

2008

FOOD AID FLOWS

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FOREWORD

After a prolonged decline in global food aid deliveries, which started in 1999, food aid levels began to recover in 2008, rising from 6.0 million mt in 2007 to 6.3 million mt, a 3.8 percent increase. The raise was driven by a 1 million mt increase in emergency food aid, while programme and project food aid decreased by 600,000 and 200,000 mt respectively.

Food aid flows increased despite the rise of food aid delivery costs. In 2008, food prices peaked to a level unprecedented for the last ten years; it seems unlikely that commodity prices will make a full recovery to their 2000 levels. Owing to elevated ocean freight rates and soaring fuel prices, transportation costs surged and were reflected in higher costs incurred for global food aid deliveries.

The combined effect of commodity price inflation and the world economic crisis is hampering access to food for many developing countries. This has negative effects on emerging economies and remittances from workers abroad, further contributing to the rise in food aid needs.

The WFP Strategic Plan (2008–2011) marks a historic shift for WFP, from being a food aid agency to becoming a food assistance agency with a more nuanced and robust set of tools to respond to critical hunger needs. The new Strategic Objectives include not only saving lives in emergencies, preventing acute hunger and malnutrition, and protecting and rebuilding livelihoods during and after emergencies, but also reducing chronic hunger and malnutrition.

The annual Food Aid Flows report provides a comprehensive view of trends in global food aid, including food aid deliveries by governments, non-governmental organizations and WFP. I would like to extend our appreciation to all partners of the International Food Aid Information System (INTERFAIS), in governments and in intergovernmental, international and non-governmental organizations, for making this product a collaborative effort. Without this collaboration, particularly through the exchange of information on food aid allocations, utilization, shipments and deliveries, INTERFAIS would not be able to function.

This report and a number of data queries can be extracted from the Food Aid Information System (FAIS), the new INTERFAIS website (www.wfp.org/faais) that makes available the INTERFAIS database and a series of nutritional indicators for reporting on the quality of food aid flows. Inquiries and requests for updated and additional information may be directed to Ms Angela D'Ascenzi, telephone [+39]-06-6513 3709, e-mail: interfaais@wfp.org.

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Explanatory Notes

INTERFAIS

Data on global food aid deliveries in metric tons are from the database of the International Food Aid Information System (INTERFAIS), which was developed by WFP as a contribution to a coordinated international response to food aid shortages. INTERFAIS is a dynamic system involving the interaction of all users, which are donor governments, international organizations, non-governmental organizations (NGOs), recipient countries and WFP field offices. They share information and data on food aid transactions. All information is cross-checked before being disseminated. The comprehensive and integrated database allows food aid allocations and deliveries to be monitored for the purpose of improving food aid management, coordination, reporting and statistical analysis. The database is updated continuously, so the data may vary as allocation plans and delivery schedules are modified. Data since 1988 are available.

CONCEPTS

Food aid categories

Regarding the use of *food aid*, three categories can be distinguished:

Emergency food aid is for victims of natural or human-induced disasters. It is freely distributed to targeted beneficiary groups and is usually provided as a grant. It is channelled multilaterally, through NGOs or, sometimes, bilaterally.

Project food aid supports specific poverty reduction and disaster prevention activities. It is usually freely distributed to targeted beneficiary groups, but may also be sold on the open market, and is then referred to as “monetized” food aid. Project food aid is provided as a grant and is channelled multilaterally, through NGOs or bilaterally.

Programme food aid is usually supplied by one government to another, as a resource transfer for balance-of-payments or budgetary support. Unlike most of the food aid provided for project or emergency purposes, it is not directed to specific beneficiary groups. It is sold on the open market and provided as either a grant or a loan.

Deliveries

Deliveries of food aid refer to the quantities of commodities that actually reach the recipient country during a given period. They differ from shipment data and food aid distributed to beneficiary people. In this publication, deliveries are reported for calendar years. Quantities delivered during a calendar year may have been earmarked, shipped or purchased during the previous calendar year.

Priority country groups

Low-income, food-deficit countries (LIFDCs) include all food-deficit – net cereal-importing – countries with a per capita gross national product (GNP) used by the World Bank to determine eligibility for assistance from the International Development Association (IDA) and for International Bank for Reconstruction and Development (IBRD) 20-year terms. In 2008, the Food and Agriculture Organization of the United Nations (FAO) classified 82 countries as LIFDCs: www.fao.org/countryprofiles/lifdc.asp?lang=en.

Least-developed countries (LDCs) include low-income countries that are suffering from long-term handicaps to growth, particularly low levels of human resources, weakness and

economic vulnerability. In 2007, 49 countries were classified as LDCs by the General Assembly of the United Nations: www.un.org/special-rep/ohrls/ldc/list.htm.

Delivery modes

The commodities delivered as food aid may be classified into the following three categories based on the transactions used to acquire them.

Local purchase is the food aid purchased and distributed/utilized in the recipient country.

Triangular purchase refers to the commodities that donors purchase in a third country, for use as food aid in a final recipient country.

Direct transfer includes the food aid delivered directly from the donor to recipient countries. Such operations do not involve either local or triangular purchases.

Sale of commodities

Commodities provided as food aid may be distributed directly to targeted beneficiaries or sold on the market. Commodities delivered as programme food aid – often provided as balance of payments – are usually sold on the market, but differ from monetized project or emergency food aid. In monetization, part or all of the commodities provided under a donation are sold, and the funds generated are used to finance the transport of the balance of the commodities or other activities.

Terms of delivery

Food aid is usually provided as a grant, but may be delivered on the basis of concessional terms of sale. The conditions for this are defined according to the register of food aid transactions of FAO's Consultative Subcommittee on Surplus Disposal (CSSD), and are based on the principle that the conditions of the transactions must be more favourable to the "recipient" than are those prevailing on world trade markets. The 1999 Food Aid Convention (FAC) set, for the first time, a ceiling on each donor's contribution in the form of concessional sales provided under the Convention. This ceiling has been fixed at 20 percent of each FAC member's total commitment.

VARIABLES

Year

The period for food aid delivered and reaching the recipient country, measured by calendar year starting in January and ending in December.

Donor

The primary provider of food aid from its own resources (since 1988).

Recipient

The country that receives food aid (since 1988).

Commodity

The commodity that is either delivered as food aid or purchased locally.

UNIT OF MEASUREMENT

Actual tonnage

The actual weight in metric tons (mt) of commodities delivered; 1 mt equals 1,000 kg.

Grain equivalent

Grain equivalents for commodities derived from cereals only; represents the tonnage of grains necessary to obtain the given amount of cereal-derived product. For example, the tonnage of wheat flour is multiplied by 1.37 to derive the grain equivalent tonnage.

Nutritional indicators

These indicators are based on the nutritional requirements for energy and 13 macro- and micronutrients, or j-nutrients: protein, fat, iron, iodine, zinc, thiamine, vitamin A, vitamin C, vitamin B6, vitamin B9 (folic acid), vitamin B12 and niacin.

Individual requirements met on average, total (*IRMA_t*) provides information about the scale of food aid. Individual requirements met on average (*IRMA*) provides information about the nutritional value of 1 mt, allowing comparisons across deliveries without being influenced by the size of total deliveries. Individual requirements met on average, score (*IRMA_s*) provides information in one number on the balance of the food basket that is implicit in the food aid deliveries.

IRMA_t assesses the total number of people for whom the requirements for each nutrient are potentially met, based on the total tonnage delivered/selected. *IRMA_{tj}* shows the total number of people whose nutritional requirements for each j-nutrient could potentially be satisfied for one year, based on the total tonnage selected/delivered to the country.

IRMA is the number of people for whom the requirements for each nutrient could potentially be satisfied with a representative 1 mt of the selected food basket. *IRMA_j* scales *IRMA_{tj}* down to 1 mt by dividing *IRMA_{tj}* by the total tonnage selected for the country. This allows easy comparisons across different food aid deliveries by eliminating the quantity component of *IRMA_t*.

IRMA_s gives the average of the 13 *IRMA* values of the selected deliveries – one for each nutrient – as a percentage of the *IRMA* value for energy. No weights are applied, but maximum values are imposed so that outliers do not unduly influence the average. This indicator is restricted to the interval [0–100] and excess quantities are penalized.

Available at: www.wfp.org/fais/nutritional-reporting.

ADDITIONAL NOTES

Other commodities are expressed in actual quantities.

Geographical regions defined in the statistical tables are available at www.wfp.org/fais under INTERFAIS.

In some tables, totals do not add up exactly, because of rounding.

The data for 2008 are provisional.

The designations employed and the presentation of the material in this publication do not imply the expression of any opinion whatsoever on the part of the World Food Programme concerning the legal status of any country, territory, city or area, or of their authorities, or concerning the delimitation of frontiers or boundaries.

ACRONYMS

CIS	Commonwealth of Independent States
DPRK	Democratic People's Republic of Korea
DRC	Democratic Republic of the Congo
EC	European Commission
EU	European Union
FAC	Food Aid Convention
FAO	Food and Agriculture Organization of the United Nations
GNP	gross national product
IBRD	International Bank for Reconstruction and Development
ICRC	International Committee of the Red Cross
IDA	International Development Association
IGO	inter-governmental organization
INTERFAIS	International Food Aid Information System
IRMA	individual requirements met on average
LDC	least-developed country
LIFDC	low-income, food-deficit country
NGO	non-governmental organization
UNHCR	Office of the United Nations High Commissioner for Refugees
UNICEF	United Nations Children's Fund
UNRWA	United Nations Relief and Work Agency for Palestine Refugees in the Near East

2008 GLOBAL FOOD AID IN FIGURES

In million mt

Global food aid deliveries¹		6.3
By category	Emergency	4.8
	Project	1.2
	Programme	0.3
By commodity	Cereals	5.4
	Non-cereals	0.9
By mode	Local purchase	1.1
	Triangular purchase	1.5
	Direct transfer	3.7
By sale	Sold	0.5
	Distributed	5.7
By channel	Multilateral	4.2
	Bilateral	0.6
	NGOs	1.5
By recipient region	Sub-Saharan Africa	4.0
	Asia	1.4
	Latin America and the Caribbean	0.3
	Middle East and North Africa	0.4
	Eastern Europe and CIS	0.1
By donor	United States of America	3.2
	EC and Member States (EU)	1.2
	United Nations	0.3
	Japan	0.4
	Canada	0.3
	Australia	0.1
	Other donors	0.8

CIS = Commonwealth of Independent States

EC = European Commission

EU = European Union

¹ Global food aid deliveries encompass food aid from all sources, including WFP.

GLOBAL FOOD AID PROFILE

Food aid deliveries (mt)					
	2004	2005	2006	2007	2008*
Global Food Aid Deliveries	7.3	8.3	7.0	6.0	6.3
WFP share of total	3.7	4.5	3.8	3.1	4.0
Food Aid Delivered by Commodity					
Cereals	6.4	7.1	5.9	5.2	5.4
Non-cereals	0.9	1.2	1.0	0.9	0.9
Global food aid deliveries (%)					
Procurement in Developing Countries	28	29	35	39	34
Deliveries by Channel					
Bilateral	23	23	20	22	10
Multilateral	52	54	55	54	66
NGOs	25	23	25	24	24
Food Aid Deliveries by Category					
Emergency	57	63	61	62	76
Project	25	23	24	23	19
Programme	18	14	15	15	5
Food Aid Deliveries by Region					
Sub-Saharan Africa	50	55	57	53	64
Asia	28	30	20	30	23
Eastern Europe & CIS	6	4	6	5	2
Latin America & the Caribbean	8	8	9	6	5
Middle East & North Africa	8	3	8	6	6
Deliveries to					
Developing countries	94.4	99.1	99.4	97.7	98.3
LDC countries	53.7	60.3	58.3	56.0	70.3
LIFDC countries	85.1	93.9	89.0	92.1	93.0
Total cereal food aid deliveries as % of					
World cereal production	0.3	0.4	0.3	0.3	0.3
World cereal imports	2.7	2.9	2.3	2.2	2.4
Cereals food aid deliveries to LIFDC as % of					
LIFDC cereal production	0.6	0.8	0.6	0.5	0.6
LIFDC cereal imports	8.4	9.5	7.4	6.7	6.8

* 2008 data are provisional.

1. OVERVIEW

As indicated in Figure 1, global food aid flows have followed a clear downwards trend since 1999, reaching the lowest level ever registered in 2007. In 2008, the decline was interrupted by an increase of 3.8 percent. Food aid levels reached 6.3 million mt, but this is 64 percent below their 1993 level, as shown in Table 1.

Figure 1

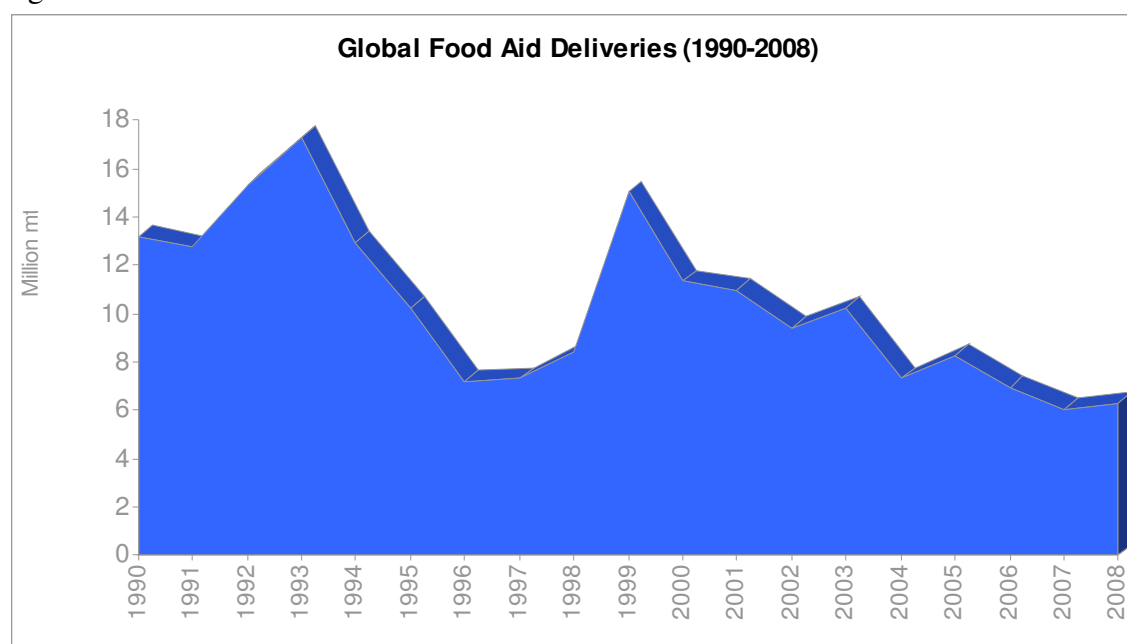


Table 1

1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
13.2	12.7	15.3	17.3	12.9	10.2	7.2	7.3	8.4	15.0	11.3	10.9	9.4	10.2	7.3	8.3	7.0	6.0	6.3

Sub-Saharan Africa remained the main recipient region and contained the majority of recipient countries. Food aid to sub-Saharan Africa increased by 800,000 mt, and represented 64 percent of total food aid deliveries. Food aid declined in all other regions.

Ethiopia with 16 percent, the Sudan with 11 percent, Somalia with 6 percent, Zimbabwe with 6 percent, Bangladesh with 5 percent, Afghanistan with 5 percent, the Democratic People's Republic of Korea (DPRK) with 5 percent, and Kenya with 4 percent were the top eight recipient countries, receiving 58 percent of total food aid deliveries.

In 2008, the top five donor governments – the United States of America, the European Commission, Japan, Canada and Saudi Arabia – accounted for 72 percent of total deliveries. The remaining 50 donor governments decreased their food aid deliveries, providing 33 percent less than in 2007.

In 2008, there was an increasing emphasis on food aid being directly distributed to targeted beneficiaries, rather than monetized. This peaked at 91 percent of total deliveries. In 1999, the equivalent figure was 45 percent.

In 2008, for the first time, all food aid was provided on a full grant basis.

Food aid purchased from developing countries accounted for 2.1 million mt, representing 34 percent of the total.

Emergency food aid remained the predominant food aid category, accounting for 76 percent of total deliveries. Compared with 2007, emergency food aid's total amount increased by 1 million mt, which was almost entirely channelled through WFP. Programme food aid, which represented the main category in 1999, at 52 percent of the total, continued its gradual decline, resulting in its 5 percent share in 2008. Project food aid, which represented 19 percent of global food aid, decreased by 157,000 mt compared with 2007.

The multilateral channel continued to increase, taking a 66 percent share of global food aid deliveries, up from 36 percent in 2000. Bilateral food aid represented 10 percent of total deliveries, well below its 2007 share. Food aid channelled through NGOs represented 24 percent of global food aid, maintaining the same share as in 2007.

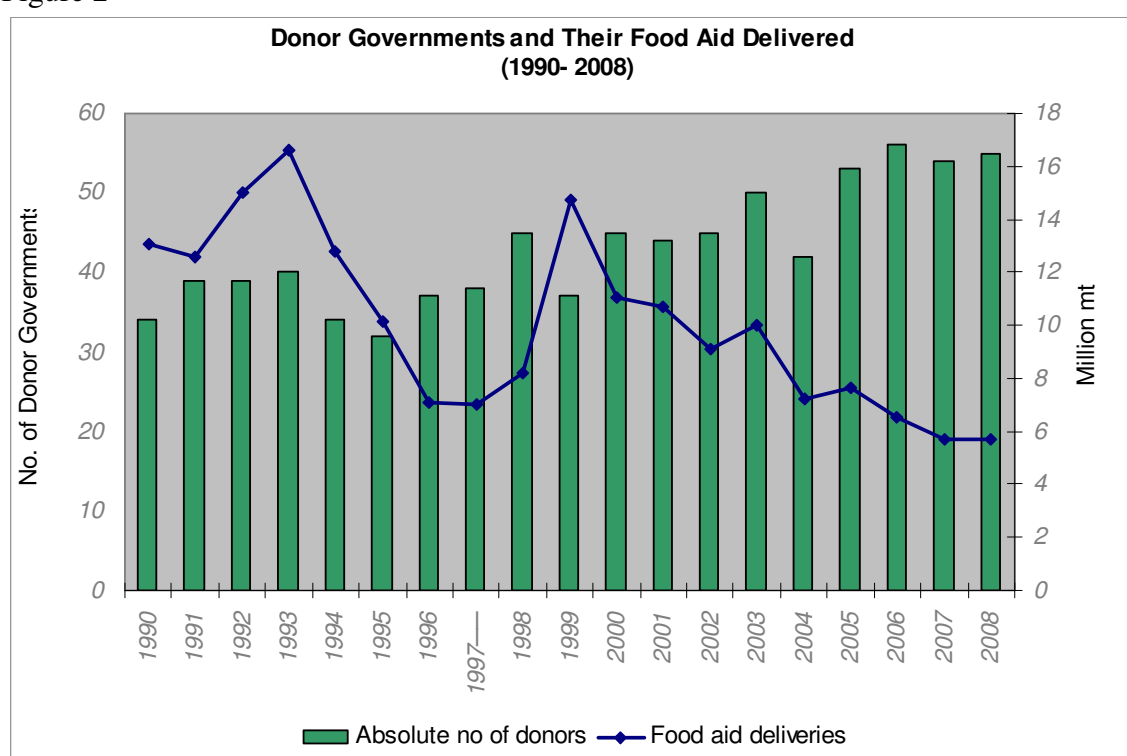
The availability of global food aid was 45 percent lower than in 2000, as a result of a prolonged period of high food prices. High food prices have created a shift in the commodities used for food aid, for example, sorghum was replaced by rice. This trend encouraged WFP to develop a series of nutritional indicators to measure the number of people whose nutritional requirements could potentially be met from global food aid deliveries. According to these indicators, the caloric content of global food aid deliveries in 2008 provided the caloric amount necessary to feed 28.6 million people over one year. However, the same food aid deliveries may have met the yearly iodine requirement of only 841,000 people.

2. FOOD AID DONORS

Traditionally, donor governments represent the core of food aid donations. In 2008, 55 donor governments, including the European Commission, accounted for 91 percent of global food aid, with 5.7 million mt of food aid deliveries. This is 50,000 mt more than in 2007, confirming donor governments' efforts to maintain global food aid levels.

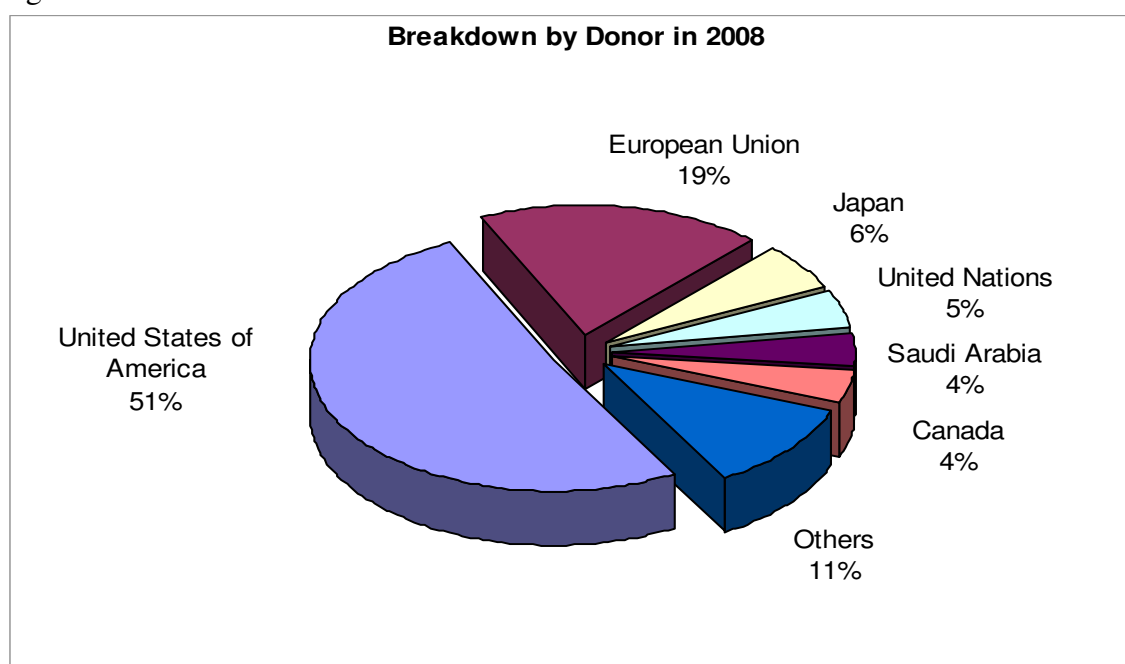
The number of donor governments has increased since 1999, when it stood at 37, while the level of government-funded food aid during this period has progressively declined, as shown in Figure 2. Of the 55 donor governments that donated in 2008, 31 donated less than 10,000 mt. Only 20 of the 55 donor governments have donated regularly since 1988, providing an average of 95 percent of government-funded food aid over the years.

Figure 2



In 2008, the top five donor governments were the United States of America, the European Commission, Japan, Canada and Saudi Arabia, accounting for 72 percent of total food aid deliveries (Figure 3).

Figure 3



Saudi Arabia became one of the top five donors in 2008. The 200,000 mt increase in its food aid donations resulted in it accounting for 4 percent of total deliveries – a considerable difference from its 1999 share of only 0.1 percent. Saudi Arabia replaced the Republic of Korea, which was one of the top five donors in 2007, owing to a one-off increase in deliveries to DPRK.

Compared with 2007, the United States of America (Figure 4) increased its delivery by 800,000 mt to meet the increased needs resulting from high food and fuel costs in 2008. Major increases were also registered for Japan and Canada, while the European Commission decreased its delivery by 400,000 mt. The aggregated decline of total deliveries under the European Union (the European Commission plus Member States) was partly the result of this fallen share from the Commission. Other governments contributed 19 percent of global food aid deliveries, a decline of 33 percent since 2007.

Figure 4

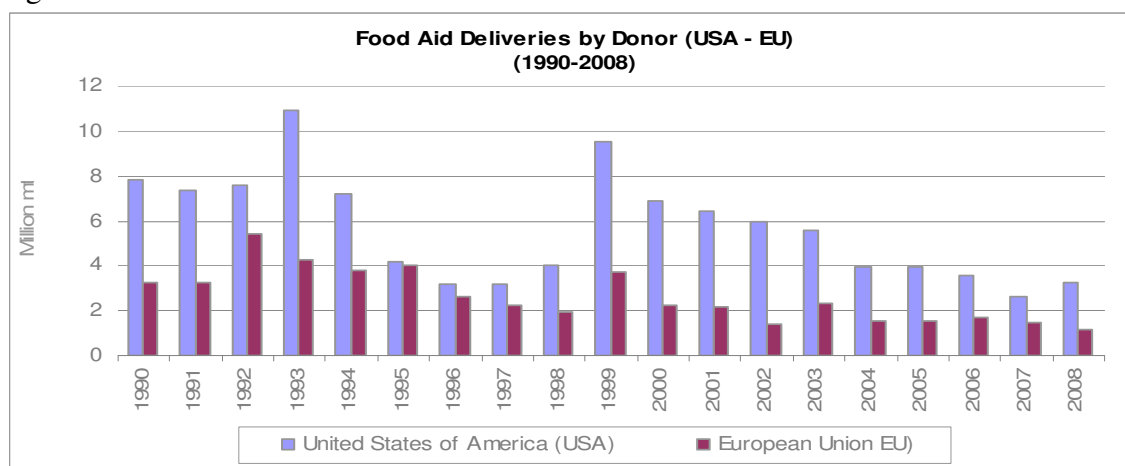
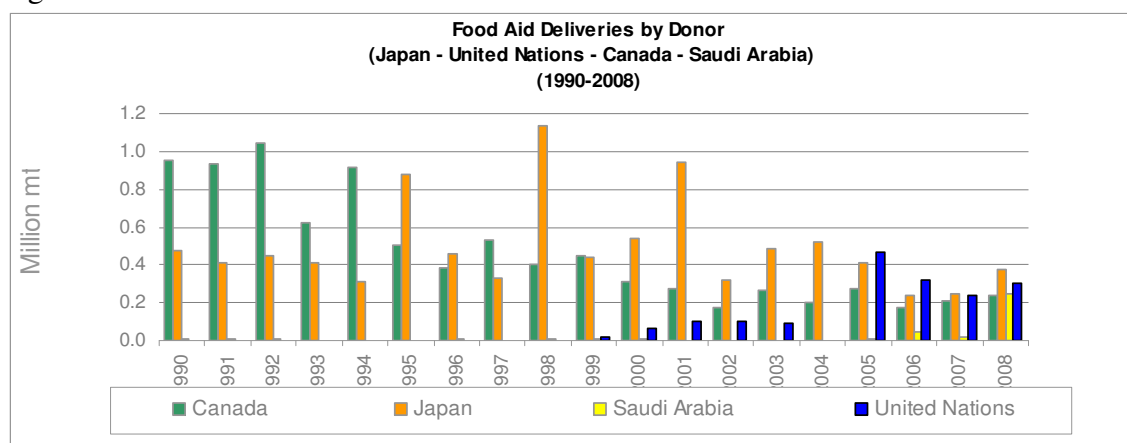


Figure 5



The United Nations accounted for 5 percent of total food aid flows, with an increase of 28 percent compared with 2007. This increase was mainly due to the growth of the United Nations' pooled funding facilities, including the Central Emergency Response Fund and the Common Humanitarian Fund. Table 2 provides detailed profiles of the top six food aid donors.

Table 2: Global Food Aid Profile of the Main Donors in 2008 (percentage)

	Canada	European Community	Japan	Saudi Arabia	United Kingdom	United Nations	United States of America
FOOD AID CATEGORY							
Emergency	79	79	54	88	100	97	77
Project	21	7	7	12	-	3	23
Programme	-	14	39	-	-	-	0
COMMODITY							
Cereals	79	83	93	80	90	83	87
Non-cereals	21	17	7	20	10	17	13
SALE							
Distributed	100	86	59	100	100	100	92
Sold	-	14	41	-	-	-	8
RECIPIENT REGION							
Sub-Saharan Africa	63	56	67	61	67	65	71
Asia	22	10	20	22	20	16	19
Eastern Europe & CIS	0	13	-	7	-	2	0
Middle East & North Africa	5	19	9	7	14	13	3
Latin America & the Caribbean	10	2	4	3	0	4	7
TERMS OF DELIVERY							
Grant	100	100	100	100	100	100	100
Concessional Sales							
FOOD AID CHANNELS							
Bilateral	8	23	45	0	-	-	3
Multilateral	92	73	52	100	95	100	58
NGOs	-	4	3	-	5	-	39
DELIVERY MODES							
Direct transfer	43	13	44	2	0	1	95
Local purchase	14	38	22	23	32	33	3
Triangular purchase	43	49	34	75	68	66	2

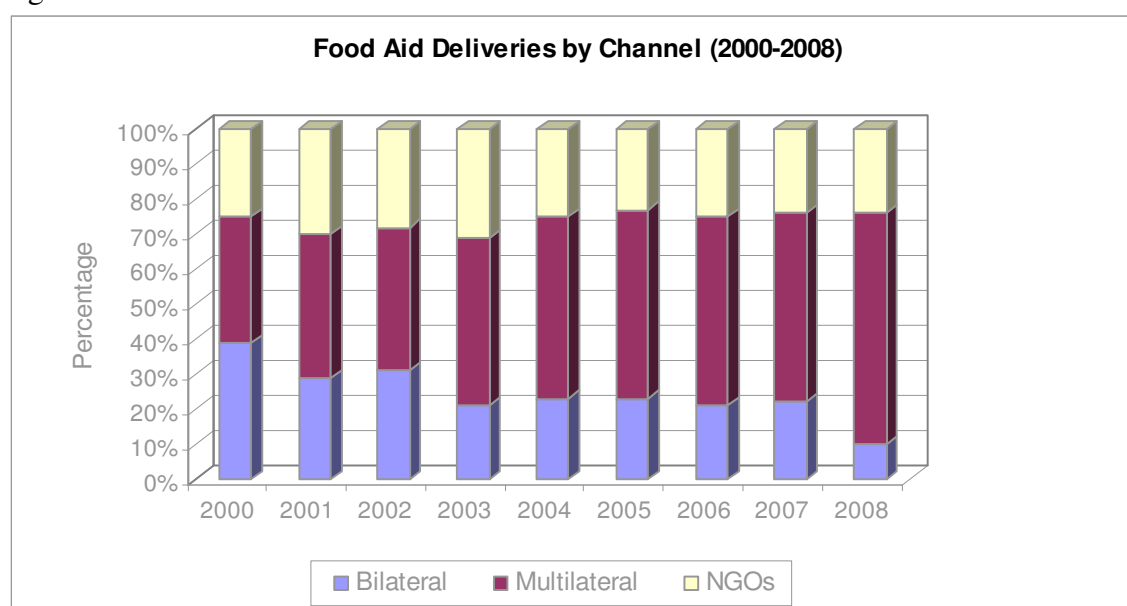
Food aid deliveries were also provided by NGOs, intergovernmental organizations (IGOs) and private donors. In 2008, NGOs delivered 1 percent of total food aid, keeping their share unchanged from the previous year. IGOs and the private sector increased their shares from 0.7 to 1.8 percent and from 0.3 to 0.6 percent respectively.

3. FOOD AID CHANNELS

3.1 Food aid deliveries by channel

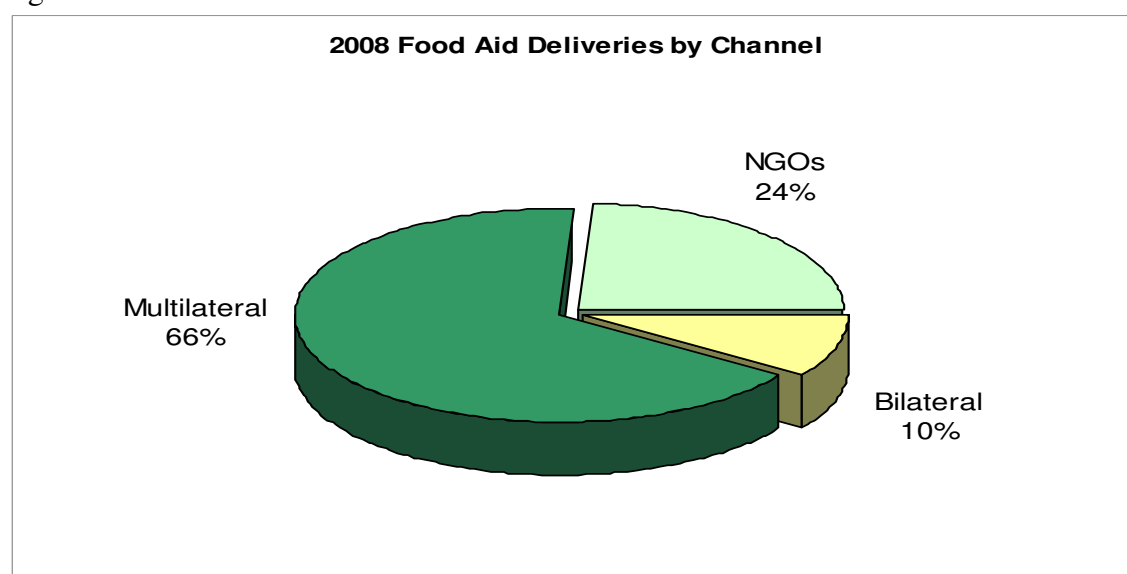
Global food aid deliveries in 2008 amounted to 6.3 million mt, a 3.8 percent increase compared with 2007. This increase mainly reflected an augmentation of multilateral food aid, the share of which has almost doubled since 2000 (Figure 6).

Figure 6



Deliveries of multilateral food aid increased by 27 percent, while bilateral food aid declined by 55 percent. The increase of food aid deliveries channelled through NGOs was 80,000 mt, maintaining the 2007 level of 24 percent of the total, as shown in Figure 7.

Figure 7



3.2 Multilateral food aid

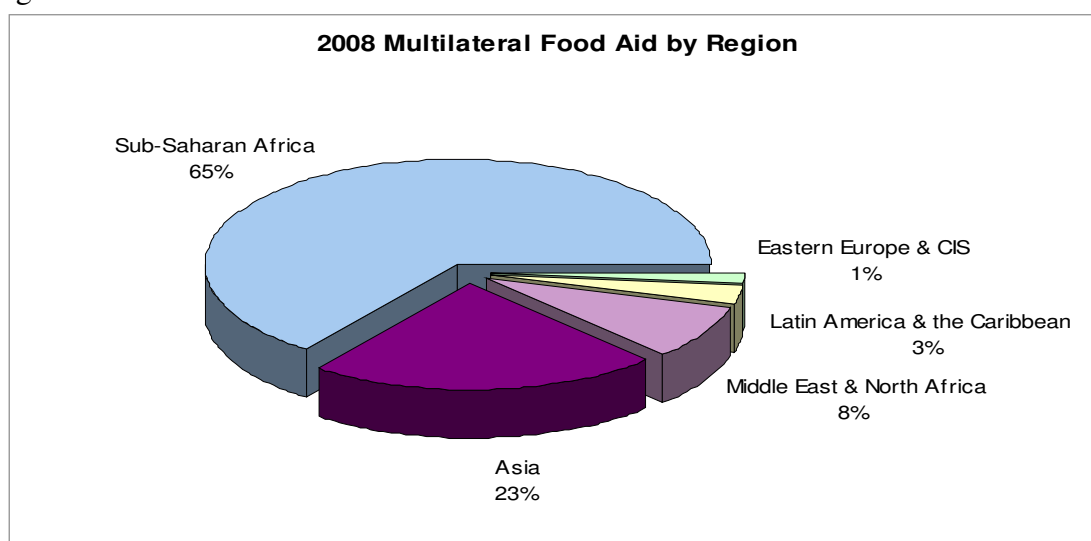
In 2008, 4.2 million mt of commodities were delivered multilaterally. These represented 66 percent of global food aid deliveries, the highest percentage share ever reached, exceeding the 55 percent registered in 2007.

Of these multilateral deliveries, 97 percent were channelled through WFP. Other United Nations agencies acting as channels were the United Nations Children's Fund (UNICEF), the United Nations Relief and Work Agency for Palestine Refugees in the Near East (UNRWA), and the Office of the United Nations High Commissioner for Refugees (UNHCR).

Most of the multilateral food aid deliveries, 90 percent, was to support emergency activities; the remaining 10 percent was earmarked for programme and project food aid.

Multilateral food aid was largely directed to sub-Saharan Africa, which accounted for the same share as in 2007, and to Asia. The balance went to the Middle East and North Africa, Latin America and the Caribbean, Eastern Europe and CIS (Figure 8).

Figure 8



The main donors of multilateral food aid were the United States of America with 45 percent, the European Union with 25 percent, the United Nations with 7 percent, and Saudi Arabia and Canada with 6 percent each.

The top five recipients of multilateral food aid were the Sudan with 15 percent, Ethiopia with 12 percent, Afghanistan with 7 percent, and Kenya and Somalia with 6 percent each. Together they received 46 percent of total deliveries.

It is worth mentioning that when food aid is channelled multilaterally, both local and triangular purchases in developing countries are higher than when food aid is delivered bilaterally or through NGOs. Some 86 percent of local purchases and 93 percent of triangular purchases are channelled multilaterally.

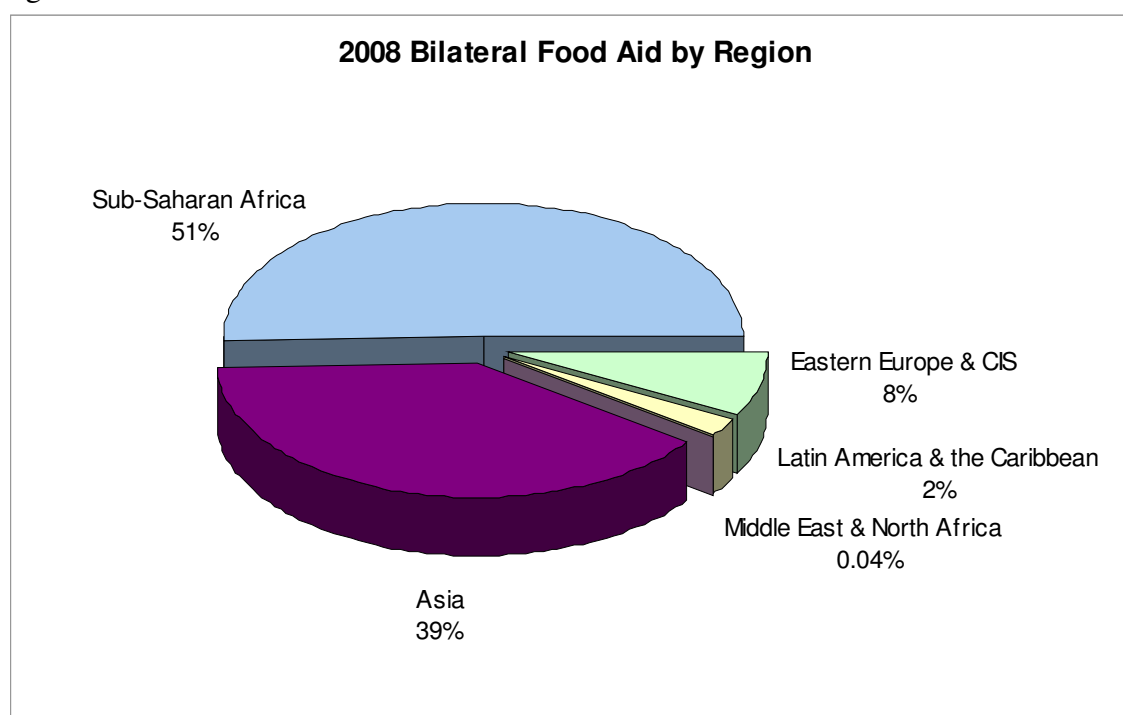
3.3 Bilateral food aid

In 2008, bilateral food aid amounted to 600,000 mt – a 700,000 mt decrease from 2007. As a result, the total share of bilateral food aid declined from 21 percent to 10 percent.

By definition, bilateral food aid is supplied on a government-to-government basis, and is mostly related to programme food aid.² In 2008, the majority of bilateral food aid – 54 percent – was emergency food aid, while 46 percent corresponded to programme food aid, inverting the trend of the last five years.

Deliveries to Asia dropped from 64 percent in 2007 to 39 percent in 2008, while sub-Saharan Africa became the main recipient region of bilateral food aid, with 51 percent. Europe and CIS received 8 percent, followed by Latin America and the Caribbean with 2 percent. Bilateral food aid dropped consistently in the Middle East and North Africa, which received only 0.04 percent of global bilateral deliveries (Figure 9).

Figure 9



The main two recipient countries of bilateral food aid were Ethiopia with 25 percent and DPRK with 21 percent. The remaining 54 percent went to 28 countries, mainly in sub-Saharan Africa and Asia.

In 2008, the largest share of bilateral food aid originated from Japan – 29 percent – which almost doubled its bilateral deliveries compared with 2007. The European Union contributed 18 percent, and the United States of America 16 percent.

² For more details on food aid categories please refer to the Explanatory Notes.

After two years of delivering only multilateral food aid, Canada resumed the bilateral channel, which accounted for 8 percent of its deliveries in 2008.

The reduction in bilateral food aid was mainly due to a drop in deliveries from the Republic of Korea, the European Union and the United States of America. The Republic of Korea alone accounted for a decline of 400,000 mt, owing to a loan of 400,000 mt of rice to DPRK.

During the year, 53 percent of bilateral food aid was freely distributed to beneficiaries; the remaining 47 percent was monetized. This highlights a changing trend in bilateral food aid, which previously was primarily sold on the market – 69 percent in 2007.

3.4 Food aid channelled through NGOs

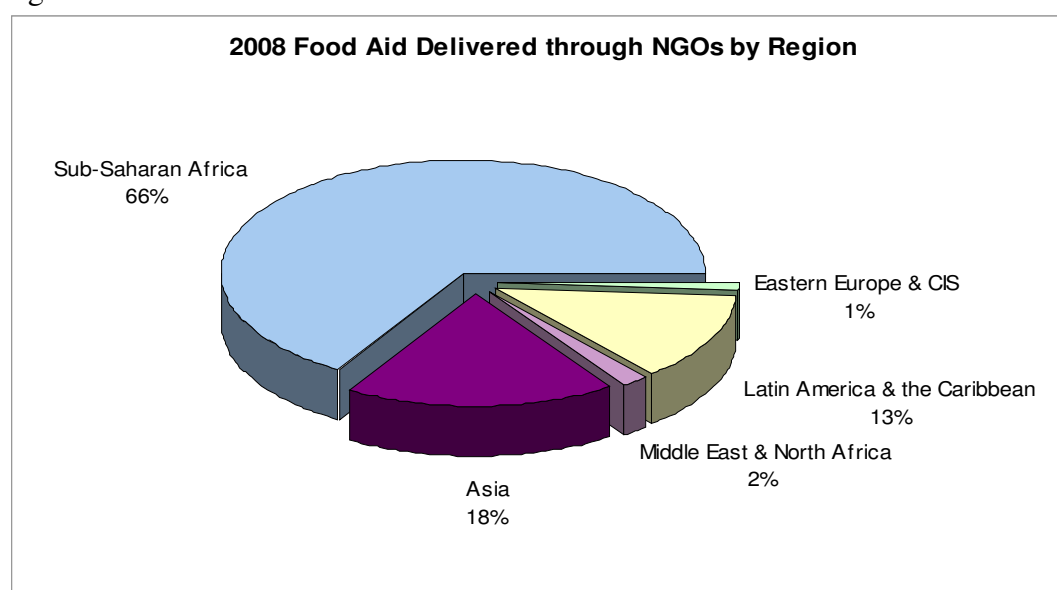
In 2008, food aid deliveries channelled through NGOs showed a slight increase of 80,000 mt compared with 2007. A total of 1.5 million mt was delivered through NGOs, leaving their share unchanged at 24 percent.

Emergency food aid accounted for 49 percent of global food aid channelled through NGOs, up from 37 percent in 2007. Project food aid's share decreased to 50 percent, while the remaining 1 percent was programme food aid.

Of food aid channelled through NGOs, 83 percent was freely distributed to targeted beneficiaries. The remaining 17 percent was sold on the market and was made up of programme food aid plus one-third of project food aid.

The distribution of deliveries among regions did not change significantly from 2007. The major recipient region was sub-Saharan Africa, receiving 1 million mt of commodities and accounting for 66 percent of the total food aid delivered through NGOs. The remaining amount was distributed in Asia, Latin America and the Caribbean, Europe and CIS, and the Middle East and North Africa (Figure 10).

Figure 10



In 2008, NGOs channelled food aid in 62 countries, three more than in 2007. The main recipient countries were Ethiopia with 354,000 mt, Bangladesh with 164,000 mt, Zimbabwe with 158,000 mt, Haiti with 130,000 mt, and Somalia with 110,000 mt. Altogether, these countries accounted for 60 percent of the total food aid channelled through NGOs.

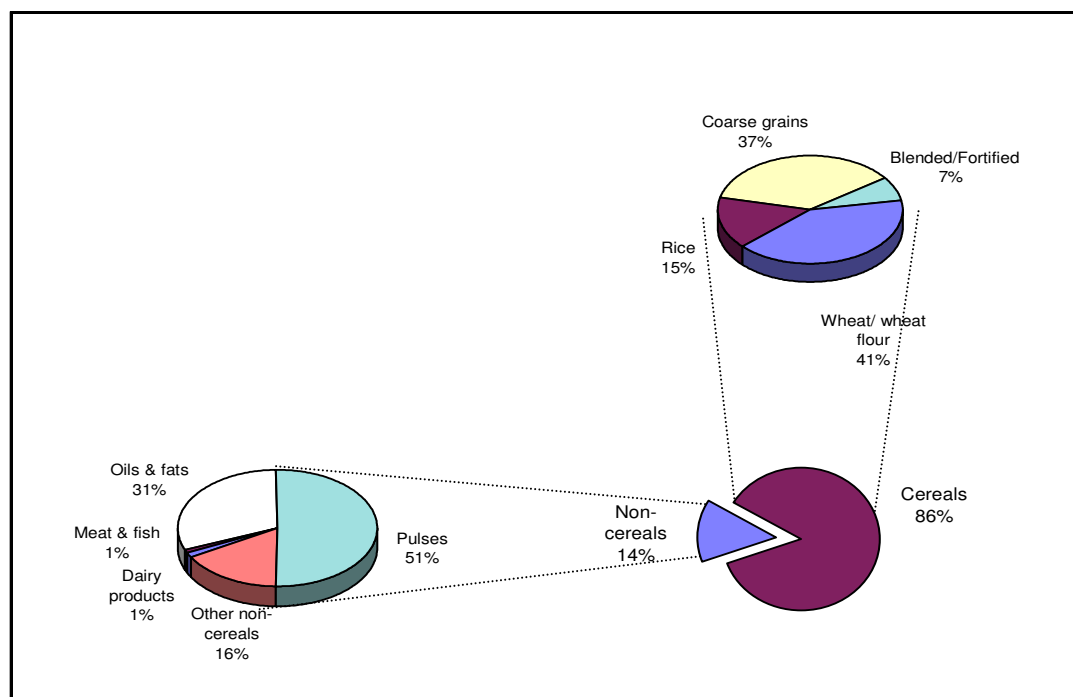
Some 83 percent of food aid deliveries channelled through NGOs originated from the United States of America, a decline from 88 percent in 2007. The other main donors channelling food aid through NGOs were the International Committee of the Red Cross (ICRC) with 7.4 percent, the Canadian Foodgrains Bank with 3.6 percent, and the European Union with 3.4 percent. The decrease in European Union deliveries was mainly due to the decline of European Commission food aid deliveries, which were 77 percent less than in 2007.

4. FOOD AID COMMODITIES

In 2008, food aid deliveries were made up of 86 percent cereals and 14 percent non-cereal commodities (Figure 11). Compared with 2007, cereal food aid increased by 222,000 mt, while non-cereal commodities showed a negligible increase of 8,000 mt.

Figure 11

2008 Global Food Aid Deliveries by Commodity



The commodity composition of food aid changed from 2007 (Table 3). In 2008, wheat and its derivatives represented 35 percent of global deliveries, down from nearly 40 percent in 2007. The share of rice food aid deliveries was 13 percent in 2008, a decline from 18 percent in 2007. Conversely, coarse grain food aid deliveries increased their share to 31 percent of total deliveries, up from 22 percent in 2007.

The shift in the commodity composition of food aid can be partly explained by an increase in commodity prices. In 2008, the price of the two main coarse grains delivered as food aid – maize and sorghum – was one-third the price of rice and two-thirds the price of wheat.

Table 3: 2007/2008 Global Food Aid Deliveries by Commodity Group

COMMODITY	2007		2008		Change 2008 vs 2007
	Mt (000)	%	Mt (000)	%	%
Cereals	5 158	85	5 380	86	4
Wheat and wheat flour	2 396	40	2 200	35	- 8
Rice	1 081	18	828	13	- 23
Coarse grains	1 341	22	1 960	31	46
Blended/Fortified	340	6	392	6	15
Non-cereals	885	15	892	14	1
Dairy products	17	0	12	0	- 30
Meat and fish	8	0	8	0	- 2
Oils and fats	268	4	276	4	3
Pulses	444	7	451	7	2
Other non-cereals	148	2	146	2	- 2

5. IMPACT OF CEREAL PRICES ON FOOD AID

In 2008, average food prices were more than double 2000 in accordance to the FAO Food Price Index, which registered an increase by 112 percent.

The rising price of food had a direct impact on the cost of purchasing food aid commodities. The total cost of providing food aid was also burdened by increases in oil prices and freight rates, which further raised the cost of food aid transport and delivery.

As a consequence, global food aid deliveries have declined, from 11.3 million mt in 2000 to only 6.3 million mt in 2008, representing a 45 percent decline. However, despite the declining trend in food aid deliveries over the previous nine years and the peaks in food prices, 2008 food aid levels started to recover, increasing by approximately 230,000 mt.

In particular, food aid deliveries of commodities with higher prices, such as wheat and rice, declined in favour of lower-priced commodities, such as sorghum. Deliveries of wheat and wheat flour were 62 percent lower in 2008 than in 2000. Rice food aid deliveries were 33 percent below the 2000 amount.

Maize and sorghum are the two main coarse grains. They show similar price trends, but different food aid amounts. In 2000, their prices differed by only US\$1, at US\$90 per mt for maize and US\$91/mt for sorghum; in 2008 the difference was US\$4 – US\$227/mt and US\$223/mt respectively. However, the volume of sorghum food aid has increased ten-fold since 2000, while maize food aid deliveries decreased to roughly one-third their 2000 level (Figures 12 and 13). This might be because of increasing utilization of maize for biofuel production, which may have decreased the availability of maize for food aid deliveries.

Figure 12

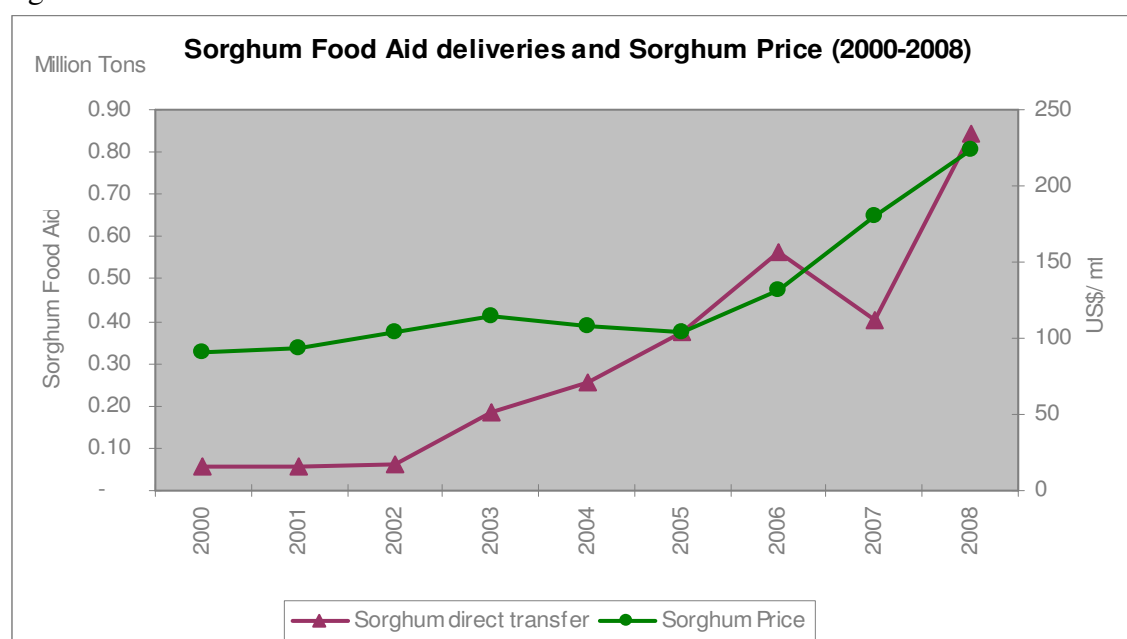
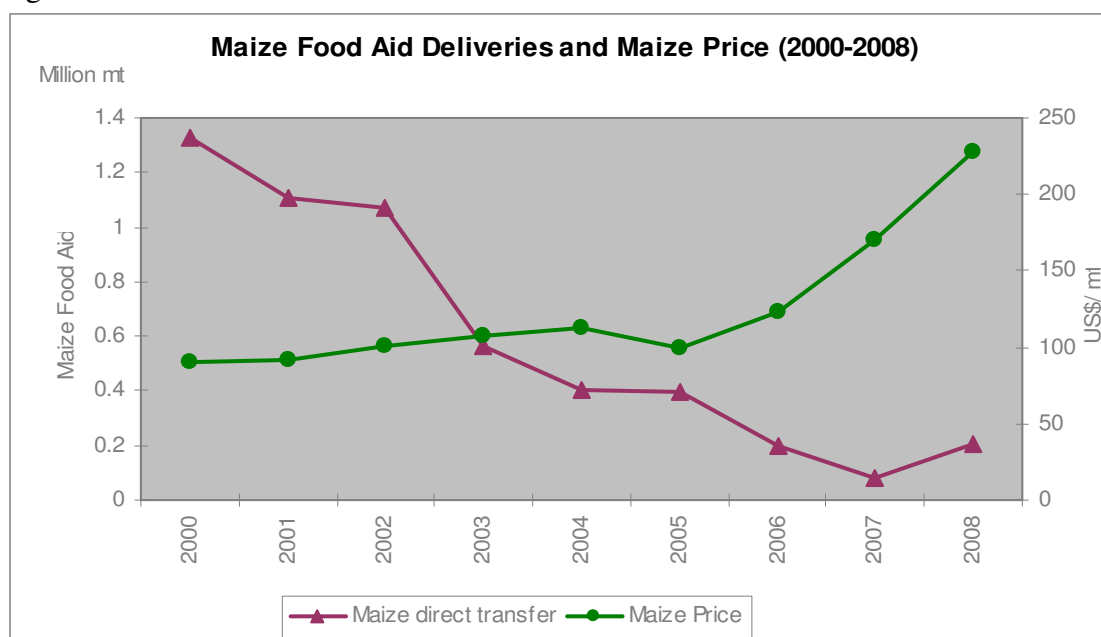


Figure 13



In 2008, 4.5 million mt of wheat (all types), maize, rice and sorghum were delivered as food aid, for an estimated expenditure of US\$1.6 billion. Had 2000 prices prevailed in 2008, it would have been possible to deliver 12.6 million mt of maize, rice, wheat and sorghum – roughly three times the actual deliveries.

Food aid purchased by donors in their home countries and delivered as direct transfers is particularly sensitive to price shocks; direct transfers account for the entire drop in food aid deliveries since 2000. Conversely, food aid purchased locally or in third countries has increased.

6. FOOD AID DELIVERY

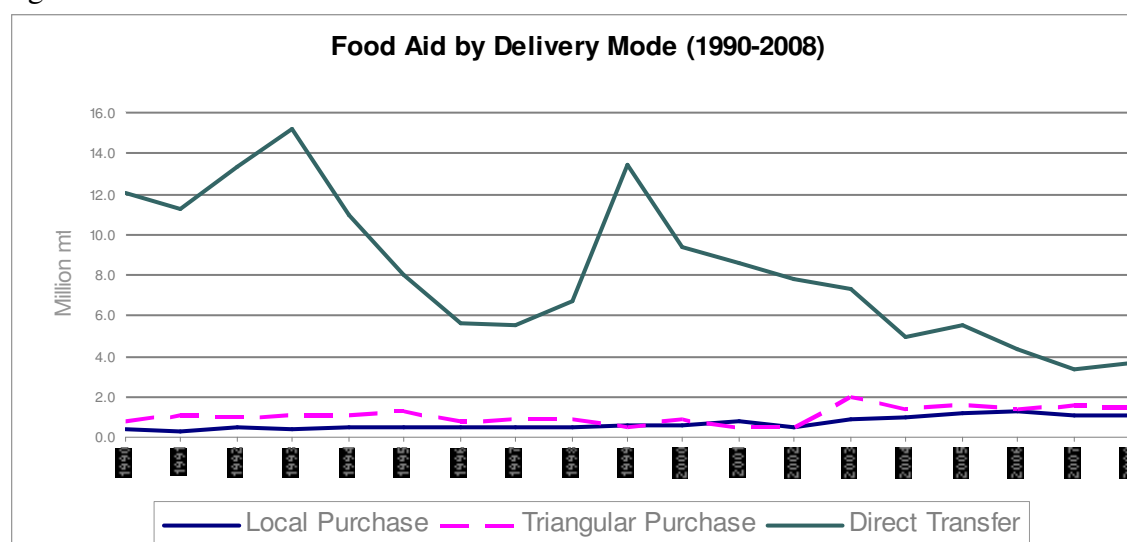
6.1 Delivery modes

The main share of food aid deliveries has traditionally been represented by direct transfers, that is, food aid purchased within the donor country.

Food aid purchased locally or in neighbouring developing countries is a preferable option for recipient countries as it prevents market distortions and strengthens local food producers. Local and regional purchases are also considered more cost-effective, as they save on transportation cost such as freight rates and oil.

Over the years, most donors have decreased direct transfers, and this reduction has not been compensated for by an equivalent increase in food aid provided through other delivery modes. The overall decline in food aid deliveries experienced since 2000 can therefore be attributed to the drop in direct transfer deliveries (Figure 14).

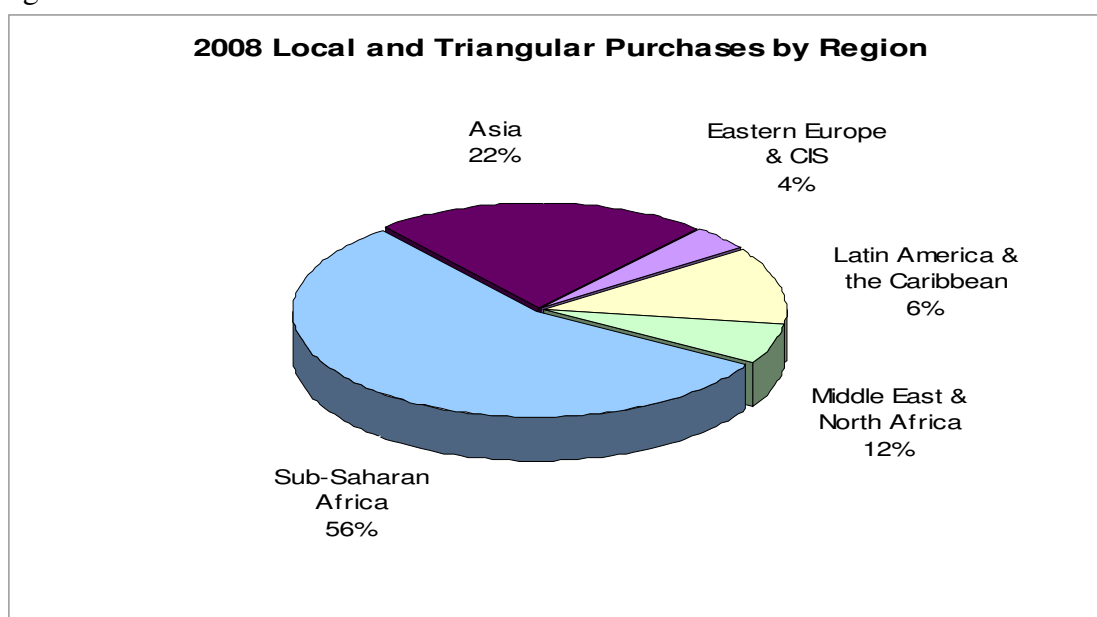
Figure 14



In 2008, direct transfers accounted for 59 percent of total food aid. This represents a 10 percent increase compared with 2007, and interrupts the gradual downwards trend in the share of direct transfers that started in 2002, when it stood at 88 percent of global deliveries. The increase in direct transfers was a response to the immediate needs of countries affected by the economic crisis and high food prices. In 2008, local and triangular purchases accounted for 41 percent of total deliveries, a decline of 107,000 mt, or 4 percent, compared with 2007.

Local and triangular transactions took place mainly in sub-Saharan Africa, which increased its share to 56 percent of the total (Figure 15). Asia remained the second recipient region of local and triangular purchases, but with a smaller share (22 percent) than in 2007. Food aid originating in developing countries accounted for 2.1 million mt, or 33 percent of the total.

Figure 15



In 2008, 96 percent of direct transfers of food aid were provided by five donor governments. The United States of America accounted for 83 percent of total direct transfers, while the European Commission remained the main donor of food aid purchased locally, accounting for 14 percent, followed by the United Nations and the United States of America with 9 percent each. The main donors providing food aid through triangular purchases were the United Nations and the European Commission with 13 percent each, and Saudi Arabia with 12 percent.

In 2008, almost three fourths of each delivery mode were directed to emergencies (see Table 4).

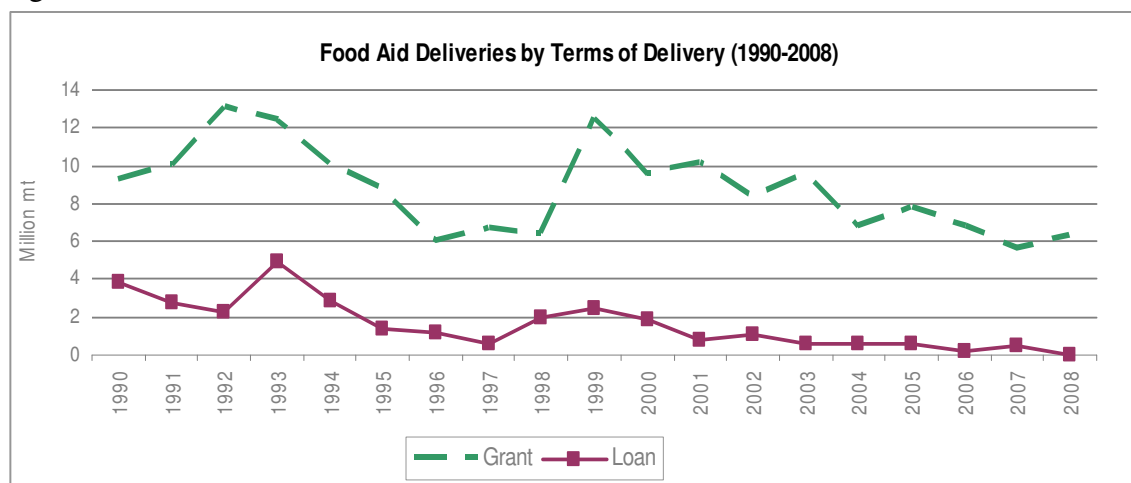
Table 4: 2007/2008 Global Food Aid Deliveries by Delivery Mode and Category

DELIVERY MODE	CATEGORY	2007		2008		Change 2008 vs 2007
		Mt (000)	%	Mt (000)	%	%
Direct transfer		3 345	100	3 682	100	10
	Emergency	2 031	61	2 750	75	35
	Project	948	28	723	20	-24
	Programme	367	11	209	6	-43
Triangular purchase		1 598	100	1 510	100	-5
	Emergency	851	53	1 263	84	48
	Project	202	13	168	11	-17
	Programme	544	34	78	5	-86
Local purchase		1 099	100	1 080	100	-2
	Emergency	844	77	785	73	-7
	Project	255	23	295	27	16
	Programme	-	-	-	-	-

6.2 Terms of delivery

Data suggest that in 2008, for the first time on record, food aid deliveries were entirely on a grant basis (Figure 16). In 2007, 8 percent of food aid was provided in concessional terms, and in 1999, food aid delivered as loans accounted for 17 percent of total deliveries.

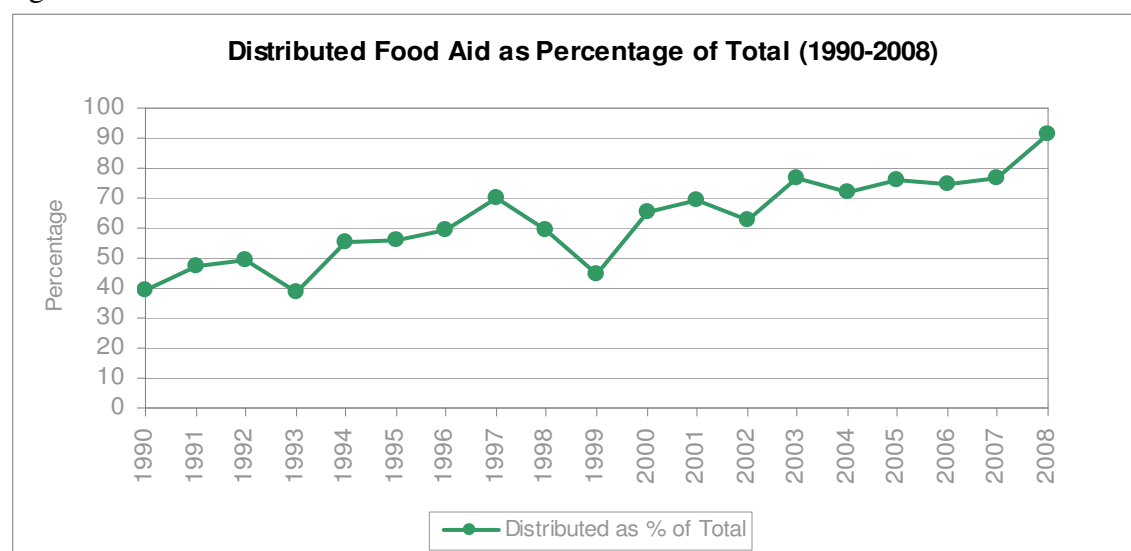
Figure 16



6.3 Food aid sales

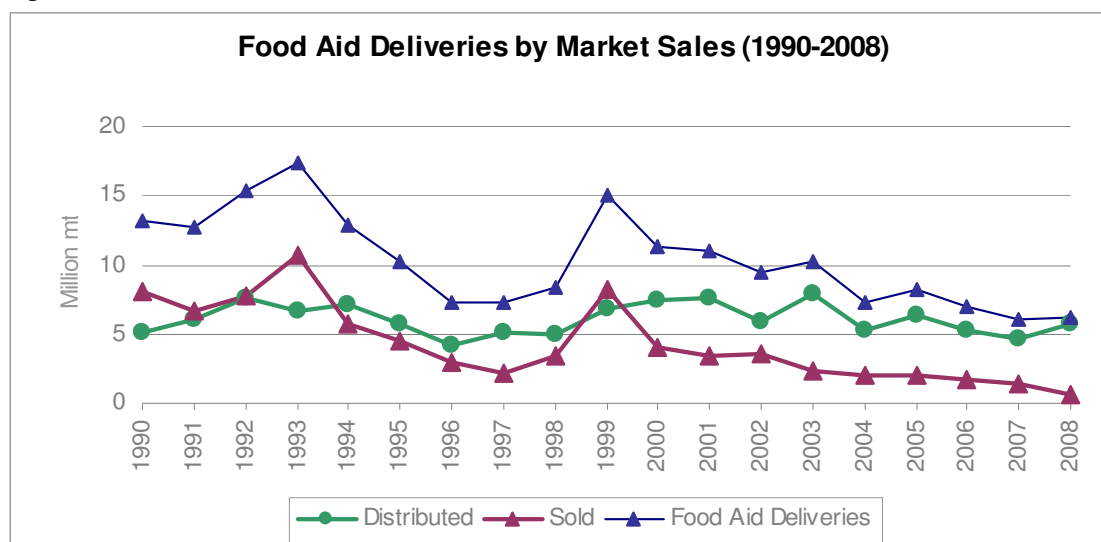
In 2008, food aid sales represented only 9 percent of total food aid deliveries; the remaining 91 percent were directly distributed to beneficiaries. This share was the highest recorded since 1999 (Figure 17).

Figure 17



In 2008, food aid directly distributed to beneficiaries increased by 1 million mt. Monetized food aid deliveries were 544,000 mt, representing the lowest amount since 1999 and a decline of nearly 61 percent compared with 2007 (Figure 18).

Figure 18



In 2008, 52 percent of food aid sold in the market derived from programme food aid, 47 percent from project food aid and the remaining from emergency food aid. The monetization of food aid was undertaken mainly to meet transport or additional operational costs.

7. FOOD AID CATEGORIES

7.1 Global perspective

Food aid continues to be dominated by emergencies, the main food aid category since 2000. In 2008, emergencies represented more than three-quarters of global food aid deliveries, amounting to 4.8 million mt. This marks a significant increase in terms of both shares, which was up to 76 percent, and quantity, up by more than 1 million mt. The United States of America accounted for 80 percent of the increase in emergency food aid.

Programme food aid decreased by approximately 626,000 mt, its share falling from 14 percent of total deliveries in 2007 to 5 percent in 2008, a record low. Project food aid also registered a decline, of 219,000 mt (Figures 19 and 20).

Figure 19

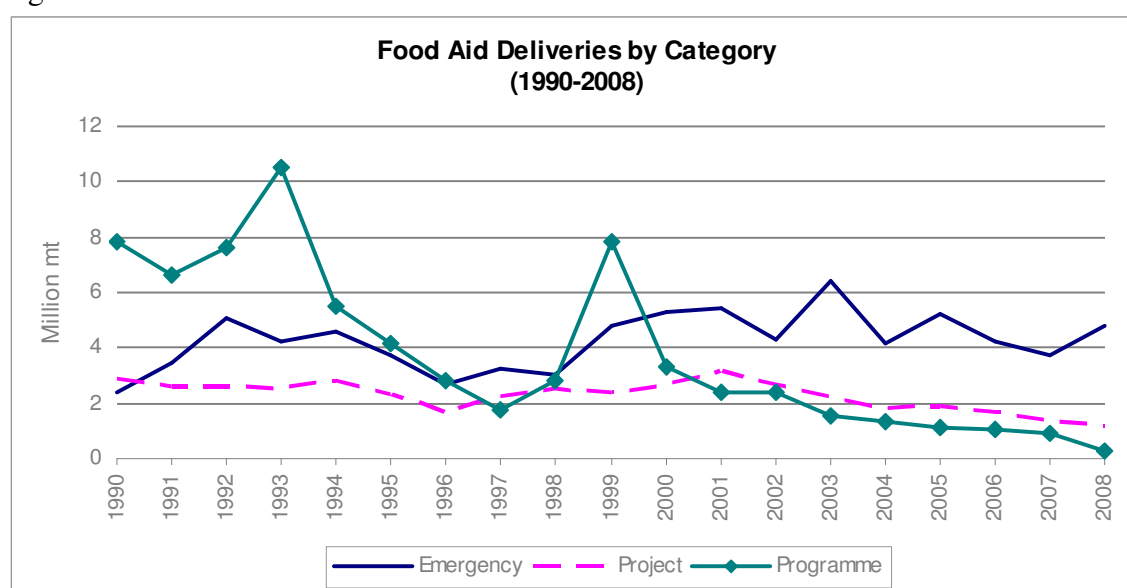
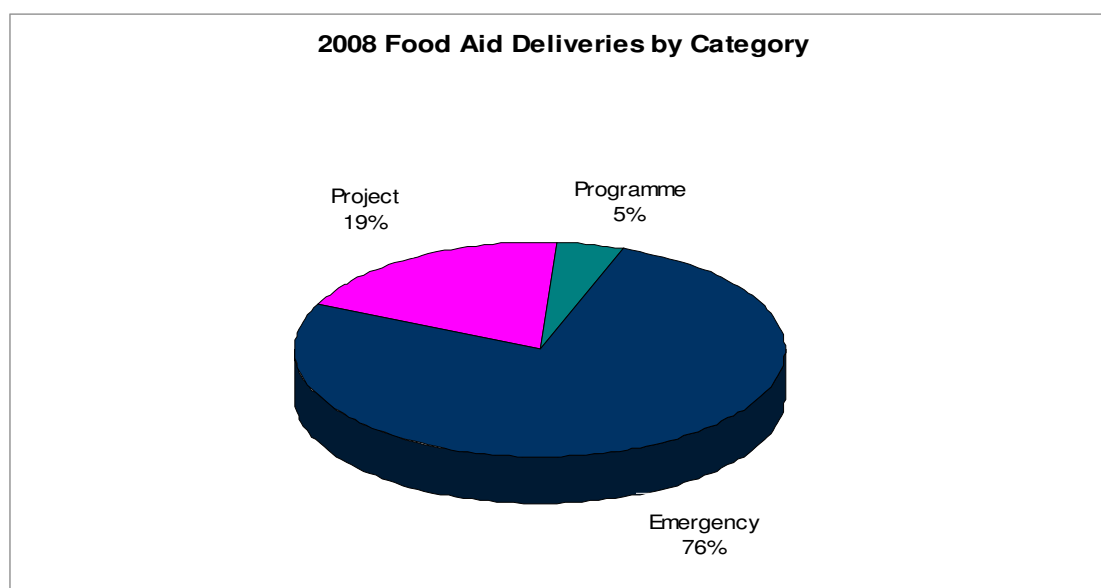


Figure 20



In 2008 76 percent of emergency food aid deliveries were channelled through WFP. Emergency food aid delivered by WFP increased by 985,000 mt compared with 2007. Therefore, almost the entire 1 million mt increase in emergency food aid was channelled through WFP.

Project food aid delivered by WFP represented 32 percent of global project food aid, a decline of nearly 86,000 mt from 2007. No programme food aid was channelled through WFP in 2008.

See Table 5 for a breakdown by delivery mode.

Table 5: 2007/2008 Global Food Aid Deliveries by Category and Delivery mode

CATEGORY	DELIVERY MODE	2007		2008		Change 2008 vs 2007
		Mt (000)	%	Mt (000)	%	%
Emergency		3 726	100	4 798	100	29
	Direct transfer	2 031	55	2 750	57	35
	Triangular purchase	851	23	1 263	26	48
	Local purchase	844	23	785	16	-7
Project		1 405	100	1 186	100	-16
	Direct transfer	948	67	723	61	-24
	Triangular purchase	202	14	168	14	-17
	Local purchase	255	18	295	25	16
Programme		911	100	287	100	-68
	Direct transfer	367	40	209	73	-43
	Triangular purchase	544	60	78	27	-86
	Local purchase	-	-	-	-	-

7.2 Emergency food aid

Emergency food aid increased in all regions apart from the Middle East and North Africa, which registered a slight decline. The main increase was directed to sub-Saharan Africa, which continued to be the top recipient region of emergency food aid, with a total of 3.3 million mt. Asia was the second recipient region, accounting for 1 million mt (Table 6). Altogether, sub-Saharan Africa and Asia received 90 percent of emergency food aid in 2008. During 2008, these regions also suffered the most natural disasters – one of the principal causes of emergencies – with a combined share of 63 percent of the world total.

Table 6: 2007/2008 Emergency Food Aid Deliveries by Region

REGION	2007		2008		Change 2008 vs 2007
	Mt (000)	% of total	Mt (000)	% of total	%
Sub-Saharan Africa	2 436	65	3 267	68	34
Asia	845	23	1 050	22	24
Latin America & the Caribbean	62	2	121	3	96
Eastern Europe & CIS	56	2	62	1	10
Middle East & North Africa	327	9	298	6	-9

The top ten recipients of emergency food aid remained unchanged since 2007, with the exception of Myanmar, which was hit by Cyclone Nargis and replaced the Democratic Republic of the Congo (DRC) in tenth position (Table 7).

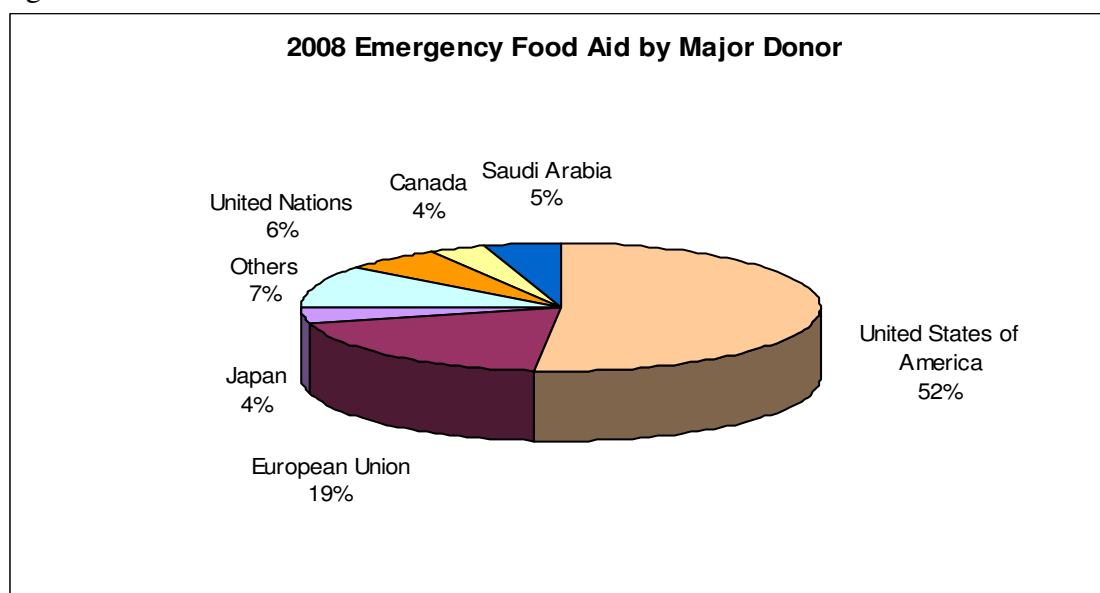
The top five recipient countries received a total of 2.6 million mt of emergency food aid, representing 54 percent of the total delivered in 2008. The top two recipient countries – Ethiopia and the Sudan – received increases of 58 and 37 percent respectively.

Table 7: 2007/2008 Major Recipients of Emergency Food Aid

RECIPIENT	2007		2008		Change 2008-2007
	Mt (000)	% of total	Mt (000)	% of total	%
Ethiopia	580	16	915	19	58
Sudan	491	13	673	14	37
Zimbabwe	157	4	344	7	119
Somalia	93	2	326	7	252
Afghanistan	205	6	309	6	51
DPRK	374	10	305	6	-18
Kenya	194	5	206	4	6
Uganda	238	6	159	3	-33
Occupied Palestinian Territory	234	6	148	3	-37
Myanmar	26	1	109	2	326

The top six emergency food aid donors were the United States of America, the European Union, Japan, the United Nations, Saudi Arabia and Canada (Figure 21).

Figure 21



7.3 Project food aid

In 2008, project food aid was 16 percent below its 2007 level. The decrease affected the top three recipient regions: sub-Saharan Africa, Asia, and Latin America and the Caribbean. These all faced declines of between 85,000 and 110,000 mt compared with 2007. Conversely, project food aid for Eastern Europe and CIS and for the Middle East and North Africa increased altogether by 60,000 mt (Table 8).

Table 8: 2007/2008 Project Food Aid Deliveries by Region

REGION	2007		2008		Change 2008 vs 2007
	Mt (000)	% of total	Mt (000)	% of total	%
Sub-Saharan Africa	683	49	596	50	-13
Asia	414	29	304	26	-26
Latin America & the Caribbean	285	20	201	17	-30
Eastern Europe & CIS	8	1	15	1	76
Middle East & North Africa	15	1	69	6	360

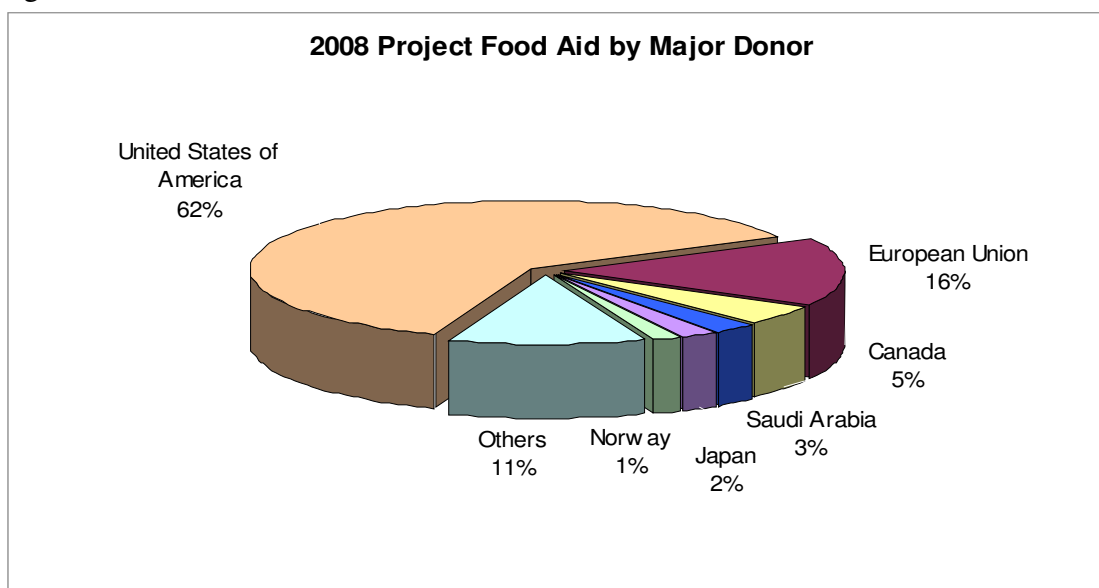
The main recipient countries of project food aid remained unchanged from 2007, with the exception of the occupied Palestinian Territory, Somalia and Uganda, which replaced Bolivia, Ghana and Nicaragua. The greatest decline, of nearly 67,000 mt, was registered in India. Other major recipients showed decreases of up to 35,000 mt (Table 9).

Table 9: 2007/2006 Major Recipients of Project Food Aid

RECIPIENT	2007		2008		Change 2008-2007
	Mt (000)	% of total	Mt (000)	% of total	%
Bangladesh	184	13	206	17	12
Haiti	90	6	117	10	29
Mozambique	47	3	84	7	77
Ethiopia	47	3	72	6	52
Kenya	92	7	61	5	-34
India	115	8	48	4	-58
Malawi	64	5	47	4	-26
Somalia	19	1	44	4	126
Uganda	28	2	37	3	29
Occupied Palestinian Territories	1	0	35	3	6,226

The main donors of project food aid were the United States of America and the European Union, which together accounted for 78 percent of the total. Compared with 2007, both donors decreased their project food aid deliveries, by 17 and 20 percent respectively (Figure 22).

Figure 22



7.4 Programme food aid

Programme food aid in 2008 amounted to 287,000 mt, representing the lowest amount ever reached and a 68 percent decline from 2007. The decrease affected mainly the Asia and Eastern Europe and CIS regions, which in 2007 were the top recipients of programme food aid. They faced declines of 433,000 mt and 205,000 mt respectively. Deliveries dropped to less than 1,000 mt in the Middle East and North Africa, while sub-Saharan Africa and Latin America and the Caribbean registered increases (Table 10).

Table 10: 2007/2008 Programme Food Aid Deliveries by Region

REGION	2007		2008		Change 2008 vs 2007
	Mt (000)	% of total	Mt (000)	% of total	%
Sub-Saharan Africa	86	9	137	48	59
Asia	522	57	90	31	-83
Latin America & the Caribbean	8	1	14	5	83
Eastern Europe & CIS	251	28	46	16	-82
Middle East & North Africa	43	5	0	0	-99

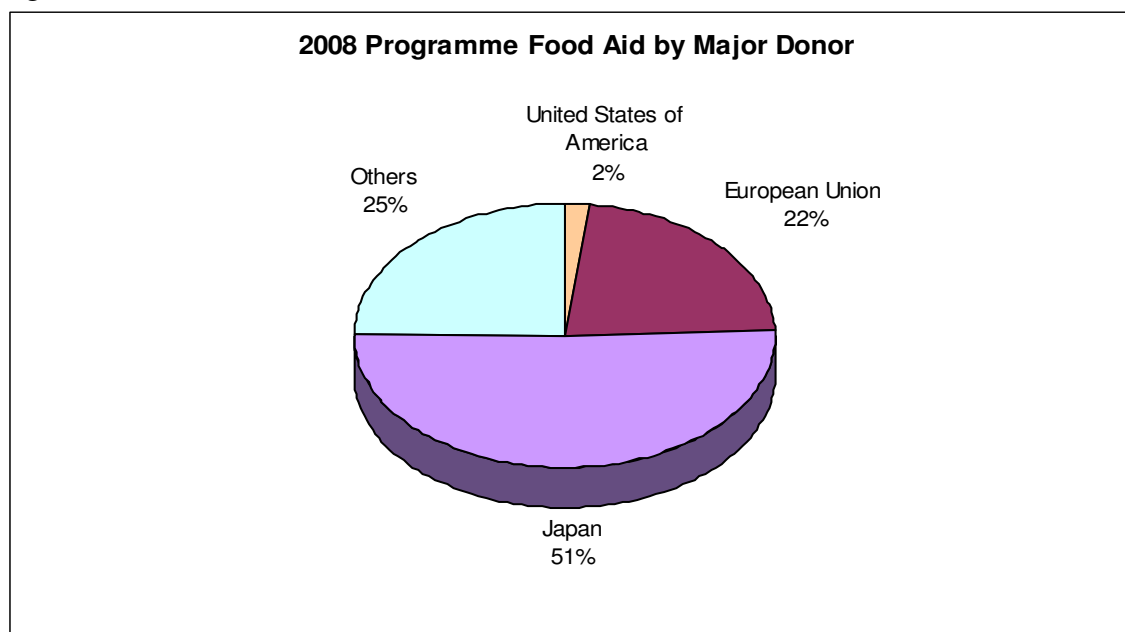
Data show that DPRK, which was the top recipient of programme food aid in 2007, did not receive any food aid delivery in 2008. As indicated in Table 11, nine of the top ten programme food aid recipients retained their 2007 rankings. The exception was Bangladesh, which was the tenth recipient country in 2007, but received an increase of 32,000 mt in 2008, making it the top programme food aid recipient.

Table 11: 2007/2008 Major Recipients of Programme Food Aid

RECIPIENT	2007		2008		Change 2008 vs 2007
	Mt (000)	% of total	Mt (000)	% of total	%
Bangladesh	15	25	47	16	206
Moldova	9	16	46	16	387
Tanzania	-	-	19	6	-
Eritrea	10	17	17	6	66
Guinea	3	5	17	6	441
Mongolia	8	14	17	6	103
Haiti	5	9	14	5	165
Nepal	5	9	14	5	169
Cape Verde	4	6	11	4	210
Ghana	-	-	10	4	-

The main donors of programme food aid changed. The Republic of Korea, the top donor in 2007, did not deliver programme food aid in 2008. The European Union, which ranked second in 2007, maintained its position despite a 78 percent reduction in its programme food aid deliveries. Programme deliveries from the United States of America declined by 96 percent. These three donors accounted for an aggregate reduction in programme food aid deliveries of nearly 740,000 mt. Following an increase of about 70,000 mt, Japan became the main donor of programme food aid in 2008 (Figure 23).

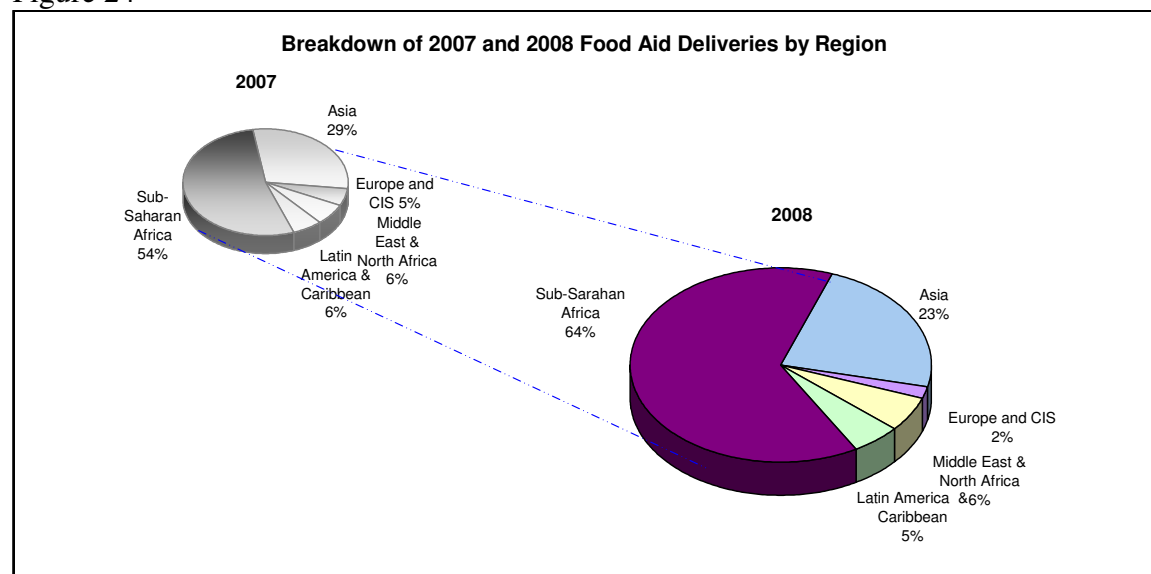
Figure 23



8. REGIONAL PERSPECTIVES

2008 was marked by an increasing focus on sub-Saharan Africa, which has been the major recipient region of food aid since 2003. Its share of total deliveries rose to 64 percent, a 20-year record. Asia was the second top recipient region, with 23 percent of deliveries. The Middle East and North Africa, Latin America and the Caribbean, and Eastern Europe and CIS regions together accounted for the remaining 13 percent (Figure 24).

Figure 24



In 2008, food aid deliveries to sub-Saharan Africa, increased by nearly 800,000 mt, fully recovering their 2000 level of 4 million mt. All other regions registered declines from 2007 (Table 12). Deliveries to these regions in 2008 were between 54 and 95 percent below their 2000 levels.

Table 12: 2007/2008 Global Food Aid Deliveries: Regional Perspectives

REGION	2007		2008		Change 2008 vs 2007
	Mt (000)	% of total	Mt (000)	% of total	%
Sub-Saharan Africa	3 205	53	4 001	64	25
Asia	1 781	29	1 445	23	-19
Latin America & the Caribbean	355	6	336	5	-5
Eastern Europe & CIS	316	5	123	2	-61
Middle East & North Africa	385	6	368	6	-5

In 2008, food aid deliveries to Asia and sub-Saharan Africa accounted for 87 percent of the total. This roughly reflects the combined share of undernourished people within the

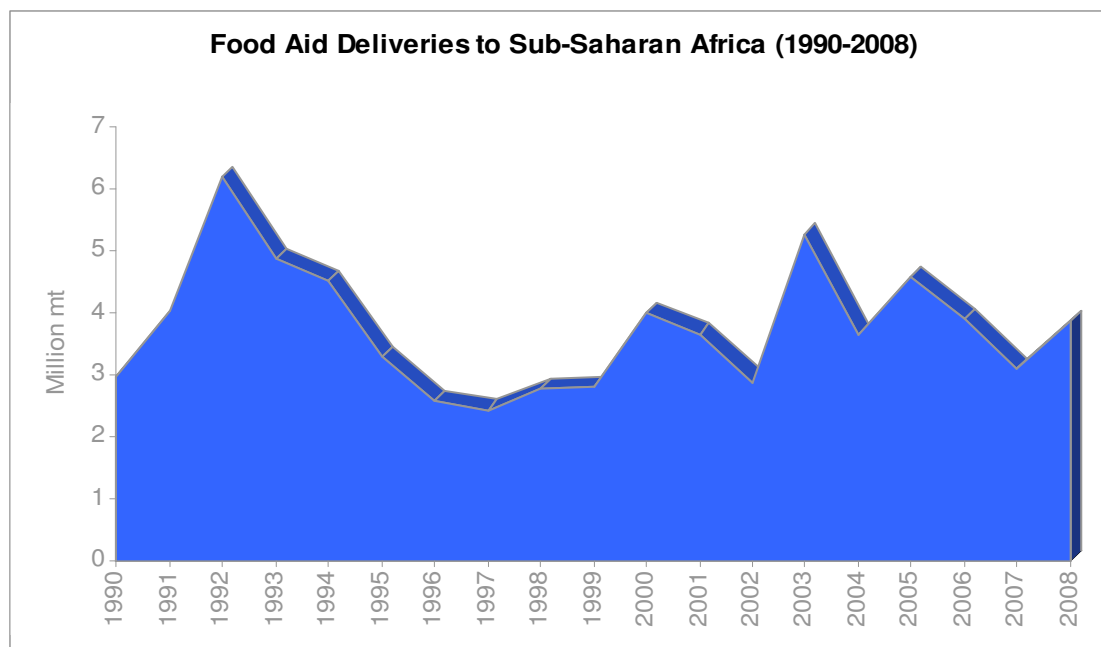
two regions, which was 91 percent in 2003–2005.³ The allocation of food aid to these two regions does not reflect the distribution of needs, however. In 2003–2005, 65 percent of the world's undernourished people lived in Asia, but only 23 percent of food aid deliveries were directed to this region in 2008. Conversely, the 2003–2005 share of undernourished people living in sub-Saharan Africa was 25 percent, but the region received 64 percent of total food aid deliveries in 2008.

³ FAO. 2008. *The State of Food Insecurity in the World*. Rome.

8.1 Sub-Saharan Africa

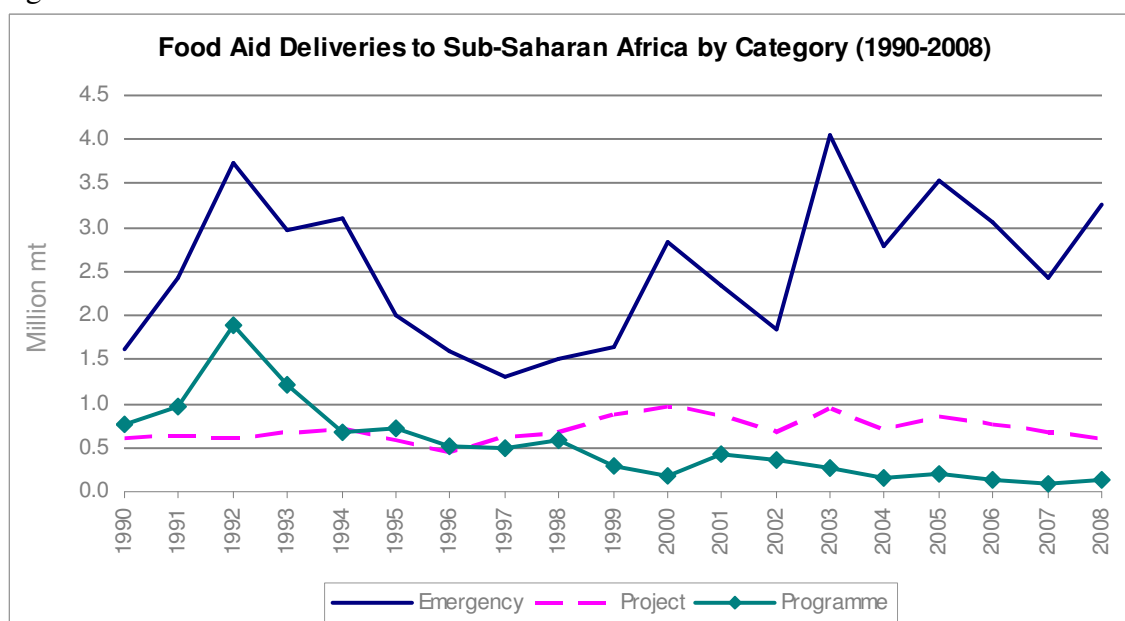
In 2008, food aid deliveries to sub-Saharan Africa amounted to 4 million mt, up by 25 percent on the previous year (Figure 25).

Figure 25



The increase was entirely in response to emergencies. Emergency has always been the predominant food aid category in the region. In 2008, its share peaked to 82 percent (Table 13). Programme food aid increased by nearly 50,000 mt, while project food aid registered a decline of 90,000 mt. These two categories together accounted for 18 percent of total deliveries (Figure 26).

Figure 26



Food aid deliveries to the region have been increasingly distributed to beneficiaries; the amount distributed in this way rose by almost 830,000 mt in 2008. The quantity of food aid sold on the open market remained constant from the previous year. As in 2007, multilateral agencies delivered two-thirds of total food aid to the region. Most – 64 percent – food aid provided to sub-Saharan Africa was purchased in the donor countries, increasing by 600,000 mt since 2007 (Table 13).

Table 13: 2007/2008 Food Aid Deliveries to Sub-Saharan Africa

SUB-SAHARAN AFRICA	2007		2008		Change 2008 vs 2007
	Mt (000)	% of total	Mt (000)	% of total	%
Emergency	2 436	76	3 267	82	34
Project	683	21	596	15	-13
Programme	86	3	137	3	59
Sold	273	9	270	7	-1
Distributed	2 932	91	3 731	93	27
Multilateral	2 141	67	2 686	67	25
Bilateral	189	6	304	8	61
NGOs	875	27	1 011	25	16
Direct transfer	1 950	61	2 556	64	31
Triangular purchase	594	19	889	22	50
Local purchase	661	21	556	14	-16

The main recipient countries in sub-Saharan Africa were Ethiopia with nearly 1 million mt, the Sudan with 680,000 mt, Somalia with 370,000 mt, and Zimbabwe with 350,000 mt. These were also the world's top four recipient countries. Together they accounted for 38 percent of global food aid flows and 60 percent of deliveries in the region. The sharpest increases in food aid quantities were registered in Somalia with 230 percent and Zimbabwe with 109 percent more than in 2007.

As in 2007, the top three donors of global food aid were also the main donors to the region in 2008. They were the United States of America with 57 percent, and the European Community and Japan with 6 percent each.

8.2 Asia

Food aid deliveries to Asia declined by 19 percent compared with 2007, reaching a total of 1.4 million mt (Figure 27). The reduction is explained by decreases in programme and project food aid of 430,000 mt and 109,000 mt respectively. Emergency food aid, which was the predominant category, increased by nearly 200,000 mt reaching the unprecedented share of 73 percent (Figure 28).

Figure 27

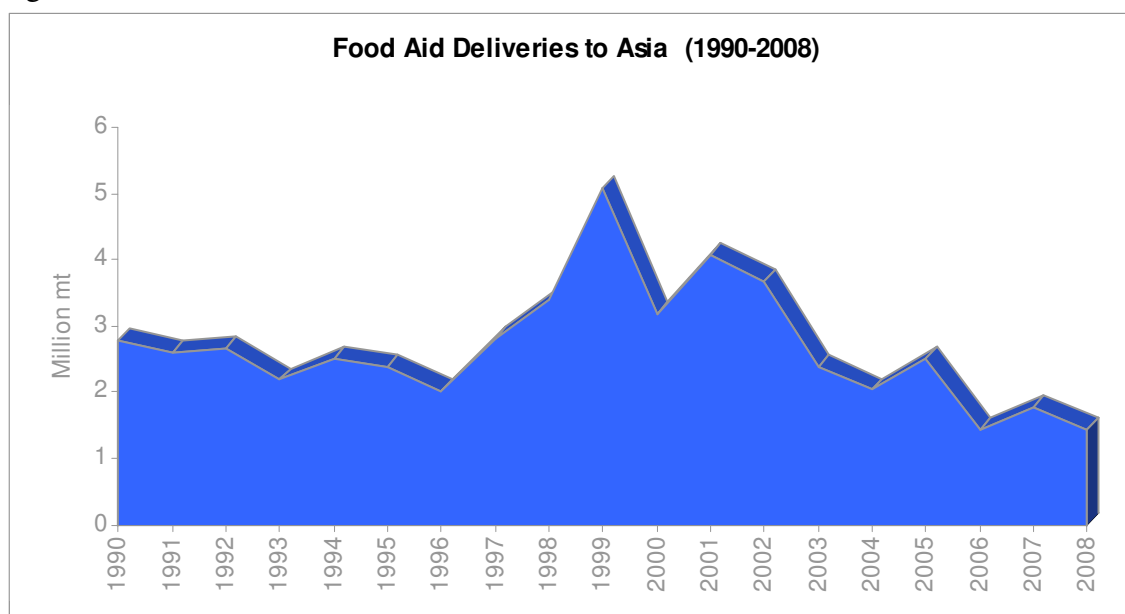
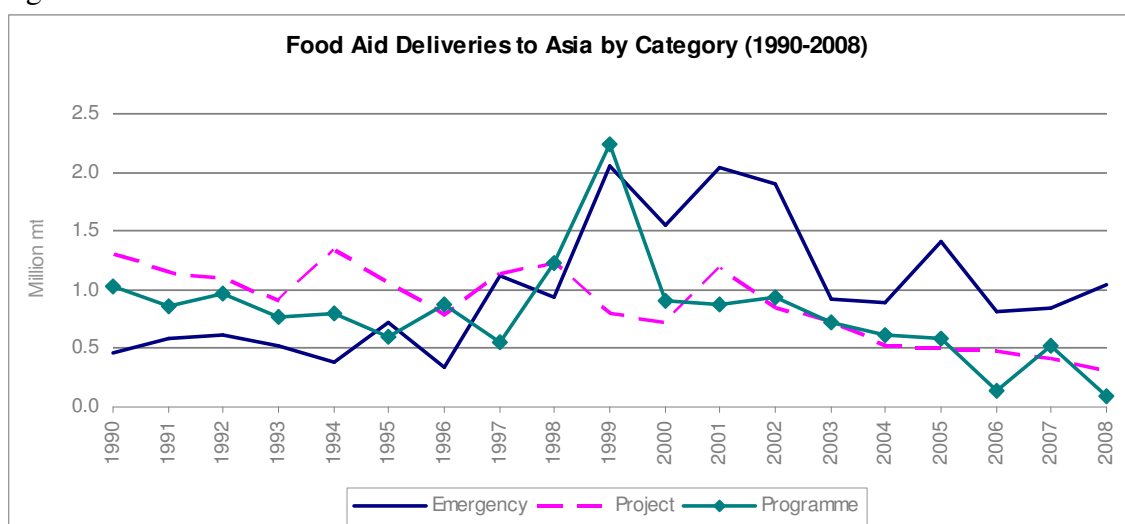


Figure 28



During 2008, Asia experienced a remarkable 500,000 mt decline in monetized food aid (Table 14). Food aid channelled bilaterally declined by 600,000 mt, and was only partly compensated for by an increase in multilaterally channelled food aid of 260,000 mt.

Table 14: 2007/2008 Food Aid Deliveries to Asia

ASIA	2007		2008		Change 2008 vs 2007
	Mt (000)	% of total	Mt (000)	% of total	%
Emergency	845	47	1 050	73	24
Project	414	23	304	21	-26
Programme	522	29	90	6	-83
Sold	663	37	163	11	-75
Distributed	1 118	63	1 282	89	15
Multilateral	678	38	938	65	38
Bilateral	836	47	236	16	-72
NGOs	267	15	271	19	2
Direct transfer	1 007	57	867	60	-14
Triangular purchase	519	29	320	22	-38
Local purchase	255	14	257	18	1

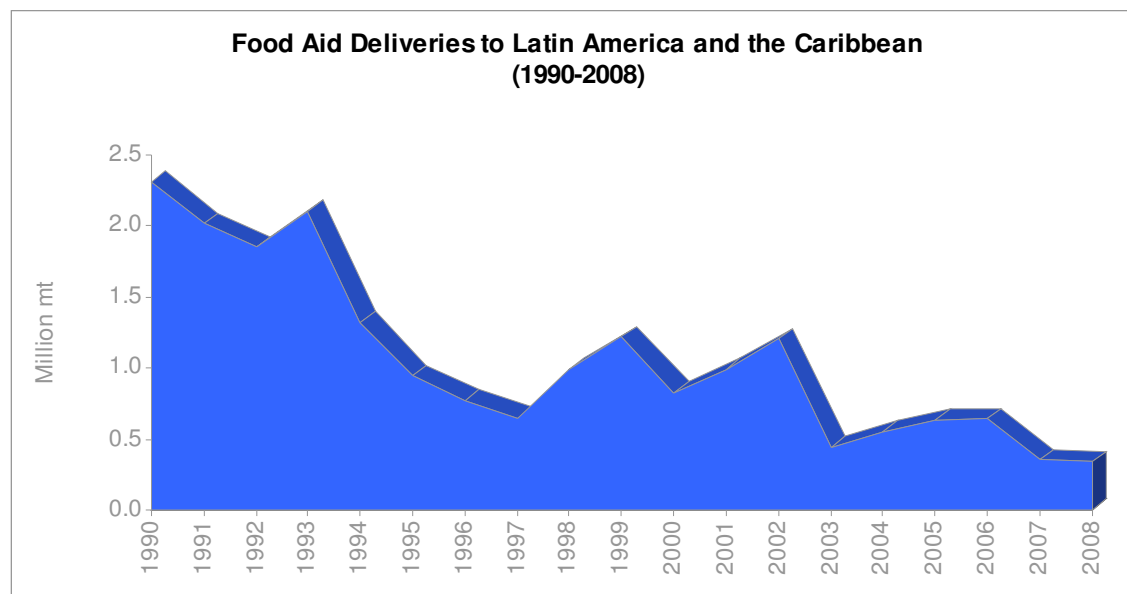
The top two recipient countries were Bangladesh and Afghanistan. Each received approximately 300,000 mt, representing 45 percent of total food aid deliveries to the region. Compared with 2007, Bangladesh registered an increase of 51 percent in total food aid deliveries, in response to Cyclone Sidr.

The United States of America contributed 43 percent of total food aid in Asia.

8.3 Latin America and the Caribbean

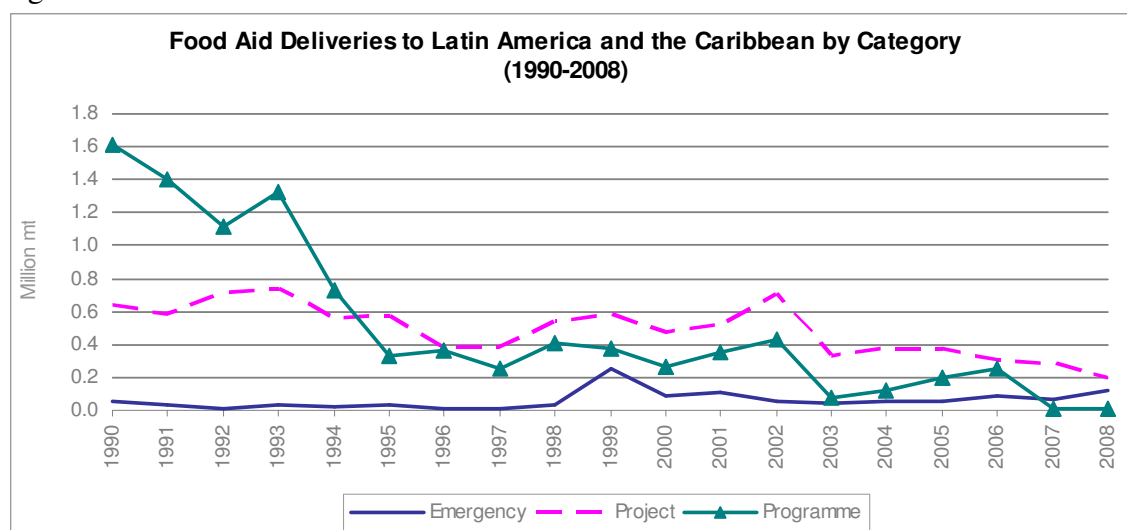
Food aid directed to Latin America and the Caribbean amounted to 335,000 mt, a 5 percent reduction from 2007 (Figure 29).

Figure 29



Unlike other regions, in Latin America and the Caribbean the main food aid category was project food aid, despite a decline of 30 percent from the previous year. Emergency food aid doubled from 2007, and programme food aid continued a slow decline (Figure 30).

Figure 30



As in other regions, food aid was mainly distributed to beneficiaries – 81 percent – rather than being sold on local markets. In 2008, NGOs channelled 57 percent of deliveries to the region. Food aid purchased within the donor country (direct transfer) continued to be the predominant delivery mode, despite a reduction of 100,000 mt (Table 15).

Table 15: 2007/2008 Food Aid Deliveries to Latin America and the Caribbean

LATIN AMERICA AND THE CARIBBEAN	2007		2008		Change 2008 vs 2007
	Mt (000)	% of total	Mt (000)	% of total	%
Emergency	62	17	121	36	96
Project	285	80	201	60	-30
Programme	8	2	14	4	83
Sold	163	46	65	19	-60
Distributed	192	54	270	81	41
Multilateral	93	26	129	38	27
Bilateral	8	2	14	4	45
NGOs	253	71	193	57	-31
Direct transfer	275	77	175	52	-56
Triangular purchase	28	8	39	12	28
Local purchase	51	14	121	36	58

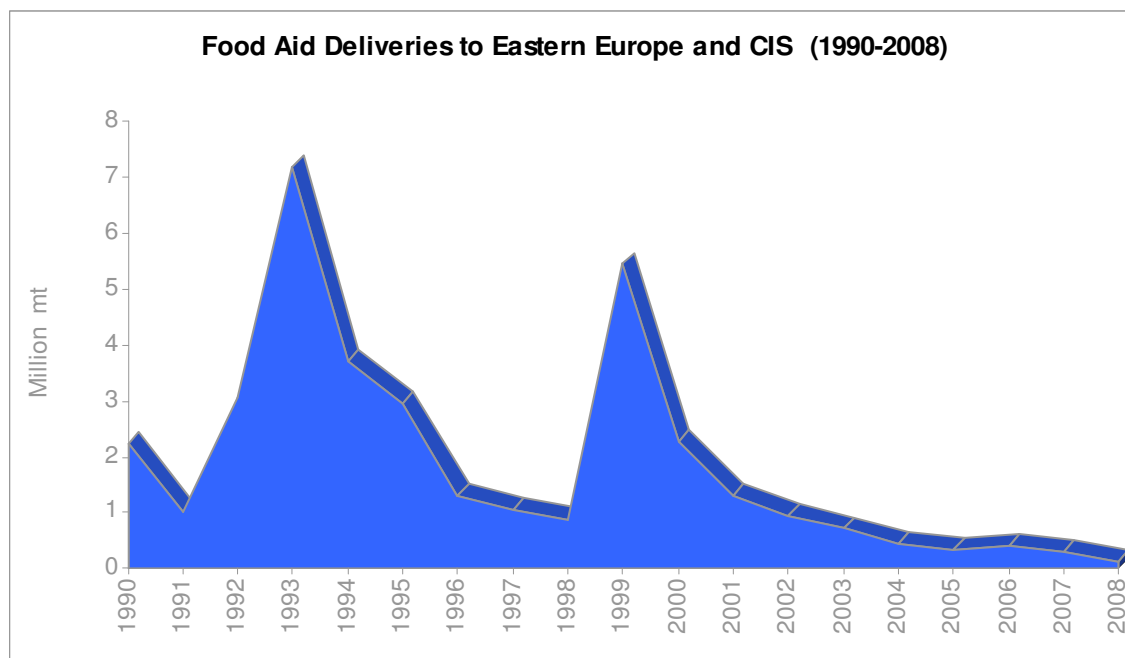
In 2008, Haiti was the region's major recipient country, receiving 60 percent of total food aid delivered. Compared with 2007, food aid deliveries to this country increased by 88 percent, in response to an acute food crisis and the occurrence of natural disasters.

The main donors in the region were the United States of America with 65 percent of total food aid, and Canada with 7 percent.

8.4 Eastern Europe and CIS

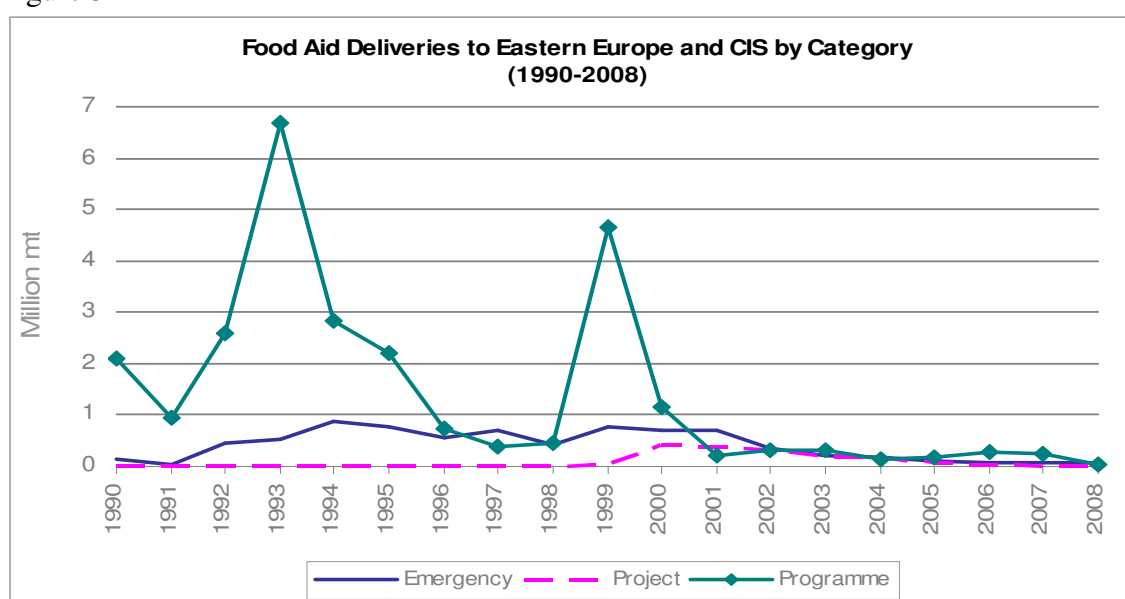
In 2008, food aid deliveries in Eastern Europe and CIS dropped to less than half their 2007 level (Figure 31) to stand at 123,000 mt, or less than 2 percent of the global total.

Figure 31



The decline in food aid deliveries reflects a 205,000 mt drop in programme food aid. Emergency and project food aid increased slightly, but could not compensate for this drop. Programme food aid ceased to be the main food aid category, having represented 80 percent of deliveries to the region in 2007 (Figure 32).

Figure 32



Food aid in the CIS region was mainly distributed to beneficiaries, although some 37 percent was monetized. In 2008, multilateral agencies were the main intermediary, channelling 48 percent of food aid deliveries. Unlike in other regions, 85 percent of food aid was purchased through triangular or local transactions (Table 16).

Table 16: 2007/2008 Food Aid Deliveries to Eastern Europe & CIS

EASTERN EUROPE & CIS	2007		2008		Change 2008 vs 2007
	Mt (000)	% of total	Mt (000)	% of total	%
Emergency	56	18	62	51	10
Project	8	3	15	12	76
Programme	251	80	46	37	-82
Sold	255	81	46	37	-82
Distributed	61	19	77	63	27
Multilateral	52	16	60	48	15
Bilateral	251	80	46	37	-82
NGOs	13	4	17	14	36
Direct transfer	13	4	19	16	51
Triangular purchase	281	89	91	74	-68
Local purchase	22	7	13	11	-41

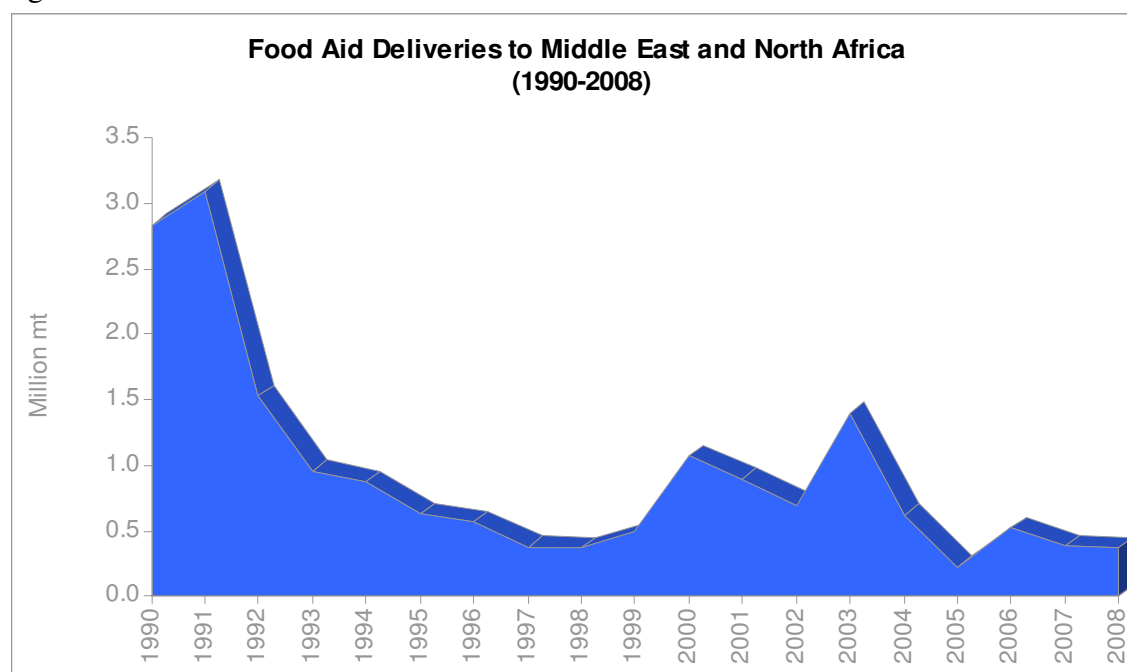
Eastern European countries stopped receiving food aid in 2005. Since then, deliveries have been directed to a few CIS countries. In 2008, Moldova and Tajikistan were the main recipient countries, together accounting for 69 percent of total food aid in the region. Deliveries to Armenia, Azerbaijan, Georgia and Kyrgyzstan decreased by between 80 and 100 percent.

The main food aid donors in this region were the European Commission with 42 percent, Saudi Arabia with 14 percent and the United Nations with 7 percent.

8.5 Middle East and North Africa

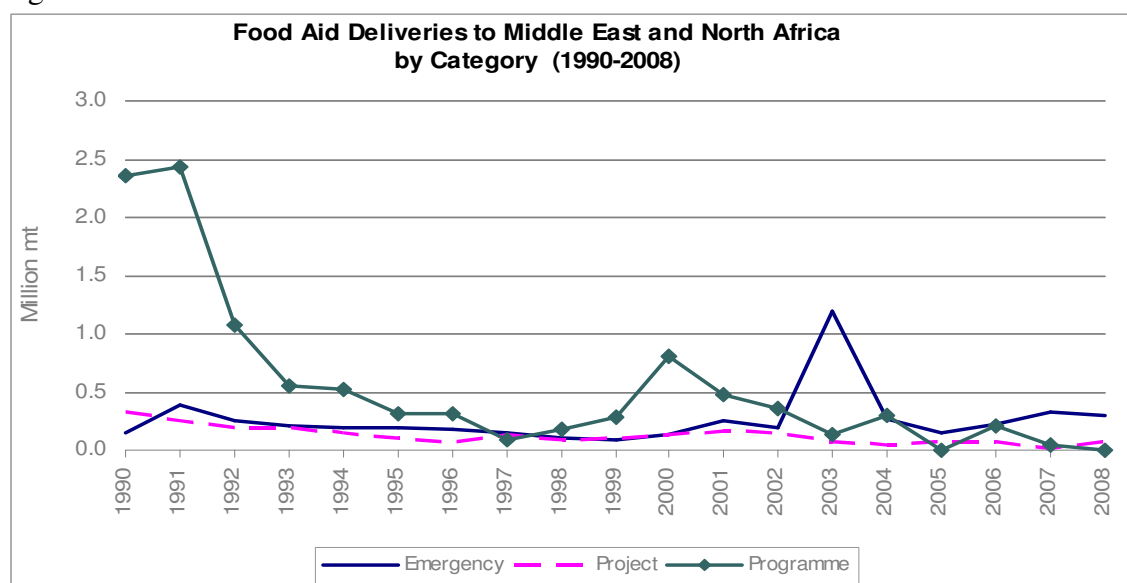
Food aid deliveries to the Middle East and North Africa stood at nearly 370,000 mt in 2008, nearly 6 percent of the global total. This represented a slight decline of 4.5 percent since 2007 (Figure 33).

Figure 33



Emergency food aid continued to be the main category, accounting for 81 percent of deliveries to the region. Programme food aid fell to less than 1,000 mt, representing a 99 percent decline from 2007 levels. As a result, monetized food aid, which relates entirely to programme food aid, dropped to almost nothing in 2008 (Figure 34).

Figure 34



For the first time ever, and only in this region, food aid was distributed entirely to beneficiaries. It was predominantly delivered through the multilateral channel, with 92 percent of the total, and purchased through local and triangular transactions, with 82 percent.

Table 17: 2007/2008 Food Aid Deliveries to Middle East and North Africa

MIDDLE EAST AND NORTH AFRICA	2007		2008		Change 2008 vs 2007
	Mt (000)	% of total	Mt (000)	% of total	%
Emergency	327	92	298	81	-9
Project	15	4	69	19	360
Programme	43	12	0	0	-99
Sold	43	12	0	0	-99
Distributed	342	96	367	100	7
Multilateral	305	86	340	92	11
Bilateral	43	12	0	0	-99
NGOs	37	10	28	8	-25
Direct transfer	115	32	64	17	-45
Triangular purchase	161	45	171	46	6
Local purchase	110	31	133	36	22

The major recipients in the Middle East and North Africa were the occupied Palestinian Territory with 50 percent, and Iraq and the Syrian Arab Republic with 14 percent each.

As in 2007, the main food aid donations to the Middle East and North Africa originated from the United States of America with 26 percent, the European Commission with 21 percent and Japan with 11 percent.

8.6 Food aid recipient countries

In 2008, 6.3 million mt of food aid was distributed to 82 recipient countries, 4 countries fewer than in 2007. The number of recipient countries has declined steadily since the early 1990s, when 120 received food assistance. Compared with 1990, fewer recipient countries received a smaller amount of food aid in 2008. The average quantity distributed to each recipient in 2008 was almost 76,000 mt, which is half its 1990 equivalent (141,000 mt). The quantities delivered to each recipient varied widely in 2008, ranging from 1 million mt for Ethiopia to 1 mt in China.

Of the 82 countries, 39 were located in sub-Saharan Africa, 17 in Asia, 11 in Latin America and the Caribbean, 9 in the Middle East and North Africa, and 6 in Eastern Europe and CIS.

During 2008, 58 percent of total food aid was concentrated among only eight recipients: Ethiopia with 16 percent, the Sudan with 11 percent, Somalia with 6 percent, Zimbabwe with 6 percent, Bangladesh with 5 percent, Afghanistan with 5 percent, DPRK with 5 percent, and Kenya with 4 percent (Table 18). Almost 80 percent of total food aid was delivered to the top 20 recipients.

Table 18: Global Food Aid Profile of the Main Recipients in 2008 (percentage)

	Ethiopia	Sudan	Somalia	Zimbabwe	Bangladesh	Afghanistan	DPRK	Kenya
FOOD AID CATEGORY								
Emergency	93	99	88	99	24	96	100	77
Project	7	1	12		62	2		23
Programme				1	14	2		
COMMODITY								
Cereals	94	78	87	85	93	85	89	88
Non-cereals	6	22	13	15	7	15	11	12
SALE								
Distributed	100	100	100	99	63	99	100	94
Sold				1	37	1		6
DONOR								
USA	71	63	60	71	59	54	48	55
EU	10	15	8	16	12	12	2	18
Canada	7	3	3	3	1	13	0	2
China	0			1	6	1	42	
UN	4	4	7	2	3	3		7
Saudi Arabia	1	6	8			3	3	5
Japan	1	4	1	1	1	5		6
Australia	1	0		4	6	1	0	
NGOs	3	0	1	1	1	0		1
Others	1	5	13	1	12	7	6	6
TERM								
Grant	100	100		100	100		100	100
Concessional sales								
CHANNEL								
Bilateral	15			1	14	4	42	
Multilateral	49	93	70	53	37	89	46	91
NGOs	36	7	30	45	49	7	12	9
MODE								
Direct Transfer	84	67	54	72	73	63	91	55
Local purchase	4	16	14	3	8	2		19
Triangular transaction	11	17	32	25	19	35	9	26

9. NUTRITIONAL VALUE OF FOOD AID

In recent years the international community has paid increasing attention to the nutritional quality of food aid. In response to this, and with support from the European Commission and the Government of Canada, WFP has developed three indicators (see below) to measure the nutritional value of global food aid, and a web-based tool aimed at giving the implementation and reporting of food aid operations a nutrition perspective. These indicators can be used in conjunction with the traditional measures based on metric tonnage.

The core concept of these indicators is a comparison between the supply of nutrients and nutritional requirements. The individual requirements met on average (IRMA) compares the nutritional content of food aid commodities with average nutritional requirements for energy and a basket of macro- and micronutrients essential for an active and healthy life: fat, protein, iodine, iron, vitamin A, vitamin C, niacin, thiamine, riboflavin, vitamin B6, vitamin B9 (folic acid), vitamin B12 and zinc.⁴ These macro- and micronutrients are also known as j-nutrients. The nutrients delivered are not compared with the actual needs of recipients, but with those of an average individual in a developing country; this is to make the indicators universally applicable and comparable.⁵ The indicators do not infer any judgement on the quality of the food aid, which refers to a much broader set of issues.⁶ They only focus on one aspect of quality – the nutritional content of food aid.

Three indicators to measure the nutritional value of food aid

IRMA_t = individual requirements met on average, total

The total number of people for whom the requirements for each nutrient are potentially met, based on the total tonnage of food aid delivered. IRMA_{tj} shows the total number of people whose nutritional requirements for each j-nutrient could potentially be satisfied by the total tonnage delivered to the country.

IRMA = individual requirements met on average

The number of people for whom the requirements for each nutrient could potentially be satisfied with a representative 1 mt of food aid deliveries. IRMA_j scales IRMA_{tj} down to 1 mt by dividing IRMA_{tj} by the total tonnage selected for the country. This allows easy comparisons across different food aid deliveries by eliminating the quantity component of IRMA_t.

IRMAs = individual requirements met on average, score

The average of 13 IRMA_j values as a percentage of the IRMA value for energy. No weights are applied, but maximum values are imposed so that outliers do not unduly influence the average. This indicator is restricted to the interval [0–100] and excess quantities are penalized. IRMAs is the only indicator that is a single number.

⁴ The nutritional requirements for energy and ten nutrients are from WHO, 2000, The Management of Nutrition in Major Emergencies (<http://whqlibdoc.who.int/publications/2000/924154508.pdf>). The nutritional requirements for protein and zinc are from The Sphere Project, 2004, Humanitarian Charter and Minimum Standards in Disaster Response. <http://www.sphereproject.org>, <http://www.act-inl.org/media/documents/8032-sphereHandbookfull.pdf>. Nutritional requirements for vitamin B6 were computed as a weighted average, using as weights the same size of sex-age groups as used for the other nutritional requirements.

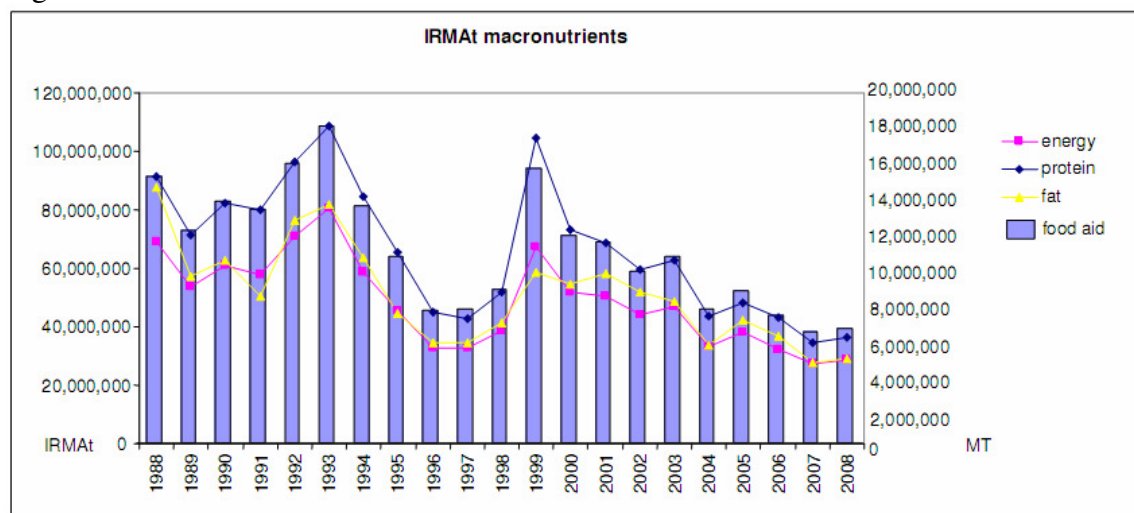
⁵ The actual needs of individual beneficiaries could be different, for example because of age, sex, diseases, activity levels and other sources of food besides food aid. The nutritional requirements are based on averages, using the size of various age/sex groups as weights.

⁶ Including targeting, timing, safety, shelf-life, local preferences/acceptability, and useability in terms of preparation requirements.

9.1 Food Aid Flows and IRMA_t

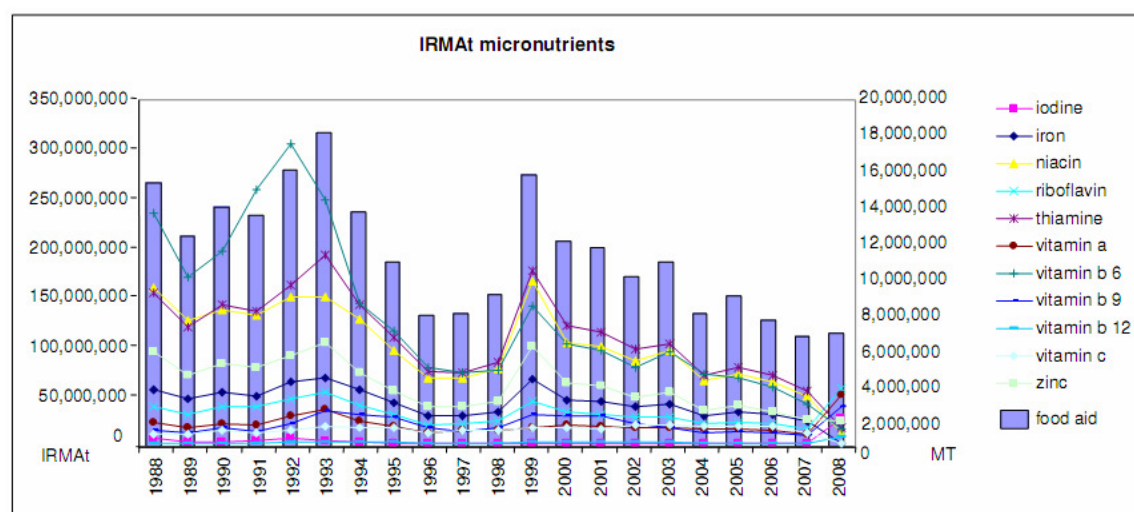
Among the three indicators, IRMA_t is the most appropriate for measuring total food aid flows. There is a correlation between IRMA_t values and food aid quantities in mt. IRMA_t represents the total number of people whose minimal nutrient requirements are satisfied. Based on the humanitarian threshold of 2,100 kilocalories a day, total food aid deliveries in 2008 could potentially meet the energy needs of 28.6 million individuals, up from 27.3 million individuals in 2007. The IRMA_t for protein shows a similar trend, with the IRMA_t for protein showing a higher value. Food aid flows in 2008 were potentially able to meet the protein requirements of 36.4 million people.

Figure 35



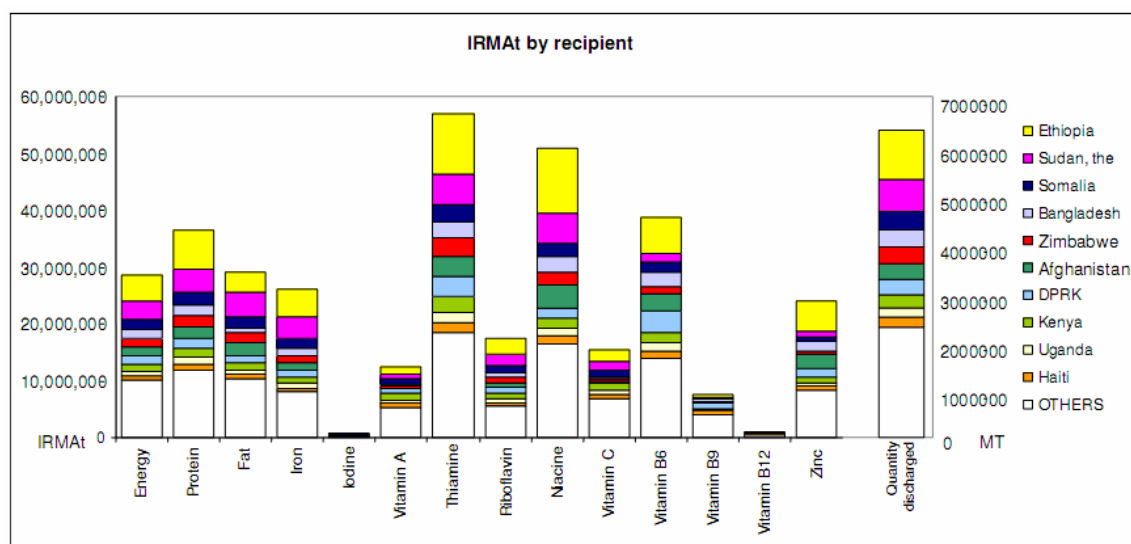
Analysis of the IRMA_t for micronutrients shows that the food aid deliveries are not balanced, as the IRMA_t values for micronutrients are significantly different from those for energy and macronutrients. For example, global food aid flows in 2008 were able potentially to meet the riboflavin requirements of 57 million people, twice as many as for energy.

Figure 36



In 2008, the ten largest recipient countries received 64 percent of global food aid deliveries as tonnage. The same recipients accounted for almost the same percentage or more of each of the various IRMA values, with the exceptions of iodine at 59 percent, vitamin A at 57 percent, vitamin C at 55 percent, vitamin B9 at 46 percent, and vitamin B12 at 43 percent.

Figure 37



Analysis of donors shows that the largest ten donors accounted for 86 percent of global contributions. They accounted for similar percentages of IRMA values, with the exception of iodine at 78 percent, vitamin A at 79 percent, vitamin C at 79 percent, vitamin B6 at 83 percent, vitamin B9 at 83 percent, and vitamin B12 at 81 percent.

From a commodity perspective, maize, rice, sorghum, and wheat and its derivatives represent 71 percent of global food aid deliveries in tonnage, but have very limited nutritional value for fat and vitamin A, and no value for iodine and vitamin C. On the other hand, they account for more than 60 percent of energy and all other nutrients.

These gaps are sometimes recovered by other commodities delivered. For example, corn-soya blend accounts for 58 percent of total vitamin A and 83 percent of total vitamin C, but only 5 percent of total food aid deliveries in tonnage or energy.

Figure 38

