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Global Trade Shocks and Geopolitical Uncertainty:  
Implications for Food Security in Emerging Economies  
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# Food Security in the MENA region: Challenges and Opportunities

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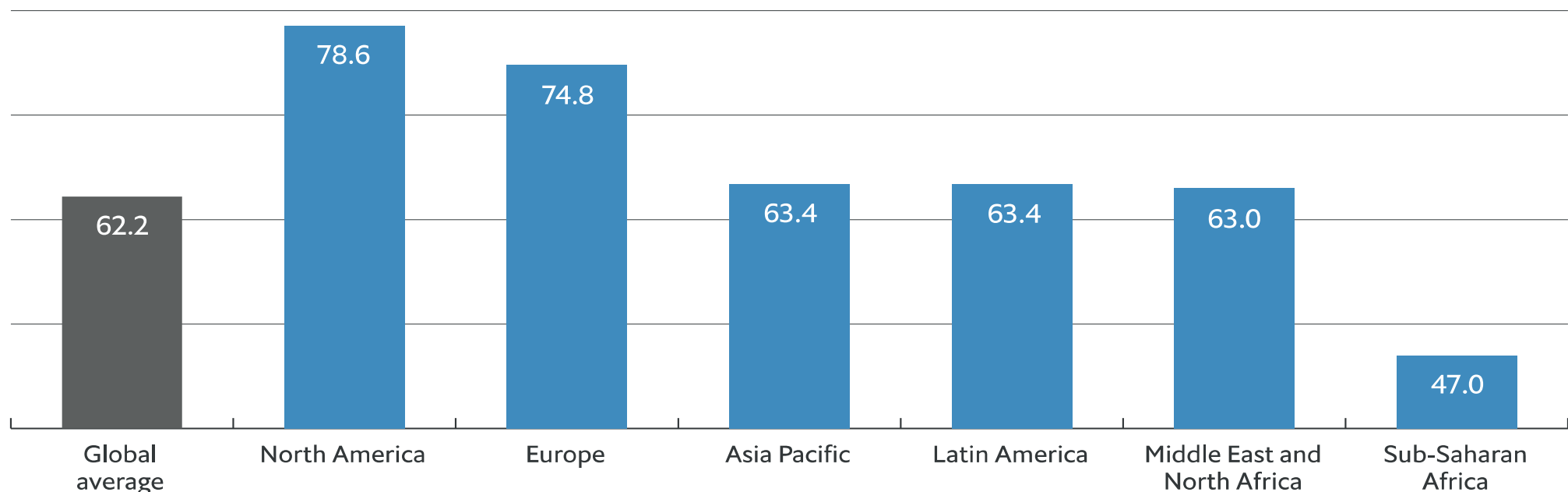
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# Food Security in the MENA region

## Overall GFSI 2022 scores, by region

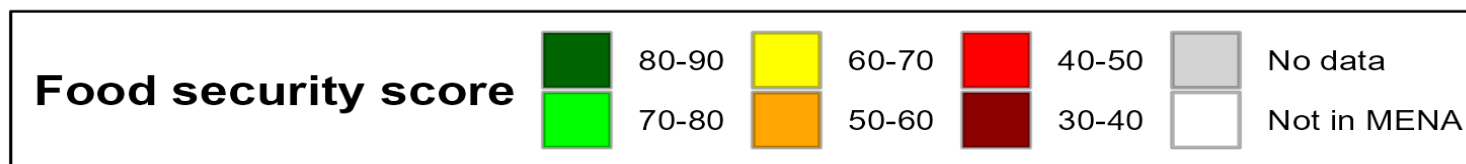
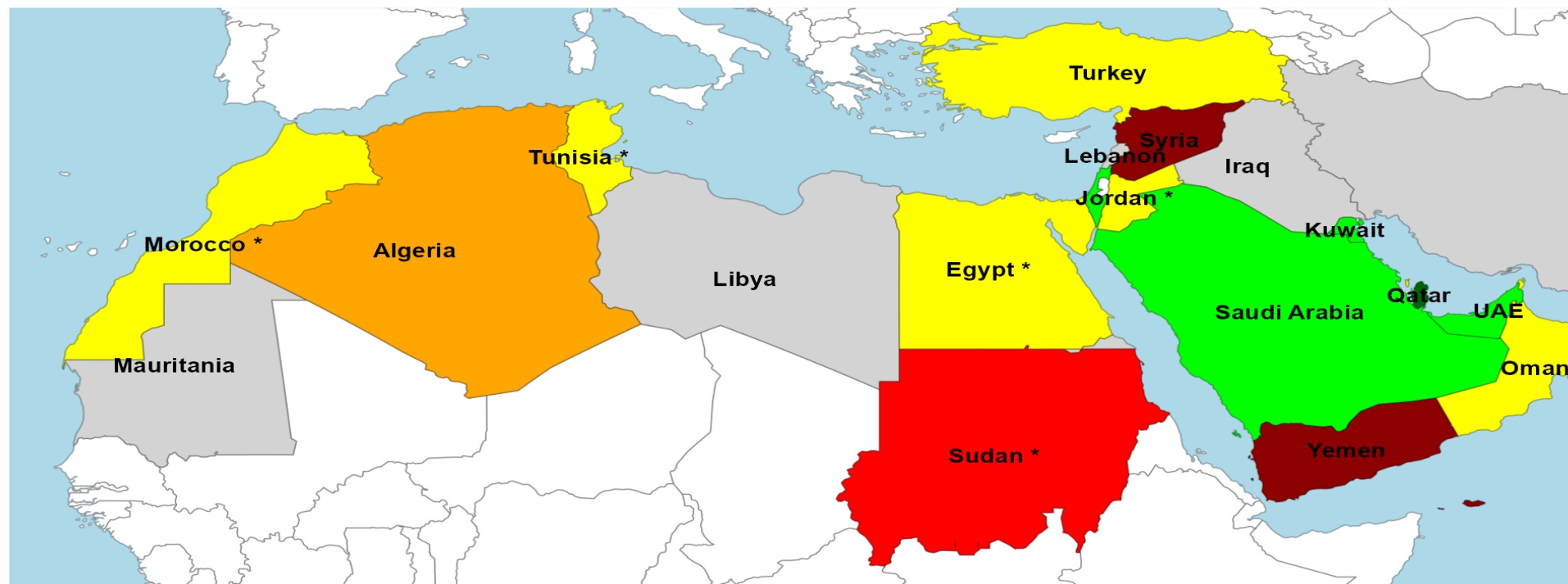
*In 2022, besides Sub-Saharan Africa, all regions performed above the global average, with North America leading the index.*



Source: Global Food Security Index 2022.

Source: Global Food Security Index- The Economist Impact (2022)

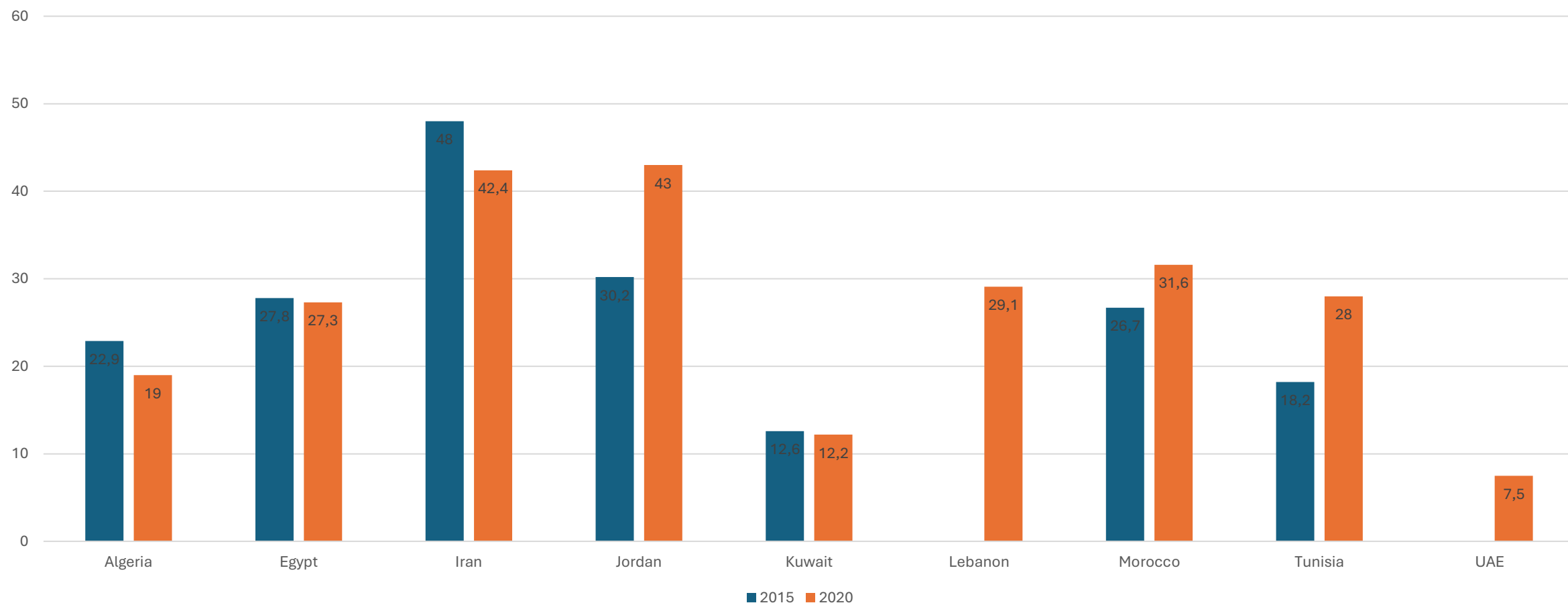
# Food Security in the MENA region



# Food Security in the MENA region

- Around **15.8%** of the population face hunger in 2025.
- Prevalence of undernourishment varies between conflict (**26.4%**) and non-conflicts areas (**6.6%**)
- In 2022, **9.5%** of children under five years old were overweight (*double the global average*). With the highest rates observed in Libya, Tunisia, and Egypt.

# Prevalence of moderate or severe food insecurity in the population (%) between 2015-2020



Source: Ramadan and Ibrahim (2022)

# Triple burden of malnutrition

## Rising trends in child and adult obesity

-Obesity prevalence among adults: 32.1% in 2022 (*more than double the global rate*)

-Upper-middle-income countries (as Egypt, Qatar, and Kuwait) had the highest rates at 33.8%

## Wasting

-The prevalence of wasting in children exceeded the global average.

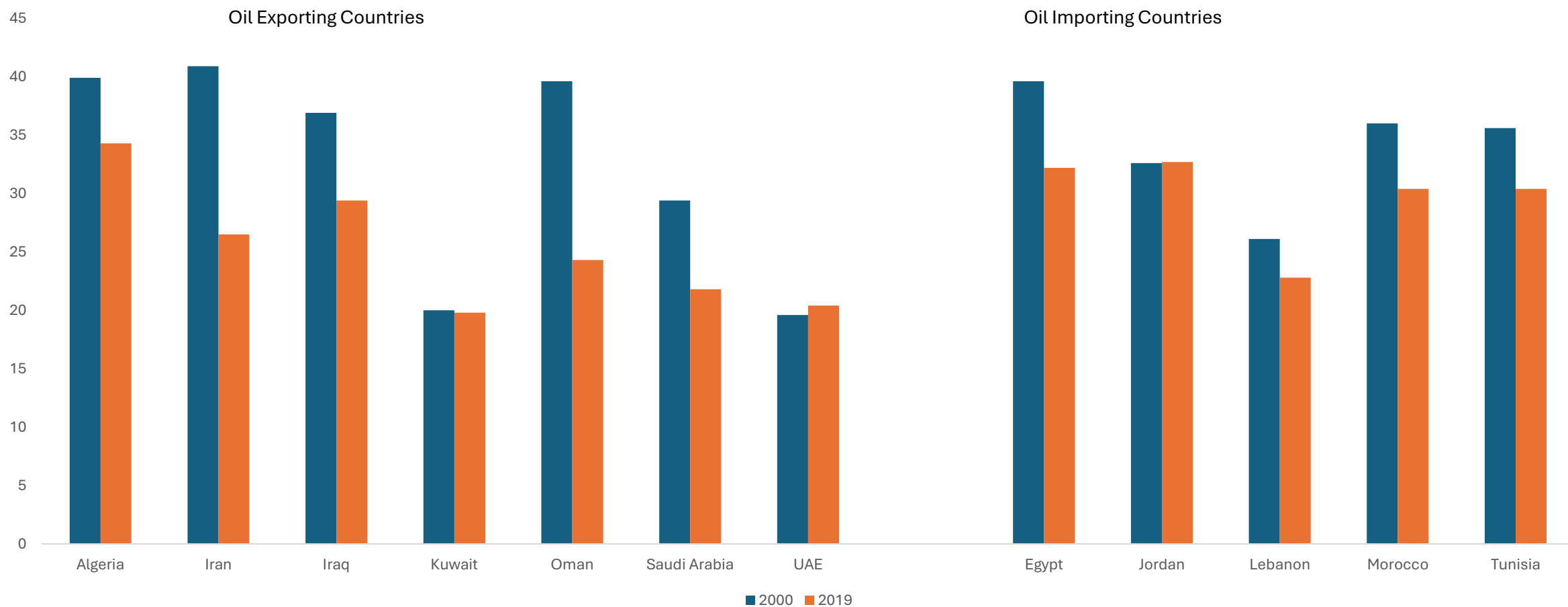
- LICs experience the highest rates at 14.6%.

## Nutrient deficiencies

- The prevalence of anemia among women aged 15 to 49 stood at 33.2% in 2019, (*higher than the global average*)

-In LICs, the rate is 43.9%.

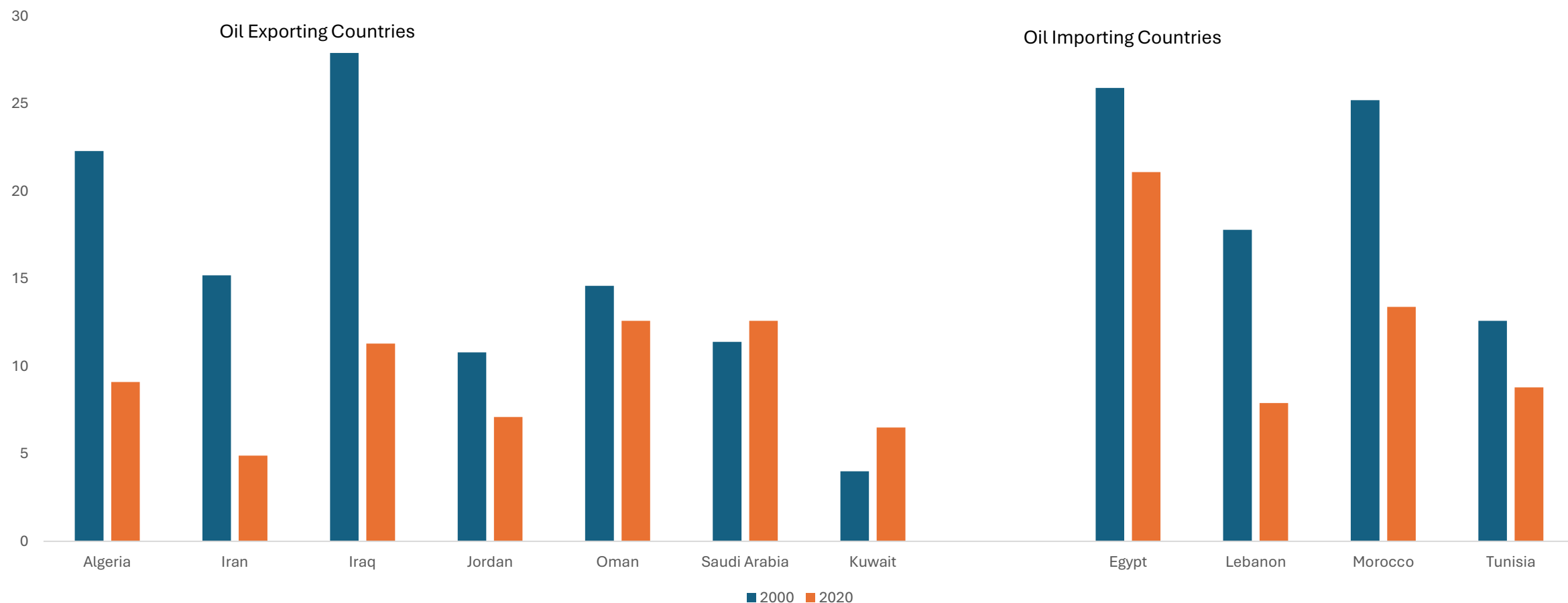
# Prevalence of Anemia among children (2000-2019)



Source: Ramadan and Ibrahim (2022)

# Prevalence of stunting among children under five years old

Stunting rates declined from **28.0%** in 2000 to **19.9%** in 2022, but remain a challenge!



Source: Ramadan and Ibrahim (2022)



The region is **off Track** to meet the food security and nutrition targets of the Sustainable Development Goals (SDGs) by 2030



# Challenges

Limited  
Agriculture  
Production

Water Scarcity  
and Climate  
Pressure

Population  
growth and urban  
expansion and

Waste and  
Leakages

Dependence on  
Imports

Conflicts: Gaza,  
Sudan, Syria,  
Yemen.

Economic factors

# Food Production- Agriculture Output

According to the food policy monitoring in the Near East and North Africa region, 3rd Quarter 2025:

- Tunisia reported above-average cereal harvests due to improved rainfall
- Morocco and Algeria saw sharp declines due to drought and heat.
- Lebanon's cereal production was 50 percent below average due to conflict and drought,
- Syrian's wheat harvest dropped by 60 percent
- Egypt's irrigated systems provided stability, but long-term risks from rising temperatures persist.
- For 2025/26, North Africa's wheat production is expected to grow 4.2%, while the Near East faces a 10.4 % decline.



# Climate Pressure

- The region faces several climate challenges: droughts and heat waves, flooding, erratic rainfall and landslides.
- The region is water scarce: MENA region holds only 1-2% of the world's renewable freshwater (*sustains over 6% of the global population*)



# Climate Pressure

- By 2050, estimates predict that climate change will decrease precipitation in the MENA region, leading to a reduction of internal renewable water by **4%** (Frederic and Ninar, 2022), decreasing per capita water availability, and jeopardizing the food system.
- Rising sea levels is expected to reduce the available land for agriculture production.
  - In **Egypt**, the delta region is expected to lose a minimum of **30%** of its food production, by 2030 (Ramadan and Castet, 2024).
- By 2050, crop yields is expected to decline.
  - In Egypt, total food production is estimated to decrease by **6%** , wheat production by **15%**, maize production by **22%** , and pulses production by **24%** (Ramadan and Castet, 2024)

# Climate Pressure

Extreme weather events, threaten all dimensions of food security. **NOT ONLY PRODUCTION!**

- Ibrahim and Ramadan (2022) show that climate change has a significant adverse effect on food access.
- Increasing temperature and GHG emission increase the number of undernourished in the region.
- This is explained through food availability and poverty channels.

# Urban expansion and population growth

- By 2050, half of the countries in the region are projected to experience population increases of at least 50% from their 2015 levels (UNICEF, 2019).
- Urban expansion and population growth putting pressure on demand for water, food and energy
- Leakages: outdated irrigation infrastructure and stockage utilities, consumption behavior.
- In **Egypt, by 2050**: wheat consumption will reach 40 million tons, while local wheat production will only be 14.5 million tons

This gap between will grow, and dependence on imports is projected to be around 53% (Ramadan and Castet, 2023)

# Dependence on Imports

- The region is net food importer, importing more than 50% of its cereal consumption.
- **Egypt:**
  - The leading wheat importer (with a self-sufficiency rate of 43%).
  - The seventh importer of maize (with a self-sufficiency rate of 46%)
  - For other products as rice, potatoes, fresh vegetables, eggs and milk, the self-sufficiency rates exceed 90% (Ramadan and Castet, 2023).
- The region is vulnerable to global market shocks:
  - Supply chain disruptions during COVID-19 (availability and affordability had been affected, Castet and Ramadan, 2023)
  - War in Ukraine (85% of the wheat imported by Egypt comes from these two countries )



# Economic Factors

- Poverty and Income inequality
- **Inflation:**
  - over **60%** in some countries and triple-digit in Lebanon and Syria, Palestine and Libya
  - challenges food security in the region making it difficult for families to afford essential food items like bread, rice, and vegetables.
- **Stunting** is highly correlated with chronic poverty and other factors related to the households' characteristics (Abu ismail et al, 2020; Elayouty et al, 2022).
- Vulnerable groups include poor households, smallholder farmers and women.

# Governments' Responses:

responding to immediate shocks, while building more sustainable and climate-resilient food systems

## Short-term policy fixes:

- Expanding procurement from local farmers
- Food Subsidies (*In Egypt: the system covers around 88% of the Egyptian population, increases during periods of crisis*).
- Diversify sources of imports
- Expanding and improving storage capacities

## Long term policies:

- Advancing renewable energy and climate finance initiatives
- Major irrigation rehabilitation projects
- Investment in renewable energy and seed research

# More needs to be done: Opportunities

Social protections: ensure that healthy diets are affordable and accessible to all

**BUT Limited Fiscal Space!**

Address inequalities: supporting smallholder farmers and female farmers with access to **finance**, climate-smart technologies and extension services.

Investment in inclusive and resilient infrastructure and increase in R&D in agriculture

Transform and strengthen agrifood systems to generate higher value-added products and create more non-farm economic opportunities

Increasing the competitiveness of products for which the region has comparative advantages in the international markets

Promote regional cooperation and trade between the countries of the region and countries in the African continent

# Thank you!

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