

North Africa

Calorie consumption in the region is well above the nutritional requirement of 2,100 calories per day as recommended by FAO. Given the region's reliance on imports—accounting for nearly half of food supplies—the state of the economy and export potential play a key role in the food security outlook. [Stacey Rosen]

North Africa has the highest import dependency of all the regions included in the study with imports contributing roughly 45 percent of food supplies. Between 1990 and 2000, commercial imports grew 5.5 percent per year, far outstripping the population growth of 2 percent. In the early 1990s, food aid accounted for about 10 percent of grain imports, but that figure now averages less than 1 percent. Improved domestic production and commercial import capacity in Egypt and Morocco are the principal factors behind this trend.

Grain production growth measured about 2 percent per year during the last decade, largely due to yield growth. Trends in Egypt influence the regional trend because of its size, and grain yields in the country increased 2 percent per year during the last 10 years, principally due to the expansion of irrigated land area. Yield growth was responsible for most of the growth in output in Tunisia as well.

As a result of positive trends in imports and production, per capita consumption in the region grew 0.4 percent per year during the last decade. Calorie consumption in these countries, at the national level, is well above the nutritional requirements as recommended by FAO—2,100 calories per day. In Egypt and Tunisia, calorie intake averaged 3,300 per day in the late 1990s. In Morocco, calorie consumption averaged just over 3,000 and in Algeria, the average was just shy of 3,000.

While a flat consumption trend will not place these countries in a precarious position with respect to food security, it is important to note that per capita consumption in both Algeria and Egypt is projected to stagnate in the next decade. Algeria's production is projected to grow slowly through 2011. Commercial imports are projected to grow less than 2 percent per year, so food supplies will barely be able to keep up with population growth. Oil exports account for over 90 percent of Algeria's export earnings. The price of oil, although currently strong relative to the mid- to late-1990s, is expected to decline in the long term. Slow growth in export earnings will limit the capacity to raise imports.

Following strong historical growth, production growth in Egypt is projected to slow considerably. Because yields are now so high, we assume that they have basically reached their peak. The potential for irrigated area expansion is severely limited. Egypt's corn yields are roughly equal to those of the United States and rice yields are more than two times those of Vietnam. Egypt's commercial import growth is also expected to slow relative to that of the historical period. Like Algeria, although to a lesser extent, the country is vulnerable to trends in oil prices.

As a result of the projections for relatively steady food supplies and high caloric intake, status quo and nutritional food gaps are projected to be zero for these countries over the next decade.

While the national level food gaps are projected at zero, this does not mean that these countries are not subject to periods of food insecurity. Production variability in Algeria, Morocco, and Tunisia can result in severe production shortfalls and, with import capacity expected to become more limited due to slow growth or declining prices for exports, a production shock could result in food gaps. Variation from the trend in grain production averaged 46 percent in these 3 countries from 1980 to 1999. For example, in Algeria, 1996 grain production was nearly 5 million tons; in 1997, output dropped to less than 1 million tons. Production in 2000 was half the 1999 level.

Given the region's reliance on imports, the state of the economy and export potential play a key role in the food security outlook. If political problems and security concerns in the Middle East have any spillover effects to this region, tourism earnings could suffer. Efforts to privatize state industries, albeit slow, should attract foreign investment and improve efficiencies in the long term. Despite reforms, much of the region's growth in the last couple of years has stemmed from external factors such as favorable oil prices and strong economic growth in export markets.

Table 2—Food availability and food gaps for North Africa

Year	Grain production	Root production	Commercial imports	Food aid receipts (grains)	Aggregate availability of all food
			---1,000 tons---		
1992	20,765	1,085	15,573	831	39,217
1993	19,082	1,053	17,389	418	40,355
1994	24,645	945	19,639	239	42,510
1995	19,881	1,353	20,189	221	47,275
1996	33,267	1,465	16,628	190	44,417
1997	22,439	1,192	20,979	94	46,666
1998	26,699	1,261	22,149	50	46,264
1999	24,506	1,194	21,890	102	47,642
2000	21,733	1,160	23,686	83	48,129
Projections					
				Food gap	
				SQ	NR
				(w/o food aid)	
2001	24,140	1,259	23,473	0	0
2006	26,747	1,376	24,561	0	0
2011	29,001	1,499	25,993	0	0

North Africa

138 million people in 2001

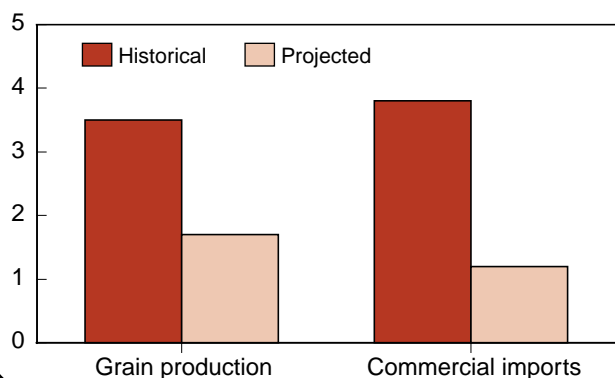
Calorie consumption is well above the nutritional requirement of 2,100 calories per day.

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

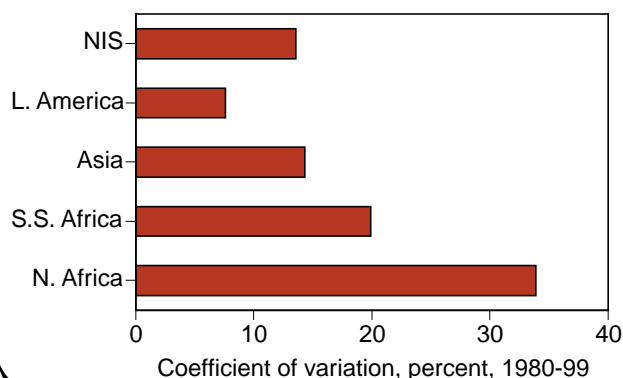
Imports contribute to about 45 percent of food supplies, therefore the state of the economies of these countries and export potential play a key role in the food security outlook.

North Africa's food supply growth rates

Percent



North Africa's grain output variability is relatively high



North Africa: Calorie consumption

	Calories per capita per day		Per capita consumption growth	Gini coefficient	GNP per capita U.S. dollars
	1994-95	1998-99	1980-99		
	Number		Percent		
North Africa	3,109	3,174	0.5	36.0	1,563
Algeria	2,948	2,955	-1.5	35.3	1,550
Egypt	3,262	3,317	1.4	28.9	1,400
Morocco	3,044	3,055	1.2	39.5	1,200
Tunisia	3,183	3,369	0.7	40.2	2,100

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