

# Impacts of the Covid-19 Pandemic and Associated Policy Responses on Food Systems in sub-Saharan Africa

## A SYNTHESIS OF EVIDENCE

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### Introduction

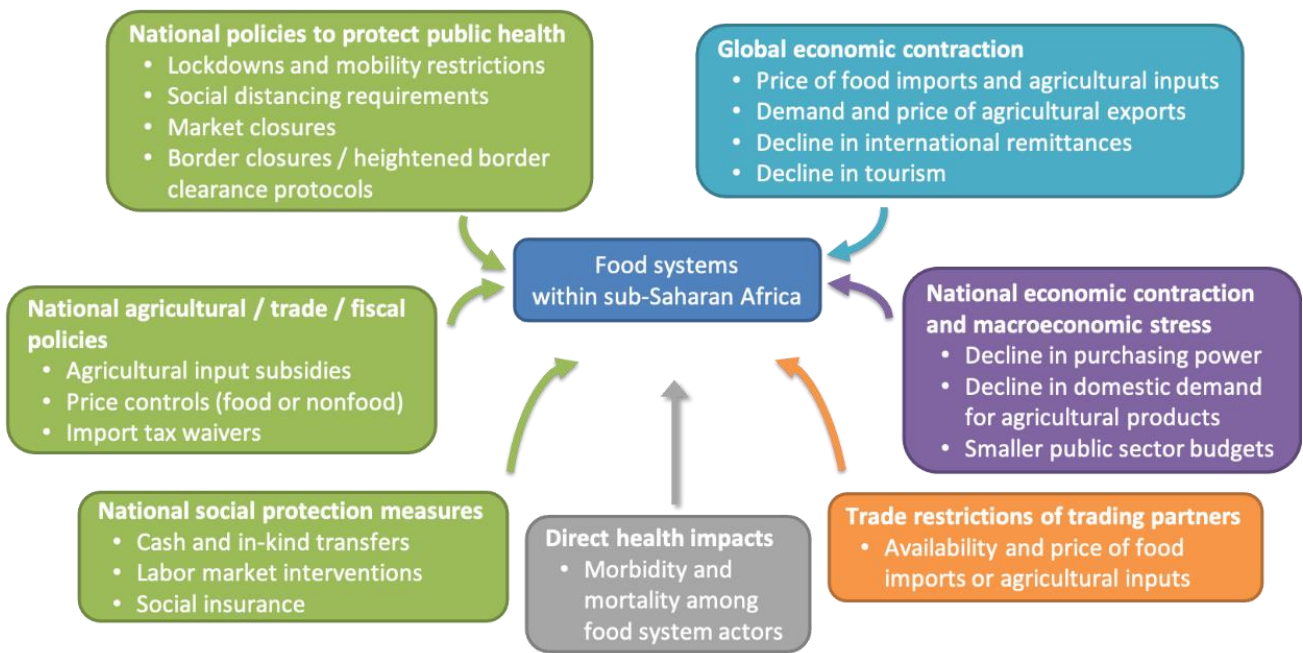
The Covid-19 pandemic and associated policy responses are likely to affect food systems in sub-Saharan Africa (SSA) through numerous pathways (Figure 1). As of late 2020, the most striking impacts have been felt through the policies aimed at preventing the spread of the virus through restrictions on movement and economic activity. These include directives to remain at home with exceptions made for limited essential activities; social distancing requirements in public spaces including markets and public transportation; the closure of markets and workplaces; and the closure or heightened security of borders and inter-state roads. To mitigate the harm caused by the pandemic and associated restrictions, governments in SSA introduced food assistance, cash transfers, and tax postponement programmes. In addition to these policy responses, a global recession triggered by the pandemic has broadly reduced the flow of international remittances. National economic contractions are likely to further manifest as a decline in domestic demand for agricultural products, which sends ripple effects up the food

value chain to affect the welfare of producers and all midstream actors, such as transporters, vendors, and other service providers. Trade restrictions on food or agricultural inputs introduced by trading partners constitute another potential source of stress.

Commentary and analyses regarding the impacts of the Covid-19 pandemic on SSA food systems have proliferated since early 2020. Yet no broad evidence synthesis has been undertaken to unpack the complex impacts of the crisis, particularly with respect to domestic food value chains, regional/international food trade, and food and nutrition security. This policy brief summarizes a report which applies a systematic literature review methodology to survey the evidence on this topic. In September–November 2020, a literature search was conducted to identify studies that met pre-specified inclusion criteria, including the requirement that each study evaluated the impact of the Covid-19 pandemic on food systems or food security in SSA and was based on empirical data. Using computerized and manual search methods, 57 studies were found that met these criteria<sup>1</sup>.

<sup>1</sup> It should be emphasized that although this report endeavoured to be comprehensive by the time of writing, the literature on this topic will surely grow over time.

**Figure 1: Covid-19 impact pathways on food systems in SSA**

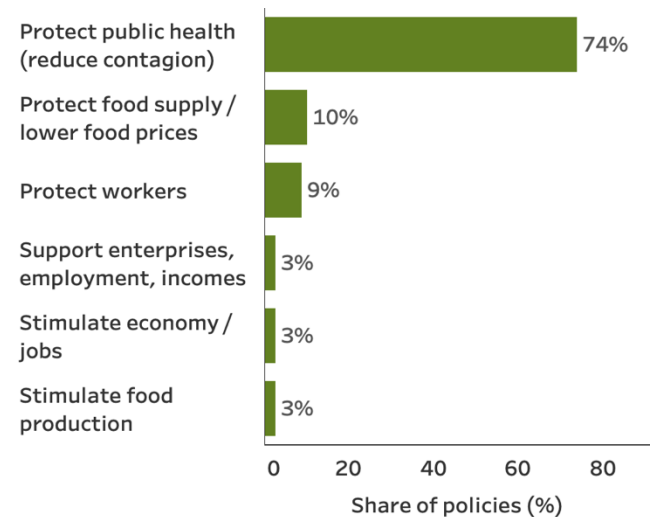


## Description of the Literature

The studies reviewed in this synthesis span 20 countries spread across all regions of SSA, and 75% of the studies come from the grey literature. The studies mostly use quantitative methods (86%); among these, most are *ex post* analyses, although some are *ex ante* models of national economies. Almost three quarters (74%) of the policies discussed in these studies relate to restrictions on populations, often in the form of stay-at-home decrees/lockdowns, market closures, and national mandates for social distancing. Along these lines, 74% of the policies discussed have the intention to protect public health and limit the spread of the virus (Figure 2). In this literature, it is far less common to find attention given to policies that aim to protect food supply, bolster food production, protect workers, or stimulate the economy. The reasons for this situation may be twofold. First, public health policies that restrict movement or economic activity have been far more common in SSA than policies aimed at economic support and social protection. It is possible that most SSA governments simply do not have the fiscal latitude to offer economic support. Second, SSA governments have largely sought to protect food production through nuanced policies intended to protect public health, thus placing limits on most parts of the economy while carving out exceptions for the agrifood sector. However, these policy nuances are not

assessed on their own, relative to a counterfactual of economic restrictions with no exceptions.

**Figure 2: Distribution of policy intentions among responses to Covid-19, as discussed in the literature**



## Impacts on Food Systems

This evidence synthesis is three-pronged, focusing on domestic food value chains, regional (intra-African) and international food trade, and food and nutrition security in SSA countries (Table 1). Within domestic food value chains, the studies reveal impacts on input supplies (with higher prices due to disruptions in supply chains) and domestic agricultural

production (with reduced production especially where farmers were limited by mobility restrictions). The literature also documents impacts on transport, with movement restrictions making it difficult for farmers, transporters, and processors to move agricultural inputs to farmers and agricultural outputs to the market. In addition, the informal food sector has been singled out by policy responses to the Covid-19 pandemic, as several SSA countries enforced closures of informal and open-air markets based on relatively high perceived risks. In contrast, supermarkets were better able to enforce social distancing and were therefore less disrupted by policy measures intended to protect public health. These policies necessarily affect the livelihoods of informal food vendors and retailers and restrict the food market options available to lower income consumers.

In terms of regional and international food trade, the most noticeable impact has come through temporary bans and restrictions on exports and through road and border closures. However, pervasive impacts have also been felt through additional inspections at the border, reduced hours of operation for trading, and increased transport costs. Several studies document a sharp decline in trade between neighbouring countries, with roadblocks and checkpoints

particularly affecting value chains of perishable products, such as vegetables or dairy, which cannot withstand an extended delay while *en route*. The contraction in regional trade necessarily affects the livelihoods of informal cross-border traders, a large majority of whom are women and youth.

Covid-19-related restrictions on economic activity have especially affected the demand side of food markets in SSA. All three facets of food access (economic, physical, and social) have been profoundly affected by the Covid-19 pandemic and its associated policy responses. Consumers have experienced diminished *economic access* through lost income, reduced remittances, and higher food retail prices; they have experienced reduced *physical access* with the closure of (particularly informal) markets and restrictions on public transportation; and they have experienced reduced *social access* because social networks and informal safety nets have been disrupted in such a widespread shock. There is also evidence that households in SSA have responded to the pandemic by shifting their consumption from more expensive and nutritious foods toward staple foods, which are a poor source of micronutrients.



**Table 1: Evidence of impacts of Covid-19 and associated policy responses on food systems in SSA**

Domestic Food Value Chains	
<p><b>Agricultural inputs</b></p> <ul style="list-style-type: none"> <li>Some evidence of decline in supply, increase in prices, and reduction in domestic purchasing power among potential buyers.</li> </ul> <p><b>Producers and agricultural production</b></p> <ul style="list-style-type: none"> <li>Some evidence of disruption to agricultural production, especially where farmers were limited by mobility restrictions.</li> <li>Mixed evidence regarding labour availability.</li> <li>Some evidence of fewer traders/buyers and lower farmgate prices.</li> <li>Volatility in agricultural prices due to mobility restrictions, producing both winners and losers.</li> </ul>	<p><b>Trade, transport, processing, and storage</b></p> <ul style="list-style-type: none"> <li>Evidence of decline in transportation options and increase in transport costs due to mobility restrictions.</li> <li>Roadblocks extend the time spent in transport, which is especially detrimental to perishable products.</li> <li>Evidence of difficulties in moving food between farm, processor, port, and market, affecting food supply and retail prices.</li> </ul> <p><b>Wholesalers and retailers</b></p> <ul style="list-style-type: none"> <li>Evidence of difficulties sourcing food due to high prices or few suppliers.</li> <li>Closures of, or restrictions on, informal markets lead to massive income disruptions for retailers and food vendors.</li> <li>Decline in business due to social distancing requirements or restrictions on non-economic activity that reduced foot traffic.</li> </ul>
Regional (intra-African) and international food trade	
<p><b>Trade flows</b></p> <ul style="list-style-type: none"> <li>Evidence of declines (and/or volatility) in regional trade due to heightened border clearance protocols and road congestion at border crossings.</li> </ul> <p><b>Impacts on traders</b></p> <ul style="list-style-type: none"> <li>Loss of livelihoods for informal cross-border traders where such trade was prohibited.</li> </ul>	<p><b>Prices of imports and exports</b></p> <ul style="list-style-type: none"> <li>Some evidence of price increases for imported food items.</li> <li>Mixed evidence regarding price effects for exports traded internationally, with some reports of price declines and other evidence of price stability.</li> </ul>
Food and nutrition security	
<p><b>Availability</b></p> <ul style="list-style-type: none"> <li>Mostly stable availability of staple foods</li> <li>Reduced availability of specific items, particularly imported foods, perishable foods, and animal-sourced foods.</li> </ul> <p><b>Dietary quality</b></p> <ul style="list-style-type: none"> <li>Evidence that households have shifted from more nutritious and expensive foods, such as vegetables and dairy products, toward cheaper foods.</li> </ul>	<p><b>Access</b></p> <ul style="list-style-type: none"> <li>Reduced <i>economic access</i> due to reduced income and increased food retail prices.</li> <li>Reduced <i>physical access</i> due to bans or restrictions on informal markets or street vending.</li> <li>Reduced <i>social access</i> due to the covariate nature of the Covid-19 shock, which disrupted informal safety nets.</li> <li>Reduced frequency and quantity of consumption.</li> </ul>

## Recommendations

This evidence synthesis gives rise to several recommendations for policy makers, some of which are immediately applicable while others would be relevant if a lockdown were re-introduced in a future crisis (Box 1). One lesson is the critical role of informal markets in the food security of (primarily but not only) the urban poor. The policy reflex to close or restrict informal markets has been detrimental to market vendors and consumers, and this underscores how these markets are (in normal times) nodes of food value chain resilience. With respect to restrictions on mobility and transport, horticulture and other perishable products stand out as being vulnerable to such measures. This situation suggests an urgent need to develop cold storage systems to make the value chains of perishable products more resilient to disruptions; this will necessitate more reliable electrification in both urban and rural areas. To the extent that SSA food systems are reliant on global food value chains, the region is vulnerable to external shocks. However, a more robust system of intra-African trade would render SSA more resilient in the face of global shocks.

### Box 1: Recommendations for policy

- Keep informal markets functioning and work with market leaders and shopkeepers to strengthen their ability to adhere to public health guidelines.
- Give policy attention to input suppliers/transporters and food transporters, processors, traders, and retailers to ensure that the entire food value chain can function.
- Introduce cold storage systems to support value chains of perishable products.
- Extend greater social protections to those most affected by restrictions on economic activity, particularly the urban poor and informal workers.
- Implement the African Continental Free Trade Area (AfCFTA) to make SSA food systems more resilient to current or future shocks.
- Be mindful of the long-term fallout from the Covid-19 pandemic, particularly with respect to children's health.

This evidence synthesis has also unearthed some significant gaps in data and research around the topic of Covid-19 impacts on food systems in SSA (Box 2). Future research should aim to determine more precise causality with respect to specific policies and policy nuances to produce the most policy-relevant and actionable evidence. Thus far, the impact of exempting the agricultural sector from economywide restrictions has not been evaluated on its own, relative to a counterfactual of not exempting the agricultural sector. The scope of research should furthermore capture regional and international trade in greater detail and should document what specific changes in border clearance protocols have been damaging or helpful to trade. As the Covid-19 pandemic evolves in SSA, researchers should be attentive to whether the effects outlined in this evidence synthesis also change over time.

### Box 2: Recommendations for future research

- Identify direct causality between policy responses to the Covid-19 pandemic and the impacts of these policies.
- Evaluate the impacts of specific policy *nuances* (such as exemptions to movement restrictions for agrifood-related activities) to draw clear lessons for policy makers.
- Differentiate the immediate or short-term effects from the medium- or long-term effects of the Covid-19 crisis.
- Consider the impacts of the pandemic on food processors, traders, transporters, wholesalers, and retailers that link “farm” to “fork” within food value chains.
- Measure the extent to which small-scale versus large-scale enterprises (or informal versus formal food outlets) have been differentially affected by Covid-19 policy responses.
- Examine the impact of the Covid-19 pandemic and changes to border clearance protocols for both regional and international food trade.
- Give attention to the impacts experienced in the poorest countries in SSA.



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