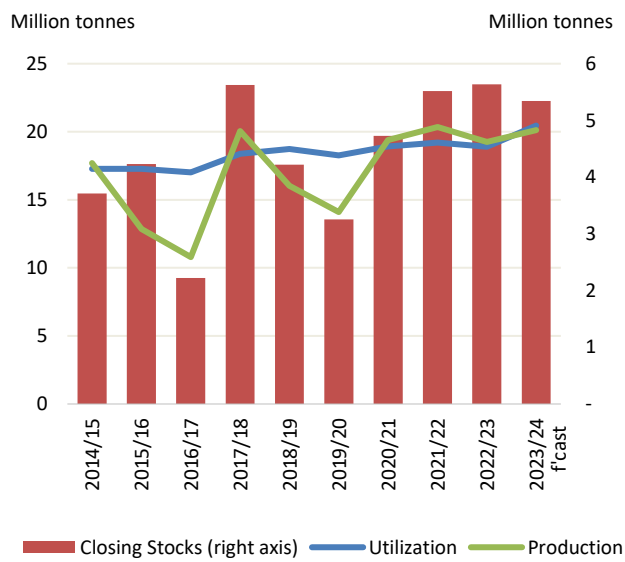
Cereal production, utilization and stocks East Africa

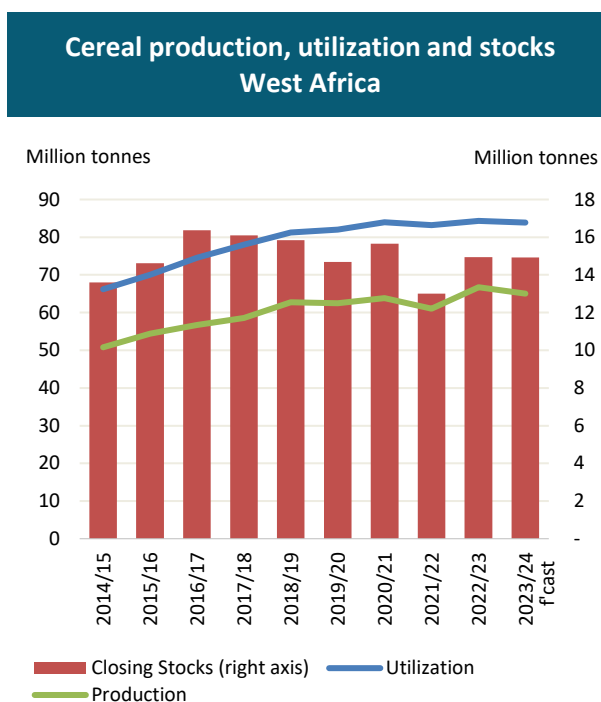


Cereal production, utilization and stocks Northern Africa



Cereal production, utilization and stocks Southern Africa





Source: FAO. February 2024. Cereal Supply and Demand Brief.

<https://www.fao.org/worldfoodsituation/fao-cereal-supply-and-demand-brief/en>

49. Despite prevailing food subsidies in many countries, food price inflation in the region remains a significant concern, exacerbating the ongoing macroeconomic challenges, high energy and input costs, national currency depreciations and the impacts of conflicts.

50. Conflicts in the region constrain food production activities and intra-regional trade. Meanwhile, conflicts beyond the region's borders, including the ripple effects of the war in Ukraine, and food export restrictions imposed by various countries, can limit global food supplies and agricultural inputs, thereby constraining the region's capacity to meet its food needs.

51. Decreasing rainfall and increasing incidents of drought continue to be serious concerns, resulting in declining water availability with implications for the production of staple food commodities and livestock-derived products. In addition to the lower feed supplies, high feed import costs and national currency depreciations exacerbate challenges to food production.

52. Livestock farm operational costs remain a critical challenge, despite some drops in feed prices. Increases in grain prices and their volatility and limited access, together with high energy costs, could endanger the viability of small- and medium-sized livestock farming operations, reducing production prospects and lowering access to animal protein.

K. Medium-term outlook

53. By 2030, Africa's 1.67 billion inhabitants are expected to account for nearly 20 percent of the world's population. While urbanisation is occurring, the absolute size of the rural population is still increasing, and more than half of the total population is still expected to reside in rural areas by 2030.

54. The high inflation and the slow projected recovery in income levels suggest that population growth will remain the major driver of rising food consumption in the continent (Figure 15).

55. The projected increase of 77 kcal/day will enable average calorie consumption in the region to reach 2582 kcal/capita per day by 2030. Adjusting for estimated household food waste, however,

reduces the total average intake to 2469 kcal/capita per day. Regardless of adjustments for household waste, total calorie availability in Africa is projected to be 13 percent below the global average and the lowest in the world by 2030.

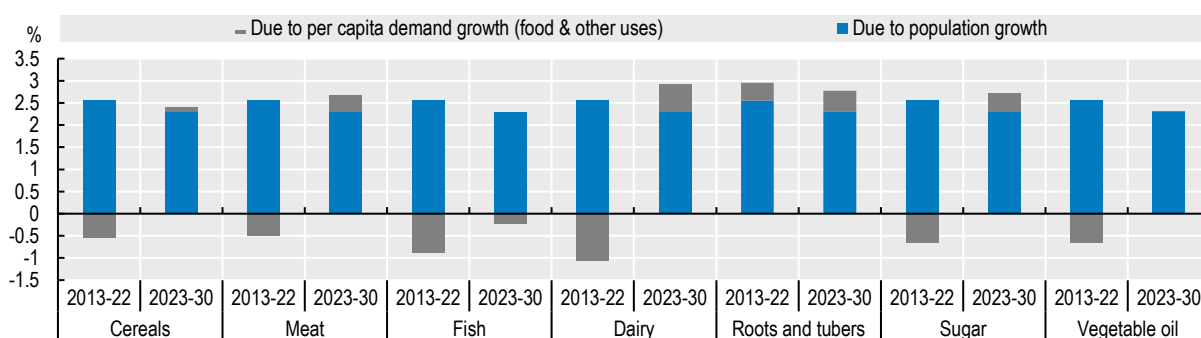
56. Per capita consumption of food staples in the continent is set to rise further over the outlook period, but the composition is expected to change, with relative stability in roots and tubers contrasted by rising intake of rice and maize. Per capita consumption of meat, dairy products, sugar, and vegetable oil is set to rise only modestly over the outlook period suggesting that dietary diversification remains slow. Protein availability is expected to increase by 0.65 g per person per day, primarily from plant-based sources (Figure 16).

57. Agriculture and fish production in the region is projected to expand by 2.1 percent annually to 2030, which remains slower than the expected population growth in the region and hence, production per capita is set to decline further, in line with the trend observed since 2015 (Figure 17). The bulk of growth in value is expected to come from crop production, while the rate of growth in livestock production is marginally higher than crops.

58. Food crop production over the coming decade will be underpinned by a combination of intensification, productivity gains and changes to the crop mix. Bovine meat along with poultry are expected to account the biggest share of additional meat output. Production growth is fuelled by herd expansion more than productivity gains implying that the region's direct greenhouse gas (GHG) emissions from agriculture are going to rise by 12 percent to 2030.

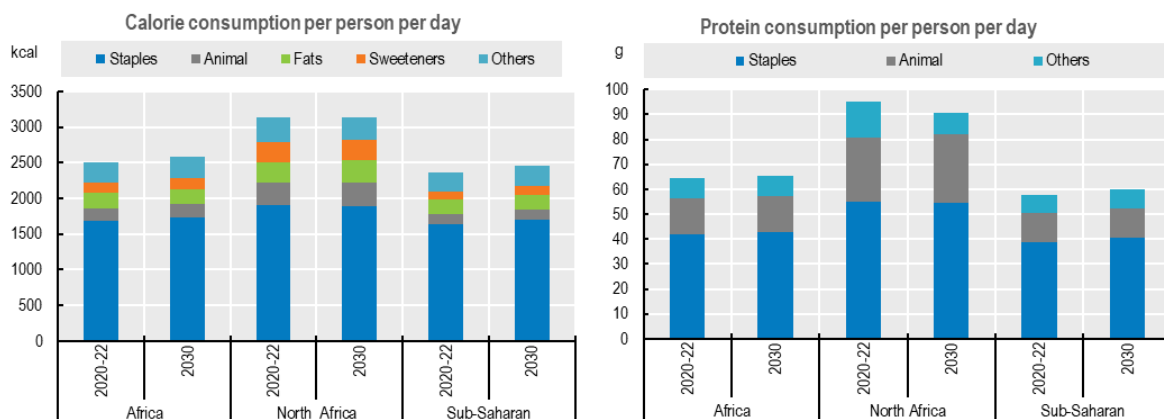
59. The region's trade deficit in major food items is anticipated to deepen over the coming decade, as the need for imports grows faster than the supply of exports (Figure 18). The deficit is projected to accelerate compared to the past decade, and persistent food deficits are expected to be amplified by an increasing food import bill due to global inflation, national debt denominated in US dollars and rising US interest rates, particularly for African countries that are over-exposed to the US dollar. In contrast to basic food crops, the region is a net exporter of higher value products such as cotton, fresh fruits and vegetables. By 2030, about 86 percent of cotton production will be exported. Fruit exports by countries in the region are projected to grow by 20 percent and vegetable shipments by 25 percent by 2030.

Figure 15. Annual change in demand for key commodity groups in Africa



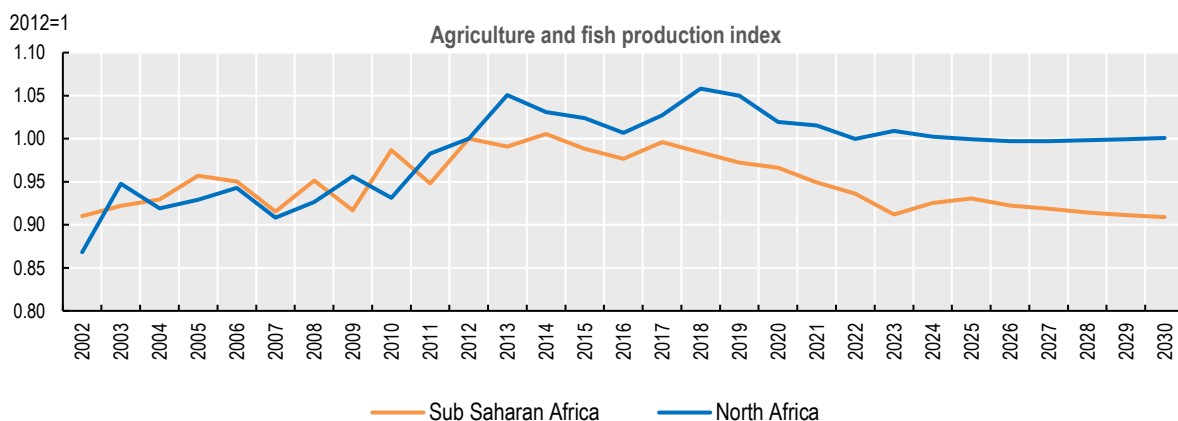
Source: OECD/FAO. 2023. *OECD-FAO Agricultural Outlook 2023-2032*. Paris, OECD Publishing.

Figure 16. Contribution of main food groups to total calorie and protein consumption



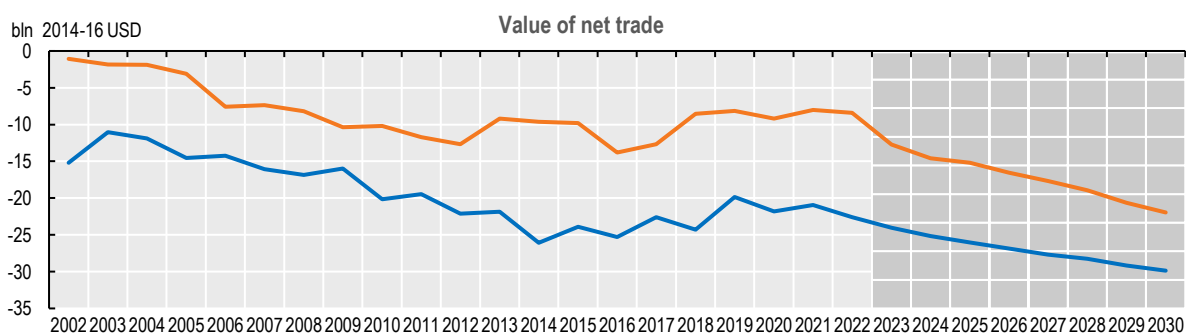
Source: OECD/FAO. 2023. *OECD-FAO Agricultural Outlook 2023-2032*. Paris, OECD Publishing.

Figure 17. Per capita net value of agriculture and fish production in Sub Saharan Africa and Northern Africa



Source: OECD/FAO. 2023. *OECD-FAO Agricultural Outlook 2023-2032*. Paris, OECD Publishing

Figure 18. Agricultural trade balances in Sub Saharan Africa and Northern Africa



Source: OECD/FAO. 2023. *OECD-FAO Agricultural Outlook 2023-2032*. Paris, OECD Publishing.