

North Africa

Per capita consumption in North Africa averages more than 3,000 calories per day. Therefore, there are no nutritional needs at the national level. Tunisia is the only country in the region where no food security concerns are projected at the disaggregated level through 2013. [Stacey Rosen]

North Africa is and will continue to be a food secure region, at the national level. Per capita calorie consumption in the region averages well above 3,000 calories per day, which is comparable to most developed countries. The region's per capita consumption is projected to decline slightly during the next decade, compared with a 0.6-percent annual increase from 1980 to the present. This slight decline is a reflection of slow production growth—from 2.9 percent per year during the last two decades to just over 1 percent for the projection period. This trend, in turn, mirrors trends in Egypt, the region's largest producer. Egypt's grain yields are by far the highest in the region—and among the highest in the world—and therefore, growth is not expected to match that of the historical period.

As a result of these trends, Egypt is the only country in the region with aggregate-level food gaps. By 2013, status quo food gaps are projected at nearly 2 million tons. This means that the slowdown in production will prevent the country from maintaining consumption levels of the 2000-02 period. The country will, however, be able to meet nutritional food needs in 2013, except for the lowest 10 percent of the population where consumption is projected to fall below the nutritional target.

While Algeria and Morocco are projected to have sufficient food at the national level, there are gaps at the disaggregate level for 2013. The analysis indicates that in Morocco, the lowest 10 percent of the population will not be able to meet the nutritional target. In Algeria, the lowest income quintile is projected to consume below the nutritional target, meaning that roughly 20 percent of the population will be hungry. For Tunisia, however, this is not the case as consumption across all income groups is projected to exceed the target.

Food aid does not play much of a role in imports in the region. In the early 1990s, grain food aid accounted for roughly 10 percent of grain imports. In more recent years, this figure fell to less than 1 percent. Generally speaking, these countries are able to compensate for production shortfalls by increasing commercial imports. Imports have, however, played an increasingly important part in supplementing domestic food supplies. In the early 1990s, imports accounted for 40 percent of grain consumption. More recently, this share rose to about 50 percent. Therefore, the region's food security is dependent upon the health of national economies and the continued ability to fund these imports.

Recently, these countries have been adversely affected by the security concerns in the aftermath of September 11 and the ensuing slowdown in tourism. In addition, weak demand by the European Union—the principal trading partner of the region—has adversely affected the region's export earnings, particularly in the manufacturing sector. Despite economic reforms begun in the late 1980s aimed at promoting the private sector, the public sectors' shares of the economies in this region are the highest in the world. Moreover, basic infrastructure and services necessary for private sector growth are often inadequate.

On a positive note, central banks in Morocco and Tunisia have lowered interest rates to boost domestic demand. This, coupled with a recovery in the tourist sectors and a revived European economy, could stimulate these economies. In addition, countries in the region have made strides in the area of trade liberalization (i.e., lowering tariff and non-tariff barriers) as shown in trade agreements with European countries and World Trade Organization membership (all but Algeria). Continuation of these policies is essential for growth.

Table 2—Food availability and food gaps for North Africa

Year	Grain production	Root production (grain equiv.)	Commercial imports (grains)	Food aid receipts (grain equiv.)	Aggregate availability of all food
			1,000 tons		
1994	24,645	945	19,527	466	42,470
1995	19,881	1,353	20,182	250	47,219
1996	33,267	1,465	16,578	193	44,159
1997	22,439	1,192	20,691	137	46,123
1998	26,699	1,261	20,959	74	44,940
1999	24,476	1,202	22,191	100	47,371
2000	21,312	1,224	25,067	309	46,753
2001	25,442	1,239	23,838	133	47,158
2002	23,992	1,295	24,755	74	50,071
Projections				Food gap	
				SQ	NR
2003	31,458	1,310	19,392	0	0
2008	28,838	1,429	23,158	0	0
2013	30,897	1,555	26,252	1,964	0

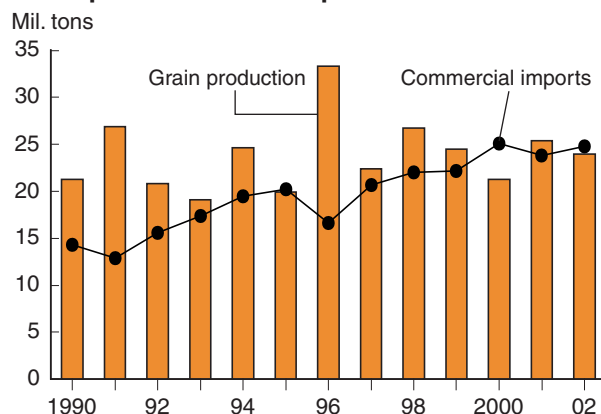
North Africa (147 million people in 2003)

Calorie consumption, on average, is well above the nutritional requirement of 2,100 calories per day.

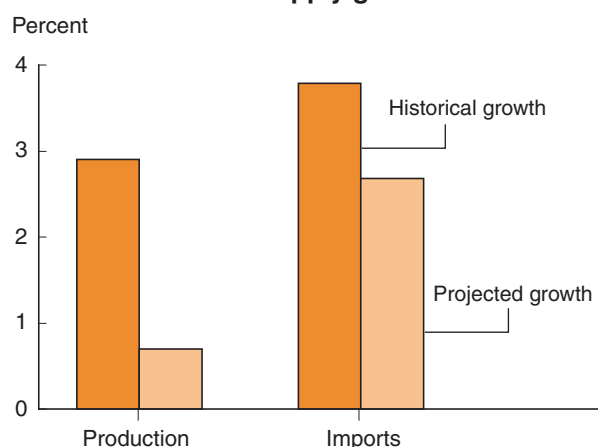
Although production growth is projected to slow relative to the historical period, food supplies will be adequate to meet nutritional requirements through the next decade.

Imports contribute about 50 percent of food supplies, therefore the state of the economies of these countries and export potential play a key role in the food security outlook.

North Africa: Grain production and imports



North Africa's food supply growth rates



North Africa: Food aid

	Total food aid received	Food aid per capita		Highest food aid amount received		Food aid as % of supply	
	1988-2002	1989-91	1999-2001	1,000 tons	Year	1989-91	1999-2001
	1,000 tons	Kg		1,000 tons	Year	Percent	
North Africa	12,381	20.3	1.3			5.4	0.4
Algeria	447	1.3	1.1	56	2002	0.4	0.4
Egypt	7,902	27.7	0.6	1,772	1991	7.8	0.1
Morocco	2,411	13.7	3.5	403	1988	3.5	1.2
Tunisia	1,621	38.3	0.1	430	1988	9.9	0.0

Source: FAOSTAT, ERS calculations.