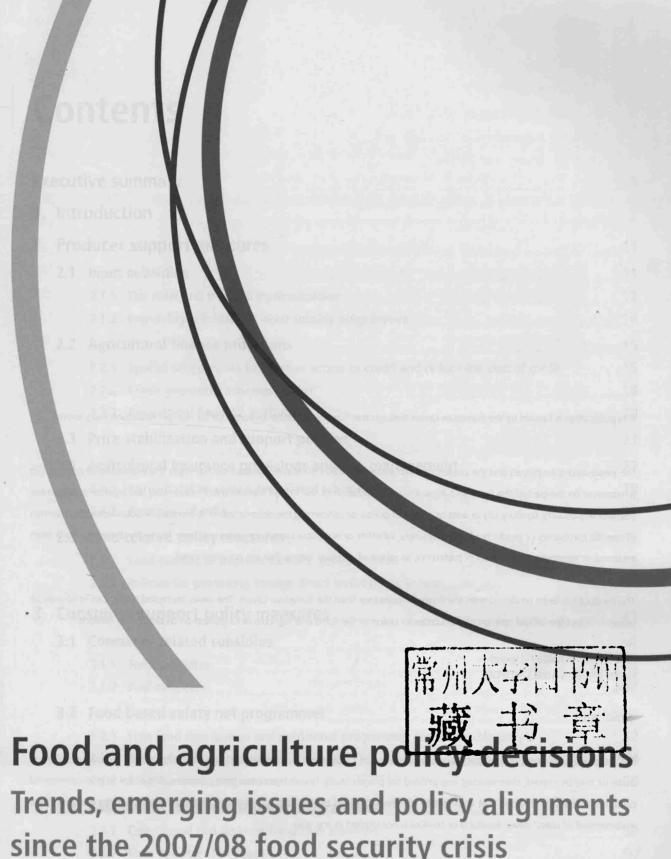


Food and agriculture policy decisions

Trends, emerging issues and policy alignments since the 2007/08 food security crisis





since the 2007/08 food security crisis

Authors: Mulat Demeke, Adriano Spinelli, Stefania Croce, Valentina Pernechele, Eugenia Stefanelli, Areej Jafari, Guendalina Pangrazio, Giovanni Carrasco, Barthelemy Lanos, Camille Roux

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Acronyms and abbreviations

AFTA ASEAN Free Trade Area

ADB Agricultural Development Bank

AMIS Agricultural Market Information System

APTERR ASEAN Plus three Emergency Rice Reserve

ASEAN Association of Southeast Asian Nations

AU African Union

CAADP Comprehensive African Agriculture Development Program

CAN Andean Community
CCT Conditional Cash Transfer
CES Commodity Exchange System
CET Common External Tariff

CFA Financial Cooperation in Central Africa
CFS Committee on World Food Security

CGS Credit Guarantee Scheme

CILSS Permanent Interstates Committee for Drought Control in the Sahel

CT Cash Transfer
CU Customs Union

DRC Democratic Republic of Congo
DRM Disaster Risk Management
EAC East African Community

EAERR East Asia Emergency Rice Reserve

ECOWAS Economic Community of West African States

ETLS ECOWAS Trade Liberalization Scheme

FAO Food and Agriculture Organization of the United Nations

FAPDA Food and Agriculture Policy Decision Analysis

FDI Foreign Direct Investment

FTA Free Trade Area

GDP Gross Domestic Product
GFD General Food Distribution

GIEWS Global Information and Early Warning System

GMP Guaranteed Minimum Price
HLPE High Level Panel of Experts

ICT Information and Communication Technologies

IEA International Energy Agency

IFAD International Fund for Agricultural Development

IFPRI International Food Policy Research Institute

IMF International Monetary Fund
ISFP Initiative on Soaring Food Prices
LAC Latin America and the Caribbean
LAO PDR Lao People's Democratic Republic

LDCs Least Developed Countries

MAFAP Monitoring African Food and Agricultural Policies Project

MCCA Central American Common Market
MENA Middle East and North Africa
MERCOSUR Southern Common Market
MFI Microfinance Institution
MIS Market Information System

NAFTA North American Free Trade Agreement

Minimum Support Price

NCT Non-contributory cash transfer

NEPAD New Partnership for Africa's Development Program

NGO Non-governmental organization

OECD Organization for Economic Co-operation and Development

OMS Open Market Sales

PFDS Public Distribution System (Bangladesh)

PMV Plan Maroc Vert

MSP

RAIP Regional Agricultural Investment Plan

REC Regional Economic Community

SAARC South Asian Association for Regional Cooperation
SADC Southern African Development Community

SAFTA South Asian Free Trade Agreement

SCT Social Cash Transfer
SFB SAARC Food Bank

SICA Central American Integration System

SSA Sub-Saharan Africa
TRQ Tariff Rate Quota

UNCTAD United Nations Conference on Trade and Development

VAT Value-added tax

WAEMU West African Economic and Monetary Union

WB The World Bank

WFP World Food Programme
WRS Warehouse Receipt System
WTO World Trade Organization

Contents

EX	ecu	ive summary	1		
1.	Inti	Ay coherence, integration and harmonization at national and oduction	7		
		ducer support measures			
	2.1	Input subsidies			
		2.1.1 The scale and trend of input subsidies	12		
		2.1.2 Improving efficiency of input subsidy programmes			
	2.2	Agricultural finance provisions	15		
		2.2.1 Special programmes to improve access to credit and reduce the cost of credit			
		2.2.2 Credit guarantee schemes (CGSs)	18		
		2.2.3 Agricultural financial institutions	20		
	2.3	Price stabilization and support policies	23		
	2.4	Agricultural insurance provisions and risk management	27		
		2.4.1 Agricultural insurance and related schemes	28		
		2.4.2 Premium subsidies	31		
	2.5	Land-related policy measures	33		
		2.5.1 Land policies to improve farmers' access to land	33		
		2.5.2 Policies for governing foreign direct investments in land	36		
3.	Consumer support policy measures				
	3.1	Consumer related subsidies	41		
		3.1.1 Food subsidies			
		3.1.2 Fuel subsidies	47		
	3.2	Food-based safety net programmes	50		
			52		
		3.2.2 School feeding programmes	54		
		3.2.3 Food-for-work programmes	56		
	3.3	Cash-based consumer support programmes	57		
		3.3.1 Conditional and unconditional cash transfers	58		
		3.3.2 Cash vouchers (for food)	60		
		3.3.3 Cash-for-work programmes	61		
4.	Trac	de and market development policy measures	65		
		Trade policies	65		
			ACTA CTAL		

		4.1.1	Import policies	66
			Export policies	
	4.2	Mark	et development policies	73
			Foodgrain stock management	
			Market institutions	
5.	Policy coherence, integration and harmonization at national and regilevels			
	5.1		nal level policy coherence and integration 1113690 11000112 12300	85 86
	3.1		Policy coherence and integration to achieve food self-sufficiency things have	
			Integrated policies to stimulate exports of key commodities	
	5.2		onization of country level policy decisions with Regional Economic	
	3.4		nunities	91
			Trade-related policy harmonization	
			Policy convergence on regional grain stocks	
Bil	olio	graph	y	109
			ntry examples of fuel policy changes and decisions over the period	
			itry examples of fuel policy changes and decisions over the period	119
			Transfers Typology	120
		3: Exar d mea	nples of policy coherence and integration to achieve self-sufficiency (o	only 121
			nples of policy packages to boost agriculture exports (only selected	123
			Consumer related subsidies	
r	IG	ur	es	
		-		
Figu	re 1.	Proportio	n of countries with input subsidy programmes (2007-2012)	12
Figu	re 2.	Proportio	n of countries implementing measures to enhance credit provision to smallholders (2007-12)	16
Figu	re 3.	Proportio	n of countries implementing price stabilization and support schemes (2007-2012)	24
			n of countries with public measures in agricultural insurance and disaster risk management	
			n of countries implementing land policies (2007-2012)	
			n of countries implementing direct food subsidies (including price control measures) (2007-2012)	
			n of countries implementing fuel subsidies (2007-2012)	
			n of countries implementing food distribution (2007-12)	
			n of countries implementing cash-based transfer programmes (2007-12)	
			n of countries adopting export bans (2007-2012)	
Figu	re 11.	proportio	n of countries with National food reserve system in place (2007-2012)	14

Tables

		10
Table 1.	Input subsidy schemes for selected countries (2007-2012)	
Table 2.	Major credit instruments adopted in selected countries over the reference period (2007-12)	17
Table 3.	Examples of countries with public, partially public and non-governmental credit guarantee schemes (CGSs)	20
Table 4.	Countries with financial institutions serving agriculture	22
Table 5.	Examples of countries with price support measures for staple commodities	25
Table 6.	Agriculture insurance schemes and disaster risk management (2007-2012)	30
Table 7.	Examples of countries with land-related policy measures (2007-2012)	35
Table 8.	VAT exemptions/reductions on basic food items (2007-2012)	46
Table 9.	Food-based safety net programmes implemented in selected countries (2007-2012)	52
Table 10.	Cash transfer programmes recently introduced and expanded or retained in selected countries (2007-2012)	60
Table 11.	Cash transfer typology in selected countries	62
Table 12.	Changes in import tariff policies (2007-2012)	69
Table 13.	Country level trade policy alignment vs. REC on selected staples (2007-2012)	96
Ro	Xes	
DU	ACS ACTION IN THE PROPERTY OF	
Box 1.	Family farming policies and credits within MERCOSUR	18
Box 2.	A pilot Agricultural Credit Guarantee Fund Scheme in four African countries	19
Box 3.	The Land Act, Argentina	
Box 4.	Nutritional programmes in LAC	54
Box 5.	Quotas and compensation system for maize and wheat in Argentina	72
Box 6.	Agricultural Commodity Exchange in South Africa	81
Box 7.	India ICT applications in market information and related services	
Box 8.	APTERR Operational Mechanism	

Executive summary

This report is based on extensive research, including document reviews and country level surveys, on policy decisions made by governments during the period 2007 to 2012. A broad range of food security and agricultural development policy decisions implemented in 71 developing countries of **Africa** (27), **Asia** (24) and **Latin America and the Caribbean**, **LAC**, (20) was reviewed. The countries covered represent 81, 90 and 98 percent of the total population in **Africa**, **Asia** and **LAC**, respectively. The review has focused on policy trends, common practices and emerging issues. Policies are increasingly designed to influence domestic food availability and access.

Concerns about food security have increasingly prompted measures to boost production and manage price volatility and other risks

Since the global food crisis of 2007/08 there has been a renewed focus on production support measures. Most countries have implemented policies and programmes designed to enhance support for domestic producers, especially small farmers.

Subsidizing inputs and improving access to credit have attracted increased policy attention

Subsidizing inputs and improving access to credit have gained widespread popularity in all the three regions during the reference period. Many countries have opted for large-scale national subsidy programmes to lower input costs, especially following the significant and rapid increases in the international price of fertilizers in 2008. However, the report also finds that there is a growing interest in improving the efficiency of subsidy programmes by switching the design from universal coverage to targeted households and/or staple grains. The high cost and insufficient supply of private sector credit resources have also been responsible for government interventions to guarantee the availability of credit at preferential interest rates in many countries. Market failures in the credit market are being addressed through special programmes, credit guarantee schemes and specialized banks in many countries.

The reduction of price, production and land tenure risks has gained widespread public support

A series of recent high price volatility events and production shocks has triggered a number of government interventions to stabilize prices and promote insurance as part of their production support measures. Several countries adopted price stabilization and support measures in 2007/08 to protect producers against price risks. These policy decisions were retained in 2009/10 and 2011/12 although the interventions were applied more consistently and systematically in **Asia** than in **Africa** or **LAC**. Both public and private agricultural insurance schemes were expanded to tackle production shocks including disaster risk management. State-owned insurance companies were often required to operate alongside private insurance companies and provide special services, such as reinsurance and insurance coverage, for catastrophic risks.

The period was marked by a considerable increase in global demand for farmland. As a consequence the proportion of countries adopting measures to improve access to land for smallholder farmers and increase security of land tenure witnessed a marked increase during the reference period. Legislative and administrative measures as well as broader land reform programmes are being applied to improve the security of tenure of smallholders in a number of countries. Concern about potential social and political conflicts associated with large-scale land acquisitions has also led to responses at the global level, including the Principles for Responsible Agricultural Investment (RAI) adopted by FAO, UNCTAD, IFAD and the World Bank and the Voluntary Guidelines on the Responsible Governance of Tenure of Land, Fisheries and Forests in the Context of National Food Security adopted by the UN Committee on World Food Security.

Since the 2007/08 global food crisis, governments have focused on improving the access and utilization of food to ensure food security

Consumer support policies to lessen the impact of the 2007-09 food, fuel and financial crisis on the poorest and most vulnerable groups were used by countries in all three regions (**Africa**, **Asia** and **LAC**). However, although the implementation of these policy measures between 2007 and 2012 followed different trends, approaches and practices, some common features and patterns have emerged.

Food and fuel subsidies remain popular despite ongoing attempts to reform

Food and fuel subsidy measures have remained popular with a number of countries seeking to rationalize their public spending by gradually moving from generalized universal subsidies toward more targeted interventions directed at vulnerable households. Although attempts to phase out subsidy regimes have often proved challenging, there is a growing recognition that universal price subsidies represent a burden for public finances, benefit better-off groups more than poor ones and distort the market.

Food and cash-based transfers have received a growing attention

Food-based transfer schemes have been widely utilized to protect vulnerable people from hunger and malnutrition. A growing number of countries in all three regions are shifting from short-term, ad-hoc food-based interventions, in most cases implemented in response to emergencies, towards mainstreaming and institutionalizing free food distributions, nutritional support initiatives and school feeding into their national social safety nets programmes. School feeding has gained popularity but there is a large discrepancy among the regions, with all selected **LAC** countries operating such programmes, compared to only 40 percent in **Africa** and 50 percent in **Asia**. Several countries have institutionalized long-term nutritional interventions to address hunger, especially among children and mothers. Nutritional programmes are more common in LAC and are often implemented as mother and child health care, delivery of food and micronutrients, nutritional extension and education. On the other hand, government-based food for work programmes have declined in popularity compared to nutrition or school feeding programmes.

Cash-based transfer schemes have emerged as a preferred policy instrument against poverty and food insecurity in LAC (mainly as conditional cash transfers) as well as **Africa** and **Asia** (mainly as unconditional transfers). Among the major attractions of cash transfer schemes are the greater choice they give to beneficiaries in how to use the additional income, the higher cost-effectiveness due to reduced administrative costs, lower transaction costs, and the greater impact on long-term education and poverty. The *Bolsa Familia* of **Brazil**, the best known of all conditional cash transfer schemes in the developing world, has the objective of reducing short-term poverty by direct cash transfers and fighting long-term poverty by increasing human capital among the poor through linking education and health services to cash transfers. A growing number of countries are also institutionalizing cash transfer as well as cash-for-work programmes.

Trade and market development policies are being applied to influence prices in favour of producers or consumers

Various trade and market development policy measures were used to mitigate the impact of high and volatile food prices on consumers, producers and other value chain operators throughout the reference period with differing degrees of intensity and policy mix. Some policies were adopted on an ad-hoc and short term basis while others were applied more consistently and with a longer term perspective.

More open import policies are being pursued often along with restrictive export policies

In the immediate aftermath of the 2007/08 food crisis a number of governments adopted more open or non-restrictive import policies but imposed export bans and restrictions to ensure the domestic availability of food staples at affordable prices. Import tariffs on staples were commonly reduced and/or suspended while

exports of important crops such as wheat, maize and rice were banned or restricted. Over the 2009/10 to 2011/12 period, however, an increasing number of countries removed export bans and modified import tariffs, with the goal of securing food for consumers (e.g. reducing tariffs) or protecting producers (e.g. increasing tariffs). The negative impact of export bans on producers' incentive was recognized and many countries replaced the bans with export taxes, minimum export prices and quotas. A few countries also reintroduced import tariffs to support domestic production.

Marketing development has received renewed public interest

A renewed public interest in foodgrain stocks (especially in **Asia** and **Africa**), warehouse receipt systems (WRSs), agricultural commodity exchanges and market information systems was observed as a longer term solution to manage price fluctuations, enhance farmers' incomes and promote market efficiency. Many of the countries reviewed increasingly promoted public-private partnership in grain marketing, particularly in stock management and market information systems. Measures to address regulatory and legislative challenges in the operation of WRSs and commodity exchanges have also attracted a growing attention. Many **African**, **Asian** and **LAC** countries have seen a rapid expansion of mobile phone networks and other ICT applications to provide pricing as well as matching (sellers with buyers) services (virtual trading floors).

Policy harmonization within Regional Economic Communities remains a major challenge as integrated policies are pursued to achieve food self-sufficiency at national level

Food-self-sufficiency policies are being pursued despite regional free trade agreements

A systematic promotion of mutually reinforcing actions and coordination to achieve food-security related goals at national or regional levels is generally seen as positive. At national level, goals such as food self-sufficiency have led to an integrated and coordinated approach. Since 2007/08, a few countries in **Asia**, **Africa** and **LAC** have shifted from a policy of food self-reliance (this includes food imports to achieve national food demands) to food self-sufficiency. To this end, a comprehensive programme, which entailed a package of subsidized technological inputs and services, price support, import tariffs to protect domestic producers, and increased public spending in agriculture, was launched during the reference period. Strategies aimed at national food self-sufficiency, however, could mean less dependence on trade with negative implications for regional food security and intra-regional food trade. High international prices, on the other hand, encouraged few countries to adopt integrated policy packages to stimulate the export of selected food commodities. A small number of countries (from all three regions) have recently launched export promotion

policies that include measures for facilitating trade (by easing export procedures) along with integrated programmes to boost production and enhance private sector participation. Such an export strategy is consistent with trade and food security policies of many RECs as most of them are dependent on food imports to feed the population and would benefit from being able to obtain adequate and reliable sources of food within the REC. Other member countries could also see this as a sign to pursue more open trade policies rather than follow a food self-sufficiency strategy.

National concerns about food availability and prices have led to regional policy misalignment

At the regional level, attempts have been made to harmonize trade and stock policies to achieve regional food security. However, export restrictions were widely implemented by members of most of the RECs covered in the study, whilst at the same time reducing or suspending import tariffs, particularly in 2007/08, causing policy misalignment with regional commitments. Food deficit countries restricted exports and facilitated imports with the objective of increasing domestic food supply and keeping prices lower for consumers. As a result, most RECs appear to have run into difficulties attaining collective region-wide food security because of divergent national interests, especially between food-deficit and food-surplus countries. In at least one particular case, that of the Central American Common Market (MCCA), trade policies seem to have been aligned with minimal trade restrictions on the selected staples thus boosting trade among the REC members and enhancing regional food security during the reference period.

The food price surge of 2007/08 has revamped policy debates on strategic stocks at global and regional levels and a few RECs in **Asia** and **Africa** have shown greater interest in harmonizing their policies to establish a regional stock during the study period. The Economic Community of West African States (ECOWAS), the Association of South-East Asian Nations (ASEAN) Plus Three Emergency Rice Reserve (APTERR) and the South Asian Association for Regional Cooperation (SAARC) Food Bank (SFB) are all trying to set up such mechanisms to create regional food reserves. However, it is unclear how countries can remain committed to regional reserves while simultaneously implementing policies and stepping up investment to establish or expand their own national stocks. It is still to be seen whether regional stocks could be a useful and effective tool for tackling future food emergencies, or whether national food stocks would be the most effective option for countries dealing with unexpected food shortages, or whether a combination of the two is a better option. Alternatively, RECs and national governments could agree to maintain a combination of regional and national stocks with the goal of benefiting from the merits of maintaining national as well as regional stocks.

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1. Introduction

The FAO Food and Agriculture Policy Decisions Analysis (FAPDA)¹ initiative, led by the Agricultural Development Economics Division (ESA)², produced this report in collaboration with the Regional Office for Latin America and the Caribbean (RLC), the Regional Office for Asia and the Pacific (RAP), the Regional Office for Africa (RAF) and the Global Information and Early Warning System (GIEWS). The FAPDA team comprises staff from FAO headquarters as well as from regional, sub-regional and country offices. With the aim of promoting evidence-based decision making, FAPDA seeks to enhance the collection and dissemination of information on policy decisions and to create a policy database as a public good. To achieve these goals, FAPDA provides a web-based tool which tracks national food and agriculture policy decisions from more than 80 countries³.

Policy monitoring is about gathering evidence on a policy while it is being implemented, enabling the findings to be used when deciding future courses of action. Because it is of paramount importance to FAO's mission of achieving food security and agricultural development, policy monitoring and analysis is now fully included in FAO's new Strategic Objectives (SOs), namely SO1 (Contribute to the eradication of hunger, food insecurity and malnutrition) and SO4 (Enable more inclusive and efficient agricultural and food systems at local, national and international levels).

Policies can be seen as a process; therefore, it is crucial to monitor them in order to provide evidence and create a space for policy dialogue, thereby shedding light on emerging issues. FAPDA's policy monitoring activities started in 2008 within the framework of the Initiative on Soaring Food Prices (ISFP)⁴ to track policy decisions as an immediate response to the food security crisis. The scope has subsequently been expanded to cover medium and long term food and agriculture policy decisions. During the food crisis (2007/08), information was collected mainly through periodic reports prepared by FAO country, sub-regional and regional offices on a weekly basis, as well as mission reports and web-based monitoring. The first output was the

¹ See FAPDA's website: http://www.fao.org/economic/fapda

² The FAPDA initiative started in 2008 under the former Policy Assistance and Support Service (TCSP).

³ Policy decisions discussed and analysed in this report have been registered and published in the FAPDA web-based tool and are available for consultation at: http://www.fao.org/economic/fapda/tool/Main.html

⁴ For more information, see the FAO ISFP website at: http://www.fao.org/isfp/about/en/

2009 publication: Country Responses to the Food Security Crisis: Nature and Preliminary Implications on the Policies Pursued.⁵

After the peak of the food crisis, attempts were made to expand the scope of policy monitoring activities. During this time, FAO country reports became less regular and the information less exhaustive. A combination of different modalities was thus adopted for collecting information on policy decisions, including:

- Web-based monitoring through governments' official websites and online reliable sources (mainly used for Latin America and the Caribbean and Asia regions);
- National consultants collecting information through purposely designed questionnaires (principally in Sub-Saharan Africa);
- National focal points nominated by governments in relevant ministries, or based in national policy institutes (few pilot countries in North and Sub-Saharan Africa as well as Asia).

This methodology was adopted for preparing the second global policy report, Food and Agriculture Policy Trends after the 2008 Food Security Crisis: Renewed Attention to Agricultural Development, covering the 2009/10 period⁶, as well as for the current third global report.

This report is based on extensive research, document reviews and country level surveys on policy decisions made by governments over three biennia (2007/08; 2009/10; 2011/12). A broad range of food and agriculture policy decisions implemented in 71 developing countries have been reviewed. Selected policy decisions were analysed following FAPDA's classification dividing policy decisions into three main categories: producer-oriented policies, consumer-oriented policies, as well as trade-oriented and macroeconomic policies. The policy decisions selected included those most debated and most frequently implemented since the 2008 food crisis. The analysis, where applicable, focused on the three major staple food commodities, rice, wheat and maize, due to their importance for food security, and volume of trade in the international market. The countries selected included: 27 countries in Africa (22 in Sub-Saharan Africa and 5 in North-Africa), 24 countries in Asia (14 in South and East Asia, 3 in Central Asia and 7 in Middle East) and 20 countries in Latin America and the Caribbean (10 in Central America and the Caribbean and 10 in South America), as shown below. Countries were selected considering: (i) the coverage in the two previous FAPDA reports; (ii) institutional settings or political conditions supporting the information collection process; and (iii) human resources and funding constraints. The countries reviewed represent 81, 90 and 98 percent of the total population in Africa, Asia and LAC respectively.

⁵ Demeke M., Pangrazio G., Maetz M. (2009), Country Responses to the Food Security Crisis: Nature and Preliminary Implications on the Policies Pursued, FAO, Rome, available at http://www.fao.org/fileadmin/user_upload/ISFP/pdf_for_site_Country_Response_to_the_Food_Security.pdf

⁶ See Food and agriculture policy trends after the 2008 food security crisis: renewed attention to agricultural development, (2011) at: http://www.fao.org/docs/up/easypol/932/policy-trends_125en.pdf