

COVID-19 Discussion Papers

Sub-Saharan Africa's Food Systems and COVID-19: Emerging Evidence



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The
Food and Land Use
Coalition

SUB-SAHARAN AFRICA'S FOOD SYSTEMS AND COVID-19: EMERGING EVIDENCE

Summary

The COVID-19 pandemic, and the national and international policy responses to contain it, are already having an impact on Sub-Saharan Africa's (SSA) food systems. Different indicators point to growing stress. For example, the cost of a basic food basket has risen by 5-10% in eight SSA countries and by over 10% in a further nine SSA countries. Fears are growing that the pressures on food systems we can already observe will lead to a full-blown food crisis with potentially catastrophic consequences for the region.

SSA food systems are particularly susceptible to the impact of COVID-19, due to a vulnerability that pre-dates the virus. This brief, written by the Food and Land Use Coalition (FOLU) and Alliance for a Green Revolution in Africa (AGRA), presents a framework for understanding COVID-19 impacts on food systems and presents the emerging evidence from the region. It then highlights a short-term agenda to address the negative impacts of the crisis, and a longer-term plan to foster the transformation towards more resilient food systems in the region. Short-term priorities include improving logistics and putting in place monitoring systems to chart the evolution of the crisis and inform action. Policies that achieve longer term resilience will also need to be implemented, including regional trade integration and infrastructure investment, as well as enhanced social safety nets and improved farm practices.

A. COVID-19 IMPACTS ON FOOD SYSTEMS

Over the last few months, evidence has begun accumulating on the immediate and longer term impacts of COVID-19 on food systems, especially for the poorest populations whose dependence on daily labour and informal urban markets make them particularly susceptible to the effects of lockdowns related to the pandemic.

Exhibit 1 shows that COVID-19, in the immediacy, on the supply side is mostly a crisis of logistics, where bottlenecks caused by restrictions on movement affect supply chains, particularly those where producers rely on casual labour or seasonal migrants. On the demand side, reductions in income through job losses reduce consumers' ability to afford the necessary quantity and quality of food they require, while the closure of schools impacts children that rely on them for meals.

Exhibit 1

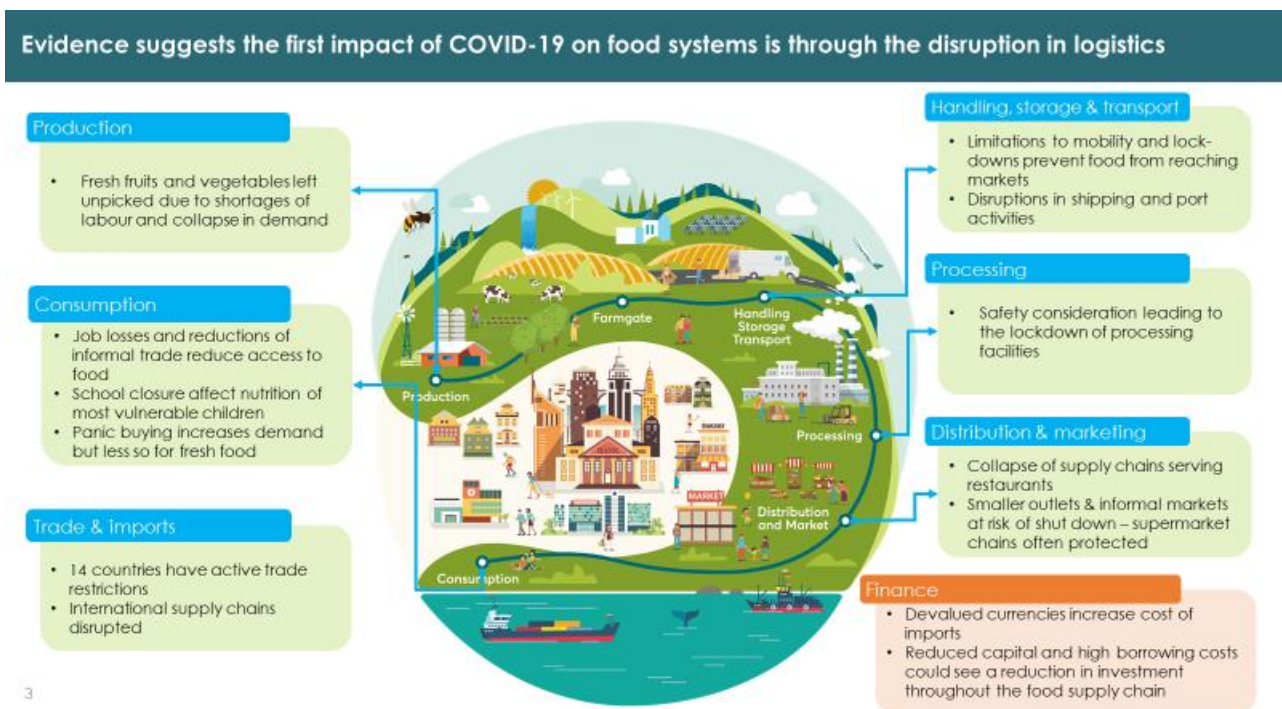


Exhibit 2 shows that as the pandemic continues to spread and governments continue to implement measures that reduce mobility, logistical challenges are likely to turn into a food crisis. The unavailability of inputs and labour, higher and more volatile food prices and persistent lack of income are key challenges for access to food by the poorest and vulnerable. These impacts will heighten with continuing trade restrictions, proving especially damaging to import dependant countries.

Exhibit 2



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Beyond the direct impacts on food systems, which can jeopardise access to affordable foods especially for the poorest and most vulnerable, COVID-19 could have broader longer-term impacts.

Some impacts are on people. COVID-19 is not just causing a global health crisis but also an economic one, leaving many governments in deeper debt due to falling tax receipts at a time of intense spending on the pandemic. This jeopardises their ability, both now and in the future, to provide essential services and boost efforts to meet the SDGs. With a synchronised recession in the Global North and South, international aid through NGOs or international organizations is also likely to be affected by the economic fallout from COVID-19.

Some impacts are related to food systems and natural resources. Governments’ and international development agencies’ attention and resources are going to be diverted from food systems and the protection of natural habitats. Strained public finances and wary investors could lead to falls in investment in infrastructure and conservation. A sudden decline in tourism will compound these issues. Tourism provides an income for many living around nature reserves and national parks, as well as for those that work to protect these areas from illegal land grabbing for farming, poaching and logging.

At the same time, there will be increased pressure on natural resources. The pandemic is spurring countries around the world, including in SSA, to reduce their dependence on food imports at a time of growing trade restrictions by encouraging domestic production of staples such as rice. This has the potential to cause an increase in the conversion of natural habitats as officials seek to increase agricultural land and might result in less efficient production of food as well as rising greenhouse

gas emissions. In order to survive, vulnerable groups might feel it necessary to respond in ways which add further strain on natural resources, for example with slash-and-burn farming, overfishing, and encroachment of protected natural habitats. Fears also exist that governments may loosen rules around protecting natural habitats to boost economic growth in a short-term attempt to counter COVID-19's impact on national economies.

Some of the pressures on nature in turn result in greater health risks, such as by increasing the risk of zoonotic diseases spreading to humans, caused by closer proximity between humans and animals. Though the immediate response agenda aims to stem a humanitarian tragedy, these considerations should be part of the thinking around how to “rebuild better” to increase the resilience of food and land use systems in the future.

B. EMERGING EVIDENCE IN SSA

The outbreak of COVID-19 and the national and international policy responses to contain it are already having an impact on SSA food systems. While it is too early to have systematic evidence, there are several indicators of stress. The cost of a basic food basket has risen by 5-10% in eight SSA countries and by over 10% in a further nine SSA countries. Fears surrounding food security saw rioting and looting taking place in South Africa in mid-April and a stampede in Kenya which left two people dead. And this is in the context of the first regional recession in 25 years. Models suggest that in Nigeria, GDP fell by 38 percent in the first 5 weeks of the lockdown. GDP fell by a similar amount in South Africa and almost halved in Rwanda during its six-week lockdown.

The Vulnerability of SSA Food Systems

Many of the features of SSA food systems point to a great vulnerability to this crisis, which the impacts of the pandemic are helping highlight.

Agriculture is often characterised by low productivity. While an estimated 53% of SSA inhabitants work in agriculture, the sector accounts for less than 25% of the regional GDP. The region is also dependent on food imports, making it vulnerable to increases in international food prices as well as shortages that are likely to happen in the long run, while regional trade integration is low. COVID-19 has resulted in the indefinite postponement of the African Continental Free Trade Area which had been due to launch on 1 July 2020, potentially damaging vital interregional trade.

Natural disasters, together with fragility, have already heightened the vulnerability of SSA food systems. Massive crop loss, caused by locust swarms, is straining food systems in large parts of East Africa, as well as conflicts estimated to affect six out of 46 countries in the region. Further food supply disruptions caused by COVID-19 will exacerbate this and limit the ability of aid agencies to respond with food aid. Conflict is also partially responsible for the existence of over 6 million refugees in SSA and even more internally displaced persons, many of whom are highly dependent on humanitarian assistance and therefore vulnerable to supply disruptions.

Many of the poor depend on high labour, low input agriculture which is a further cause of vulnerability, as COVID-19 both directly and indirectly is affecting labour mobility and livelihood options for those working in the food system. Though less than 20% of farmers use fertiliser and

improved seeds in their farming practices, higher input agriculture is likely to be affected by devaluations as the region is mostly dependent on international production of fertiliser. In addition, lockdowns and disruptions in trade logistics have affected the import of equipment required by higher input farming.

Low levels of income limit access to food, made worse by the job losses brought about by the pandemic. The ILO estimates that 26% of Africa's population work in sectors that are at-risk from COVID-19. The World Bank estimates that an additional 23 million people in SSA will be thrown into extreme poverty by a 3% global contraction in income. Poorer communities in society have a higher dependency on street markets, representing a stark trade-off between imposing lockdowns and social distancing measures, and cutting access to food. This is especially true of urban households, where up to 70% regularly purchase their food from informal markets or street vendors.

Some 237 million people in SSA are estimated as being undernourished. Further disruptions to the region's food systems due to income loss and higher food prices could increase this number and worsen the situation for those already affected.

The ability of national governments to intervene is likely to be very limited. Numerous countries in the region face a financially precarious position as they are burdened by large levels of debt and depend on government revenue and foreign exchange reserves from commodity exports and tourism. Large volumes of capital flight this year have exacerbated this situation. At least 4 billion USD is estimated to have left the region between February and April, Official development assistance and remittances are also likely to decline as the global economy contracts by an estimated 3% in 2020.

Despite the large programmes put in place by multilateral organizations, structural challenges such as the low coverage of safety nets – an estimated 80% of the population was not covered by any social protection program before the crisis – seriously hamper governments' ability to support the poor and vulnerable.

A View from the Ground

Planting and harvesting seasons vary by region and country in SSA, which together with diverging government restrictions on lockdowns and movement, expose countries to different potential COVID-19 related disruptions. Evidence collected by AGRA on the ground identifies two broad patterns:

- Countries harvesting between March and May, could see short-term impacts due to border closures and lockdowns, disrupting logistics and sales. These are expected to include southern parts of Tanzania, Mozambique, Malawi, Zambia, Zimbabwe and others in the region.
- Countries planting in June and July could see long-term food production impacts caused by reduced access to inputs and extension services. These are expected to include countries such as Nigeria, Mali, Ghana, Burkina Faso and others in similar geographies and agroecological systems.

Rapid response surveys by GAIN based on the small enterprises they work with highlight how some of vulnerability mentioned here is playing out on the ground, with obstacles to labour mobility and road transport, a labour intensive activity, being two of the main challenges affecting food supply chains.

There are currently many, sometimes contradictory, local sources of information and data being used by different stakeholders, but the effects of disruptions on food systems in relation to COVID-19 are becoming apparent in certain countries, such as input availability in Rwanda and disrupted sales in Tanzania. A better understanding of each country's individual vulnerabilities as well as detailed monitoring is therefore necessary to mitigate the potential impact on food systems in the region.

C. THE WAY FORWARD

To limit the short-term impact of COVID-19 throughout SSA's food systems, quick and effective policies and programmes are needed. Two policy areas where rapid progress could unlock exponential benefits for the region's food systems are emerging, namely strengthening monitoring systems and analytics, and improving logistics. Further long-term policies will also be needed to mitigate the long-lasting impacts that COVID-19 could have on SSA food systems, while also addressing existing weakness that pre-date the virus. Pursuing these priorities should not detract from addressing the most immediate needs that the pandemic is generating in terms of community care and food availability.

Short-Term Priorities

Monitoring systems and Analytics. The ability to collect and rapidly analyse food systems data in SSA could provide invaluable insights to break the link between the short-term disruption in food availability and the longer-term disruption in food production and possible humanitarian crisis. A lack of real-time data, as currently exists, can limit the effectiveness of the responses of aid agencies, governments, policy makers and financial organisations, leading to hunger and malnutrition in the short-term and especially the long-term.

Data that needs to be collected includes the availability and prices of different food products as well as where food and agricultural inputs are needed. Information on storage and cold storage availability, logistical bottlenecks, causes of waste, future planting plans and financing issues will also need to be collected and geographically mapped.

A multitude of potential data sources exist including the millions of smallholder farmers and traders that possess mobile telephones and smart phones. Different models have been proposed on information gathering from farmers and traders, such as generating a two-way information exchange (e.g. extension services) or providing financial services and incentives. Existing databases and systems used to distribute government agricultural subsidies, can also be utilised to collect data to inform decision-makers. Such data can be supplemented and crosschecked with other sources such as information gathered by AGRA's 20,000 food monitors in SSA, as well as mobile banking and cellular network data. Furthermore, existing data collection organisations such

as '[Gro Intelligence](#)' and '[Atlas AI](#)' and aid agencies could contribute, as well as information from remote sensing technology. Big data could in this way prove critical to food systems in the region.

Improving Logistics. The food system's varying components will require a range of policy actions to confront COVID-19 related disruptions in logistics. Individuals working throughout the food supply chain must be classified as 'essential workers' allowing them to carry out important work such as transporting food to market and inputs to farmers. To assist in this, 'green channels' like those created in China, should be introduced across SSA, that fast stream the transportation of agricultural products and minimise bureaucratic checks. This will get food to market in the short-term, reducing waste and improve long-term production by ensuring the delivery of inputs. [Utilising data, apps and other IT services](#) such as those discussed above to locate and reduce logistical bottlenecks while increasing coordination and efficiency is also important, thereby minimising transportation times and empty return journeys. E-commerce for smallholders should be developed reducing the disruption caused by lockdowns and collection centres should move closer to smallholder producers to reduce the need for mobility. [Policies should also support storage access and capacity and establish warehouse receipt systems for farmers to use receipts to receive payments.](#)

Longer Term Priorities

COVID-19 has shone a light on some of the key vulnerabilities of SSA's food systems and highlighted the need for longer term structural transformation that can mitigate future food crises in the region. Three key elements which will need to be addressed once the emergency phase of the crisis response is over include:

Furthering Regional Trade Integration and Developing Infrastructure. The *African Continental Free Trade Area* offers an important opportunity to foster cross-border trade in agricultural products and increase regional resilience. Ensuring that this agreement increases transborder trade will require major efforts in terms of reducing trade restrictions and enhancing trade facilitation. The efficiency of cross-border trade can be improved through the standardisation of areas such as food safety and documentation, as well as aligning rules and regulations and digitising the process. This will help in accelerating the import, inspection and transportation of agricultural products. Infrastructure development both across and within countries is essential in improving long-term food security in SSA and should include connecting farmers to central collection points, building roads, storage and cold storage and improving port facilities. This would speed up the transportation of food, reduce food waste and provide the facilities to stockpile.

Improving Farming Practices. Diversifying crops and implementing regenerative agricultural practices, conservation agriculture and agroecological approaches could help improve resilience, soil health and yields. Climate change will produce more extreme weather patterns in the coming years that could affect food supply. The protection of biodiversity, improved water management and flood and drought risk management can all improve resilience. Protecting forests and the biodiversity they contain will also be vital in stopping the future spread of zoonotic disease.

Building an Adaptive Safety Net Infrastructure. Countries across the world have been adapting their safety nets by increasing coverage and benefits and making administrative requirements lighter to simplify access. In SSA, the options have been limited for countries who do not have well established social assistance programmes, resulting in the majority of the responses to COVID-19 occurring in the upper middle income countries in the region. A priority is putting in place the administrative infrastructure (e.g. identification mechanisms, procedures for determining eligibility, payment systems) required to provide safety nets to the population to ensure greater resilience within the system. Income support for those in need and designing the system so that it can easily expand at times of crisis are parts of the equation. Ensuring that appropriate policies are in place to address hunger and malnutrition is also key – ranging from nutritional interventions, to the provision of school meals. Addressing the inter-generational transfer of malnutrition through interventions focused on teen pregnancy and maternal health and encouraging the uptake of nature-positive nutritious diets that can improve health and development will also be necessary.