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U.S. DEPARTMENT OF AGRICULTURE

Outlook

Global Food Assessment, 2025–35

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Economic Research Service
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Global Food Assessment Number 36

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Global Food Assessment, 2025–35

Yacob Abrehe Zereyesus, Lila Cardell, Jarrad Farris, Kayode Ajewole, Michael E. Johnson, Jessie Lin, Constanza Valdes, and Wendy Zeng

Abstract

This annual report is published by the U.S. Department of Agriculture, Economic Research Service before September 30 of each year as required by section 408 (b) of Public Law 480 and 7 U.S.C. 1736b of Public Law 95–98. The results in this report are based on macroeconomic assumptions finalized as of August 2024. Food insecurity, defined by the lack of consistent access to sufficient, safe, and nutritious food for an active and healthy life, affects millions globally. Declining incomes, high food prices, and food supply shocks exacerbate food security. This report, using the Global Food Assessment (GFA) model, projects food security trends in 83 low- and middle-income countries by estimating the percentage of people in each country consuming less than 2,100 kilocalories per person per day. The assessment reports a significant improvement in food security in 2025 compared to 2024 due to an average 3.7 percent growth in per capita Gross Domestic Product (GDP) and reduced food price inflation. Specifically, the number of food insecure people is estimated to decrease by 26.7 percent (220.5 million people), reaching 604.2 million people, or 13.5 percent of the GFA population, in 2025. However, ongoing political and macroeconomic instability, armed conflict, and weather-related shocks such as droughts, are identified as key factors driving worsening food security in vulnerable countries. Over the next decade, a further 51.7 percent reduction in the proportion of food insecurity is projected, reaching 6.5 percent of the GFA population. This reduction is driven by sustained GDP growth, particularly in Asia and the Former Soviet Union, and relatively lower commodity prices. This would result in a food insecure population of 332.9 million by 2035, representing a 44.9 percent reduction relative to 2025.

Keywords: Calories, food demand, food insecurity, food prices, caloric threshold

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About the Authors

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Preface

This annual report is published by the U.S. Department of Agriculture, Economic Research Service before the end of each fiscal year as required by section 408 (b) of Public Law 480 and 7 U.S.C. 1736b of Public Law 95-98. The report continues the series of Global Food Assessments (GFA) in low- and middle-income countries, initiated in the late 1970s by Congressional request. The report focuses on assessing food demand in 83 low- and middle-income countries and monitors each country's ability to meet this demand from its own production and local sources. The resulting gap between local food availability and food demand helps identify potential markets for U.S. agricultural products.

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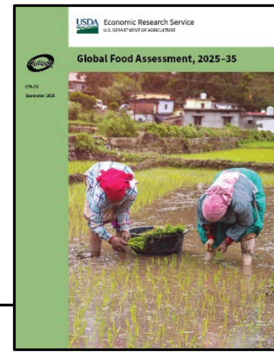


Global Food Assessment, 2025–35

Yacob Abrehe Zereyesus, Lila Cardell, Jarrad Farris, Kayode Ajewole, Michael E. Johnson, Jessie Lin, Constanza Valdes, and Wendy Zeng

Key Points

- Food security in most of the 83 countries covered in this report is estimated to improve in 2025 compared to 2024, due to an average 3.7 percent growth in per capita Gross Domestic Product (GDP) and reduced food price inflation.
- An estimated 13.5 percent of the population (604.2 million people) of the 83 countries covered in this report is food insecure in 2025. This number is 26.7 percent lower (220.5 million fewer food-insecure people) from 2024.
- Food security is projected to improve significantly by 2035, with 332.9 million people (6.5 percent) projected to be food insecure. The improvements in food security are driven by projected per capita GDP growth and relatively lower international commodity prices.
- The food gap—the amount of food needed for all food insecure people to reach the caloric threshold of 2,100 kilocalories (kcal) per day—is projected to rise slightly from 353 kcal in 2025 to 362 kcal in 2035 (a 2.6 -percent increase) primarily due to the disproportionate number of food insecure populations concentrated in the most vulnerable countries in Sub-Saharan Africa and the Caribbean, particularly Haiti.
- Grain demand is projected to increase by 2.2 percent annually over the next decade, reaching 1.4 billion metric tons by 2035. This is driven by rising per capita income (mainly in Asia and the Former Soviet Union) and population growth (especially in Sub-Saharan Africa). However, grain production in these countries is only projected to grow by 1.6 percent annually, leading to a significant shortfall in food and feed availability, particularly in Asia and Sub-Saharan Africa.

Why Does This Matter?

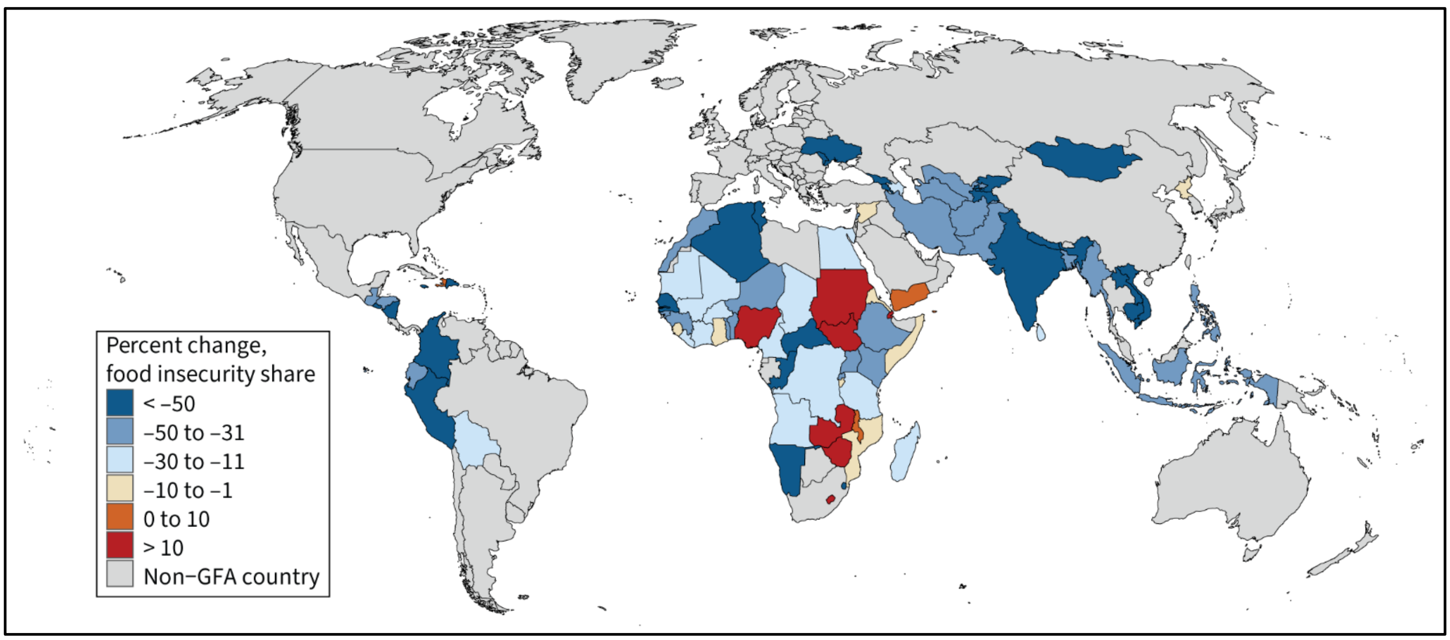
Food insecurity, defined by the lack of consistent access to sufficient, safe, and nutritious food for an active and healthy life, affects millions worldwide. Factors that affect the prevalence of food security include food availability (agricultural production and market conditions), access to food (economic and physical), stability (price and income shocks), and utilization (food safety and nutritional knowledge).

Among the factors that affect the ability of people to access food are personal income and food prices. Food security can be worsened by declining income levels, high food prices, and/or food supply shocks. Focusing on the availability and access dimensions of food security, this report helps the United States Government, U.S. Department of Agriculture (USDA), and its stakeholders assess food security for 83 low- and middle-income countries in 5 regions: Asia, the Former Soviet Union, Latin America and the Caribbean, the Middle East and North Africa, and Sub-Saharan Africa.

A Few More Details

This report is based on observed country-level domestic commodity prices up to December 2024 and macroeconomic price projections completed as of August 2024. The international price projections are based on production, consumption, and trade assumptions as of October 2024. This information is then used to estimate and project its potential impact on present and future food insecurity levels. The USDA, Economic Research Service (ERS) demand-driven Global Food Assessment (GFA) model projects food demand and food gaps in 83 low- and middle-income countries through 2035. Food security is evaluated for each country by estimating the share of the population unable to reach a caloric threshold of 2,100 kcal per person per day. The intensity of food insecurity for those falling below the minimum caloric target is measured by the gap between projected food demand and this caloric threshold. Food demand is expressed in grain equivalents and is based on caloric content to allow aggregation across four separate food groups: the primary grain consumed in the country, other grains, roots and tubers, and all other food. Average per capita food consumption data are from the Food and Agriculture Organization of the United Nations (FAO) Food Balance Sheets and FAO's Global Information Early Warning System's (GIEWS), Country Cereal Balance Sheet (January 2025 dataset). Observed domestic prices are from the FAO-GIEWS Food Price Monitoring and Analysis Tool. Tariff data are from the World Bank's World Integrated Trade Solution. Incomes, exchange rates, and Consumer Price Indexes are from the USDA, ERS International Macroeconomic Data Set. World prices are from the *USDA Agricultural Projections to 2034* report.

Improved food security rates in most Global Food Assessment (GFA) countries in 2025, relative to 2024, are associated with an increase in per capita Gross Domestic Product and a decrease in food price inflation



Source: USDA, Economic Research Service based on results from the Global Food Assessment model.

ERS is a primary source of economic research and analysis from the U.S. Department of Agriculture, providing timely information on economic and policy issues related to agriculture, food, the environment, and rural America.

Global Food Assessment, 2025–35

Introduction

Food insecurity, defined by the lack of consistent access to sufficient, safe, and nutritious food for an active and healthy life, impacts millions worldwide. Food insecurity can be intensified by declining income levels, high food prices, and food supply shocks. The U.S. Department of Agriculture, Economic Research Service (ERS) Global Food Assessment (GFA) [1] projects food security trends in 83 low- and middle-income countries [2] for the current year and the next 10 years. [3] GFA estimates per capita food demand and compares the estimations against a global caloric threshold of 2,100 kilocalories [4] (kcal) per person per day. This threshold, set by the United Nations, [5] represents the average calorie level necessary to sustain a healthy and active lifestyle. The intensity of food insecurity for those falling below the minimum caloric target is measured by the gap between projected food demand and this caloric threshold. Food demand is expressed in grain equivalents and is based on caloric content to allow aggregation across four separate food groups: the primary grain consumed in the country, other grains, roots and tubers, and all other food.

The report identifies that over the next decade, most regions are projected to see a growing gap between domestic grain production and demand, except for the Former Soviet Union (FSU). The gap between demand and supply for grains in GFA countries is projected to increase by 3.8 percent annually from 271.4 million metric tons in 2025 to 394.3 million metric tons in 2035. This increase is

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[1] The results from the GFA model are not directly comparable with other analyses, such as the Food and Agriculture Organization of the United Nations (FAO) modeling work for its report on the State of Food Insecurity (SOFI), which has a broader country coverage and different methodology. Because GFA also uses aggregate data, GFA cannot be directly compared with evaluations using household-level surveys. See Tandon et al. (2017) for a more in-depth discussion and comparison of USDA's GFA model with other modeling approaches. It is also difficult to extrapolate results to the Food Security Information Network's (FSIN) report on global crises, which uses the five-phase food insecurity measure, which is a consensus approach across international organizations and development practitioners directly responding to major crises. Nevertheless, this assessment highlights regions and populations at risk of food insecurity and provides country and regional level drivers of food insecurity that are comparable with other analyses.

[2] The GFA countries are Afghanistan, Algeria, Angola, Armenia, Azerbaijan, Bangladesh, Benin, Bolivia, Burkina Faso, Burma, Burundi, Cabo Verde, Cambodia, Cameroon, Central African Republic, Chad, Colombia, Congo, Cote d'Ivoire, Democratic People's Republic of Korea, Democratic Republic of the Congo, Djibouti, Dominican Republic, Ecuador, Egypt, El Salvador, Eritrea, Eswatini, Ethiopia, Gambia, Georgia, Ghana, Guatemala, Guinea, Guinea-Bissau, Haiti, Honduras, India, Indonesia, Iran, Jamaica, Kenya, Kyrgyzstan, Laos, Lebanon, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Moldova, Mongolia, Morocco, Mozambique, Namibia, Nepal, Nicaragua, Niger, Nigeria, Pakistan, Peru, Philippines, Rwanda, Senegal, Sierra Leone, Somalia, South Sudan, Sri Lanka, Sudan, Syria, Tajikistan, Tanzania, Togo, Tunisia, Turkmenistan, Uganda, Ukraine, Uzbekistan, Vietnam, Yemen, Zambia, and Zimbabwe.

[3] Not all low- and middle-income countries with significant food deficits are included in the assessment due to a lack of data on key metrics, such as average caloric consumption, prices, or macroeconomic figures.

[4] A kilocalorie is the same as 1 calorie. A kilocalorie is the amount of heat required to raise the temperature of 1 kilogram of water 1 degree Celsius.

[5] The 2,100-kilocalorie per capita per day threshold was an internationally agreed upon level set by the United Nations as the recommended level of dietary energy intake for a healthy, well-nourished individual and is an average across sex, age, region, and activity level (FAO, 2004).

primarily driven by substantial grain shortfalls in Asia (5.1 percent annual growth) and Sub-Saharan Africa (4.4 percent annual growth).

This report relies on assumptions about key macroeconomic variables (e.g., income growth, inflation, and exchange rates), population figures from USDA, ERS's International Macroeconomic Data Set, and short- and medium-term international and domestic food price trends. [6] Average per capita food consumption data are from the Food and Agriculture Organization of the United Nations (FAO) Food Balance Sheets and Global Information Early Warning System's (GIEWS), Country Cereal Balance Sheet (January 2025 dataset). The macroeconomic, trade, consumption, and production assumptions, as well as domestic and international price projections, were completed in 2024. The economies of the 83 GFA countries (covering an estimated 4.4 billion people in 2025) continue their recovery from several global shocks in the last three years including food and input price inflation and erratic weather events. Average per capita Gross Domestic Product (GDP) for these countries is estimated to rise to $2,648 (in 2017 prices) in 2025, exceeding the $2,476 average for 2022–2024 period. This growth, coupled with relatively lower inflation in most assessed countries, is expected to significantly decrease food insecurity in 2025 compared to 2024. However, inflation remains a concern for many low-income countries. Over the next decade, food security is projected to improve for most countries covered by the assessment. Key findings for GFA countries include:

- Food security [7] is estimated to improve in 2025 relative to 2024 for most of the 83 countries covered by the Global Food Assessment (GFA) due to an average of 3.7 percent growth in per capita GDP and easing of international and domestic food price levels for most commodities, including vegetable oils, wheat, sorghum, and corn. In 2025, an estimated 13.5 percent of the population included in the GFA (604.2 million people) are unable to consume the 2,100 [8] kcal per day considered necessary for a healthy and active lifestyle. This represents a 26.7 percent decrease (220.5 million fewer food-insecure people) from 2024.
- Food security is estimated to deteriorate in 11 countries: Cabo Verde, Djibouti, Haiti, Lesotho, Malawi, Nigeria, Sudan, South Sudan, Yemen, Zambia, and Zimbabwe. This worsening food security is attributed to several factors: drought-induced maize production shortfalls in 2024 in Lesotho, Malawi, Zambia, and Zimbabwe; ongoing macroeconomic instability and high inflation in Zimbabwe; weak economic growth, armed conflict, and flooding in Nigeria; ongoing conflict and high inflation in Sudan and South Sudan; weather-related shocks and trade disruptions in Djibouti; ongoing conflict, droughts, and high inflation in Yemen; and food and fuel shortages, high inflation, weather-related shocks, and ongoing violent conflict in Haiti.
- Sub-Saharan Africa is estimated to have the highest number (332.3 million) and share (26.9 percent) of food insecure people in 2025.

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[6] Long-term price projections are taken from the *USDA Agricultural Projections to 2034* report (USDA, Office of the Chief Economist, 2025). These projections are used to project medium-term domestic price trends using data from FAO's Global Information and Early Warning System (GIEWS), Food Price Monitoring and Analysis (FPMA) dataset.

[7] The box "How Food Security is Assessed: Method and Definitions" contains the definition of food insecurity and other terms used in the report.

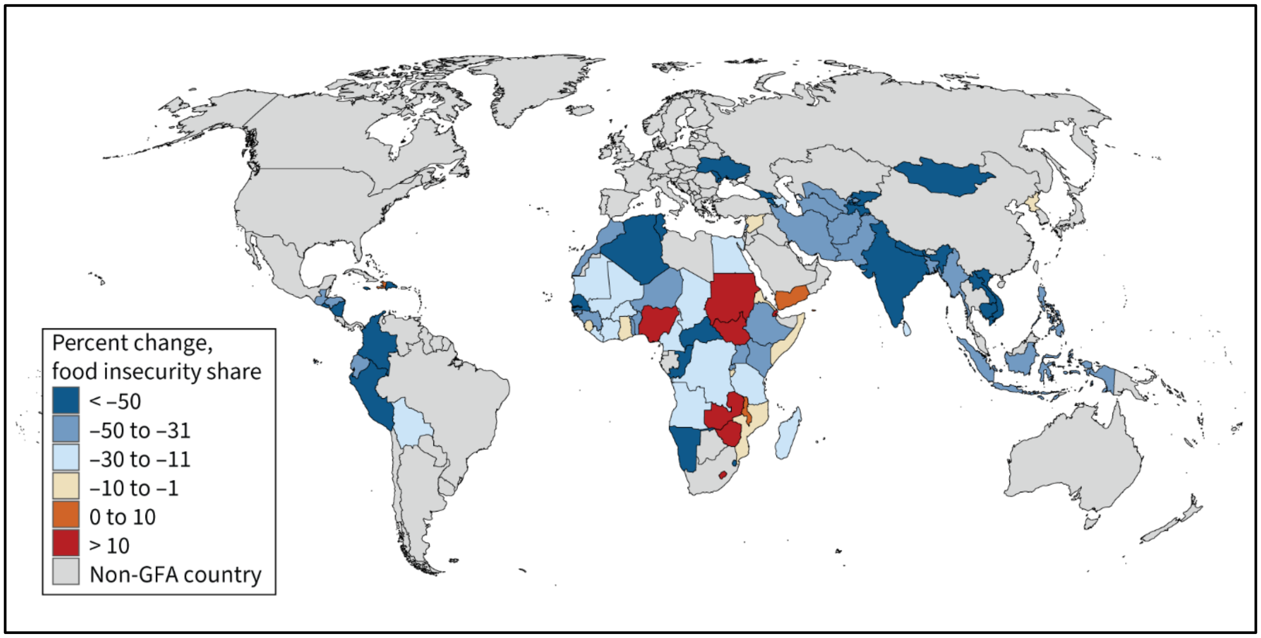
[8] The caloric threshold considered in the assessment is an average across sex, age, region, and activity level.

- Food security in GFA countries is projected to improve significantly by 2035, with 332.9 million people projected to be food insecure (a 44.9 percent reduction from 2025). The share of the population consuming less than 2,100 kcal per day is projected to fall to 6.5 percent by 2035 (a 51.7 percent decrease from 2025), driven by projected per capita GDP growth, especially in the Former Soviet Union and South Asia and Southeast Asia. Relatively lower international commodity prices across the GFA countries are also projected to contribute to this positive trend.
- The food gap—defined as the amount of food needed for all food insecure people to reach the caloric threshold of 2,100 kcal per day—reflects the severity of food insecurity. It is calculated by weighing the estimated food gap by the number of food-insecure people in each country or region. Across the 83 GFA countries, the average daily caloric food gap is projected to rise slightly from 353 kcal in 2025 to 362 kcal in 2035 (a 2.6 percent increase). This increase is primarily due to the disproportionate number of food insecure populations concentrated in the highly food insecure countries and regions in Sub-Saharan Africa and the Caribbean, particularly Haiti, by 2035.
- Total grain demand [9] across the 83 countries is projected to increase by 2.2 percent annually over the next decade, reaching 1.4 billion metric tons by 2035. This growth is driven by rising per capita incomes (mainly in Asia and the Former Soviet Union) and population growth (especially in Sub-Saharan Africa). However, grain production in these countries is only projected to grow by 1.6 percent per year, leading to a significant shortfall in food and feed availability, particularly in Asia and Sub-Saharan Africa.

[9] Assuming individuals can meet projected food demand, food consumption is considered equal to food demand.

Figure 1

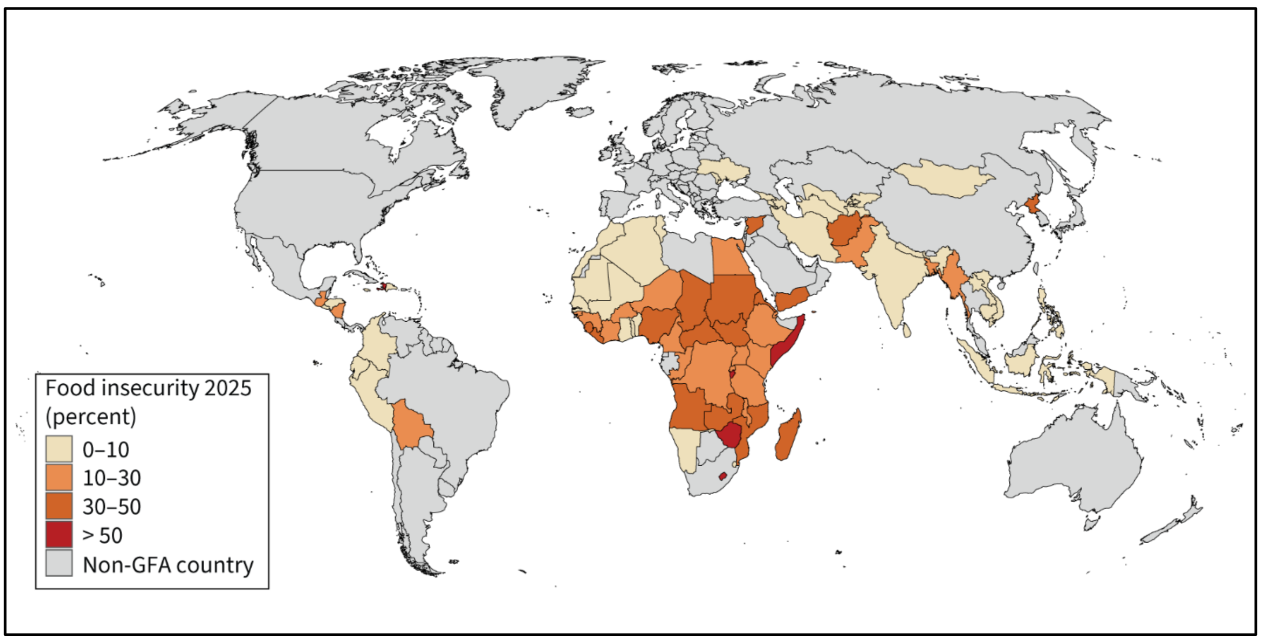
Improved food security rates in most Global Food Assessment (GFA) countries in 2025, relative to 2024, are associated with an increase in per capita Gross Domestic Product and a decrease in food price inflation



Source: USDA, Economic Research Service based on results from the Global Food Assessment model.

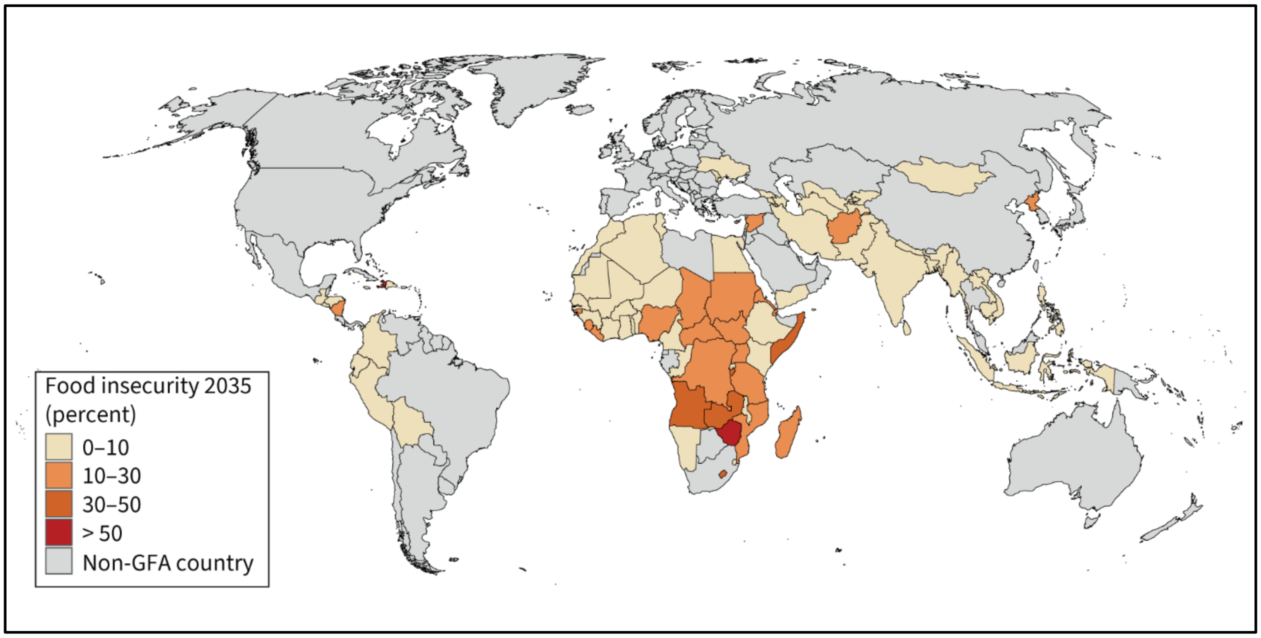
Figure 2

Share of Global Food Assessment (GFA) population estimated to be food insecure, 2025



Source: USDA, Economic Research Service based on results from the Global Food Assessment model.

Figure 3
Share of Global Food Assessment (GFA) population projected to be food insecure, 2035



Source: USDA, Economic Research Service based on results from the Global Food Assessment model.

Gross Domestic Product (GDP) Expectations in the Global Food Assessment (GFA) Countries

The macroeconomic projections for GDP, inflation, and exchange rates are developed using several forecasting services, including the publicly available projections from the World Bank's World Development Indicators and the International Monetary Fund's (IMF) World Economic Outlook. Additional sources of data included United States Government and international agency projections, USDA, ERS regional and country experts, and private forecast services. The projections do not consider the impacts of unpredictable future events, such as production shocks, conflict, and economic instability. These macroeconomic projections were completed using data from August 2024 based on expectations at that time.

The macroeconomic projections for the countries covered in the GFA report [10] show a positive outlook for real GDP [11] growth in 2025 and for the rest of the decade. Global disinflation continues, meaning that prices are no longer rising as rapidly as during the inflation peak in 2022, while central banks in many economies have started easing monetary policy to help encourage economic growth, monetary policies in developing countries have been more cautious (Zeng et al., 2025). However, fiscal support, lending, and debt relief continue to help the growth of low- and middle-income economies, such as from the IMF and the International Development Association (IDA) which have both scaled-up support

[10] A full list of the GFA countries and respective macroeconomic variables is provided in appendix C.

[11] Gross Domestic Product and per capita Gross Domestic Product are expressed in real terms, specifically in 2017 constant dollars, throughout the GFA report.

since the COVID-19 pandemic and other shocks (IDA, 2024; IMF, 2024). In 2025, GDP growth is projected to continue to rise and remain stable over the next decade (Zeng et al., 2025).

Aggregate GDP for the countries included in the GFA report is projected to reach 11.8 trillion in 2025 and further increase to almost 19.0 trillion by 2035 (appendix C). GDP growth is estimated at 5.2 percent yearly in 2025, an increase of 0.5 percentage points compared to growth in 2022–2024, and slightly drops to a 4.9 percent annual average for the rest of the decade. [12]

Regionally, GDP growth rates in two of the five GFA regions are estimated to increase significantly in 2025 compared to 2022–2024. The Latin America and the Caribbean (LAC) region will see GDP growth nearly doubling to 3.1 percent in 2025, compared to 1.6 percent GDP growth in the previous 2 years. The biggest contributor of this growth increase comes from the South America subregion. Colombia is expected to grow 3.4 percent in 2025, over triple its growth rate during 2022–2024, while Peru is similarly expected to increase growth to 3.0 percent in 2025 compared to 0.7 percent growth in 2022–2024. The Caribbean subregion's growth increase is more modest at 3.4 percent in 2025 compared to 2.6 percent in 2022–2024. While Haiti is projected at negative 0.5 percent growth in 2025, a slight improvement over the previous 2 years, its economy continues to slowly recover from past contractions and is expected to return to positive 2.4 percent growth on average in the next decade. The Central America subregion is expected to show a slight decline in growth to 3.0 percent in 2025 compared to 3.5 percent growth in 2022–2024. The second region showing a significant growth increase is the Sub-Saharan Africa region at 4.8 percent growth in 2025, double the growth rate of 2.4 percent in 2022–2024 (appendix C).

GDP growth in the other three regions is expected to remain steady in 2025 compared to the prior 2 years. The Former Soviet Union (FSU) region shows a slight decrease to 5.1 percent growth compared to the average growth rate of 5.4 percent during 2022–2024. Over the next decade growth drops down to a 4.2 percent annual average. The lower growth is driven by decreases in the projected growth rate for every country in the FSU except Ukraine, which is expected to see further increases in growth from 5.5 percent in 2025 to 6.0 percent annual average from 2025–35. In the Asia region, growth is stable at 5.8 percent in 2025 with just a 0.3-percentage point decrease in the annual average growth rate over the next decade. Finally, the Middle East and North Africa (MENA) region shows a slight increase of 0.2 percentage points in growth to 3.6 percent in 2025 before reverting to an annual average of 3.1 percent from 2025–35 (appendix C).

Population for all the GFA countries is estimated at 4.5 billion in 2025 with a 1.3 percent annual average growth rate for the next decade. The total population is projected to reach 5.1 billion in 2035. Countries estimated to have negative population growth rates over the next decade include Ukraine, Moldova, Armenia, and Georgia which are located in the Former Soviet Union region (appendix C).

In 2025, per capita GDP across the GFA countries is estimated to increase to $2,648. Per capita GDP growth is estimated to increase by 0.5 percentage points to 3.7 percent in 2025 compared to growth during 2022–2024. Over the next decade, per capita GDP growth will revert to 3.5 percent annually with a projection of $3,734 in 2035 (table 1; appendix C).

[12] All growth estimates over the decade or past 2-year periods are calculated using the compound annual growth rate (CAGR) to provide a smoothed annual rate of return throughout the period.

In the Asia region, per capita GDP in 2025 is estimated to be higher than the average levels of all GFA countries at $2,888 with the highest growth rate among all regions of 4.9 percent, unchanged from the previous 2-year average. This growth is mostly driven by the South Asia subregion's growth of 5.1 percent in 2025 and 5.3 percent over 2022–2024. The Asia region's per capita GDP will fall slightly over the next decade to 4.6 percent annual growth. In the FSU region, which is comprised primarily of middle-income countries, per capita GDP is slightly higher at $3,256 in 2025. Growth is estimated to fall to 3.7 percent in 2025 and remain stable for the rest of the decade. The LAC region has the highest per capita GDP among the GFA regions at $6,092, with a more modest per capita GDP growth of 2.3 percent in 2025 that grows slightly to 2.7 percent on average annually over the next decade. In the MENA region, per capita GDP in 2025 remains above the GFA average at $3,515 and is estimated to grow 2.4 percent in 2025 and continue at 2.0 percent over the next decade. Finally, the Sub-Saharan Africa (SSA) region continues to show the lowest per capita GDP levels at $1,335 in 2025. Per capita GDP growth is estimated to recover in 2025 to 2.1 percent, having been slightly negative over the previous 2 years, and is projected to remain stable at 1.9 percent over the next decade (table 1; appendix C).

Table 1
Inflation-adjusted per capita Gross Domestic Product (GDP) in Global Food Assessment (GFA) regions, 2025 and 2035

Region	2022–2024 (average)	2025	2035	Annual growth rate (2024–2025)	Annual growth rate (2025–2035)
	U.S. dollars, 2017			Percent	
GFA total	**2,476**	**2,648**	**3,734**	**3.7**	**3.5**
Asia	2,627	2,888	4,520	4.9	4.6
Former Soviet Union	2,988	3,256	4,676	3.7	3.7
Latin America and the Caribbean	5,907	6,092	7,938	2.3	2.7
Middle East and North Africa	3,376	3,515	4,306	2.4	2.0
Sub-Saharan Africa	1,310	1,335	1,608	2.1	1.9

Note: Regions include only countries covered by the Global Food Assessment.
Source: USDA, Economic Research Service estimation using the Global Food Assessment model and *USDA Agricultural Projections to 2034* long-term projections report (USDA, Office of the Chief Economist (OCE), 2025).

International Food Price Projections and Trends

USDA's international agricultural commodity price projections are estimated to continue to decline in 2025 due to abundant supplies and lower input prices, including for fuel and feed. [13] Prices are projected to return close to pre-pandemic levels, after reaching historic highs during 2021–23 due to supply chain disruptions, conflicts, and inflation (figure 4; Agricultural Market Information System (AMIS), 2025; USDA, OCE, 2025). Over the next 10 years, international agricultural commodity prices for all major grains are projected to trend downward and remain relatively stable due to a projected food supply that will outweigh global demand and lower food and feed costs (figure 4). The international price projections are based on production, consumption, and trade assumptions as of October 2024 (USDA, OCE, 2025).

In 2025, rice prices are projected to be slightly elevated from pre-pandemic trends but decline to long-term averages by 2035. Prices were elevated in 2023 and 2024 associated with export restrictions by the Indian government and production shortfalls due to El Niño. However, the lifting of those restrictions in 2024 and higher production levels during the 2024–25 season are associated with a projected decline in international rice prices in 2025. Global rice production for the 2024–25 market year is projected to be 541.6 million metric tons due to a record crop in India, among other countries (Childs & Abadam, 2025; AMIS, 2025; FAO, 2024). Wheat prices are projected to decrease in 2025 and continue declining over the next decade to pre-pandemic price levels. Production for the 2024–25 season is projected to be 799.9 million metric tons with higher output in the U.S. and Australia offsetting anticipated declines in the European Union (EU) and Russia (Sowell & Swearingen, 2025; FAO, 2024; AMIS, 2024). Corn prices are estimated to decline in 2025 from their peak during 2021–23 and are projected to continue decreasing through 2035. Production for the 2024–25 season is projected to be 1,223.3 million metric tons globally, below 2023–24 production levels due to lower estimates in the U.S. and Ukraine (WASDE, 2025; AMIS, 2025).

The GFA model connects world and domestic food prices through trade, [14] although the degree of transmission varies by country. In 2025, the domestic price for the primary grain consumed by households is projected to decline in 82 of the 83 GFA countries. Prices are projected to rise in Zimbabwe, where persistently high inflation over the past 2 years was further exacerbated by a 40 percent devaluation of the currency in September 2024 (FAO GIEWS, 2024). In 2024, domestic prices declined from pandemic highs due to lower inflation and the easing of supply chain disruptions that occurred during the 2021–23 period (Cardell et al., 2024). This trend is estimated to continue in 2025 and throughout the projection period. Lower domestic prices can improve the purchasing power of consumers and may be associated with lower food security estimates.

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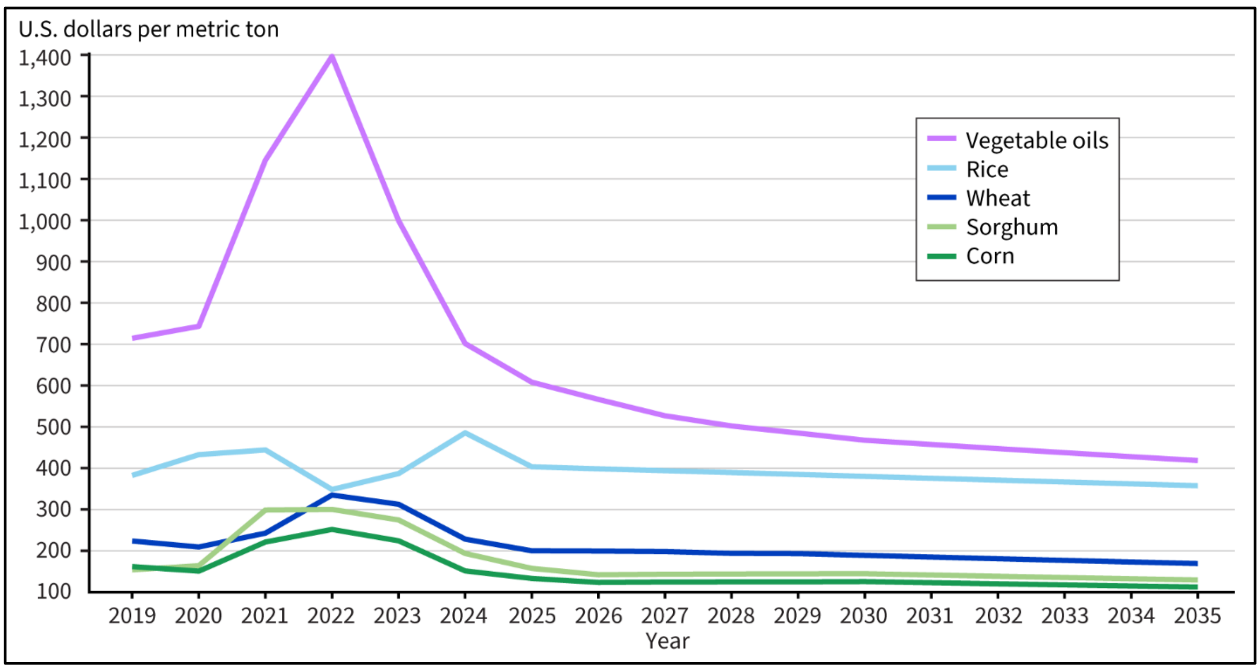
[13] Price projections come from the *USDA Agricultural Projections to 2034* long-term projections report (USDA, OCE, 2025) and are expressed in 2017 prices, adjusted for inflation.

[14] See appendix A for details about the international price transmission equations used for the GFA countries in the GFA demand modeling.

Rice is the major grain consumed for 31 of the 83 GFA countries. [15] Real domestic rice prices are projected to decline between 0 percent and 18 percent in 2025 due to higher supplies and reduced trade restrictions. Wheat is the predominant grain in 27 of the 83 GFA countries and the real domestic price of wheat is projected to decline between 2 percent and 25 percent in those countries. For 20 of the 21 countries who primarily consume corn, real domestic prices are projected to decline between 2 percent and 9 percent in 2025. In Zimbabwe, the real domestic price of corn is projected to increase 11 percent due to persistently high inflation, currency devaluation, and limited domestic supplies (FAO GIEWS, 2024).

Four countries consume sorghum or millet as their preferred grain and are projected to see real domestic prices decline between 4 percent and 9 percent in 2025 (appendix D). Other than Zimbabwe, domestic prices for all food categories included in GFA are projected to stay flat or decline in 2025. The average price for vegetable oil, which peaked in 2022 and has been declining since 2023, is projected to be 11 percent lower in 2025 than in 2024 (appendix D).

Figure 4
International commodity prices in 2025 are estimated to fall to near pre-pandemic levels



Note: Value in 2017 U.S. dollars.
Source: USDA, Economic Research Service using data from *USDA Agricultural Projections to 2034* long-term projections report (USDA, OCE, 2025).

[15] See the box "How Food Security is Assessed: Method and Definitions" for more on the four food group categories and grain equivalent conversions and prices.

Grain Demand, Production Trends, and the Implied Additional Supply Required

The Implied Additional Supply Required (IASR) is the difference between total grain demand and grain production. The IASR represents an estimate of the shortfall/surplus in food and feed availability when the result is positive/negative for a GFA country. Total grain demand comprises food demand and other uses (seed, feed, processing, and waste). In 2025, total grain demand for these countries is estimated at over 1.1 billion metric tons, 4.7 percent higher than 2024 (table 2). This is projected to increase by 2.2 percent annually, reaching 1.4 billion metric tons by 2035. Growth rates vary by region. Asia's total grain demand is projected to rise from 687.1 million metric tons in 2025 to 841.2 million metric tons in 2035, growing at 2 percent annually. Sub-Saharan Africa (SSA) is projected to see total grain demand grow from 213.9 million metric tons to 297.8 million metric tons over the same period, with an annual growth rate of 3.4. In the Middle East and North Africa (MENA) region, the total grain demand is projected to increase from 137.4 million metric tons to 157.6 million metric tons, growing at 1.4 percent annually, while the Latin America and the Caribbean (LAC)'s total grain demand is projected to grow from 52.1 million metric tons to 60.9 million metric tons (1.6 percent growth annually). The Former Soviet Union (FSU) region's total grain demand is projected to grow from 48.6 million metric tons to 58.2 million metric tons over the same period. Food demand, the largest component of total grain demand, is projected to grow at 2.5 percent per year for the GFA countries, while demand for other uses (seed, feed, processing, and waste) is projected to grow at 1.3 percent per year (table 2).

Over the next decade, grain production is projected to increase by an average of 1.6 percent annually in the countries covered by the GFA report, rising from 867 million metric tons in 2025 to 1 billion metric tons in 2035. Regional trends vary considerably. While the FSU is projected to see 1 percent annual growth in grain production (from 72.1 million metric tons in 2025 to 79.4 million metric tons in 2035), this increase will contribute to a surplus in food availability within the region.

However, other regions face significant food availability challenges. Asia's grain production is projected to grow by 1.3 percent annually, from 577.8 million metric tons in 2025 to 660.7 million metric tons in 2035. This increase, however, is projected to fall significantly below the region's total grain demand, leading to food availability shortfalls. Similarly, SSA's grain production is projected to increase from 144.8 million metric tons in 2025 to 191.4 million metric tons in 2035 (2.8 percent annually), but this increase will still fall far short of the region's total grain demand. The MENA region is projected to see a 1.9 percent annual growth rate in grain production, increasing from 54.4 million metric tons in 2025 to 65.9 million metric tons in 2035. The LAC region is projected to experience a 2 percent annual growth rate, with production rising from 17.8 million metric tons in 2025 to 21.7 million metric tons in 2035. Despite these relatively higher growth rates, both the MENA and LAC regions are still projected to face food availability shortages (table 2).

Over the next decade, most regions with GFA countries are projected to see a growing gap between domestic grain production and demand, except for the FSU. Overall, IASR—which provides an estimate of the gap between demand and supply for grains—is projected to increase by 3.8 percent annually from 271.4 million metric tons in 2025 to 394.3 million metric tons in 2035. This increase is primarily driven by substantial grain shortfalls in Asia (5.1 percent annual growth) and Sub-Saharan Africa (4.4 percent annual growth) (table 2).

Table 2
Demand for grains is projected to outpace grain production over the 2025–35 period

Region	Food demand		Other demand		Grain production		Implied Additional Supply Required[1]	
	2025	2035	2025	2035	2025	2035	2025	2035
	Million metric tons							
GFA total	**849.5**	**1,084.8**	**288.8**	**328.6**	**867.0**	**1,019.1**	**271.4**	**394.3**
Asia	543.5	667.9	143.6	173.4	577.8	660.7	109.3	180.6
Former Soviet Union	22.4	34.1	26.2	24.1	72.1	79.4	-23.5	-21.2
Latin America and the Caribbean	26.3	30.7	25.8	30.2	17.8	21.7	34.3	39.2
Middle East and North Africa	83.9	104.2	53.5	53.4	54.4	65.9	83.0	91.7
Sub-Saharan Africa	173.5	247.9	40.4	49.9	144.8	191.4	69.1	106.4

GFA = Global Food Assessment.
[1] The Implied Additional Supply Required is the gap between total grain demand (food demand plus other demand) and domestic grain production.
Note: Other grain demand includes seed, feed, waste, and processing.
Source: USDA, Economic Research Service estimation using the Global Food Assessment model.

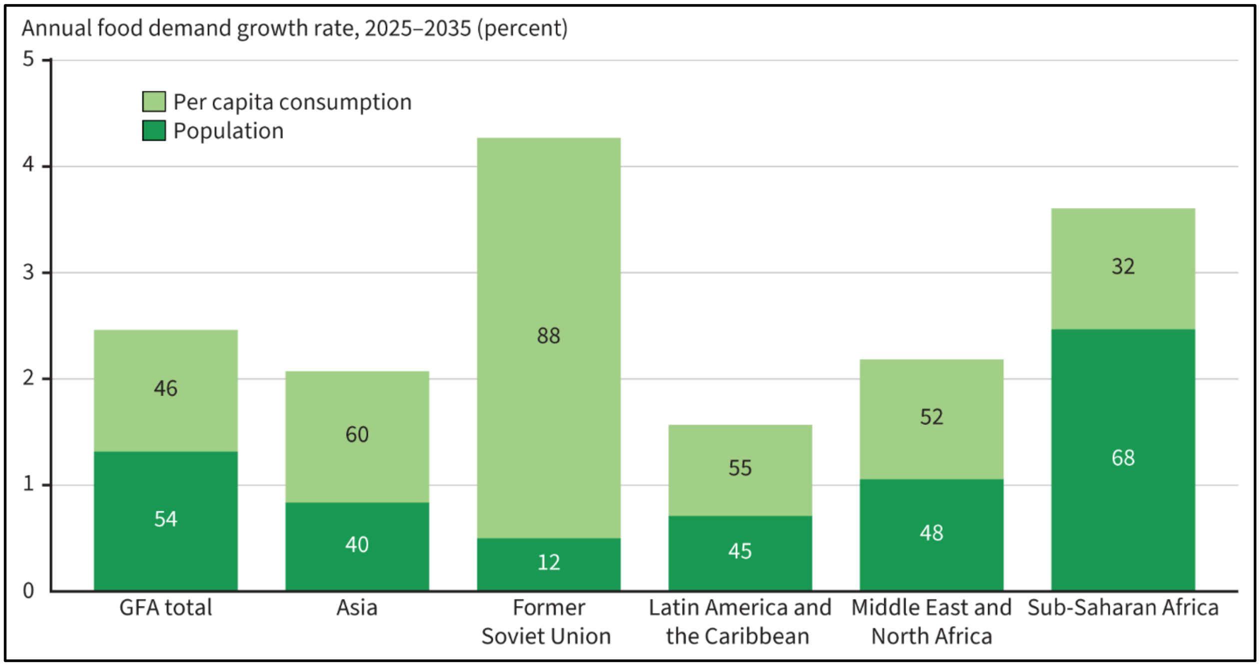
Decomposition of Regional Food Demand Growth

Overall, food demand across the GFA countries is projected to increase by an average of 2.5 percent annually over the next decade, rising from 849.5 million metric tons in 2025 to 1,084.8 million metric tons in 2035. The Former Soviet Union region is projected to experience the fastest food demand growth (4.3 percent per year), increasing from 22.4 million metric tons in 2025 to 34.1 million metric tons in 2025. Sub-Saharan Africa's food demand is projected to increase 3.6 percent per year, from 173.5 million metric tons in 2025 to 247.9 million metric tons in 2035. The Middle East and North Africa and Latin America and the Caribbean regions are projected to grow at 2.2 percent and 1.6 percent annually, respectively. Although Asia's growth rate is projected at 2.1 percent annually, it will see the largest absolute increase in demand, from 543.5 million metric tons in 2025 to 667.9 million metric tons in 2035. Latin America and the Caribbean is projected to have the lowest growth in food demand among all regions, at 1.6 percent annually (table 2).

Of the projected 2.5 percent annual food demand growth in GFA countries, 1.2 percent (46 percent of the total growth) is attributed to rising per capita food consumption, with the remaining 1.3 percent of growth due to population increase (54 percent of the total growth). Overall, except for Sub-Saharan Africa, rising per capita food consumption is the primary driver of increased food demand. In the Former Soviet Union region, this is particularly pronounced, with 88 percent of the projected food demand growth stemming from higher per capita consumption due to significant income growth that outpaces population growth. Sub-Saharan Africa is a key exception. While it has one of the highest projected annual food demand growth rates at 3.6 percent, population growth accounts for 68 percent of this increase (figure 5).

Figure 5

Contrasting drivers of food demand growth (2025–2035): Population in Sub Saharan Africa, per capita consumption in other regions



Source: USDA, Economic Research Service estimation using the Global Food Assessment (GFA) model.

How Food Security Is Assessed: Method and Definitions

The Global Food Assessment (GFA) projects food demand for 83 low- and middle-income countries—14 in Asia, 9 in the Former Soviet Union, 11 in Latin America and the Caribbean, 8 in the Middle East and North Africa, and 41 in Sub-Saharan Africa. Food is divided into four groups: (1) the major grain consumed in the country; (2) other grains; (3) root crops; and (4) all other food. The GFA model's projections of food demand are expressed in grain equivalents, based on the caloric content of food items to allow for aggregation across food groups. A grain equivalent may be expressed in either kilograms or kilocalories. For example, grains have roughly 3.5 kilocalories per gram, and tubers have about 1 calorie per gram. One ton of tubers is therefore equivalent to 0.29 tons of grain.

The real domestic price in a grain equivalent (expressed per kilocalories) is used to generate price indices for the four food groups: price for the major grain is the same as its own price, whereas the prices of "other grains," and "roots and tubers" are the weighted average prices expressed in grain equivalents of each of the food items consumed in the food groups. Prices for "all other foods" (in grain equivalents) are obtained by using vegetable oil prices as a proxy for the food group.

The GFA model analyzes the gap between projected food demand and a caloric threshold of 2,100 kilocalories per capita per day. Food demand is modeled as a function of per capita income, income inequality, food prices, observed food consumption, and income and price elasticities.

The following terms are commonly used in the report:

Food consumption—if we assume individuals can meet projected food demand, then food consumption is equal to food demand.

Food access—the facet of food security that reflects economic and physical access to food, relating to consumer income and food prices.

Food insecurity—this report identifies food insecurity as when per capita food consumption for an individual is estimated to be less than the caloric threshold of 2,100 kilocalories per person per day.

Based on these definitions, this report uses three indicators of food insecurity:

The share of the population that is food insecure is defined as the proportion of the population that falls below the caloric threshold of 2,100 calories per capita per day, based on the distribution of food consumption.

The number of food insecure people—those who cannot meet the caloric threshold—is based on the total population and the share of the population share that is projected to consume less than the caloric threshold.

The food gap measures the food needed to raise consumption at every income level to the caloric threshold. In many countries, per capita consumption in the lower income deciles is significantly less than the per capita consumption for the country. In these countries, the distribution gap provides a measure of the intensity of hunger—the extent to which the food security of already hungry people deteriorates because of income declines or other negative economic conditions. This measure can be expressed on a per capita basis (in kilocalories per day) or as an aggregate measure (the total tons of food needed to fill the gap in each country).

For more detailed information on the model, see appendix A.

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Regional Coverage and Estimated Food Security Trends

The 83 countries covered by this Global Food Assessment (GFA) report are sub-divided across 5 regions: 41 countries and 4 sub-regions in Sub-Saharan Africa (SSA), 14 countries and 3 sub-regions in Asia, 11 countries and 3 sub-regions in Latin America and the Caribbean (LAC), 8 countries and 2 sub-regions in the Middle East and North Africa (MENA), and 9 countries in the Former Soviet Union (FSU).[16] In 2025, Asia (208.5 million people) and SSA (332.3 million people) account for 89.5 percent of the total number of food insecure people covered by the GFA report (figure 6). In 2024, the Asia region had the highest number of food insecure people across the five regions in GFA (appendix B). However, projected growth in per capita GDP in the Asia region (4.9 percent in 2024–25) is more than twice projected growth in SSA (2.1 percent) (table 1). In addition, the easing of domestic prices for rice, which is the primary grain consumed in many Asian countries, is associated with estimated improvements food security in the Asia region in 2025 (appendix D).

LAC (18.9 million people), MENA (42.2 million people), and the FSU (2.3 million people) account for the remaining 10.5 percent of food insecure people in the 2025 assessment. In 2025, despite Asia having the largest share of the population with 57 percent (2.6 billion people) of the population covered by GFA, SSA has the highest estimated share of the population that is food insecure at 26.9 percent. SSA is followed by MENA (11.7 percent), LAC (10.5 percent), and Asia (8.1 percent). The FSU region (2.0 percent), which is comprised primarily of middle-income countries, is projected to have the lowest prevalence of food insecurity across the five regions in 2025 (figure 6; table 3).

By 2035, SSA is projected to have the highest number of food insecure people, with 262.8 million people (equal to 78.9 percent of the food insecure people covered by the GFA report in 2035) potentially unable to consume 2,100 calories per day. Conversely, Asia is projected to have 45.8 million food insecure people, which is equal to 13.8 percent of the food insecure people in GFA in 2035 (table 3). The daily caloric food gap measures the intensity of food insecurity for the population that is estimated to be food insecure. The food gap is the difference between the caloric threshold of 2,100 kcal and the average calorie availability for food insecure people. This gap provides a measure of the food gap in kcal per day per food insecure person. In 2025, the food gap ranges from an average of 176 calories per capita per day in the Former Soviet Union region to 462 calories per capita per day in the Latin America and the Caribbean region. The median food gap is projected to decline in all regions by 2035. However, many countries in SSA are projected to maintain caloric deficits above 300 calories per capita per day (figure 7).

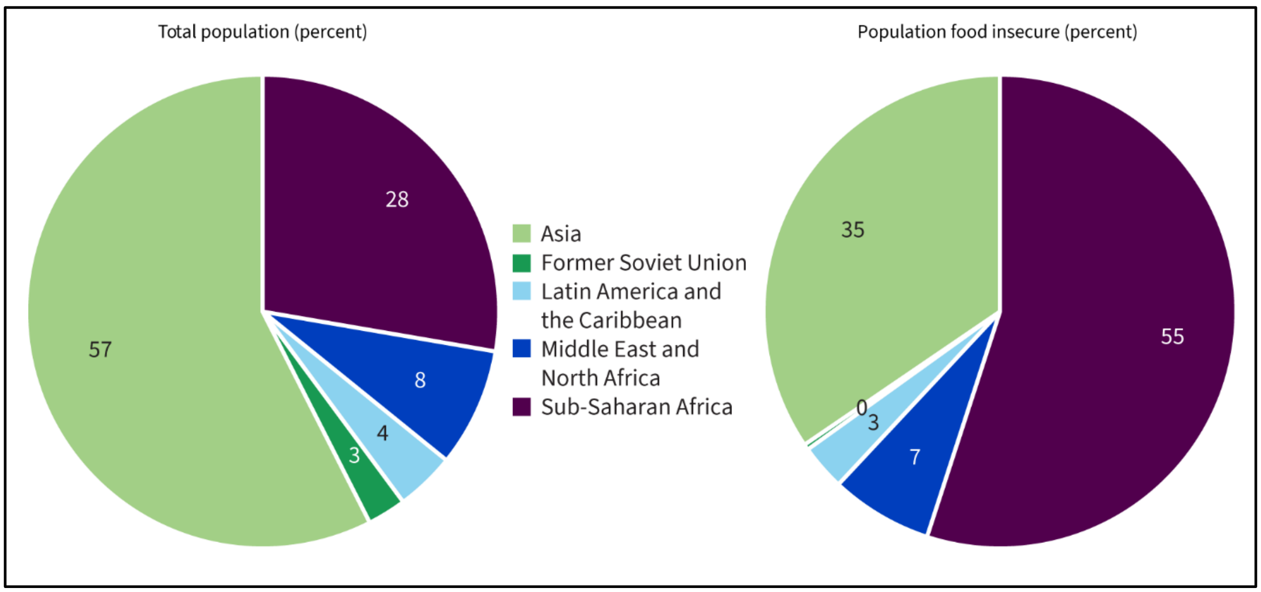
[16] The GFA report covers major drivers of food security at a global, regional, subregional, or country level. Country-level discussions are included to highlight the importance of specific countries in food security trends. India, for example, comprises 31.8 percent of the GFA population and significantly shapes global food security projections. Additional data on income, prices, and food security for each of the 83 countries is provided in the appendix.

Table 3
Food security results in Global Food Assessment (GFA) countries, 2025 and 2035

Region	Population		Population food insecure		Share of population food insecure	
	2025	2035	2025	2035	2025	2035
	Million		Million		Percent	
GFA total	**4,460.9**	**5,084.1**	**604.2**	**332.9**	**13.5**	**6.5**
Asia	2,564.4	2,787.1	208.5	45.8	8.1	1.6
Former Soviet Union	118.3	124.3	2.3	0.3	2.0	0.2
Latin America and the Caribbean	180.7	194.0	18.9	11.6	10.5	6.0
Middle East and North Africa	361.9	402.0	42.2	12.4	11.7	3.1
Sub-Saharan Africa	1,235.5	1,576.7	332.3	262.8	26.9	16.7

Note: Regions only include countries that are in the Global Food Assessment.
Source: USDA, Economic Research Service estimation using the Global Food Assessment model.

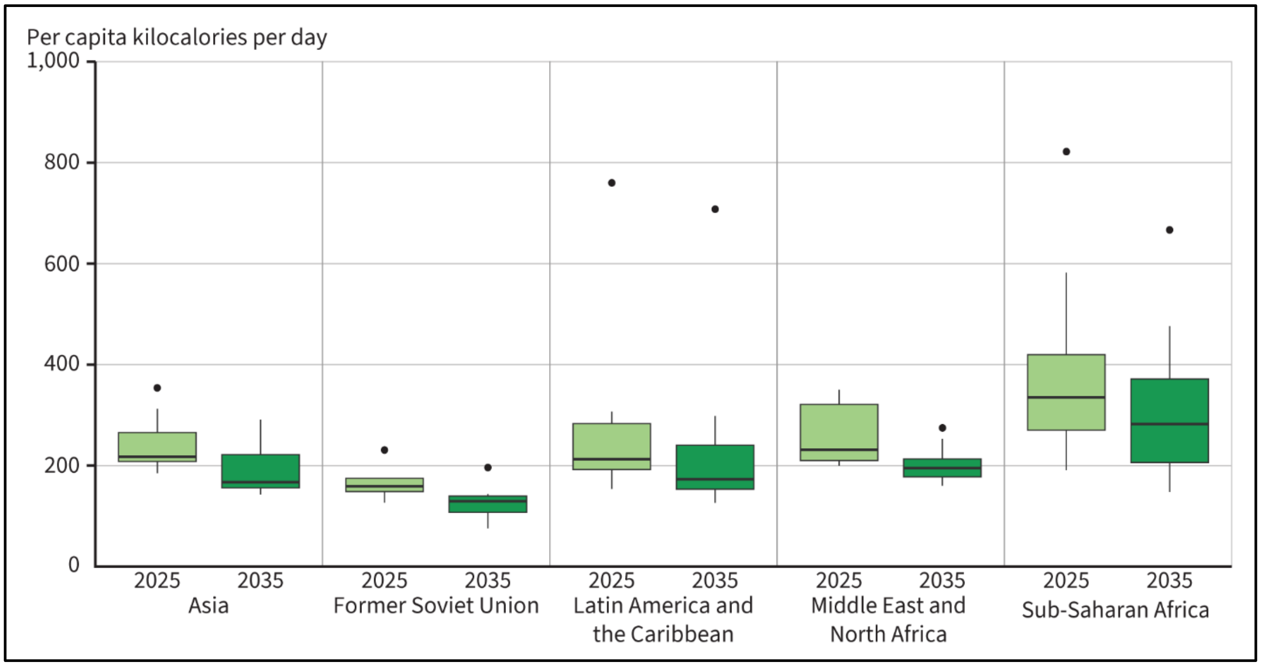
Figure 6
More than half of the food insecure population in 2025 are estimated to be in the Sub-Saharan Africa region



Note: Regions only include countries that are in the Global Food Assessment.
Source: USDA, Economic Research Service estimation using the Global Food Assessment model.

Figure 7

The highest median food gap is estimated in the Sub-Saharan Africa region in both 2025 and 2035



Note: Regions only include countries that are in the Global Food Assessment. The boxplot shows the distribution of the food gap in each region, where the black horizontal line in each boxplot represents the median food gap, and the points show any countries in the region above or below the interquartile range (25–75 percent of the distribution). A kilocalorie is the same as 1 calorie. A kilocalorie is the amount of heat required to raise the temperature of 1 kilogram of water 1 degree Celsius.
Source: USDA, Economic Research Service estimation using the Global Food Assessment model.

Asia

In 2025, Asia's average per capita GDP growth is projected at 4.9 percent, the highest of any region, with numerous countries like India, Bangladesh, Sri Lanka, Cambodia, and Vietnam projected to exceed 5 percent (table 1; appendix C). Asia is estimated to experience a substantial decrease in the number of food insecure people, dropping from 383.6 million people (15.4 percent) in 2024 to 208.5 million people (8.1 percent) in 2025, a 45.6 percent reduction (table 4; appendix B).

By 2035, only 1.6 percent of the population in Asia is projected to be classified as food insecure. While there are improvements to food security status in Asia, the East Asia subregion still has a high per capita food gap. The food gap in East Asia for 2025 is estimated at 353 kilocalories per day. The Democratic People's Republic of Korea (DPRK) is the country with the highest calorie deficiency, with a food gap of 354 calories per capita per day (table 4).

The overall improvement in food security in the Asia region in 2025 is largely attributed to the general decline in the international prices of major staple foods relative to the peak of food inflation between December 2022 and January 2023. These favorable trends have significantly contributed to the overall enhancement of food security in Asia (FAO, 2024a). An increase in average income is also projected to be a major contributor to the improvement in food security in Asia in 2025. Per capita GDP is estimated to increase by 4.9 percent in 2025 relative to 2024 levels. In addition to these macro trends, several governments in Asia have introduced policies aimed at tackling food insecurity. These measures include exchange rate stabilization, food subsidies, targeted credit policies, reducing reliance on food imports, and prioritizing the domestic production of staples (World Bank, 2025). Additionally, the Asian Development Bank (ADB) has reiterated its commitment to delivering $14 billion to alleviate the food crisis in the Asia and Pacific regions (ADB, 2024a).

Over the next 10 years, per capita GDP in the Asia region is expected to rise from the 2025 estimate of $2,888 to $4,520 by 2035, reflecting an average annual growth rate of 4.6 percent—the highest across all regions covered in the GFA (table 1). However, not all countries in the region are projected to experience rapid GDP growth. For instance, Afghanistan is projected to have a negative per capita GDP growth rate in 2025 (-0.5 percent), with only a 0.2 percent average growth rate over the next decade. Similarly, the per capita GDP annual growth rate is projected to be less than 3 percent in the DPRK , Pakistan, and Burma (appendix C).

The South Asia subregion continues to be the major contributor to food insecurity in the Asia region, accounting for an estimated 80 percent of the total food insecure population in Asia in 2025. This subregion is among the poorest in the world, with over 50 percent of its population living below the $3.65/day poverty line for lower-middle-income countries (International Food Policy Research Institute (IFPRI), 2024). The subregion is estimated to see a significant reduction in the number of food insecure individuals in 2025 relative to 2024. An estimated 164.4 million people, or 8.5 percent of the subregional population, are estimated to be food insecure in 2025, a 63 percent decrease from the 2024 level of 310.2 million people (appendix B). By 2035, the total number of food insecure people in the South Asia subregion is projected to be less than 34.8 million, representing only 1.6 percent of the subregional population (table 4).

India is the major contributor to the total reduction in the number of food insecure people in Asia in 2025. The country is expected to see its food insecure population decline by 100 million individuals in 2025 from the 2024 estimate of 181.5 million. With an estimated 81.6 million people being food insecure in 2025, India contributes 68.5 percent of the estimated reduction in the total number of food insecure people in South Asia between 2024 and 2025 (appendix B). Crop production in India also looks promising, with favorable conditions for sowing rice and corn, as well as an increase in the sowing area for wheat for the 2024/2025 crop season (AMIS, 2025).

Afghanistan remains highly food insecure in terms of the share of its population. Although there has been some improvement from the previous year, it is estimated that 33.7 percent of Afghanistan's population will be classified as food insecure in 2025 (table 4). Drought and conflict, combined with low economic activity and rising fuel costs, are major hindrances to improving food security in Afghanistan. These factors lead to severe food shortages by destabilizing agricultural production (World Bank, 2025). Among all the Asian countries covered in the GFA, Afghanistan is the only country projected to see an increase in the number of food insecure individuals by 2035, rising from 13.8 million people in 2025 to 14.7 million in 2035 (table 4).

Besides Afghanistan, Pakistan and Bangladesh are other countries in the South Asia subregion with a double-digit percentage share of the population estimated to be food insecure in 2025. Pakistan and Bangladesh are estimated to have 10.5 percent and 18.8 percent, respectively, of their populations classified as food insecure in 2025. However, food insecurity in both countries is projected to improve by 2035, dropping to 1.2 percent in Pakistan and 4.1 percent in Bangladesh (table 4). Pakistan is expected to see improvements in food security due to higher agricultural production, tighter monetary policy, and stable global commodity prices (ADB, 2024b). Bangladesh has also implemented policies targeted toward the poorest households, including the provision of 30 kilograms (kg) of subsidized rice to poor households through the Food Friendly Program (IFPRI, 2024).

Nepal is the country with the lowest share of food insecure people in the South Asia subregion, with 4.3 percents of its population estimated to be food insecure in 2025. By 2035, Nepal is projected to have one of the lowest shares of its population classified as food insecure in the South Asia subregion, with only 0.2 percent facing food insecurity (table 4).

In the Asia region, only Mongolia and Vietnam are expected to have lower shares of food insecure populations than Nepal, with both countries projected to have 0.1 percent of their populations classified as food insecure by 2035. Mongolia is also estimated to have the lowest share of its population facing food insecurity in 2025. Sri Lanka, despite facing extreme weather challenges, is projected to have less than 250,000 people classified as food insecure by 2035, the region's second-lowest number after Nepal (table 4). The share of the food insecure population in Sri Lanka is projected to decrease from 6.8 percent in 2025 to 1.1 percent in 2035 as the country's economic situation improves and inflation trends downward (World Food Programme (WFP), 2025).

Laos is estimated to witness the largest drop in the total share of food insecure people, falling from 31.6 percent in 2024 to 5.2 percent in 2025. In the Southeast Asia subregion, Indonesia has the highest number of food insecure individuals. Of the estimated 33.1 million food insecure people in 2025 in this subregion, 13 million are in Indonesia. The country is expected to see a significant drop in its food insecure population over the next decade, with only 0.4 percent of the population projected to be food insecure by 2035 (table 4). Inflation in Indonesia is expected to slow in 2025 due to a relatively stable exchange rate (ADB, 2024b). The government of Indonesia is allocating $8.7 billion towards improving food security in 2025 through programs that provide superior rice and corn varieties to farmers and allocating new land for production (World Bank, 2025).

Despite its relatively small population, Burma has the highest share of food insecure people among the Southeast Asia countries. An estimated 13.4 percent of Burma's population is food insecure in 2025 [17] (table 4). Several domestic conflicts are major contributors to the high level of food insecurity in Burma, with nearly 3.5 million people internally displaced without adequate access to food, clean water, and medical support (WFP/UNICEF, 2024). Burma is the only country in the subregion projected to have over 5 percent of its population food insecure by 2035. In contrast, the rest of the countries in the subregion are projected to have less than 2 percent of their populations classified as food insecure (table 4).

After Burma, the Philippines has the second-highest share of food insecure individuals in the Southeast Asia region. An estimated 7.5 percent of the Philippines' population is classified as food insecure in 2025. The food security situation in the Philippines is projected to improve by 2035 (table 4). In December 2024, the government of the Philippines extended the implementation of the Rice Competitiveness Enhancement Act (RCEF), which includes activities such as farm mechanization and

[17] The macroeconomic, trade, consumption, and production assumptions, as well as domestic and international price projections, were completed in 2024. However, the earthquake in Burma on March 28, 2025, would likely exacerbate the country's already precarious food security situation due to its significant impact on agriculture, infrastructure, and vulnerable populations.

seed development (AMIS, 2025). The total number of food insecure individuals in the Philippines is projected to decrease to only 2.1 million people by 2035, representing 1.5 percent of the population.

Laos is estimated to have the most significant improvement in the share of food insecure individuals in Southeast Asia. The share of food insecure people in Laos is estimated to be 5.2 percent in 2025, an 83.5 percent drop from 31.6 percent in 2024 ((table 4; appendix B). The government of Laos has implemented several programs to tackle food insecurity in the country, including the planned distribution of food to 16 million low-income households for the first 6 months of 2025 (World Bank, 2025). Additionally, the production of specific crops is being encouraged through the provision of subsidies and technical help to Laos' farmers. A shift in La Niña, which is expected to bring more rainfall, and the completion of new power projects are expected to support agricultural production in Laos (ADB, 2024). Food security is projected to continue to improve over the next decade, with only 1 percent of the population in Laos projected to be food insecure by 2035 relative to 5.2 percent in 2025. Cambodia and Vietnam are projected to have the lowest shares of food insecure populations by 2035, at 0.2 percent and 0.1 percent, respectively (table 4). In Cambodia, prices have been falling, with deflation observed in early 2024 due to a decrease in food and fuel prices (ADB, 2024b). The increase in fertilizer exports, bank credit for agriculture, and strong industrial exports are expected to support continued agricultural growth in Cambodia (ADB, 2024b). In Vietnam, price control is one of the tools the government is using to tackle food supply issues across cities (World Bank, 2025).

An estimated 36.7 percent of the population in the East Asia subregion is considered food insecure in 2025 (representing 11.7 million individuals), a slight improvement from 39.8 percent in 2024 (table 4; appendix B). The total number of food insecure people in East Asia is projected to decrease to 4 million people by 2035, representing 13.3 percent of the population. The DPRK is a major contributor to the high percentage of people classified as food insecure in the East Asia subregion. The DPRK is estimated to see only a small improvement in the share of its food insecure population in 2025 compared to the previous year (table 4; appendix B). Severe floods affected standing crops in mid-2024, but abundant rain is expected to benefit crops in areas not affected by the flooding (FAO, 2024b). Over 41 percent of the population is estimated to be food insecure in 2025. However, this number is projected to improve to 15 percent of the population by 2035.

Table 4
Food security results in the Asia region, 2025 and 2035

Region/subregion	Country	Population		Population food insecure		Share of population food insecure		Food gap (per capita)	
		2025	2035	2025	2035	2025	2035	2025	2035
		Million		Million		Percent		Kilocalories per day	
Asia	Region total	2,564.4	2,787.1	208.5	45.8	8.1	1.6	255	239
East Asia	Subregion total	29.9	30.3	11.0	4.0	36.7	13.3	353	261
	Democratic People's Republic of Korea	26.6	26.8	10.9	4.0	41.1	15.0	354	261
	Mongolia	3.3	3.5	0.0	0.0	1.3	0.1	185	143
South Asia	Subregion total	1,940.9	2,114.6	164.4	34.8	8.5	1.6	251	242
	Afghanistan	41.0	50.0	13.8	14.7	33.7	29.4	305	291
	Bangladesh	170.2	183.2	17.8	2.3	10.5	1.2	242	178
	India	1,419.3	1,522.8	81.6	5.2	5.7	0.3	210	152
	Nepal	31.3	33.3	1.3	0.1	4.3	0.2	208	151
	Pakistan	257.0	303.0	48.3	12.4	18.8	4.1	312	235
	Sri Lanka	22.1	22.4	1.5	0.2	6.8	1.1	208	163
Southeast Asia	Subregion total	593.6	642.2	33.1	7.0	5.6	1.1	243	210
	Burma	57.9	61.4	7.8	3.4	13.4	5.6	263	224
	Cambodia	17.2	18.7	0.6	0.0	3.4	0.2	209	155
	Indonesia	283.6	301.6	13.0	1.2	4.6	0.4	225	171
	Laos	8.1	8.9	0.4	0.1	5.2	1.0	199	162
	Philippines	120.1	137.2	9.0	2.1	7.5	1.5	266	214
	Vietnam	106.7	114.4	2.3	0.1	2.2	0.1	210	158

Source: USDA, Economic Research Service estimation using the Global Food Assessment model and *USDA Agricultural Projections to 2034* long-term projections report (USDA, OCE, 2025).

Table 5

Inflation-adjusted per capita Gross Domestic Product (GDP) in the Asia region, 2025 and 2035

Region/subregion	2022–2024 (average)	2025	2035	Annual growth rate (2024–2025)	Annual growth rate (2025–2035)
	U.S. dollars, 2017			Percent	
Asia	2,627	2,888	4,520	4.9	4.6
East Asia	1,029	1,099	1,434	3.2	2.7
South Asia	2,318	2,562	4,096	5.1	4.8
Southeast Asia	3,721	4,046	6,060	4.4	4.1

Note: Values are expressed in 2017 U.S. dollars. Regions include only countries covered by the Global Food Assessment. For full country statistics, see appendix C.

Source: USDA, Economic Research Service estimation using the Global Food Assessment model and *USDA Agricultural Projections to 2034* long-term projections report (USDA, OCE, 2025).

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Former Soviet Union

The Former Soviet Union (FSU) region is one of the most important regions in the world for food supply and exports. Despite the ongoing war with Russia, Ukraine continues to be an important supplier of agricultural commodities to the world. It is the world's fifth-largest exporter of wheat, and the third-largest exporter of corn (USDA, 2025a).

The region has made significant improvements in the prevalence of food insecurity. In 2025, the estimated prevalence of food insecurity in the FSU region is 2.0 percent, equivalent to 2.3 million people compared with an average of 9.6 percent from 2022–2024 (11.2 million people). Within the region, the estimated share of the population that is food insecure in 2025 varies from 0.1 percent in Armenia to 4.4 percent in Tajikistan. Of the nine countries covered by the GFA report, eight are estimated to have under 3 percent of their populations considered to be food insecure in 2025 (table 6). This is associated with an estimated 7-percent decrease in the average price of major grains in the FSU region and estimated growth in average Gross Domestic Product (GDP) of 5.1 percent in 2025 (appendix C and D). Countries in the FSU depend on wheat as the major grain in their diet, hence, price fluctuations of wheat would influence the food security status of many in the region.

The population in the FSU region is estimated to increase at an annual rate of 0.5 percent, from 118.3 million people in 2025 to 124.3 million in 2035. This regional population growth is the lowest among the regions covered in this report, while per capita GDP is one of the highest. Per capita GDP in the FSU region is estimated to increase at an annual rate of 3.7 percent, from $3,256 in 2025 to $4,676 in 2035 (table 7). By 2035, the FSU region is projected to have the lowest food insecurity level among the five GFA regions, with 0.2 percent of the population in the region unable to consume 2,100 kcal per day (table 6).

Tajikistan is estimated to have the highest share of food insecure people in the FSU region in 2025 (table 6). In 2025, 4.4 percent of the population of Tajikistan (1.5 million) is estimated to be food insecure, a reduction of 71.6 percent relative to 2024 (15.5 percent). The progress in Tajikistan can be attributed to strong remittances and a rise in public sector salaries that increased private consumption (ADB, 2024). Per capita GDP increased by 5.9 percent between 2022 and 2024 and is projected to further increase by 3.1 percent in 2025. The real domestic price of major grains is projected to decrease by 5 percent in 2025 (appendix C and D). Tajikistan continues to be highly dependent on food imports to meet domestic food requirements, making the country vulnerable to world market shocks. Between 2000 and 2023, Tajikistan's total food imports increased 16 times (Khakimov et al., 2025). The ongoing war in Ukraine is a concern for Tajikistan, given its role in remittances (WFP, 2024).

Moldova, previously ranked second-highest in food insecurity among FSU countries, demonstrates significant improvement, with projected food insecurity dropping from 9.2 percent (0.1 million people) in 2024 to 1.5 percent in 2025 (table 6). This progress is supported by a projected 4.8 percent per capita GDP growth between 2024 and 2025, a notable increase from the 1.5 percent growth observed in 2022–2024. Nevertheless, Moldova's proximity to and continued reliance on food imports from Russia and Ukraine maintains its vulnerability to the ongoing conflict.

Ukraine has also made significant progress in reducing the prevalence of food insecurity despite its ongoing conflict with Russia. Ukraine's food insecurity is estimated to be 1.3 percent in 2025 (0.5 million people) compared with 7.5 percent (3.2 million people) in 2024. Prices of major grains is projected to decrease by 23 percent in 2025 (appendix D).

Ukraine's annual GDP growth rate is estimated to be 6 percent from 2025–35, and per capita GDP is projected to grow by 6.2 percent in that timeframe, the highest increases among the FSU countries included in GFA (appendix C). Key aspects that have supported Ukraine's improved performance can be attributed to access to trade routes, labor market developments, energy supply, and external support (IMF, 2024). By the first half of the 2024/25 marketing year, Ukraine achieved its pre-war average export volumes as it was able to operate independently out of its three major ports in the Black Sea (Odessa, Pivdennyi, and Chornomorsk) (USDA, FAS, 2025b).

Uzbekistan, the country with the largest population in the FSU region (37 million people in 2025), is estimated to have the greatest number of food insecure people in 2025 with 900,000 people and the second-highest percentage of food insecure people at 2.4 percent of the population (table 6). This share, however, is projected to decrease to 0.1 percent (100,000 people) by 2035, similar to other countries in the FSU region. Uzbekistan has the third-lowest per capita GDP ($2,587) in the FSU for 2025. Per capita GDP is projected to grow at an annual rate of 3.2 percent until 2035. Prices of major grains in Uzbekistan decreased by 8 percent in 2025 (appendix D).

Table 6
Food security results in the Former Soviet Union region, 2025 and 2035

Region/subregion	Country	Population		Population food insecure		Share of population food insecure		Food gap (per capita)	
		2025	2035	2025	2035	2025	2035	2025	2035
		Million		Million		Percent		Kilocalories per day	
Former Soviet Union	**Region total**	118.3	124.3	2.3	0.3	2.0	0.2	176	167
Former Soviet Union	Armenia	3.0	2.8	0.0	0.0	0.1	0.0	127	97
	Azerbaijan	10.7	11.1	0.2	0.0	2.2	0.4	156	129
	Georgia	4.9	4.7	0.0	0.0	0.6	0.0	159	127
	Kyrgyzstan	6.2	6.6	0.1	0.0	1.4	0.1	175	140
	Moldova	3.6	3.4	0.1	0.0	1.5	0.0	149	107
	Tajikistan	10.6	12.7	0.5	0.1	4.4	1.2	231	196
	Turkmenistan	5.8	6.2	0.1	0.0	2.1	0.3	176	144
	Ukraine	36.5	35.6	0.5	0.0	1.3	0.0	146	76
	Uzbekistan	37.0	41.2	0.9	0.1	2.4	0.1	171	131

Note: Countries with relatively small food insecure populations may appear as 0 due to rounding.
Source: USDA, Economic Research Service estimation using the Global Food Assessment model and *USDA Agricultural Projections to 2034* long-term projections report (USDA, OCE, 2025).

Table 7
Inflation-adjusted per capita Gross Domestic Product (GDP) in the Former Soviet Union region, 2025 and 2035

Region/subregion	2022–2024 (average)	2025	2035	Annual growth rate (2024–2025)	Annual growth rate (2025–2035)
	U.S. dollars, 2017			Percent	
Former Soviet Union	2,988	3,256	4,676	3.7	3.7

Note: Values are expressed in 2017 U.S. dollars. Regions include only countries covered by the Global Food Assessment. For full country statistics, see appendix C.
Source: USDA, Economic Research Service estimation using the Global Food Assessment model and *USDA Agricultural Projections to 2034* long-term projections report (USDA, OCE, 2025).

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Latin America and the Caribbean

Latin America and the Caribbean (LAC) region is projected to achieve a GDP growth rate of 3.1 percent in 2025, which is expected to increase slightly to 3.4 percent annual growth rate between 2025 and 2035 (appendix C). Countries leading the near-term economic growth in the region include Colombia, Peru, and to a lesser extent Guatemala and Honduras, where favorable global commodities demand and exchange rates benefit their agricultural exports. Increased exports of tourism services in the Dominican Republic and Jamaica also contribute to LAC's growth. While the region's short-term growth reflects lower inflation trends and economic recovery from the COVID 19 pandemic, LAC's economic growth remains among the lowest of all other GFA regions except for the Sub-Saharan Africa region. The low growth trend reflects LAC's persistent bottlenecks of income inequality, labor informality, internal conflict, and low investment attraction (Economic Commission for Latin America and the Caribbean (ECLAC), 2025).

In 2025, per capita GDP in the LAC region (which includes significant heterogeneity across countries) is estimated to be $6,092—nearly 130 percent higher than the GFA total average of $2,648 (table 1). Over the next decade, per capita GDP in the LAC region is projected to grow by 2.7 percent per year, to reach $7,938 in 2035—more than double the GFA average (table 1). Food security in the LAC region also shows significant improvement as the combined effects of advances in the region's economic recovery, lower inflation, higher remittances, and new domestic food access programs in selected countries contribute to lower the prevalence of food insecurity. The prevalence of food insecurity in the LAC region is estimated to be 10.5 percent in 2025, which is 36.7 percent lower than the average prevalence of food insecurity in the region in 2024 (16.6 percent) (table 3). The estimated prevalence of food insecurity for 2025 ranges from a high level of 66.1 percent in Haiti and 18 percent in Bolivia, to a low of 1.9 percent in Colombia and 0.6 percent in the Dominican Republic (table 8). Food insecurity in the LAC region is projected to fall to 6.0 percent by 2035 (table 9). The number of food insecure people is projected to decline from an estimated 18.9 million in 2025 (11 million less than in 2024) to 11.6 million in 2035 (table 8).

The total population in the LAC region is estimated at 180.7 million in 2025 and is projected to reach 194.0 million by 2035. Population growth varies across the region, with higher income countries associated with lower population growth rates than those with lower incomes (table 3; appendix C).

Consumer price inflation (CPI) in the LAC economies shows a downward trend, with the average regional inflation rate dropping to 4.8 percent in 2025 after peaking at 9.7 percent in 2022 (USDA, ERS, 2024). It is estimated that inflation will continue to ease, reaching 3.3 percent in 2035 (appendix D). However, while the regional average inflation has declined, the rates projected in the near term continue to be above pre-pandemic levels (USDA, ERS, 2024). The effects of food inflation across LAC countries differ, according to the type of major grains, roots, and tubers prevalent in the diet. Domestic main staple grain prices are projected to fall in 2025–35 in all LAC countries (except for Nicaragua), while domestic prices of other grains and roots and tubers are projected to fall across all countries in the region (appendix D).

The economies of the Central America subregion (El Salvador, Guatemala, Honduras, and Nicaragua) were adversely affected by unfavorable weather conditions (drought and excessive rains) in 2024, impacting agricultural production and driving food insecurity (FAO GIEWS, 2024). Severe dry weather delayed crop plantings in early 2024, a situation followed by above-average rainfall from La Niña which resulted in increased flooding and landslides. These weather events negatively impacted cereal production in the Central America subregion but differed across countries: Honduras saw excessive rainfall that negatively impacted production while in El Salvador increases in crop productivity more than offset these adverse weather conditions (FAO GIEWS, 2024). Cereal production in El Salvador increased 1.9 percent in 2024, compared to a year earlier (FAO GIEWS, 2024). Additionally, increased imports of wheat and white corn (which were facilitated by the removal of import tariffs on commodities and agricultural inputs—a measure first implemented in 2002 and extended in July 2024 through 2034), contributed to lower food inflation and higher food availability to meet domestic demand (FAO GIEWS, 2024). As a result, the average prevalence of food insecurity in El Salvador declined by 69 percent in 2025, compared to 2024—the highest decline among all Central American countries (table 8). In 2025, about 11.8 percent of the population (4.9 million people) in Central America is estimated to be food insecure (table 3). Central America has the lowest per capita GDP in LAC, estimated at $4,075 in 2025 (table 9). With a population of 41.6 million in 2025, the subregion is projected to have the fastest population growth rate (1.0 percent) in 2025–35 and the lowest per capita GDP growth rate (1.8 percent) in LAC (appendix C).

The Caribbean subregion (Haiti, Dominican Republic, and Jamaica)—widely diverse in terms of economic performance and the prevalence of food insecurity—is expected to make the least progress among LAC countries in its food security metrics. Haiti and the Dominican Republic—sharing an island territory—are the countries with the highest and lowest levels of food insecurity in all of LAC, respectively. This disparity reflects their vastly different resource endowments, governance, and institutions (IMF, 2007). Haiti has faced significant political and economic instability over the years (IMF, 2007). The country has recurrently been afflicted by high levels of acute food insecurity due to extreme weather events, food shortages, soaring inflation, challenges in financing food imports, and armed conflicts that drive displacement and restrict access to food (WFP, 2024). This situation has resulted in extreme food insecurity in Haiti—the poorest country in the LAC region—and one of the most critically food-insecure nations in the world (WFP, 2024). The country's per capita GDP, which has been declining for the past 10 years, is estimated to further decline 1.7 percent in 2024‒25 and to increase 1.3 percent in 2025‒35 (appendix C). In 2025, Haiti's per capita GDP is estimated at $1,152 with 7.9 million people (66.1 percent of the country's total population) considered to be food insecure (table 8; appendix B). Haiti is the country projected to make the least progress in terms of its food security metrics in the LAC region with a projected 12.1 percent decrease in the prevalence of food insecurity between 2025 and 2035; it also has the highest estimated food gap of 760 kcal per capita per day in 2025 (table 8). In contrast, the Dominican Republic has experienced more rapid and stable economic growth. The country's soils are better suited for commercial agriculture, contributing to economic development and rising per capita incomes (IMF, 2007). Since 2012, the Dominican Republic has implemented various food security policies to address hunger and poverty, including a national plan for food assistance (IADB, 2022). In recent years, strong tourism-based revenue drove an estimated 5.0 percent GDP growth in the Dominican Republic and a 2.1 percent GDP growth in Jamaica, in 2024–25. These countries also exhibit the lowest levels of food insecurity in the LAC region, with the prevalence of food insecurity estimated at 0.6 percent in the Dominican Republic and 2.0 percent in Jamaica (table 8). On the aggregate, the prevalence of food insecurity in the Central America and Caribbean subregions is estimated to reach 31.2 percent of the population in 2025 (triple the average for LAC region) and decline to 28.2 percent by 2035. Over the next decade, the daily caloric food gap is projected to decline by just 5.6 percent from 751 kcal in 2025 to 707 kcal in 2035 (table 8).

In the South America region (Bolivia, Colombia, Ecuador, and Peru), economic growth improved in 2024−25 while heterogeneity across countries reflect differences in income inequality, informal employment, domestic support programs, exposure to foreign markets, and success in combating high inflation. South America remains the leader in terms of absolute GDP, accounting for nearly three quarters of LAC's GDP (table 9; appendix C). Colombia, the largest economy in the subregion, registered the most rapid economic growth in 2024−25 (OECD, 2024). However, the large number of migrants, refugees, and internally displaced nationals impacted by domestic conflict, continues to limit income generation and affect the economy. An estimated 7.3 million people are displaced by conflict and vulnerable to food insecurity (FAO GIEWS, 2024). Colombia's per capita GDP is projected to grow 2.9 percent in 2024−25 and accelerate to 3.4 percent per year in 2025−35 (appendix C). In 2024, Colombia expanded its food and cash transfer programs to households living in extreme poverty in urban and rural areas, which also allowed program participation to close to 3 million Venezuelan migrants, equivalent to 37.5 percent of all Venezuelans displaced globally (UNHCR, 2024). In 2024, 5.5 percent of Colombia's population was estimated to be food insecure (table 8). While dry weather conditions affected corn production, rice area and production registered an increase in 2024 (FAO GIEWS, 2024). The prevalence of food insecurity is estimated to decrease to 1.9 percent in 2025—the lowest in South America and second-lowest across the LAC region. Driven by dynamic agricultural exports and remittances, Peru's economy was able to recover and attain a 3.0 annual GDP growth in 2024–25 and is projected to grow 3.7 percent per year in 2025–35. This economic growth has led to a reduction in the food insecure population: 5 percent of the population is estimated to be food insecure in 2025 compared to 16.4 percent in 2024 (appendix B).

Table 8

Food security results in the Latin America and the Caribbean region, 2025 and 2035

Region/subregion	Country	Population		Population food insecure		Share of population food insecure		Food gap (per capita)	
		2025	2035	2025	2035	2025	2035	2025	2035
		Million		Million		Percent		Kilocalories per day	
Latin America and the Caribbean	Region total	180.7	194.0	18.9	11.6	10.5	6.0	462	553
Caribbean	Subregion total	25.6	27.8	8.0	7.8	31.2	28.2	751	707
	Dominican Republic	10.9	11.6	0.1	0.0	0.6	0.0	154	126
	Haiti	11.9	13.3	7.9	7.8	66.1	59.0	760	708
	Jamaica	2.8	2.9	0.1	0.0	2.0	0.3	168	137
Central America	Subregion total	41.6	45.9	4.9	2.6	11.7	5.6	289	261
	El Salvador	6.6	6.7	0.3	0.1	4.7	0.9	211	173
	Guatemala	18.5	21.1	2.9	1.4	15.5	6.6	299	254
	Honduras	9.7	10.8	0.9	0.3	9.1	3.2	268	227
	Nicaragua	6.7	7.3	0.8	0.8	11.9	10.3	307	298
South America	Subregion total	113.5	120.3	6.1	1.2	5.3	1.0	220	180
	Bolivia	12.4	13.5	2.2	0.7	18.0	5.0	253	197
	Colombia	49.8	51.5	1.0	0.1	1.9	0.2	194	154
	Ecuador	18.5	20.2	1.2	0.3	6.6	1.2	191	153
	Peru	32.8	35.1	1.6	0.2	5.0	0.7	213	168

Source: USDA, Economic Research Service estimation using the Global Food Assessment model and *USDA Agricultural Projections to 2034* long-term projections report (USDA, OCE, 2025).

Table 9

Inflation-adjusted per capita Gross Domestic Product (GDP) in the Latin America and the Caribbean region, 2025 and 2035

Region/subregion	2022–2024 (average)	2025	2035	Annual growth rate (2024–2025)	(2025–2035)
	U.S. dollars, 2017			Percent	
Latin America and the Caribbean	5,907	6,092	7,938	2.3	2.7
Caribbean	5,208	5,435	7,121	2.4	2.7
Central America	3,920	4,075	4,861	1.8	1.8
South America	6,784	6,978	9,300	2.4	2.9

Note: Values are expressed in 2017 U.S. dollars. Regions include only countries covered by the Global Food Assessment. For full country statistics, see appendix C.

Source: USDA, Economic Research Service estimation using the Global Food Assessment model and *USDA Agricultural Projections to 2034* long-term projections report (USDA, OCE, 2025).

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Middle East and North Africa

The percentage of the population that is food insecure in the Middle East and North Africa (MENA) region is estimated to fall to 11.7 percent in 2025 (table 10) from 14.9 percent in 2024 (appendix B). This is partially due to modest gains in income in 2024 based on an estimated real per capita GDP growth of 2.4 percent between 2024 and 2025 (table 11) relative to previous years when it grew at 1.9 percent per year between 2022 and 2024 (appendix C). Overall inflation eased in 2024 from the previous year but remains high for Egypt, Lebanon, Syria, and Yemen (appendix D). Combined with a moderate population growth of 1.1 percent per year and a projected per capita GDP growth of 2.0 percent per year (appendix C) the prevalence of food insecurity is projected to further decline to 3.1 percent by 2035 (table 11). The per capita food gap also declines from 318 kcal per day to 255 kcal per day over the same period although it remains high in Syria and Yemen (appendix B).

Conflict continues to affect the food insecurity situation in the Middle East subregion, with a growing number of internally displaced people facing acute food in GFA countries Lebanon, Syria, and Yemen. Among the GFA countries in the Middle East, Yemen has continued to experience some of the highest prevalences of acute food insecurity brought about by a continuing conflict. Recent estimates show nearly half of the population, or 4.7 million people in government controlled areas, experienced high levels of acute food insecurity between July and September 2024 (Integrated Food Security Phase Classification (IPC), 2025a). The total food insecure population is estimated to increase in 2025, from 10.9 million people across the country in 2024 to 11.1 million in 2025 (appendix B). A major driver of food insecurity in Yemen is the weak economy, irregular humanitarian assistance, and uncertainties related to conflict and weather conditions. For instance, in 2024, flooding in various parts of the country impacted more than 400,000 households and led to the loss of livestock and farmland in the affected areas (Integrated Food Security Phase Classification (IPC), 2025). Syria also has a large food insecure population resulting from many years of internal conflict and displacement. The country is estimated to have 9.4 million people experiencing food insecurity in 2025 (table 10). As a share of the total population, this means it will maintain the highest prevalence of food insecurity among GFA countries in the MENA subregion, hovering around 39 percent on average and similar to 2024 (appendix B). Rising food import prices due to a weakened currency and economic instability in 2024 continued to put pressure on food access (appendix D; FAO, 2024). A recent tenfold spike in bread prices since the fall of the governing regime in December 2024 has put a further strain on food access for millions of Syrians (World Bank, 2025). Iran is estimated to have the lowest prevalence of food insecurity in the Middle East subregion in 2025, 2.7 percent and down from 4.4 percent in 2024 (appendix B). The decline stems from a modest growth in incomes (appendix C) and a 25 percent decline in real wheat prices (appendix D).

Compared with the Middle East subregion, a majority of the GFA countries in the North Africa (NAF) subregion are estimated to have some of the lowest food insecurity prevalence rates in 2025, all below 3 percent. These included Algeria, Morocco, and Tunisia (table 10) which have traditionally accounted for the least number of food insecure people in the NAF region. The favorable outlook for these countries can also be explained by their stable macroeconomic environments with respect to lower domestic inflation and exchange rate movements. The CPI annual growth rate in Morocco, for example, has remained below 5 percent since 2022 while its real exchange rate has only marginally depreciated over time (appendix D). Tunisa and Algeria have also experienced similar trends.

Egypt is the exception among the NAF countries covered by the GFA report. The country makes up more than 80 percent of the food insecure population in the subregion, which is estimated at 16.8 million in 2025 (table 10). While this is partially due to the sheer size of the country's population in the subregion, the country also has the highest share of the food insecure people in the subregion (table 10). Nevertheless, the estimated number of food insecure people in Egypt has declined from 2024, when the estimate was 23.2 million people (appendix B). The country's heavy reliance on wheat imports makes it especially vulnerable to surges in global prices, exchange rate volatility, and changes in global supplies. Global prices for wheat have trended downwards (USDA, OCE, 2024) and the country's exchange rate is also expected to stabilize in 2025 leading to an estimated decline in domestic prices by about 5 percent (appendix D). Combined with an estimated increase in per capita GDP (appendix C), this leads to a modestly improved outlook for food insecurity in the country. However, high inflation levels are expected to prevail with a CPI growth rate of 17.5 percent between 2024 and 2025. The recent four-fold increase in the price of subsidized bread in June 2024 [18] (the highest increase in 36 years) (USDA, FAS, 2024) and the growing number of refugees (1 million in 2025) flowing into Egypt from Sudan (FAO, 2025) could exacerbate the country's food security situation.

Overall, the food security outlook for the MENA region in 2025 could be volatile given the many uncertainties surrounding ongoing conflicts, economic instability, cross-border refugee movements, and internal displacements that face many of the GFA countries in the region.

Table 10
Food security results in the Middle East and North Africa region, 2025 and 2035

Region/ subregion	Country	Population		Population food insecure		Share of population food insecure		Food gap (per capita)	
		2025	2035	2025	2035	2025	2035	2025	2035
		Million		Million		Percent		Kilocalories per day	
Middle East and North Africa	Region total	361.9	402.0	42.2	12.4	11.7	3.1	318	255
Middle East	Subregion total	151.5	167.1	23.3	6.0	15.4	3.6	330	263
	Iran	89.1	95.2	2.4	0.3	2.7	0.3	202	160
	Lebanon	5.4	5.7	0.5	0.2	9.0	3.1	235	199
	Syria	24.3	28.1	9.4	5.3	38.5	18.7	345	275
	Yemen	32.7	38.2	11.1	0.3	33.9	0.7	350	181
North Africa	Subregion total	210.4	234.9	18.9	6.4	9.0	2.7	303	246
	Algeria	47.7	54.2	0.9	0.4	1.9	0.7	213	191
	Egypt	112.9	127.7	16.8	5.7	14.9	4.5	313	253
	Morocco	37.7	40.4	1.0	0.3	2.6	0.8	228	200
	Tunisia	12.1	12.6	0.2	0.0	1.4	0.2	200	167

Source: USDA, Economic Research Service estimation using the Global Food Assessment model and *USDA Agricultural Projections to 2034* long-term projections report (USDA, OCE, 2025).

[18] Approximately two-thirds of the population receive the bread subsidy which allots 150 discounted loaves of bread per month (USDA, 2024).

Table 11

Inflation-adjusted per capita Gross Domestic Product (GDP) in the Middle East and North Africa region, 2025 and 2035

Region/subregion	2022–2024 (average)	2025	2035	Annual growth rate (2024–2025)	Annual growth rate (2025–2035)
	U.S. dollars, 2017			Percent	
Middle East and North Africa	3,376	3,515	4,306	2.4	2.0
Middle East	3,771	3,925	4,774	2.3	2.0
North Africa	3,092	3,220	3,973	2.4	2.1

Note: Values are expressed in 2017 U.S. dollars. Regions include only countries covered by the Global Food Assessment. For full country statistics, see appendix C.

Source: USDA, Economic Research Service estimation using the Global Food Assessment model and *USDA Agricultural Projections to 2034* long-term projections report (USDA, OCE, 2025).

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Sub-Saharan Africa

The food security outlook in Sub-Saharan Africa (SSA) is estimated to improve, on average, relative to 2024, albeit at a slower pace than that of the other GFA regions. An estimated 332.3 million people in SSA are projected to be food insecure in 2025, representing 26.9 percent of the region's population (table 12). Compared to 2024, this corresponds to a 5.4 percent decrease in the food insecure population and an 8.3 percent decrease in the food-insecurity share in the region (appendix B). This trend is expected to continue over the coming decade, with 262.8 million people in SSA projected to be food insecure in 2035, a 20.9 percent decline from the 2025 estimate (table 12). The relative improvements in SSA's regional food security are lower than that of the other GFA regions, leading SSA to have the highest estimated food insecure population—in terms of number of people and relative share—in both the short term (2025) and long-term (2035) (table 3). Moreover, the region's food gap per capita is estimated to increase marginally in 2025 to 414 kilocalories per day, indicating the intensity of food insecurity is expected to remain elevated among the share of the regional population unable to meet its food needs (table 12).

The SSA region's slower relative improvements in overall food security are due in part to the region's macroeconomic outlook. Of the five GFA regions, SSA is projected to have the second-fastest Gross Domestic Product (GDP) annual growth rate over the coming decade (4.4 percent) (appendix C). This high GDP growth rate, however, is offset by the region's rapid population growth. SSA's estimated 2025−35 annual population growth rate of 2.5 percent is more than twice that of any other GFA region (appendix C). As a result, the population of SSA is projected to increase by 28 percent by 2035, surpassing 1.5 billion (table 12). These population trends are the major driver of SSA's high annual food demand growth rate (figure 5). Moreover, SSA's estimated 2025 per capita GDP of $1,335 is the lowest of the five GFA regions and only a marginal ($25) improvement over the region's 2022−2024 average (table 1). In addition, despite a relatively high overall GDP growth rate in the coming decade, the SSA region's projected 2025−35 annual growth rate in per capita GDP lags all other GFA regions at 1.9 percent (table 1). These factors contribute to the SSA region's low expected per capita GDP over the next decade. The projected per capita GDP in 2035 for the SSA region ($1,608) is at least 40 percent lower than the current year (2025) estimates of per capita GDP for each of the other GFA regions, implying that average economic output per person in SSA over the next decade is anticipated to be lower than that of other regions (table 1).

Estimated improvements in regional food security trends in SSA are related to lower inflationary pressures and real food prices. More than 70 percent of the 41 SSA countries included in the GFA report are expected to experience lower consumer price index (CPI) annual growth rates in 2025 compared to their respective country averages over the 2022−2024 period (appendix D). Despite these relative reductions, many SSA countries continue to face food security challenges stemming from high inflation rates—nearly 30 percent of the SSA countries included in the GFA report are expected to have CPI annual growth rates exceeding 10 percent in 2025 (appendix D). In addition to lower general inflationary pressures, the improved overall food security outlook in SSA is further due to the domestic price outlooks of countries' major grains. Real domestic major grain prices in the region are expected to fall by 7 percent, on average, in 2025 (appendix D). This reduction is related to lower estimated international rice prices relative to 2024 (Cardell et al., 2024). Rice is the major grain for 15 of the 41 SSA countries covered in the GFA report, and these countries rely on rice imports to meet their domestic rice demand (appendix D; Yuan et al., 2024). Expected declines in international rice prices are associated with high world rice production and the return of India to the rice export market (Childs & Jarrell, 2025; USDA, FAS, 2025).

In addition to macroeconomic factors, political instability and conflict risks remain potential impediments to food security in the region. SSA consistently experiences the highest number of deaths from terrorism of any world region (Institute for Economics and Peace (IEP), 2024) and violent events remained elevated in the region in 2024 (IMF, 2024a; World Bank, 2025). Moreover, droughts, flooding, and other extreme weather events are also drivers of food insecurity in the region (WFP & FAO, 2024). While the average prevalence of food insecurity in SSA is estimated to improve in 2025 compared to 2024, food insecurity varies widely across SSA subregions as well as across and within SSA countries, depending on the presence and frequency of these and other drivers.

An estimated 56.3 million people in the Central Africa (CAF) subregion are considered to be food insecure in 2025, representing 28.6 percent of the subregion's population (table 12). This corresponds to a 16-percent decrease in the subregion's food insecurity prevalence compared to 2024 (appendix B). Of the CAF countries covered in the GFA report, Burundi is estimated to be the most food insecure, in terms of both food insecurity prevalence (72.3 percent) and per capita food gap (528 kilocalories per day). High food insecurity in Burundi is related to the country's macroeconomic difficulties; Burundi's estimated 2025 per capita GDP of $290 is the lowest in CAF (appendix C). Overall food security trends in the CAF subregion are predominately driven by the Democratic Republic of the Congo (DRC), which accounts for an estimated 61 percent of the subregion's total population and 57 percent of the subregion's food insecure population in 2025 (table 12). The prevalence of food insecurity in DRC is estimated to fall by 10 percent in 2025 compared to 2024 (appendix B). This reduction is related to strong projected 2025 annual GDP growth (5.1 percent) coupled with an expected weakening of inflationary pressures (appendix C and D); however, food insecurity in DRC and its neighboring countries could be adversely affected by intensifying conflict in eastern DRC provinces (Armed Conflict Location & Event Data (ACLED), 2024; FAO, 2024; Integrated Food Security Phase Classification (IPC), 2024a). Over the next decade, GDP growth is projected to outpace population growth in the CAF subregion, resulting in a decline in food insecurity prevalence in the subregion to 20.4 percent in 2035 (appendix C; table 12).

The subregional food security outlook in East Africa (EAF) is estimated to improve in 2025 relative to 2024 (appendix B). An estimated 118 million people in EAF are considered to be food insecure in 2025, representing 27.2 percent of the subregion's population (table 12). Improving food security trends in EAF are driven by strong anticipated economic growth in the subregion. EAF is the fastest growing of the four SSA subregions covered in the GFA report, with a projected 2025 per capita GDP growth rate of 3.7 percent (table 13). Moreover, 80 percent of the EAF countries covered in the GFA report have an expected 2025 per capita GDP growth rate above 2 percent (appendix C). The strong economic growth prospects across most of the EAF subregion are related to favorable private and public investment environments, continued domestic demand growth, and further recovery of international tourism in the subregion (United Nations (UN), 2025; World Bank, 2025). In Uganda, accelerated economic growth projections in 2025 are supported by rising investment related to the expected commencement of oil production in the country (UN, 2025; World Bank, 2025). Over the next decade, the food-insecure share of the EAF subregion's population is expected to fall to 10.8 percent, driven by strong overall economic growth prospects in the subregion (table 12). EAF's per capita annual GDP growth rate of 3.3 percent over the next decade is more than twice the rate of the other SSA subregions (table 13).

In contrast to the strong overall food security outlook in the EAF subregion, the food insecure share of Sudan's population is estimated to increase to 33.6 percent in 2025, a more than 100 percent increase relative to 2024 (appendix B). The estimated outlook of Sudan's food insecure population is also worsened, as indicated by the expected 29 percent increase in Sudan's 2025 per capita food gap relative to 2024 (appendix B). Deteriorating food security in Sudan is related to the country's ongoing civil conflict and associated political and macroeconomic instability (FAO, 2024; World Bank, 2025; IPC, 2024b). Sudan's economy has substantially contracted amidst the ongoing conflict—Sudan's per capita GDP growth rate over the 2022–2024 period was -20.8 percent (appendix C). Moreover, despite an expected weakening of inflationary pressures compared to the 2022–2024 period, Sudan's CPI is estimated to increase by 100 percent in 2025 (appendix D). IPC indicates that a famine (IPC phase 5) occurred in areas of southwest Sudan in October and November 2024 due to the country's intensifying civil conflict and, absent a cessation of the conflict, projects a continuation and spread of the famine through May 2025 (IPC, 2024b). Intensification of the conflict in Sudan could also impact food security in neighboring countries. For instance, South Sudan has experienced an inflow of refugees displaced by the conflict in Sudan and South Sudan's economy relies on oil export revenues which have been hindered by damage to oil pipelines running through Sudan (Economist Intelligence Unit (EIU), 2024; IPC, 2024c; World Bank, 2024a). South Sudan's per capita GDP is expected to decline, and inflationary pressures are expected to strengthen in 2025 relative to 2022–2024 (appendix C and D). Related to these factors, the food insecure share of South Sudan's population is estimated to be 48.1 percent in 2025, a 21 percent increase relative to 2024 (appendix B). In addition, the prevalence of food insecurity in Djibouti is also estimated to increase to 18.0 percent in 2025 (table 12). This worsening situation is driven by several factors, including weather shocks (especially droughts) and trade disruptions in the Red Sea coupled with a reliance on food imports (WFP, 2024).

Of the four SSA subregions covered in the GFA report, Southern Africa (SAF) is the most food insecure in terms of food insecurity prevalence and food gap (table 12). The overall food insecurity outlook in the SAF subregion is estimated to worsen in 2025 compared to 2024. An estimated 41.9 percent of the subregion's population is considered to be food insecure in 2025, an increase of 10 percent from 2024 (appendix B). Moreover, the average food gap per capita in the subregion is estimated to be 536 kilocalories per day, an increase of 21 percent from 2024, indicating heightened food insecurity intensity among the population unable to meet its caloric needs (appendix B). These subregional trends are driven by rising food insecurity prevalence rates in select SAF countries; in 2025, the food insecure share of the population in Zimbabwe, Lesotho, and Zambia is estimated to reach 92.5 percent, 75.1 percent, and 45.9 percent, respectively (table 12). Worsening food security in these three countries is due in part to drought-induced production shortfalls in maize, each country's main staple grain. Maize production fell more than 50 percent in 2024 relative to Zimbabwe, Lesotho, and Zambia's respective 5-year production averages (WFP & FAO, 2024). Drought induced production shortfalls are also expected to contribute to rising food insecurity in Malawi. Malawi's maize production fell by approximately 17 percent in 2024 relative to the country's 5-year production average and food insecurity in the country is estimated to rise by 5 percent in 2025 relative to 2024 (appendix B; FAO GIEWS, 2025). Zimbabwe's worsening food security outlook is further associated with macroeconomic instability; Zimbabwe's CPI annual growth rate exceeded 200 percent over the 2022–2024 period (appendix D). Following persistent inflationary pressures, the country introduced a new currency, Zimbabwe Gold, in April 2024 (IMF, 2024b); however, high inflation and exchange rate depreciation continued under the new currency in the latter half of 2024 (FAO GIEWS, 2024; World Bank, 2024b). Agricultural production shortfalls and macroeconomic instability combine to increase Zimbabwe's inflation-adjusted food prices, further weakening the country's food security prospects. Zimbabwe is the only country covered by the GFA report where real domestic food prices are expected to rise in 2025 (appendix D). Over the next decade, GDP growth is projected to outpace population growth in SAF, resulting in a fall in food insecurity prevalence in the subregion to 32.4 percent in 2035 (table 12, appendix C).

The West Africa (WAF) subregion is the most food secure of the four SSA subregions in the GFA report, although food security prevalence is expected to worsen in the subregion in 2025, relative to 2024. Approximately 21 percent of the subregion's population is estimated to be food insecure in 2025, an increase of 9 percent over the 2024 estimate (appendix B). This subregional trend is driven by rising food insecurity in Nigeria, the most populous country and largest economy among the SSA countries covered in the GFA report (appendix C). Nigeria's food insecurity prevalence in 2025 is estimated to increase by 37 percent compared to 2024, resulting in 30.2 percent of the country's population being unable to meet their food needs (appendix B). Of the 99.3 million people in the WAF subregion estimated to be food insecure in 2025, nearly three of four reside in Nigeria (table 12). Worsening food security in Nigeria is associated with weak macroeconomic outcomes as per capita real GDP growth stagnated over the 2022–2024 period and inflation remains elevated with CPI expected to grow by 21.3 percent in 2025 (appendix C and D; WFP & FAO, 2024). Along with macroeconomic factors, flooding and violent conflict have further exacerbated food insecurity in the country, particularly in northern states (FAO, 2024; WFP & FAO, 2024).

In addition, the WAF subregion has been impacted by political instability—Burkina Faso, Guinea, Guinea-Bissau, Mali, and Niger have each been affected by coups or attempted coups in the past 5 years (IMF, 2024a). This has contributed to fraying of economic linkages in the subregion, marked by Burkina Faso, Mali, and Niger each leaving the Economic Community of West African States (ECOWAS) in January 2025 (ECOWAS Commission, 2025). These impacts notwithstanding, food insecurity prevalence in the subregion is projected to decline to 15.6 percent in 2035 driven by GDP growth outpacing population growth (Table 12; appendix C).

Table 12
Food security results in the Sub-Saharan Africa region, 2025 and 2035

Region/subregion	Country	Population		Population food insecure		Share of population food insecure		Food gap (per capita)	
		2025	2035	2025	2035	2025	2035	2025	2035
		Million		Million		Percent		Kilocalories per day	
Sub-Saharan Africa	**Region total**	1,235.5	1,576.7	332.3	262.8	26.9	16.7	414	380
Central Africa	**Subregion total**	196.5	261.0	56.3	53.2	28.6	20.4	474	429
	Burundi	14.0	18.3	10.1	8.1	72.3	44.5	528	391
	Cameroon	31.8	41.1	4.1	3.2	13.0	7.7	270	244
	Central African Republic	5.8	6.8	1.7	1.0	30.3	14.5	348	285
	Chad	19.7	26.2	7.2	7.0	36.8	26.6	448	402
	Congo	6.2	7.8	1.0	0.4	15.6	4.8	254	204
	Democratic Republic of the Congo	119.0	160.9	32.1	33.6	26.9	20.9	502	468
East Africa	**Subregion total**	434.0	541.9	118.0	58.4	27.2	10.8	383	338
	Djibouti	1.0	1.2	0.2	0.1	18.0	12.0	309	282
	Eritrea	6.4	7.4	2.1	1.3	32.6	17.3	324	270
	Ethiopia	121.4	150.8	18.9	3.2	15.5	2.1	272	196
	Kenya	59.4	71.8	12.3	2.0	20.7	2.8	282	196
	Madagascar	30.1	36.4	14.7	8.1	48.8	22.3	408	307
	Rwanda	13.8	16.1	1.9	0.4	13.8	2.2	299	223
	Somalia	19.7	26.3	13.2	12.6	67.1	47.7	582	476
	South Sudan	12.2	14.8	5.9	3.2	48.1	21.9	430	325
	Sudan	49.8	59.7	16.7	10.5	33.6	17.6	371	308
	Tanzania	69.3	89.5	17.8	9.4	25.6	10.5	416	338
	Uganda	50.9	68.0	14.5	7.7	28.5	11.3	381	303
Southern Africa	**Subregion total**	140.0	180.0	58.6	58.3	41.9	32.4	536	472
	Angola	38.5	53.3	14.1	18.6	36.8	34.9	383	376
	Eswatini	1.1	1.2	0.1	0.0	9.6	2.8	229	189
	Lesotho	2.2	2.4	1.7	1.2	75.1	49.5	532	399
	Malawi	22.2	27.0	3.7	0.9	16.6	3.4	312	236
	Mozambique	34.2	44.2	12.9	11.6	37.6	26.2	420	372
	Namibia	2.9	3.4	0.2	0.0	6.3	1.1	197	157
	Zambia	21.4	27.8	9.8	9.1	45.9	32.6	534	468
	Zimbabwe	17.5	20.7	16.2	16.9	92.5	81.5	822	667

1 of 2 ▶

Region/subregion	Country	Population		Population food insecure		Share of population food insecure		Food gap (per capita)	
		2025	2035	2025	2035	2025	2035	2025	2035
		Million		Million		Percent		Kilocalories per day	
West Africa	**Subregion total**	465.0	593.7	99.3	92.8	21.4	15.6	344	322
	Benin	15.2	20.8	1.2	0.4	8.0	1.9	262	214
	Burkina Faso	23.6	29.1	4.4	1.7	18.6	5.9	399	320
	Cabo Verde	0.6	0.7	0.0	0.0	7.5	1.0	227	174
	Cote d'Ivoire	30.6	37.2	3.4	1.1	11.2	2.8	350	283
	Gambia	2.6	3.1	0.2	0.0	8.6	1.6	241	190
	Ghana	35.3	43.1	1.2	0.3	3.3	0.8	215	182
	Guinea	14.4	18.8	1.5	0.6	10.2	3.0	298	246
	Guinea-Bissau	2.2	2.8	0.6	0.3	28.4	12.4	330	267
	Liberia	5.6	6.8	2.4	1.6	44.0	23.1	535	431
	Mali	22.6	29.7	2.0	1.0	8.9	3.3	274	235
	Mauritania	4.4	5.2	0.3	0.1	5.8	1.4	248	206
	Niger	27.3	39.0	3.5	1.3	12.7	3.4	335	270
	Nigeria	242.8	310.6	73.3	81.2	30.2	26.1	337	322
	Senegal	19.3	23.9	0.6	0.1	3.0	0.2	191	148
	Sierra Leone	9.3	11.4	3.7	3.0	39.9	26.3	472	410
	Togo	9.1	11.4	0.9	0.2	9.9	1.7	256	198

Source: USDA, Economic Research Service estimation using the Global Food Assessment model and *USDA Agricultural Projections to 2034* long-term projections report (USDA, OCE, 2025).

Table 13
Inflation-adjusted per capita Gross Domestic Product (GDP) in the Sub-Saharan Africa region, 2025 and 2035

Region/subregion	2022–2024 (average)	2025	2035	Annual growth rate (2024–2025)	Annual growth rate (2025–2035)
	U.S. dollars, 2017			Percent	
Sub-Saharan Africa	1,310	1,335	1,608	2.1	1.9
Central Africa	670	690	788	1.5	1.3
Eastern Africa	1,155	1,169	1,614	3.7	3.3
Southern Africa	1,666	1,682	1,836	0.9	0.9
Western Africa	1,616	1,659	1,893	1.7	1.3

Note: Values are expressed in 2017 U.S. dollars. Regions include only countries covered by the Global Food Assessment. For full country statistics, see appendix C.
Source: USDA, Economic Research Service estimation using the Global Food Assessment model and *USDA Agricultural Projections to 2034* long-term projections report (USDA, OCE, 2025).

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Appendix A: Global Food Assessment Model: Definitions and Methodology

The Global Food Assessment (GFA) model [19] used in this report projects food consumption (food demand), food access, and food gaps in 83 low- and middle-income countries. Each country's food security metrics are estimated for 2025 and projected to 2035. Food is divided into four groups, covering 100 percent of food consumption: the major grain (determined by calorie share), other grains, root crops, and all other food.

The food security of a country is evaluated based on the gap between estimated domestic food consumption (food demand) and a caloric threshold necessary to sustain life at a moderate level of activity, set at 2,100 kilocalories (kcal) per capita per day. The modeling projections of food demand are expressed in a grain equivalent based on each food group's caloric content to allow aggregation across food groups, which allows this grain equivalent to be easily expressed in kilograms (kcal).

Three food security indicators are provided: (1) the share of food insecure, which is the share of the total population unable to reach the caloric threshold; (2) the number of food insecure people; and (3) the food gap, which is the amount of food needed to allow each individual consuming below the threshold level to reach the caloric target. This caloric threshold indicates the relative well-being of a country's population and helps to quantify unequal food access within a country. Projection results provide a baseline for the food security situation in each country and the results depend on the model's specification and underlying assumptions. The simulation framework used to project food demand is based on partial-equilibrium models for each country in the assessment. Beghin et al. (2015) introduced the methodology and Beghin et al. (2017) provided more detail on price transmission and food security projections.

Each country model comprises a price-independent generalized log-linear (PIGLOG) [20] demand system for each of the four food groups (Deaton & Muellbauer, 1980; Muellbauer, 1975). The demand system is calibrated on a 3-year-average of prices and incomes (2022–2024), observed consumption levels, a measure of inequality, and income and price elasticities. Demand projections are based on projected prices and incomes; the model implicitly assumes the demand system represents preferences and that the projections are constant over time.

The distribution of consumption used to calculate food security measures is described by a constant coefficient of variation, which implies an increasing standard deviation of consumption as consumption rises over the projection period. But this does not account for potential structural changes in an economy. The implied price and income elasticities evolve over the projection period as

[19] The methodology used to estimate the GFA model indicators was replaced in 2016. To understand the changes to the model and their impact on food security estimates, see Rosen et al. (2016).

[20] PIGLOG refers to a class of demand systems that provide flexible structure with a nonlinear income response and exact aggregation of individual demand into a representative consumer demand function of per capita income and, as shown later, the Theil entropy measure of income inequality.

prices and incomes change; generally, food groups become more income-inelastic because incomes rise.

Structural Framework for Estimating and Projecting Food Demand in the Aggregate Demand System

Definition and Calibration

The demand q_i^h for a given food group *i*, for income-decile *h* is specified as:

(1)
$$q_i^h = (\frac{x^h}{p_i})\left(A_i(p_i) + B_i(p_i)\, ln\left(x^h\right)\right)$$

Where p_i is the price (expressed in real local currency), and x^h is the decile-level income.[21] $A_i(p_i) = a_{i0} + a_{i1}p_i$ and $B_i(p_i) = b_{i0} + b_{i1}p_i$.

The PIGLOG demand formulation allows for aggregation of income decile-level demands in (1) into average per capita market demand for each food group i, as shown in (2).

(2)
$$\bar{q}_i = \left(\frac{\bar{x}}{p_i}\right)\left((a_{i0} + a_{i1}p_i) + (b_{i0} + b_{i1}p_i)\,(ln(\bar{x}) + ln\,(\frac{10}{z})\right)$$

The latter in equation (2) is a function of average per capita income $\bar{x}$ and Theil's entropy measure of income inequality *z.*

The average expenditure share for good category *i* is also defined as:

(3)
$$\bar{w}_i = (a_{i0} + a_{i1}p_i) + \left((b_{i0} + b_{i1}p_i)\,(ln(\bar{x}) + ln(\frac{10}{z}))\right)$$

The elasticity of average demand for good *i*, with respect to average income (or total expenditure), is:

(4) $\varepsilon_{\bar{q}_i\bar{x}} = 1 + \frac{(b_{i0}+b_{i1})}{\bar{w}_i}$.

The own-price elasticity of the average demand is:

(5)
$$\varepsilon_{\bar{q}_i p_i} = -1 + \left(\frac{p_i}{\bar{w}_i}\right)\left(a_{i1} + b_{i1}\,(ln(\bar{x}) + ln(\frac{10}{z}))\right)$$

In each country, consumers at different income levels have similar underlying preferences over good *i*, as embodied in parameters a_{i0}, a_{i1}, b_{i0}, b_{i1}, but their respective consumptions vary because their respective incomes vary.

With a system of three linear equations (equations 3, 4, and 5), with four unknown variables, one parameter remains free. The free parameter (chosen to be b_{i0}) is used to ensure that decile demands behave consistently with stylized facts of food security as follows: price sensitivity and income

[21] The combined impacts of supply side factors (such as input and fertilizer prices, weather and climate changes, and uncertainties with agricultural production) are expected to drive prices and income.

responsiveness decline with income levels, own-price elasticities must be negative, and food expenditure shares tend to fall with increasing income. A range of values of the free parameters allows can ensure these stylized facts are satisfied by the calibrated demand system. Here b_{i0} is pinned down such that the ratio of price elasticities for the bottom and top deciles is equal to the ratio of the natural logarithm of their national income shares.

For any given free parameter value, the system of equations is solved for parameters b_{i1}, a_{i1}, and a_{i0} as a function of the free parameter. Once these three parameters are recovered, parameters $\tilde{a}_{i0}$, $\tilde{a}_{i1}$, $\tilde{b}_{i0}$, and $\tilde{b}_{i1}$, along with income x^h and price p_i, are used to generate the consumption level of good i for each decile specified in equation (1). In this initial calibration, the quality of any good i is assumed to be constant across the income distribution.

For each country, a demand system is calibrated for each of the four food groups—based on income, consumption levels, and prices from the 3 years preceding the projection period (2022–24). The major grain (which varies across countries) is determined, based on caloric share in the diet. The other grains food group contains all other grains; the prices for this food group are weighted by its components' caloric shares. At the calibration stage, domestic food prices are either observed (including the components of a price index for other grains that is weighted by caloric share), or synthetic prices are created.

For the food prices not observed in the calibration stage, a synthetic domestic price, p_i^{ds}, that is linked to the world price, p_i^w, is created and expressed in local currency. The parameter θ is the price transmission slope, which is assumed 0.7. The parameter trc^{int} represents international transportation and market costs (e.g., cost, insurance and freight (CIF) and free on board (FOB)), which are assumed 10 percent, and trc^{dom} are domestic trade costs, which are assumed $20 per ton in real terms:

(6) $p_i^{ds} = \theta^* p_i^w * \left(1 + trc^{int}/\theta\right) * (1 + tariff/\theta) + trc^{dom}$

At this stage, the calibration also includes a price transmission equation that links the domestic price p_i^{dom} (either observed or synthetic) to the world price. The generic price transmission equation is:

(7) $p_i^{dom} = \theta^* p_i^w + \hat{I}$

During the calibration stage, the intercept, I, is solved in real terms and is held constant during the projection period.

Projection of Food Demand Calculation and Food Security Indicators

The GFA food security indicators (share of food insecure population, number of food insecure people, and food-gap) are derived from the levels of food demand projected, using the calibrated demand system.

For each country, the demand parameters and projected income, x_t, and prices, p_{it}, are used to project food demand, q_{it}, for each of the four food groups i in each year t so that $q_{it} = \widehat{A}_\iota(x_t/p_{it})((p_{it}) + \widehat{B}_\iota(p_{it})\ln(x_t))$. The demand for the four food groups is aggregated into total food demand expressed in calories, so that $\sum q_{it} = Q_t$, which is also referred as food or calorie consumption. This measure of total demand is used to calculate food security indicators.

The Food and Agriculture Organization of the United Nations (FAO) (2019) is followed to estimate the distribution of calorie consumption—beginning with a coefficient of variation (CV) of food availability—which characterizes consumption distributed with a mean m and variance v, so that $CV =$

$(\sqrt{v}/m)$.[22] Given the CV and the projected mean caloric consumption (Q_t), the variance (v) of the empirical distribution for a given year t can be recovered.

Assuming food consumption Q_t is distributed lognormal, then $ln\ (Q_t)$ is distributed $N(\mu, \sigma^2)$ with $\mu = \ln\left(\frac{m^2}{\sqrt{v+m^2}}\right)$ and $\sigma^2 = \ln\left(1 + v/m^2\right)$. Once μ and σ^2 are computed, the proportion of the population that falls below the calorie threshold (2,100 kcal per capita per day) is recovered using the standard normal CDF, Φ: $\Phi^{insecure} = \Phi((\frac{\ln(2{,}100-\mu)}{\sigma})$. Here, $\Phi^{insecure}$ indicates the share of the population that is food insecure. Using this share and total population in the respective country, the total number of food insecure people in this country is calculated.

Next, the expected average food intake of food insecure people, $q_{cal\ average}^{food\ insecure}$, can be recovered using the partial mean of the calorie availability below the threshold (2,100 kcal), which is calculated as $q_{cal}^{food} = e^{\mu-\sigma/\Phi\text{^}2100[\phi((\ln(2100)-\mu)/\sigma]}$, where ϕ is the standard normal density function.

The food gap is the difference between the caloric threshold of 2,100 kcal and the average calorie availability for food insecure people. This gap provides a measure of the food gap in kcal per day per food insecure person. The latter, multiplied by the number of food insecure people and converted into grain equivalent per year, yields a food-gap measure based on annual grain volume.

Data

The model is calibrated for each of the four food groups based on average prices and income from 2022–2024. Prices are expressed in real local currency units. Quantities are expressed in grain-equivalent units.

Calibrated Parameters and Variables:

Demand parameters ($\tilde{a}_{i0}$, $\tilde{a}_{i1}$, $\tilde{b}_{i0}$, and $\tilde{b}_{i1}$), price intercepts, and domestic prices (synthetic) projections are based on data from the USDA, Economic Research Service (ERS) International Macroeconomic Data Set and the *USDA Agricultural Projections to 2034* report. They utilize the calibrated demand parameters and price transmission between world and domestic prices.

Endogenous Projection Variables:

- Food demand, domestic prices

Exogenous Variables Used in Calibration and Projection:

- Average consumption per capita–Food and Agriculture Organization (FAO) of the United Nations Food Balance Sheet (most recent available)[23]
- Grain shares: FAO Food Balance Sheet[24]

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[22] See the appendix of Beghin et al. (2015b) for more detail.

[23] Food Balance Sheets (FBS) are from 2022. There are no current FBS for Eritrea, therefore, the FBS of Ethiopia was used to approximate the shares of grains and roots and tubers in total calories.

[24] In order to generate per capita consumption for each food group in grain equivalents, grain consumption levels and share of grains in total calories were used, as reported in the Food Agriculture Organization of the United Nation' (FAO)

- Elasticities of price and income calculations: 2011 International Comparison Program (ICP) data, following the methodology in Muhammad et al. (2011) [25]
- Domestic prices (observed): FAO Global Information and Early Warning System (GIEWS), annual average; market depends on reporting
- Tariffs: World Bank's World Integrated Trade Solution (WITS) [26]
- Exchange Rates and Consumer Price Indices (CPIs): USDA, ERS's International Macroeconomic Data Set [27]
- Population: U.S. Department of Commerce, Bureau of the Census.
- World prices: USDA Agricultural Projections to 2034 report [28]
- Per capita income: generated using GDP and population from USDA, ERS's International Macroeconomic Data Set [29]
- Income distribution: World Bank Data Bank. [30]
- Coefficient of variation (CV) of food consumption: FAO State of Food Insecurity (FAO, 2019) [31]

Global Information Early Warning Systems (GIEWS) Cereal Supply and Demand Balance for Sub-Saharan African Countries from January 2025.

[25] Elasticities are not available for all countries. Estimates are used from neighboring countries (Somalia, Eritrea, Djibouti, and South Sudan–Ethiopia; Lebanon–Jordan; Syria–Iraq; Algeria—average Tunisia and Morocco; Afghanistan—average Tajikistan and Pakistan; Turkmenistan—average Tajikistan, Kyrgyzstan, Kazakhstan; Uzbekistan-average Tajikistan, Kyrgyzstan, Kazakhstan).

[26] Tariff rates are available through 2022. Tariff rates are not available for Somalia, South Sudan, Eritrea, Turkmenistan, and North Korea. For Eritrea, the Common Market for Eastern and Southern Africa (COMESA) average was used. Somalia has imposed a 12.3 percent tariff on commercial imports (LCS Logistics). Turkmenistan has no tariffs but imposes excise taxes that have historically been 10 percent. North Korea does not import on the open market, so calculations assume there are zero tariffs and do not quantify other trade frictions.

[27] Ecuador and El Salvador are modeled in the currency of U.S. dollars (instead of local currency), as in the USDA, ERS International Macroeconomic Data Set, which is based on data from the International Monetary Fund (IMF) and Oxford Economics. Projections are constructed for South Sudan, Sudan, Somalia, Eritrea, Djibouti, Yemen, and North Korea using data from the International Monetary Fund, IHS Markit, and Oxford Economics.

[28] The world price series include the following: corn (U.S. gulf #2 yellow); rice (Thai, B, freight on board (FOB) Bangkok, Thailand); sorghum (U.S. Gulf, #2 yellow); wheat (U.S. Gulf, #2 Hard Red Wheat); barley (E.C., Rouen, France); Oats (U.S. farm); other food (represented by soybean oil, Dutch FOB, ex-mill Rotterdam, Netherlands). The world price of wheat to represent rye; and sorghum to represent all other cereals (e.g., millet, teff, fonio) was used. The world price for cassava (tapioca, hard pellets, FOB, Rotterdam, Netherlands)– representing roots and tubers- was predicted based on the historical relationship between cassava and corn.

[29] Projections were constructed using information from Oxford Economics and IHS Markit for South Sudan, Sudan, Somalia, Djibouti, Eritrea, Yemen, and North Korea.

[30] Income distributions are not available for all countries Missing distributions were replaced with either neighboring countries or regional averages: Djibouti, Eritrea, South Sudan, and Somalia-Ethiopia; Zimbabwe–Zambia; North Korea–Mongolia; and Afghanistan—average Uzbekistan, Pakistan, Tajikistan.

[31] The coefficient of variation and the income distribution parameters are assumed to be constant throughout the projection period.

Modeling Staple Cereal Production

The current production module of the GFA model aggregates a panel of agricultural production data for all 83 countries in the assessment to provide a model-based estimation for the current year and a projection for 10 years out for yield and area dynamics. Agricultural production is decomposed into yield (production per hectare) and area for grains. Production (*PR*) for a given country *c* in year *t* is obtained by multiplying projected yield (*YL*) and area (*AR*).

$$PR_{ct} = AR_{ct} * YL_{ct}$$

The projections cover the period 2022–32, based on producer price projections in local currency units and world price projections from the *USDA Agricultural Projections to 2033* report.

Yield

Yield parameters are estimated econometrically using panel data consisting of observations for each country and are calibrated to observed yields for the immediate past 3 years (e.g., 2020–22 yields). The calibration procedure involves in-sample prediction using observed yield data and consensus estimates for the expected return ratio, an indicator of the relative profitability of fertilizer use. Yields respond to expected relative return ratios per hectare (*RR*), autonomous technical change over time (*T*), and include a country-specific effect.

$$YL_{ct} = f(RR_{ct}, T_t)$$

The return ratios are the ratio of the return per hectare—revenue from yield divided by the price of fertilizer—$RR_{ct} = (yp_{ct} * Y_{ct})/fp_{ct})$, where yp and fp are yield and fertilizer prices, respectively. The expected return ratios include a current-year component and a long-term expectation component, expressed in the real local currency unit. In these calculations, the *USDA Agricultural Projections to 2032* prices for superphosphate and the major grain by production volume (for grain) were used.

The domestic price for each grain is linked to its world reference price, expressed in real local currency unit, through the following price transmission equation:

$$P^{domestic} = 0.7 \times P^{world} + 0.3 \ \times I$$

The expected domestic price is a weighted average of 70 percent of the current-year world price $\left(P^{world}\right)$ and 30 percent of the mean domestic price (*I)* over the analysis time period. The grain production data used in the estimation come from USDA, Foreign Agricultural Service's *Production, Supply and Distribution* (*PSD*) database and from the Food and Agriculture Organization of the United Nations (FAO). The intercept, *I*, is the mean of the price over the regression time period (1985–2023).

Modeling Area

Crop area, AR_{ct}, is modeled with the widely used Nerlovian specification—in which lagged area, expected crop and fertilizer prices, and a time trend—enter into the equation as follows:

$$AR_{ct} = f(yp_{ct}, fp_{ct}, AR_{ct-1}, T)$$

The expected prices are averages of contemporaneous and lagged relative prices. A time trend is included in the area equation to capture non-price factors in area, and a country fixed effect. The area equation is numerically calibrated to the base year average of the preceding 3 years of the report (e.g., 2022–2024), using consensus estimates for price and lagged acreage responses. Regional and subregional models are fitted to allow for heterogeneity among diverse countries included in the GFA model. The regional specification disaggregates the estimation of area and yield by the five regional classifications of the GFA countries: Sub-Saharan Africa (SSA), Asia, Latin America and the Caribbean (LAC), Middle East and North Africa (MENA), and the Former Soviet Union (FSU). The subregional specification disaggregates the model to 13 subregions of the GFA countries: Central Africa, East Africa, Southern Africa, West Africa, North Africa, Middle East, Central America, South America, the Caribbean, the Former Soviet Union, South Asia, Southeast Asia, and East Asia.

A model-based projection performance is assessed in terms of how well the specified model can be expected to perform on an independent (out-of-sample) data set, often assessed by the actual estimate of the out-of-sample Mean Squared Error (MSE). When an independent out-of-sample dataset is not available, a Cross-Validation (CV) approach (used in this report) can be used to choose the best model by estimating the out-of-sample MSE using an in-sample dataset. The out-of-sample error (often referred to as the test error) is the average error that results from using the regression method to predict the response on a new observation that was not used in regression estimation. Given an in-sample dataset, the choice of a particular specification (e.g., in this report, the regional and subregional model specifications) is warranted if the model results in a low test error (James et al., 2017). The models are assessed with a “leave-one-out-cross-validation” (LOOCV) to simulate their out-of-sample prediction performance (James et al., 2017). The performances of regional and subregional model specifications are assessed using the overall out-of-sample MSE scores. The model with the smallest out-of-sample MSE is selected for estimation (Zereyesus et al., 2022).

Modeling Implied Additional Supply Required

The Implied Additional Supply Required (IASR) quantifies the total grain demand in each country that is not projected to be met through domestic production. Total grain demand (*TD*) is comprised of food demand (*FD*) generated by our demand-driven model and nonfood use (*NFD*), which is comprised of seed, feed, processing, and other uses. The IASR for grains thus can be expressed as: $IASR = TD - PR$.

The demand for grain for processing, seed, and other uses is assumed to grow at the same rate as production. The demand for grain feed grows at the average rate was observed during 2006–23.

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Appendix B: Food Security Measures for Global Food Assessment (GFA) Countries, 2025–25

Country	Food insecure (percent)				Population insecure (million)				Food gap (kcal per capita per day)				Food gap (thousand metric tons)			
	2022–24	2024	2025	2035	2022–24	2024	2025	2035	2022–24	2024	2025	2035	2022–24	2024	2025	2035
GFA total	**23.3**	**19.0**	**13.5**	**6.5**	**1,009.9**	**824.6**	**604.2**	**332.9**	**365**	**342**	**353**	**362**	**48,839**	**37,359**	**28,091**	**15,813**
Asia region	**18.5**	**15.4**	**8.1**	**1.6**	**466.5**	**383.6**	**208.5**	**45.8**	**296**	**281**	**255**	**239**	**18,820**	**14,740**	**7,217**	**1,434**
East Asia subregion	58.5	39.8	36.7	13.3	17.4	11.7	11.0	4.0	452	363	353	261	1,087	584	537	145
Democratic People's Republic of Korea	64.9	44.1	41.1	15.0	17.1	11.6	10.9	4.0	454	365	354	261	1,080	578	536	145
Mongolia	6.8	5.5	1.3	0.1	0.2	0.2	0.0	0.0	232	224	185	143	7	6	1	0
South Asia subregion	19.7	16.5	8.5	1.6	376.2	310.2	164.4	34.8	293	280	251	242	14,475	11,469	5,378	1,052
Afghanistan	48.7	53.7	33.7	29.4	19.1	21.6	13.8	14.7	357	376	305	291	846	994	524	530
Bangladesh	21.2	18.6	10.5	1.2	35.4	31.4	17.8	2.3	284	274	242	178	1,492	1,276	640	60
India	16.1	13.3	5.7	0.3	225.9	181.5	81.6	5.2	256	245	210	152	7,862	6,093	2,330	107
Nepal	10.6	10.7	4.3	0.2	3.3	3.3	1.3	0.1	242	243	208	151	115	117	40	1
Pakistan	36.0	27.8	18.8	4.1	89.2	70.2	48.3	12.4	380	348	312	235	4,039	2,916	1,795	348
Sri Lanka	14.9	9.2	6.8	1.1	3.3	2.2	1.5	0.2	242	219	208	163	120	72	48	6
Southeast Asia subregion	12.5	10.6	5.6	1.1	73.0	61.7	33.1	7.0	277	271	243	210	3,258	2,688	1,302	237
Burma	16.9	20.3	13.4	5.6	9.6	11.8	7.8	3.4	277	290	263	224	439	562	337	127
Cambodia	9.0	11.2	3.4	0.2	1.5	2.0	0.6	0.0	243	253	209	155	64	87	21	1
Indonesia	12.2	8.8	4.6	0.4	34.0	24.2	13.0	1.2	266	250	225	171	1,463	968	471	33
Laos	14.1	31.6	5.2	1.0	1.1	2.5	0.4	0.1	239	298	199	162	42	117	13	2
Philippines	16.4	13.5	7.5	1.5	19.1	15.9	9.0	2.1	311	298	266	214	943	753	380	71

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Country	Food insecure (percent)				Population insecure (million)				Food gap (kcal per capita per day)				Food gap (thousand metric tons)			
	2022–24	2024	2025	2035	2022–24	2024	2025	2035	2022–24	2024	2025	2035	2022–24	2024	2025	2035
Vietnam	7.3	5.1	2.2	0.1	7.6	5.3	2.3	0.1	250	236	210	158	306	201	79	3
Former Soviet Union region	**9.6**	**6.0**	**2.0**	**0.2**	**11.2**	**7.1**	**2.3**	**0.3**	**218**	**207**	**176**	**167**	**337**	**202**	**57**	**6**
Armenia	1.4	0.6	0.1	0.0	0.0	0.0	0.0	0.0	161	148	127	97	1	0	0	0
Azerbaijan	8.1	2.6	2.2	0.4	0.9	0.3	0.2	0.0	189	159	156	129	24	6	5	1
Georgia	4.1	3.4	0.6	0.0	0.2	0.2	0.0	0.0	199	195	159	127	6	5	1	0
Kyrgyzstan	8.9	5.6	1.4	0.1	0.5	0.3	0.1	0.0	226	209	175	140	18	10	2	0
Moldova	6.9	9.2	1.5	0.0	0.2	0.3	0.1	0.0	184	194	149	107	7	9	1	0
Tajikistan	15.9	15.5	4.4	1.2	1.6	1.5	0.5	0.1	291	289	231	196	64	56	14	4
Turkmenistan	9.8	3.5	2.1	0.3	0.6	0.2	0.1	0.0	222	188	176	144	17	5	3	0
Ukraine	9.3	7.5	1.3	0.0	3.4	3.2	0.5	0.0	194	186	146	76	91	82	9	0
Uzbekistan	10.3	3.4	2.4	0.1	3.7	1.1	0.9	0.1	215	180	171	131	109	27	21	1
Latin America and the Caribbean region	**18.3**	**16.6**	**10.5**	**6.0**	**32.5**	**29.9**	**18.9**	**11.6**	**397**	**394**	**462**	**553**	**1,776**	**1,633**	**1,209**	**896**
Caribbean subregion	32.5	31.6	31.2	28.2	8.2	8.0	8.0	7.8	722	706	751	707	831	802	843	779
Dominican Republic	3.1	3.2	0.6	0.0	0.3	0.4	0.1	0.0	185	186	154	126	10	10	2	0
Haiti	65.9	64.1	66.1	59.0	7.7	7.4	7.9	7.8	759	745	760	708	816	785	840	778
Jamaica	6.8	7.5	2.0	0.3	0.2	0.2	0.1	0.0	200	203	168	137	5	6	1	0
Central America subregion	23.1	20.7	11.7	5.6	9.4	8.5	4.9	2.6	336	325	289	261	391	342	174	85
El Salvador	12.7	15.1	4.7	0.9	0.8	1.0	0.3	0.1	251	261	211	173	25	32	8	1
Guatemala	27.8	22.9	15.5	6.6	5.0	4.2	2.9	1.4	348	329	299	254	209	163	103	43
Honduras	20.8	16.6	9.1	3.2	2.0	1.6	0.9	0.3	321	303	268	227	74	58	28	9

Country	Food insecure (percent)				Population insecure (million)				Food gap (kcal per capita per day)				Food gap (thousand metric tons)			
	2022–24	2024	2025	2035	2022–24	2024	2025	2035	2022–24	2024	2025	2035	2022–24	2024	2025	2035
Nicaragua	23.8	26.1	11.9	10.3	1.6	1.7	0.8	0.8	362	371	307	298	82	89	35	32
South America subregion	13.3	11.8	5.3	1.0	14.9	13.4	6.1	1.2	257	251	220	180	554	490	192	32
Bolivia	32.0	24.7	18.0	5.0	3.9	3.0	2.2	0.7	299	275	253	197	162	114	78	18
Colombia	6.8	5.5	1.9	0.2	3.4	2.8	1.0	0.1	232	224	194	154	115	93	27	2
Ecuador	17.7	12.6	6.6	1.2	3.2	2.2	1.2	0.3	233	215	191	153	107	69	34	5
Peru	13.7	16.4	5.0	0.7	4.5	5.4	1.6	0.2	256	266	213	168	171	214	52	6
Middle East and North Africa region	**19.7**	**14.9**	**11.7**	**3.1**	**69.5**	**52.8**	**42.2**	**12.4**	**364**	**324**	**318**	**255**	**3,302**	**2,240**	**1,742**	**410**
Middle East subregion	28.6	16.7	15.4	3.6	42.1	25.0	23.3	6.0	395	325	330	263	2,190	1,087	1,013	207
Iran	13.0	4.4	2.7	0.3	11.4	3.9	2.4	0.3	261	216	202	160	394	112	64	5
Lebanon	13.3	16.7	9.0	3.1	0.7	0.9	0.5	0.2	254	267	235	199	22	34	14	4
Syria	39.8	38.9	38.5	18.7	9.1	9.3	9.4	5.3	349	346	345	275	418	440	425	191
Yemen	66.4	33.8	33.9	0.7	21.0	10.9	11.1	0.3	493	350	350	181	1,356	501	509	7
North Africa subregion	13.4	13.6	9.0	2.7	27.4	27.8	18.9	6.4	317	324	303	246	1,112	1,152	729	202
Algeria	5.3	4.8	1.9	0.7	2.5	2.2	0.9	0.4	245	241	213	191	82	72	26	9
Egypt	19.6	20.9	14.9	4.5	21.4	23.2	16.8	5.7	334	340	313	253	907	1,000	669	184
Morocco	7.8	5.0	2.6	0.8	2.9	1.9	1.0	0.3	269	250	228	200	105	63	30	9
Tunisia	4.7	4.6	1.4	0.2	0.6	0.6	0.2	0.0	233	233	200	167	17	17	5	1
Sub-Saharan Africa region	**36.7**	**29.3**	**26.9**	**16.7**	**430.2**	**351.4**	**332.3**	**262.8**	**441**	**410**	**414**	**380**	**24,604**	**18,544**	**17,866**	**13,066**
Central Africa subregion	38.7	34.2	28.6	20.4	71.7	65.4	56.3	53.2	524	497	474	429	4,925	4,169	3,485	2,993
Burundi	79.9	76.0	72.3	44.5	10.5	10.3	10.1	8.1	586	554	528	391	781	737	677	404

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Country	Food insecure (percent)				Population insecure (million)				Food gap (kcal per capita per day)				Food gap (thousand metric tons)			
	2022–24	2024	2025	2035	2022–24	2024	2025	2035	2022–24	2024	2025	2035	2022–24	2024	2025	2035
Cameroon	16.1	15.6	13.0	7.7	4.8	4.8	4.1	3.2	283	281	270	244	187	184	152	106
Central African Republic	50.2	66.2	30.3	14.5	2.8	4.1	1.7	1.0	427	506	348	285	145	249	74	34
Chad	52.9	48.1	36.8	26.6	9.8	9.2	7.2	7.0	525	501	448	402	659	589	415	359
Congo	49.2	40.2	15.6	4.8	2.9	2.3	1.0	0.4	371	338	254	204	158	113	36	11
Democratic Republic of the Congo	36.5	29.9	26.9	20.9	40.9	34.6	32.1	33.6	554	518	502	468	2,995	2,297	2,130	2,080
East Africa subregion	42.7	34.7	27.2	10.8	176.7	147.1	118.0	58.4	439	405	383	338	9,801	7,341	5,725	2,543
Djibouti	31.2	13.6	18.0	12.0	0.3	0.1	0.2	0.1	362	290	309	282	16	6	8	6
Eritrea	62.6	33.2	32.6	17.3	3.9	2.1	2.1	1.3	443	326	324	270	216	85	84	43
Ethiopia	27.0	28.9	15.5	2.1	31.2	34.5	18.9	3.2	315	322	272	196	1,121	1,274	585	71
Kenya	48.5	40.8	20.7	2.8	27.7	23.8	12.3	2.0	382	353	282	196	1,373	1,084	450	51
Madagascar	62.6	65.0	48.8	22.3	18.0	19.2	14.7	8.1	472	485	408	307	1,137	1,236	802	333
Rwanda	30.8	22.2	13.8	2.2	4.1	3.0	1.9	0.4	370	336	299	223	188	124	70	10
Somalia	81.7	69.5	67.1	47.7	15.0	13.0	13.2	12.6	701	598	582	476	1,455	891	1,059	825
South Sudan	53.1	39.7	48.1	21.9	6.1	4.5	5.9	3.2	453	395	430	325	320	204	292	122
Sudan	52.1	13.0	33.6	17.6	24.9	6.6	16.7	10.5	448	287	371	308	1,330	227	739	386
Tanzania	39.4	30.4	25.6	10.5	25.8	20.1	17.8	9.4	480	438	416	338	1,571	1,096	936	402
Uganda	40.9	41.0	28.5	11.3	19.5	20.2	14.5	7.7	434	434	381	303	1,073	1,115	699	294
Southern Africa subregion	47.7	38.1	41.9	32.4	63.3	51.2	58.6	58.3	499	442	536	472	4,035	2,905	4,049	3,555
Angola	38.3	41.1	36.8	34.9	13.8	15.3	14.1	18.6	390	401	383	376	697	801	702	907
Eswatini	22.4	20.6	9.6	2.8	0.3	0.2	0.1	0.0	278	272	229	189	9	8	3	1
Lesotho	87.3	48.3	75.1	49.5	1.9	1.0	1.7	1.2	644	394	532	399	153	49	111	59
Malawi	27.6	15.7	16.6	3.4	5.9	3.6	3.7	0.9	358	308	312	236	245	129	134	25

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Country	Food insecure (percent)				Population insecure (million)				Food gap (kcal per capita per day)				Food gap (thousand metric tons)			
	2022–24	2024	2025	2035	2022–24	2024	2025	2035	2022–24	2024	2025	2035	2022–24	2024	2025	2035
Mozambique	51.9	38.3	37.6	26.2	16.9	12.8	12.9	11.6	484	423	420	372	1,073	701	709	565
Namibia	18.1	16.8	6.3	1.1	0.5	0.5	0.2	0.0	244	239	197	157	17	15	5	1
Zambia	56.7	37.6	45.9	32.6	11.5	7.4	9.8	9.1	593	492	534	468	824	439	636	515
Zimbabwe	75.2	66.8	92.5	81.5	12.6	10.5	16.2	16.9	611	553	822	667	1,017	764	1,750	1,482
West Africa subregion	26.8	19.5	21.4	15.6	118.4	87.7	99.3	92.8	362	337	344	322	5,843	4,128	4,606	3,976
Benin	18.0	13.0	8.0	1.9	2.6	1.9	1.2	0.4	309	287	262	214	115	79	46	12
Burkina Faso	33.7	24.2	18.6	5.9	7.6	5.6	4.4	1.7	473	427	399	320	477	312	234	73
Cabo Verde	29.5	5.7	7.5	1.0	0.2	0.0	0.0	0.0	313	217	227	174	8	1	1	0
Cote d'Ivoire	20.2	15.1	11.2	2.8	5.9	4.5	3.4	1.1	399	372	350	283	348	256	176	44
Gambia	27.5	24.0	8.6	1.6	0.7	0.6	0.2	0.0	316	304	241	190	54	60	13	2
Ghana	8.9	3.3	3.3	0.8	3.0	1.1	1.2	0.3	250	215	215	182	111	33	37	9
Guinea	16.5	14.9	10.2	3.0	2.2	2.1	1.5	0.6	329	322	298	246	122	111	72	23
Guinea-Bissau	40.4	42.7	28.4	12.4	0.8	0.9	0.6	0.3	375	384	330	267	40	69	26	12
Liberia	55.7	58.5	44.0	23.1	3.0	3.3	2.4	1.6	599	616	535	431	285	328	210	109
Mali	18.7	12.5	8.9	3.3	4.0	2.8	2.0	1.0	321	293	274	235	171	115	73	30
Mauritania	12.8	7.8	5.8	1.4	0.5	0.3	0.3	0.1	286	261	248	206	24	14	10	2
Niger	28.4	21.9	12.7	3.4	7.2	5.8	3.5	1.3	410	381	335	270	386	295	152	47
Nigeria	31.4	22.1	30.2	26.1	72.5	52.3	73.3	81.2	341	307	337	322	3,227	2,090	3,219	3,404
Senegal	12.4	10.1	3.0	0.2	2.3	1.8	0.6	0.1	241	232	191	148	81	60	16	1
Sierra Leone	44.1	41.6	39.9	26.3	3.9	3.1	3.7	3.0	493	481	472	410	317	240	288	201
Togo	22.3	17.2	9.9	1.7	1.9	1.6	0.9	0.2	308	288	256	198	80	64	31	5

Kcal = Kilocalories.

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Source: USDA, Economic Research Service based on results from the Global Food Assessment model.

Appendix C: Macroeconomic Measures for Global Food Assessment (GFA) Countries, 2025–35

	Population (million)		Population annual growth rate (percent)	GDP (million 2017 U.S. dollars)			GDP: Annual growth rate (percent)			Per capita GDP (2017 U.S. dollars)			Per capita GDP: Annual growth rate (percent)		
Country	2025	2035	2025–35	2022–24	2025	2035	2022–24	2024–25	2025–35	2022–24	2025	2035	2022–24	2024–25	2025–35
GFA total	**4,460.9**	**5,084.1**	**1.3**	**10,740,449**	**11,814,428**	**18,984,270**	**4.7**	**5.2**	**4.9**	**2,476**	**2,648**	**3,734**	**3.2**	**3.7**	**3.5**
Asia region	**2,564.4**	**2,787.1**	**0.8**	**6,616,135**	**7,406,302**	**12,597,599**	**5.9**	**5.8**	**5.5**	**2,627**	**2,888**	**4,520**	**4.9**	**4.9**	**4.6**
East Asia subregion	29.9	30.3	0.1	30,527	32,835	43,393	4.2	3.5	2.8	1,029	1,099	1,434	3.8	3.2	2.7
Democratic People's Republic of Korea	26.6	26.8	0.1	16,376	17,072	19,617	2.8	1.5	1.4	620	642	733	2.5	1.2	1.3
Mongolia	3.3	3.5	0.6	14,151	15,764	23,776	5.8	5.8	4.2	4,346	4,768	6,797	4.9	5.0	3.6
South Asia subregion	1,940.9	2,114.6	0.9	4,418,273	4,971,957	8,662,467	6.3	6.1	5.7	2,318	2,562	4,096	5.3	5.1	4.8
Afghanistan	41.0	50.0	2.0	14,224	14,468	17,973	-0.7	1.7	2.2	363	353	360	-2.9	-0.5	0.2
Bangladesh	170.2	183.2	0.7	420,158	472,907	846,491	5.9	6.3	6.0	2,513	2,779	4,622	5.0	5.4	5.2
India	1,419.3	1,522.8	0.7	3,450,999	3,920,581	6,939,434	7.2	6.3	5.9	2,465	2,762	4,557	6.4	5.6	5.1
Nepal	31.3	33.3	0.6	37,550	40,876	69,603	3.1	5.2	5.5	1,215	1,305	2,093	2.4	4.5	4.8
Pakistan	257.0	303.0	1.7	406,687	427,682	645,119	1.0	3.8	4.2	1,642	1,664	2,129	-1.0	2.0	2.5
Sri Lanka	22.1	22.4	0.2	88,654	95,443	143,847	1.0	5.4	4.2	4,054	4,328	6,424	0.5	5.1	4.0
Southeast Asia subregion	593.6	642.2	0.8	2,167,335	2,401,510	3,891,738	5.2	5.4	4.9	3,721	4,046	6,060	4.1	4.4	4.1
Burma	57.9	61.4	0.6	62,903	65,545	88,859	1.5	2.5	3.1	1,101	1,131	1,448	0.8	1.8	2.5
Cambodia	17.2	18.7	0.8	28,347	31,699	57,306	5.5	6.0	6.1	1,678	1,840	3,072	4.5	5.0	5.3
Indonesia	283.6	301.6	0.6	1,261,564	1,392,578	2,197,296	5.1	5.1	4.7	4,513	4,911	7,285	4.3	4.4	4.0

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	Population (million)		Population annual growth rate (percent)	GDP (million 2017 U.S. dollars)			GDP: Annual growth rate (percent)			Per capita GDP (2017 U.S. dollars)			Per capita GDP: Annual growth rate (percent)		
Country	**2025**	**2035**	**2025–35**	**2022–24**	**2025**	**2035**	**2022–24**	**2024–25**	**2025–35**	**2022–24**	**2025**	**2035**	**2022–24**	**2024–25**	**2025–35**
Laos	8.1	8.9	1.0	20,719	22,296	34,394	3.6	4.0	4.4	2,638	2,769	3,850	2.2	2.7	3.4
Philippines	120.1	137.2	1.3	403,349	451,096	711,200	5.7	5.9	4.7	3,463	3,755	5,185	4.0	4.3	3.3
Vietnam	106.7	114.4	0.7	390,454	438,296	802,683	5.5	6.3	6.2	3,725	4,108	7,014	4.5	5.4	5.5
Former Soviet Union region	**118.3**	**124.3**	**0.5**	**348,022**	**385,136**	**581,251**	**5.4**	**5.1**	**4.2**	**2,988**	**3,256**	**4,676**	**5.9**	**3.7**	**3.7**
Armenia	3.0	2.8	-0.5	15,798	18,283	29,757	8.4	7.1	5.0	5,287	6,169	10,576	8.8	7.6	5.5
Azerbaijan	10.7	11.1	0.4	45,780	48,039	58,123	2.0	2.6	1.9	4,317	4,492	5,238	1.6	2.2	1.5
Georgia	4.9	4.7	-0.3	22,397	25,191	34,614	6.9	5.6	3.2	4,546	5,165	7,306	7.5	6.1	3.5
Kyrgyzstan	6.2	6.6	0.6	9,504	10,710	14,881	6.5	5.9	3.3	1,552	1,722	2,243	5.6	5.1	2.7
Moldova	3.6	3.4	-0.6	10,311	10,938	15,913	1.6	4.2	3.8	2,861	3,056	4,719	1.5	4.8	4.4
Tajikistan	10.6	12.7	1.8	11,632	13,153	18,062	7.9	5.1	3.2	1,140	1,242	1,427	5.9	3.1	1.4
Turkmenistan	5.8	6.2	0.7	57,730	64,709	87,967	6.3	5.5	3.1	10,142	11,165	14,150	5.3	4.6	2.4
Ukraine	36.5	35.6	-0.2	89,190	98,359	175,735	4.8	5.5	6.0	2,460	2,693	4,932	9.1	3.0	6.2
Uzbekistan	37.0	41.2	1.1	85,681	95,753	146,199	6.2	5.3	4.3	2,382	2,587	3,553	4.5	3.9	3.2
Latin America and the Caribbean region	**180.7**	**194.0**	**0.7**	**1,050,581**	**1,100,881**	**1,539,956**	**1.6**	**3.1**	**3.4**	**5,907**	**6,092**	**7,938**	**0.7**	**2.3**	**2.7**
Caribbean subregion	25.6	27.8	0.8	131,073	139,272	197,826	2.6	3.4	3.6	5,208	5,435	7,121	1.7	2.4	2.7
Dominican Republic	10.9	11.6	0.7	101,684	109,510	161,259	3.3	4.0	3.9	9,469	10,047	13,847	2.5	3.2	3.3
Haiti	11.9	13.3	1.1	13,976	13,705	17,327	-1.6	-0.5	2.4	1,204	1,152	1,306	-2.8	-1.7	1.3
Jamaica	2.8	2.9	0.1	15,413	16,057	19,240	2.1	2.1	1.8	5,463	5,681	6,706	2.0	2.0	1.7

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	Population (million)		Population annual growth rate (percent)	GDP (million 2017 U.S. dollars)			GDP: Annual growth rate (percent)			Per capita GDP (2017 U.S. dollars)			Per capita GDP: Annual growth rate (percent)		
Country	2025	2035	2025–35	2022–24	2025	2035	2022–24	2024–25	2025–35	2022–24	2025	2035	2022–24	2024–25	2025–35
Central America subregion	41.6	45.9	1.0	159,170	169,394	223,022	3.5	3.0	2.8	3,920	4,075	4,861	2.2	1.8	1.8
El Salvador	6.6	6.7	0.1	28,609	29,965	37,903	2.8	2.2	2.4	4,334	4,508	5,662	2.3	1.9	2.3
Guatemala	18.5	21.1	1.3	88,118	93,865	125,709	3.5	3.0	3.0	4,900	5,067	5,959	1.9	1.5	1.6
Honduras	9.7	10.8	1.1	27,269	29,315	38,610	3.7	3.7	2.8	2,898	3,037	3,571	2.4	2.4	1.6
Nicaragua	6.7	7.3	0.8	15,175	16,248	20,801	4.1	3.1	2.5	2,294	2,411	2,859	3.1	2.1	1.7
South America subregion	113.5	120.3	0.6	760,338	792,214	1,119,109	1.0	3.1	3.5	6,784	6,978	9,300	0.3	2.4	2.9
Bolivia	12.4	13.5	0.8	41,009	42,879	56,714	2.2	2.4	2.8	3,365	3,448	4,200	1.1	1.4	2.0
Colombia	49.8	51.5	0.3	367,160	383,442	551,929	0.9	3.4	3.7	7,443	7,693	10,711	0.4	2.9	3.4
Ecuador	18.5	20.2	0.9	113,552	117,162	152,272	1.3	2.2	2.7	6,263	6,340	7,555	0.3	1.3	1.8
Peru	32.8	35.1	0.7	238,618	248,731	358,194	0.7	3.0	3.7	7,356	7,591	10,192	0.2	2.5	3.0
Middle East and North Africa region	**361.9**	**402.0**	**1.1**	**1,188,679**	**1,272,264**	**1,730,953**	**3.4**	**3.6**	**3.1**	**3,376**	**3,515**	**4,306**	**1.9**	**2.4**	**2.0**
Middle East subregion	151.5	167.1	1.0	555,304	594,615	797,761	3.7	3.5	3.0	3,771	3,925	4,774	1.9	2.3	2.0
Iran	89.1	95.2	0.7	487,019	525,114	706,331	4.2	3.7	3.0	5,560	5,891	7,422	3.3	2.9	2.3
Lebanon	5.4	5.7	0.5	35,225	36,021	49,131	-0.6	3.0	3.2	6,608	6,675	8,691	-1.2	2.4	2.7
Syria	24.3	28.1	1.5	17,882	18,872	26,465	2.6	2.7	3.4	785	778	942	-2.4	1.0	1.9
Yemen	32.7	38.2	1.6	15,178	14,608	15,834	-2.8	-1.4	0.8	481	447	414	-4.6	-3.1	-0.7
North Africa subregion	210.4	234.9	1.1	633,374	677,649	933,192	3.3	3.7	3.3	3,092	3,220	3,973	1.8	2.4	2.1
Algeria	47.7	54.2	1.3	184,505	195,392	239,639	3.6	2.5	2.1	3,986	4,093	4,420	1.9	1.0	0.8

	Population (million)		Population annual growth rate (percent)	GDP (million 2017 U.S. dollars)			GDP: Annual growth rate (percent)			Per capita GDP (2017 U.S. dollars)			Per capita GDP: Annual growth rate (percent)		
Country	**2025**	**2035**	**2025–35**	**2022–24**	**2025**	**2035**	**2022–24**	**2024–25**	**2025–35**	**2022–24**	**2025**	**2035**	**2022–24**	**2024–25**	**2025–35**
Egypt	112.9	127.7	1.2	273,429	295,749	439,373	3.3	4.9	4.0	2,496	2,620	3,440	1.7	3.4	2.8
Morocco	37.7	40.4	0.7	131,850	141,196	189,982	3.3	3.6	3.0	3,557	3,745	4,702	2.4	2.8	2.3
Tunisia	12.1	12.6	0.4	43,591	45,313	64,198	1.4	2.2	3.5	3,640	3,740	5,114	0.8	1.6	3.2
Sub-Saharan Africa region	**1,235.5**	**1,576.7**	**2.5**	**1,537,032**	**1,649,845**	**2,534,510**	**2.4**	**4.8**	**4.4**	**1,310**	**1,335**	**1,608**	**-0.2**	**2.1**	**1.9**
Central Africa subregion	196.5	261.0	2.9	124,135	135,634	205,586	4.9	4.5	4.2	670	690	788	1.8	1.5	1.3
Burundi	14.0	18.3	2.7	3,711	4,054	6,801	3.4	5.4	5.3	282	290	372	0.0	2.5	2.5
Cameroon	31.8	41.1	2.6	43,287	47,033	68,435	4.1	4.4	3.8	1,436	1,478	1,666	1.3	1.6	1.2
Central African Republic	5.8	6.8	1.6	2,288	2,349	3,031	1.0	1.5	2.6	412	408	448	-0.7	-0.2	0.9
Chad	19.7	26.2	2.9	10,991	11,743	16,197	3.9	3.0	3.3	593	597	619	0.7	0.0	0.4
Congo	6.2	7.8	2.3	11,537	12,370	18,031	3.0	3.7	3.8	1,937	1,981	2,307	0.6	1.3	1.5
Democratic Republic of the Congo	119.0	160.9	3.1	52,323	58,086	93,092	6.5	5.1	4.8	467	488	579	3.2	1.9	1.7
East Africa subregion	434.0	541.9	2.2	477,507	507,451	874,853	-0.1	6.3	5.6	1,155	1,169	1,614	-2.5	3.7	3.3
Djibouti	1.0	1.2	1.6	3,578	4,012	4,993	6.1	6.0	2.2	3,663	3,958	4,197	4.1	4.0	0.6
Eritrea	6.4	7.4	1.4	2,368	2,504	2,935	2.9	2.7	1.6	377	390	399	1.9	1.5	0.2
Ethiopia	121.4	150.8	2.2	111,748	126,467	249,245	6.3	6.6	7.0	965	1,042	1,653	3.8	4.1	4.7
Kenya	59.4	71.8	1.9	108,067	119,804	203,906	5.3	5.4	5.5	1,893	2,015	2,838	3.1	3.3	3.5
Madagascar	30.1	36.4	1.9	15,080	16,447	25,836	4.2	4.6	4.6	523	547	709	2.0	2.4	2.6
Rwanda	13.8	16.1	1.5	13,748	15,749	29,727	7.6	6.9	6.6	1,025	1,137	1,850	5.8	5.2	5.0

	Population (million)		Population annual growth rate (percent)	GDP (million 2017 U.S. dollars)			GDP: Annual growth rate (percent)			Per capita GDP (2017 U.S. dollars)			Per capita GDP: Annual growth rate (percent)		
Country	2025	2035	2025–35	2022–24	2025	2035	2022–24	2024–25	2025–35	2022–24	2025	2035	2022–24	2024–25	2025–35
Somalia	19.7	26.3	3.0	9,366	10,059	15,060	3.2	3.9	4.1	509	512	573	-0.1	0.5	1.1
South Sudan	12.2	14.8	2.0	3,439	3,407	5,214	-12.3	20.0	4.3	301	280	352	-15.8	17.6	2.3
Sudan	49.8	59.7	1.8	98,237	83,416	106,269	-19.2	7.0	2.5	2,060	1,676	1,779	-20.8	4.9	0.6
Tanzania	69.3	89.5	2.6	69,866	78,466	146,735	5.7	6.2	6.5	1,064	1,132	1,639	2.8	3.4	3.8
Uganda	50.9	68.0	2.9	42,011	47,120	84,933	5.4	6.5	6.1	880	926	1,250	2.0	3.2	3.0
Southern Africa subregion	140.0	180.0	2.5	221,436	235,473	330,436	2.7	3.5	3.4	1,666	1,682	1,836	0.0	0.9	0.9
Angola	38.5	53.3	3.3	119,232	125,415	172,185	1.6	3.3	3.2	3,314	3,261	3,232	-1.8	-0.1	-0.1
Eswatini	1.1	1.2	0.6	5,286	5,646	7,241	4.0	3.0	2.5	4,678	4,927	5,954	3.3	2.3	1.9
Lesotho	2.2	2.4	0.8	2,163	2,244	2,966	1.4	2.2	2.8	978	1,000	1,224	0.6	1.4	2.0
Malawi	22.2	27.0	2.0	10,503	11,176	16,894	2.3	3.8	4.2	494	502	625	0.0	1.5	2.2
Mozambique	34.2	44.2	2.6	15,471	16,777	25,305	4.5	4.0	4.2	476	490	572	1.9	1.4	1.6
Namibia	2.9	3.4	1.6	13,493	14,524	20,487	4.1	3.5	3.5	4,892	5,091	6,107	2.4	1.7	1.8
Zambia	21.4	27.8	2.7	31,142	33,706	49,892	4.4	4.2	4.0	1,540	1,576	1,794	1.5	1.3	1.3
Zimbabwe	17.5	20.7	1.7	24,144	25,986	35,466	4.3	3.5	3.2	1,435	1,487	1,713	2.2	1.6	1.4
West Africa subregion	465.0	593.7	2.5	713,954	771,287	1,123,635	3.6	4.3	3.8	1,616	1,659	1,893	1.0	1.7	1.3
Benin	15.2	20.8	3.2	18,171	20,415	34,618	6.2	6.0	5.4	1,277	1,344	1,666	2.7	2.6	2.2
Burkina Faso	23.6	29.1	2.1	18,314	20,233	32,863	4.2	5.7	5.0	814	858	1,130	1.6	3.2	2.8
Cabo Verde	0.6	0.7	1.0	2,315	2,531	4,071	4.8	4.5	4.9	3,833	4,095	5,982	3.6	3.3	3.9
Cote d'Ivoire	30.6	37.2	2.0	71,602	81,038	145,675	6.5	6.4	6.0	2,438	2,646	3,914	4.2	4.2	4.0
Gambia	2.6	3.1	1.9	2,012	2,253	3,659	5.7	5.9	5.0	815	874	1,180	3.4	3.7	3.0
Ghana	35.3	43.1	2.0	77,182	82,931	133,040	3.0	4.3	4.8	2, 280	2,347	3,088	0.8	2.1	2.8

	Population (million)		Population annual growth rate (percent)	GDP (million 2017 U.S. dollars)			GDP: Annual growth rate (percent)			Per capita GDP (2017 U.S. dollars)			Per capita GDP: Annual growth rate (percent)		
Country	**2025**	**2035**	**2025–35**	**2022–24**	**2025**	**2035**	**2022–24**	**2024–25**	**2025–35**	**2022–24**	**2025**	**2035**	**2022–24**	**2024–25**	**2025–35**
Guinea	14.4	18.8	2.7	14,120	15,789	26,521	6.3	5.6	5.3	1,037	1,098	1,410	3.4	2.7	2.5
Guinea-Bissau	2.2	2.8	2.6	1,722	1,890	2,989	4.5	5.0	4.7	828	864	1,061	1.9	2.4	2.1
Liberia	5.6	6.8	2.1	3,047	3,321	4,793	4.6	4.3	3.7	573	597	701	2.1	2.0	1.6
Mali	22.6	29.7	2.7	18,644	20,593	33,733	5.1	5.2	5.1	872	910	1,137	2.1	2.2	2.3
Mauritania	4.4	5.2	1.8	8,141	8,902	13,316	3.8	5.2	4.1	1,917	2,018	2,537	1.8	3.2	2.3
Niger	27.3	39.0	3.6	15,646	17,912	31,198	6.2	6.7	5.7	615	656	801	2.4	2.9	2.0
Nigeria	242.8	310.6	2.5	422,446	446,582	579,878	2.6	3.2	2.6	1,830	1,839	1,867	0.0	0.6	0.1
Senegal	19.3	23.9	2.2	27,618	32,530	53,739	6.7	9.5	5.1	1,501	1,684	2,245	4.1	6.9	2.9
Sierra Leone	9.3	11.4	2.0	4,466	4,880	7,334	4.0	4.9	4.2	501	523	643	1.5	2.6	2.1
Togo	9.1	11.4	2.3	8,507	9,488	16,208	5.9	5.6	5.5	977	1,039	1,416	3.3	3.1	3.1

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GDP = Gross Domestic Product. USD = U.S. dollars.

Source: USDA, Economic Research Service, International Macroeconomic Data Set as well as data from the Oxford Economics and IHS Markit.

Appendix D: Exchange Rate and Price Measures for the Global Food Assessment (GFA) Countries, 2025–35

	Consumer price index: Annual growth rate (percent)			Real exchange rate: Annual growth rate (percent)			Real domestic price of major grain: Annual growth rate (percent)		Real domestic price of food groups: 2024–25 growth rate (percent)*			
Country	**2022–24**	**2024–25**	**2025–35**	**2022–24**	**2024–25**	**2025–35**	**2022–24**	**2025–35**	**MG**	**OG**	**RT**	**OF**
GFA total									**-12**	**-11**	**-8**	**-11**
Asia region									**-9**	**-6**	**-6**	**-7**
East Asia subregion									-5	-5	-3	-9
Democratic People's Republic of Korea	7.4	4.0	3.4	-0.9	-5.3	-1.9	13.9	-2.5	-18	-13	-12	-13
Mongolia	9.1	7.5	6.1	1.5	0.4	-0.6	-6.8	-0.7	-4	-5	-3	-9
South Asia subregion									-10	-6	-5	-7
Afghanistan	-1.1	3.8	6.2	-2.8	3.8	1.9	-10.7	0.1	-4	-11	-4	-7
Bangladesh	9.1	6.5	5.2	3.3	-1.1	0.3	15.3	-0.6	-13	-7	-8	-8
India	5.4	4.9	4.7	1.5	-2.0	-1.2	13.8	-1.6	-14	-8	-5	-6
Nepal	6.9	5.2	4.9	-0.7	-1.9	-1.3	10.3	-1.4	-12	-6	-4	-6
Pakistan	21.9	6.8	6.0	0.0	1.6	-1.9	-12.6	-2.1	-7	-8	-6	-8
Sri Lanka	10.4	4.2	5.7	-8.7	0.5	-0.5	4.1	-0.9	-9	-3	-7	-6
Southeast Asia subregion									-9	-6	-6	-7
Burma	16.0	7.8	7.3	-2.7	4.6	2.8	7.6	0.8	-7	-6	-4	-2
Cambodia	2.4	2.7	3.1	1.6	-0.4	-0.7	12.8	-1.2	-12	-9	-7	-8
Indonesia	3.6	3.4	4.0	3.7	-4.7	-2.0	8.2	-1.1	-9	-5	-11	-11
Laos	25.5	7.0	3.5	1.6	5.2	1.6	7.0	0.2	-5	-5	-3	-3
Philippines	4.7	3.3	2.7	0.8	-3.1	-1.4	8.1	-1.0	-10	-8	-8	-11
Vietnam	3.4	3.3	3.3	2.5	1.5	-0.1	15.0	-0.9	-12	-8	-6	-8
Former Soviet Union region									**-7**	**-5**	**-3**	**-6**
Armenia	1.1	3.9	3.7	-1.9	-0.4	-1.2	-6.0	-0.6	-3	-11	-2	-10
Azerbaijan	5.1	6.5	3.7	-1.4	-3.3	-0.4	-5.6	-0.4	-4	-13	-3	-11
Georgia	2.0	3.6	3.0	-1.9	-0.1	-0.7	-3.9	-0.3	-2	-10	-2	-10
Kyrgyzstan	8.0	5.4	4.6	-1.5	-1.3	0.2	-8.2	-0.5	-5	-10	-3	-9
Moldova	9.2	4.8	4.9	-8.8	-2.0	-2.3	-10.7	-1.0	-5	-6	-2	-6
Tajikistan	3.9	4.9	4.3	-0.4	1.1	0.6	-8.8	-0.4	-5	-12	-3	-9
Turkmenistan	7.3	8.9	6.3	-2.1	7.4	0.9	-9.6	-0.3	-2	-8	-3	-4
Ukraine	10.0	9.7	7.0	4.5	-4.6	-6.3	-18.0	-18.2	-23	-14	-10	-10

	Consumer price index: Annual growth rate (percent)			Real exchange rate: Annual growth rate (percent)			Real domestic price of major grain: Annual growth rate (percent)		Real domestic price of food groups: 2024–25 growth rate (percent)*			
Country	**2022–24**	**2024–25**	**2025–35**	**2022–24**	**2024–25**	**2025–35**	**2022–24**	**2025–35**	**MG**	**OG**	**RT**	**OF**
Uzbekistan	9.2	6.9	5.8	2.0	1.7	-0.1	-12.1	-1.2	-8	-5	-4	-6
Latin America and the Caribbean region									**-1**	**-3**	**-6**	**-5**
Caribbean subregion									0	0	-8	-2
Dominican Republic	4.2	4.8	4.3	2.8	1.8	1.1	6.5	0.0	-6	-7	-7	-8
Haiti	33.9	16.7	5.6	-16.4	-8.4	-1.8	0.0	0.0	0	0	-10	-1
Jamaica	6.2	6.4	5.5	-1.9	-1.9	-2.1	-15.5	-2.6	-11	-12	-7	-6
Central America subregion									-6	-6	-7	-8
El Salvador	2.7	2.1	2.3	0.0	0.0	0.0	-5.7	-0.3	-2	-4	-8	-9
Guatemala	4.9	3.1	3.1	-0.9	0.5	-0.3	-7.6	-0.4	-3	-7	-7	-7
Honduras	5.4	3.8	5.1	-0.7	0.9	0.3	-9.0	-0.4	-3	-7	-8	-7
Nicaragua	6.8	4.2	4.1	-1.9	-1.7	5.9	4.8	1.7	-6	-6	-7	-8
South America subregion									-3	-5	-5	-6
Bolivia	3.0	3.5	4.4	0.8	4.5	-0.3	-4.3	-0.3	-2	-4	-1	-5
Colombia	9.2	4.1	3.0	-7.5	2.5	-1.2	-10.7	-0.6	-3	-5	-5	-6
Ecuador	2.5	3.1	3.0	0.0	0.0	0.0	4.5	-0.3	-5	-5	-3	-8
Peru	4.5	2.0	1.9	-2.0	1.8	0.1	7.5	-0.5	-8	-3	-4	-9
Middle East and North Africa region									**-24**	**-16**	**-24**	**-18**
Middle East subregion									-24	-16	-24	-18
Iran	37.8	17.9	12.3	2.7	-32.9	-7.0	-10.1	-3.3	-25	-16	-25	-22
Lebanon	133.7	50.0	10.6	-23.9	-30.5	-4.3	-11.5	-0.6	-7	-24	-10	-2
Syria	85.7	20.0	7.5	35.8	6.2	-1.2	3.1	-0.7	-2	-5	-2	-3
Yemen	25.4	21.0	13.2	2.5	-6.5	-3.2	-15.4	-4.8	-18	-17	-6	-24
North Africa subregion									-3	-5	-2	-8
Algeria	6.8	4.8	3.9	-5.2	0.0	-0.3	-6.9	-0.4	-3	-4	-1	-8
Egypt	30.8	17.5	6.1	22.2	0.2	-3.4	0.4	-1.7	-5	-9	-4	-10
Morocco	4.3	3.5	2.2	-1.1	-0.4	1.1	-12.4	-0.3	-8	-8	-8	-9
Tunisia	8.4	7.2	3.5	-2.7	1.0	0.4	-16.0	-0.9	-9	-7	-2	-7

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	Consumer price index: Annual growth rate (percent)			Real exchange rate: Annual growth rate (percent)			Real domestic price of major grain: Annual growth rate (percent)		Real domestic price of food groups: 2024–25 growth rate (percent)*			
Country	**2022–24**	**2024–25**	**2025–35**	**2022–24**	**2024–25**	**2025–35**	**2022–24**	**2025–35**	**MG**	**OG**	**RT**	**OF**
Sub-Saharan Africa region									**-7**	**-4**	**-1**	**-5**
Central Africa subregion									-5	-8	0	-2
Burundi	19.6	10.4	6.5	3.1	-6.5	-2.9	-5.2	-0.7	-4	-7	-3	-3
Cameroon	7.1	5.5	3.0	-4.0	-4.7	-1.5	4.4	-0.8	-8	-4	0	0
Central African Republic	3.7	4.5	3.2	-3.2	-5.4	-1.4	-11.3	-0.8	-6	-8	-6	-9
Chad	8.7	3.5	3.0	-6.9	-4.0	-1.1	-13.4	-1.0	-9	-8	-7	-8
Congo	4.1	3.2	3.0	-2.7	-3.7	-1.1	-12.9	-1.4	-9	-12	-6	-6
Democratic Republic of the Congo	30.6	16.4	6.0	-6.5	-10.0	5.0	-7.8	0.6	-4	-8	-3	-8
East Africa subregion									-10	-4	-6	-7
Djibouti	2.3	3.2	2.2	1.3	-1.1	0.1	-5.9	-0.4	-4	-9	-9	-5
Eritrea	4.2	5.0	4.2	-0.5	-1.9	-0.5	-13.2	-1.4	-9	-13	-7	-9
Ethiopia	27.9	22.4	16.7	-13.3	1.0	0.0	-7.5	-0.2	-2	-2	-6	-2
Kenya	6.4	4.3	5.0	5.3	-2.9	0.3	-6.8	-0.4	-4	-10	-7	-12
Madagascar	8.8	7.3	5.8	1.3	0.2	-0.2	15.9	-1.1	-14	-9	-6	-8
Rwanda	11.8	4.0	4.6	4.3	3.1	3.1	-7.7	0.4	-3	-7	-5	-7
Somalia	5.4	3.9	3.1	-1.9	-0.7	0.1	8.9	-0.6	-11	-3	-7	-8
South Sudan	60.0	70.0	6.5	28.0	-2.4	-0.6	0.6	-0.4	-4	-3	-2	-10
Sudan	246.4	100.0	19.8	-41.5	-23.9	-9.7	-25.0	-1.1	-8	-5	-16	-12
Tanzania	3.6	3.8	4.0	6.4	5.8	2.5	-9.1	0.4	-3	-5	-3	-6
Uganda	4.6	4.3	4.0	2.6	2.3	1.9	-9.4	0.1	-4	-7	-2	-4
Southern Africa subregion									-4	-7	-2	-7
Angola	19.0	8.1	7.8	17.7	-2.2	-1.4	-1.1	-0.3	-2	-4	-2	-2
Eswatini	4.8	4.4	4.1	5.9	-0.9	0.5	-4.3	-0.2	-2	-5	-9	-11
Lesotho	6.3	4.4	4.9	4.5	-0.8	-0.3	-7.7	-0.6	-4	-5	-9	-11
Malawi	26.9	13.2	9.0	10.3	-6.1	-2.6	-6.4	-1.2	-7	-9	-3	-13
Mozambique	5.8	6.1	5.0	-2.0	-1.0	1.4	-10.2	-0.1	-4	-7	-8	-5
Namibia	5.3	4.7	4.7	5.5	-1.2	-0.1	-2.7	-0.3	-2	-3	-9	-11
Zambia	11.9	10.1	5.6	16.1	-0.8	0.6	-6.3	-0.6	-8	-12	-8	-11
Zimbabwe	224.4	10.7	3.9	184.0	29.7	0.5	57.5	-0.9	11	9	12	10

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	Consumer price index: Annual growth rate (percent)			Real exchange rate: Annual growth rate (percent)			Real domestic price of major grain: Annual growth rate (percent)		Real domestic price of food groups: 2024–25 growth rate (percent)*			
Country	**2022–24**	**2024–25**	**2025–35**	**2022–24**	**2024–25**	**2025–35**	**2022–24**	**2025–35**	**MG**	**OG**	**RT**	**OF**
West Africa subregion									-5	-5	-1	-4
Benin	2.9	2.9	2.5	-1.6	-3.4	-0.6	6.0	-0.6	-8	-6	-3	-9
Burkina Faso	1.5	2.0	1.8	1.2	-1.4	-0.4	-16.4	-1.3	-9	-9	-7	-9
Cabo Verde	2.5	2.0	1.7	0.2	-1.4	-0.3	4.5	-0.4	-5	-2	-2	-9
Cote d'Ivoire	3.6	2.4	2.0	-0.8	-1.8	-0.6	6.9	-0.7	-9	-10	-3	-8
Gambia	16.4	10.5	4.1	-1.7	-0.1	0.9	6.2	-0.1	-8	-4	-5	-4
Ghana	30.2	15.5	8.2	0.2	-3.8	1.9	6.7	0.3	-9	-9	-7	-9
Guinea	7.6	7.0	6.6	0.4	0.5	0.1	7.4	-0.5	-8	-4	-1	-4
Guinea-Bissau	4.5	2.2	1.9	-3.0	-2.8	-0.1	6.9	-0.6	-10	-3	-8	-5
Liberia	8.6	10.0	9.2	7.5	-4.5	-1.8	19.2	-2.1	-16	-12	-9	-10
Mali	1.5	1.2	-0.3	1.2	-0.6	1.7	9.4	0.3	-10	-8	-7	-8
Mauritania	3.7	4.0	3.9	-0.6	0.9	0.2	-6.1	-0.4	-3	-6	-7	-7
Niger	5.3	5.9	4.1	-3.9	-6.2	-2.2	-9.8	-1.0	-8	-9	-11	-10
Nigeria	27.0	21.3	9.7	48.0	-1.6	1.9	13.6	0.2	-6	-6	-3	-10
Senegal	4.0	2.6	2.2	-1.2	-2.0	-0.8	9.1	-1.0	-11	-7	-4	-9
Sierra Leone	34.3	17.5	9.5	0.4	-3.1	-1.3	0.0	0.0	0	-12	0	0
Togo	3.9	2.0	2.0	-2.6	-2.5	-0.2	-10.8	-0.5	-5	-9	-3	-8

MG = Major grain. OG = Other grains. RT = Roots and tubers. OF = Other foods.
*Real domestic price in grain equivalents is expressed per kilocalories is used to generate price indices for the four food groups (i.e., major grains, other grains, other food, and roots and tubers) used in the GFA demand model.
Source: USDA, Economic Research Service, International Macroeconomic Data Set.