

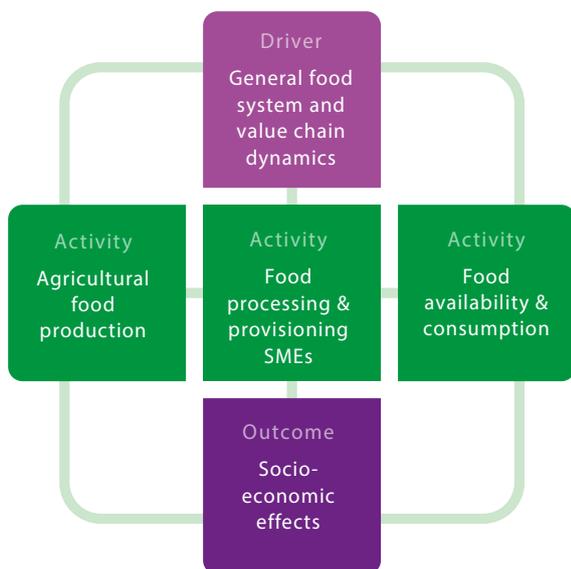


Beyond the first shock



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This is the second review in a series that provides an overview of literature and other resources covering COVID-19 and its impacts on agriculture in sub-Saharan Africa. The [first review](#) in this series provided a summary of the international information and discussions in 5 main areas; a selection of key resources; plus a long-list of interesting resources on 5 food system areas/dimensions. This second review analyses and provides an overview of key developments, impacts and shifts in conversations according to the 5 food system areas below.



In the initial stages of the COVID-19 crisis, measures taken to curb the spread of the virus, such as import/export bans and mobility restrictions, drastically impacted food value chains and thus the food security of millions of people. This created a need to understand the full extent of these impacts on agricultural value chains. In the first review of this series, these initial impacts in the context of sub-Saharan Africa were mapped according to five themes from emerging literature. It pointed to impacts and vulnerabilities from production to consumption.

Key take-aways

- While macro-economic implications are expected to hit African economies and societies severely, food supply is more resilient to COVID-19 than initially feared. Availability, prices and trade (local and international) remained relatively stable.
- Governments recognised the critical importance of food supply and adapted response measures accordingly to keep supply moving.
- The effects for upcoming growing seasons remain to be seen; for example of reduced investments, availability of finance, decreased buffers, or affordability of climate adaptation practices. These will be specific and variable for crops and locations.
- Demand is significantly affected due to sharp income losses and insecurity among consumers. These losses could be structural, with longer term implications for nutrition and health for large numbers of people.
- Women, already facing inequalities in food systems, are harder hit in their livelihoods.
- The impact on the urban poor is unclear but could prove problematic.

Nine months into the crisis, we draw up the balance from the latest available resources. A growing number of more evidence-based research reports and academic studies provide mixed accounts of the impacts. For example, food trade, prices and availability have proven to remain relatively stable in the face of the pandemic. An overall decrease in economic activities can be observed, but many restrictive measures have already been lifted. Lastly, the impacts of the COVID-19 crisis have given a new impulse to conversations on the resilience, sustainability and inclusiveness of food systems (as seen in the [Global Food Policy Report 2020](#) and discussions ahead of the [UN Food Systems Summit](#)).



General food system and value chain dynamics

Driver: context

As seen in the first review, measures to slow down the spread of the coronavirus have had profound effects on food and nutrition security. There has been a growing concern that the economic shock from lockdown measures will have a lasting impact on livelihoods and food and nutrition security ([IDS & Irish Aid, 2020](#)). In Nigeria and Rwanda, for instance, [IFPRI \(2020\)](#) estimates that national poverty rates will increase by 15% and 27% respectively. Overall, the number of hungry and food-insecure people could double due to livelihood and income loss. This includes lost remittances and shrinking foreign direct investment leading to job losses ([World Economic Forum](#)).

However, a systematic and large-scale review of reliable primary data on the impacts on general food system and value chain dynamics in sub-Saharan Africa is lacking. This makes it difficult to estimate the full impacts and raises questions on whether the evidence found to date can be generalised across countries and contexts. According to the [WTO](#), trade in food and agriculture products has been more resilient than for other products. This reflects the essential nature of food and resulting income-inelasticity of demand for it, as well as the fact that most agricultural trade (notably cereals and oilseeds) takes place in bulk shipments that have not been subject to major disruptions. This is confirmed by the [World Bank](#) report on commodity markets. Moreover, early in the crisis virtually all governments treated food and agriculture as an essential sector, making it exempt from most response measures.

Despite the above, in specific settings the effects on crop acreages, production levels and demand/consumption have been varied and sometimes very significant. Across the literature and global debates, the COVID-19 crisis has sparked interest in how to make agricultural value chains and food systems in general more resilient to future shocks and stresses. The [African Development Bank](#) argues that the COVID-19 pandemic and its ensuing economic disruptions offer opportunities that African countries could leverage by promoting vibrant intra-African food trade and market integration. Local food production is often mentioned in relation to more resilient systems, especially to guarantee sufficient food supply for cities ([FAO](#)).

Key new resources

- [IDS & Irish Aid, Food systems and building back better](#), September 2020
- [FAO, COVID-19 and the role of local food production in building more resilient local food systems](#), September 2020
- [World Bank, Commodity Markets Outlook: persistence of commodity shocks](#), section on *Agriculture*, October 2020
- [WTO, COVID-19 and Agriculture: A Story of Resilience](#), August 2020
- [Inter-réseaux \(French\), Covid-19 : quelles implications pour la sécurité alimentaire et les acteurs du développement agricole et rural ouest-africains?](#), December 2020



Agricultural food production

Activity: farming

Movement restrictions are part of the control measures put in place by countries in sub-Saharan Africa during the first wave of COVID-19 and have had implications for food security. They have coincided with planting periods for most staple crops, and are likely to exacerbate food security challenges in many countries ([Ayanlade & Radeny 2020](#)). The increase in urban to rural migration after job losses or to escape urban congestion during the pandemic ([UN HABITAT 2020](#)) led to anecdotal accounts of increased food production in some areas ([WUR rapid assessments](#)), but there is no hard evidence of this to date.

However, new evidence challenges the initial assumption that smallholder farmers have been impacted. ([Aggarwal et al. 2020](#)) have quantified the effect of market disruptions due to COVID-19 on the lives of households in rural areas of Liberia and Malawi, utilizing panel data from phone surveys that were implemented as part of a randomized cash transfer experiment. In both countries, market activity was severely disrupted and large declines in income among market vendors were observed. However, this study found no evidence of declines in food security for households in the short run: the already low level of food security did not further worsen during the market disruptions. A possible explanation is that most respondents in their sample are subsistence farmers, and farming was exempt from restrictions. Plus, while markets had been restricted, they were nevertheless open. The study finds that the price of food had increased only modestly in Liberia and even declined in Malawi. When it comes to agro-inputs and fertilizer access and retail prices, they are relatively stable and the impacts low, due partly because fertilizer in particular is being treated as an essential product ([COVID-19 Africa Fertilizer Watch](#)).

COVID-19 is not the only challenge for smallholders in Africa. A forecast below-average October-December rainy season, mainly over parts of Burundi, Ethiopia, Kenya, Somalia, Tanzania and Uganda, is likely to affect secondary-season cereal crops to be harvested from February 2021, as well as the demand for agricultural labour, staple food prices, and, in pastoral areas, the wellbeing of livestock ([FAO-WFP](#)). The WUR rapid assessments, for example with the HortiInvest project in Rwanda, show that some of the initial impacts of COVID-19 are still holding true, with limited mobility, hampered access to finance and limited availability of material from overseas ([WUR](#)).

Key new resources

- **SIANI**, [The effects of COVID-19 on food and agriculture, as experienced by African farmers](#), September 2020
- **Thrive**, [The impacts of COVID-19 on the food system in Nairobi](#), October 2020
- **WUR**, [Rwanda potato sector assessment](#), October 2020
- **WTO**, [COVID-19 and Agriculture: A Story of Resilience](#), August 2020
- **IPAR**, (French) [Effets de la COVID-19 sur les ménages agricoles et ruraux du Sénégal](#), Juillet 2020

Key websites

- [COVID-19 Africa Fertilizer Watch](#)



Food processing and provisioning

Activity: SMEs

The initial impact assessments of processing and provisioning activities by SMEs showed the COVID-19 measures hampered food supply by transport restrictions and closures of borders, markets and other public spaces. Nine months on, in general quite some movement and transport restrictions have been eased. This benefits SMEs operating in food supply, although a decline in demand remains a challenge due partly to closures of hotels, restaurants and bars, but mostly to falling consumer income and purchasing power ([IDS & Irish Aid](#)). Concerns for decreased financial capacity for SMEs also remain, as for some sectors market demand is expected to stay low for several years to come. In a survey by AGRA on women-led SMEs, the respondents reported access to markets (71%), access to finance (60%) and supply chain disruptions (59%) as the three main constraints they are facing due to the pandemic ([AGRA](#)).

The [Africa Agriculture Status Report 2020](#) highlights two key points in relation to the impacts of COVID-19. First, the crisis is seen to impact small shops and wet markets worse than supermarkets, which are better equipped to deal with shocks. Second, the COVID-19 crisis has given a new impulse to e-commerce in Africa, which could change the provisioning environment in years to come. This is confirmed by the AGRA survey on women-led SMEs, which states almost 89% of the respondents had taken up digital solutions in their business operations ([AGRA](#)).

The impact of COVID-19 measures on food provisioning in urban areas, where informal food traders and retailers provide a critical link between agricultural producers and consumers, are leading to larger debates on the key role of informal food supply chains and how to best support these networks in particular

during shocks such as COVID-19 but also more structurally. However, it remains a challenge to gather the full impacts and reliable data for this sector ([IFPRI](#)).

Academic studies on the impacts on agricultural supply chains confirm what we have seen over the past months: small enterprises face shortages in the supply market, rapid changes in demand and interruptions in accessing financial aid or lack of financial support ([Sharma et al. 2020](#)). Moreover, studies point to the importance of financially supporting the 'hidden middle'¹ in its crucial role as intermediaries, for example for rice value chains in West Africa ([Arouna et al. 2020](#)).

Key new resources

- [IFPRI](#), [The politics and governance of informal food retail in urban Africa](#), October 2020
- [AGRA](#), [Africa Agriculture Status Report 2020](#), September 2020
- [GAIN](#), [Impact of COVID-19 on Food Systems: A Situation Report](#), October 2020
- [Michael Shaw](#) (Wellspring Development), [COVID-19 impacts and access to agricultural finance in Uganda](#), October 2020

¹The 'hidden middle' is a term used to describe small operators responding dynamically to each season's needs and opportunities, but largely 'hidden' from public policy discussions and (formal) investors. For more information, see the [Africa Agriculture Status Report](#) (AGRA).



Food availability, affordability, utilisation and consumption

Activity: consumption

Food security concerns arose early during the first stages of the COVID-19 pandemic. Evidence shows loss of economic activity has had a great impact on purchasing power and households' ability to buy food, with the danger of 88 to 115 additional million people pushed into extreme poverty ([World Bank](#)). At the same time, global trends in supply and demand have in some cases led to price spikes and fluctuations for key food staples.

Currently, there are mixed messages about the availability and affordability of food across sub-Saharan Africa. Prices for maize in Rwanda and Burundi have increased significantly ([Food Security Portal](#)) and there are reports of sharp price increases for grains over the course of October ([FAO Food Price Monitoring and Analysis](#)). These prices have decreased since. Based on their analysis of market disruptions in rural Liberia and Malawi, [Aggarwal et al.](#) (2020) demonstrate how prices of crops and food items can fluctuate rapidly over the course of several weeks. Early warning analyses point to several food insecurity hotspots across Africa, especially in areas where COVID-19 impacts are exacerbated by other shocks, such as political conflicts and climatic shocks in Ethiopia, Burkina Faso, Mali and Mozambique ([FAO-WFP](#)).

On the other hand, a phone survey into food consumption in Addis Ababa, Ethiopia shows that even though incomes have declined, food budgets have remained more or less stable even for poorer households, leading to the conclusion that "food is available and many food value chains have either been or become quite resilient" ([IFPRI](#)).

The survey does confirm changes in consumption patterns: staples consumption increased 11%, legumes and nuts decreased by 16% and vegetables by 19%. An academic study into the food security situation in Kenya and Uganda shows similar changes in consumption patterns, and further reports "involuntary changes in dietary patterns" as the most used coping strategy in response to COVID-19 induced income shocks ([Kansiime et al.](#) 2020).

The interest in the effects of COVID-19 in urban areas and the implications for citizens' food security appear to be widening. Emerging studies state that lockdown measures in cities point to the vital importance of food availability for citizens and that countries should invest in urban agriculture ([Pulighe & Lupia 2020](#) and [Lal 2020](#)).

Key resources

- **FAO-WFP**, [Early warning analysis of acute food insecurity hotspots](#), October 2020
- **IFPRI**, [Survey: Despite COVID-19, food consumption remains steady in Addis Ababa, Ethiopia](#), October 2020
- **IFPRI**, [COVID-19 and food security in Ethiopia: do social protection programs protect?](#), November 2020
- **PAIRED**, (French), [Blog: Impact de la COVID-19 sur la sécurité alimentaire et nutritionnelle en Afrique de l'Ouest et du Centre](#), Août 2020



Overall socio-economic effects

Outcome

When it comes to overall socio-economic effects of the pandemic on the livelihoods of people, the loss or decline in economic activity remains concerning. There is a decline of purchasing power among many millions of already poor consumers following their loss of jobs and incomes. At this time, it is unclear how deep and long this disruption will be and how it will affect food access for different categories of consumers in different market segments and market contexts ([Heck et al. 2020](#)).

Predictions for a global recession are due to hit sub-Saharan Africa hard, especially fragile and conflict-affected states. In a new World Bank report, it is estimated that GDP per capita is expected to contract by 6,5% in the region, erasing at least five years of progress in fighting poverty ([World Bank](#)). Moreover, there are concerns about the secondary impacts of the pandemic, as it is affecting access to essential health services, increasing food insecurity and widening existing inequalities ([PERC](#)).

One of the areas in which inequalities appear to be widening is gender equality. A recent UN report emphasises the disproportionate impacts of the pandemic on women and girls, stating that “women are losing their livelihoods faster because they are more exposed to hard-hit economic sectors” ([UN](#)). These concerns are also seen within agricultural value chains, where women often already face constraints in terms of access to information, household decision-making power, control over assets and resources. [IFPRI](#) highlights some necessary steps toward more inclusive agri-food systems for communities to better withstand crises such as COVID-19.

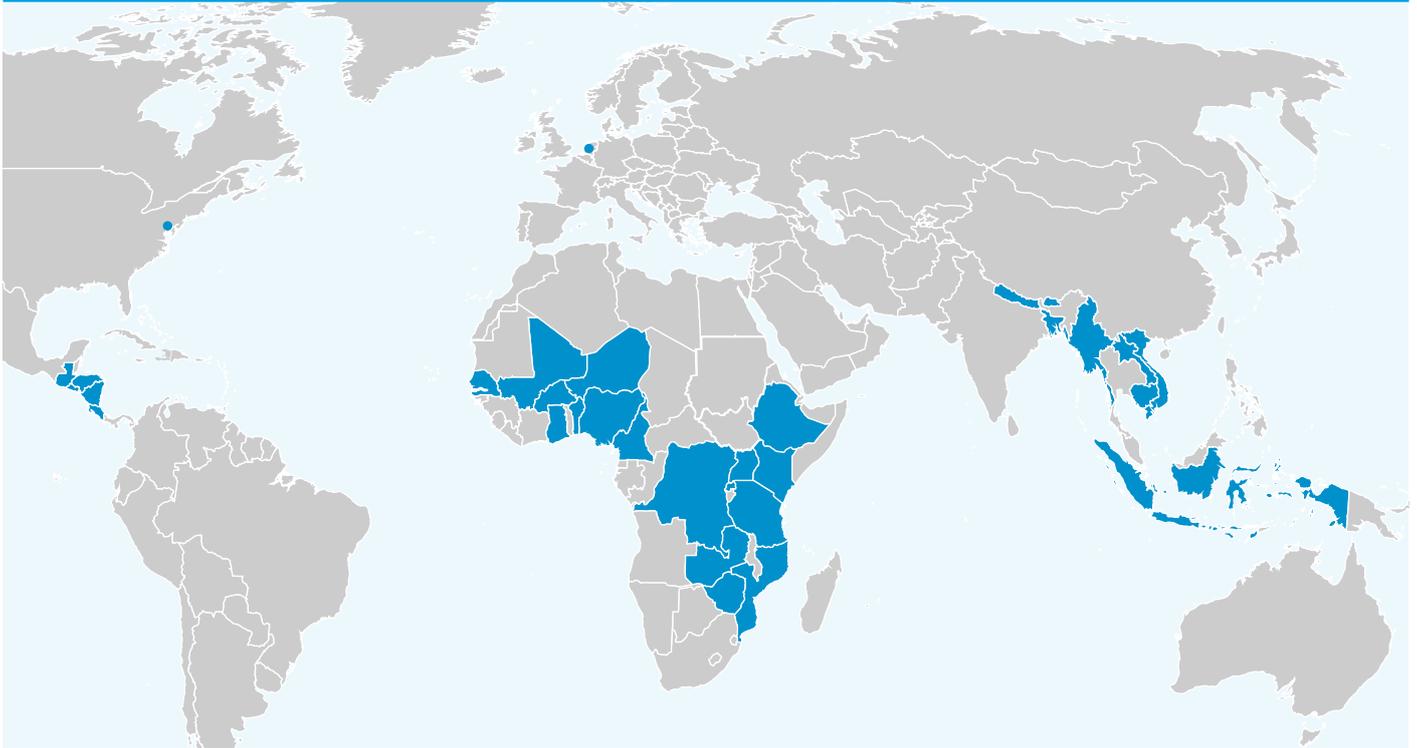
Key resources

- [PERC](#), [Responding to COVID-19 in Africa: using data to find a balance](#), September 2020
- [IFPRI](#), [Building Inclusive and Empowering Agrifood Systems for Resilience](#), October 2020
- [WFP/UN-HABITAT](#), [Impact of COVID-19 on livelihoods, food security & nutrition in East Africa](#), August 2020
- [Groupe de la Banque Africaine de Développement](#), (French) [Perspectives économiques en Afrique Centrale 2020 – Faire face à la pandémie du COVID-19](#), Juillet 2020

Longer-term impacts of COVID-19: what next?

As the pandemic evolves, so do the debates and conversations around COVID-19 that will inform future reviews. Although vaccines are becoming available now, it will likely take a long time before the pandemic is curbed. Most certainly in SSA, as global stocks of vaccines are being bought up by the global North. In the meantime, the question remains whether we sufficiently understand the direct health impacts of the crisis and what these mean for food systems and subsectors in the long run. Debates around proportionality of the measures in light of these health impacts are gaining ground with so many livelihoods threatened.

There is concern for the interconnectedness of COVID-19 with other crises and shocks across sub-Saharan Africa, such as conflict, trade wars, climate change, locusts, unseasonal flooding, swine fever, etc. How can we understand the current crisis in light of these other shocks? And what can this crisis tell us about the resilience of food systems in sub-Saharan Africa and elsewhere?



Resource collection:

From the collection of resources, 36 new resources were identified as particularly informative or insightful for the context in which the CORE lead projects operate. In the selection, specific attention was paid to region (West-/East-/sub-Saharan Africa or Africa in general) and sectors (of which horticulture and livestock featured most often).

The overview below provides summaries of the key areas in these sources, as well as an indication of the key resources or websites to consult.

For an overview of all relevant resources per area see spreadsheet – tab 'COVID-19 and Agriculture Review'. For an overview of the websites with aggregated resources consulted for this review, see spreadsheet – tab 'aggregated resources'.

Colophon

This review is published by the COVID Response and Resilience Initiative (CORE - Africa) - SNV Netherlands Development Organisation in cooperation with Wageningen University & Research.

Contact persons:

Zala Zbogar **email:** zzbogar@snv.org
Jan Ubels **email:** jubels@snv.org

Photos and graphics:

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