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**COVID-19 impacts on agrifood systems in Africa: policy priorities for
inclusive and resilient recovery**

Executive Summary

The economic recession and disruptions in food supply chains induced by the COVID-19 pandemic are taking their toll on the food security and nutrition situation in sub-Saharan Africa (SSA). As African countries and the rest of the world closed their borders and enforced lockdowns and social distancing measures, food insecurity was exacerbated due to the disruption of food supply chains which led millions to lose their livelihoods.

While the global economic recovery continues even as the pandemic resurges, economic recovery in SSA remains timid and fragile as the slow pace of vaccination exposes the region to emerging Coronavirus strains, holding back economic performance.

Aggregate crop production in the SSA region has proven to be reasonably resilient to adverse shocks associated with COVID-19 pandemic. By contrast, the pandemic is taking a toll on livestock-based livelihoods and the fisheries and aquaculture sectors are also seriously affected. Similarly, COVID-19 containment measures had a crippling effect on small and medium-sized enterprises' (SME) production and sales activities in food systems.

The continuous rise in food prices over the last two years poses new threats to food security, such as increasing domestic food prices, particularly in countries highly dependent on food imports. Prior to the pandemic, food insecurity and malnutrition levels in SSA were already high and the COVID-19 pandemic has exacerbated existing vulnerabilities. Both chronic and acute food insecurity levels increased dramatically between 2019 and 2020. Concrete policy actions are needed in the short, medium and long terms to facilitate recovery and build resilient agrifood systems in SSA, in line with the humanitarian-development-peace nexus (HDPN).

Matters to be brought to the attention of the Regional Conference

The Regional Conference is invited to:

- recognize that the deteriorating food security situation and persistent malnutrition in sub-Saharan Africa have been exacerbated by the effects of the COVID-19 pandemic; and

Documents can be consulted at www.fao.org

- provide advice on best practices, innovations and lessons learned to support inclusive and resilient recovery in African countries.

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I. Introduction

1. The outbreak of the COVID-19 pandemic, the measures put in place to control and mitigate its impacts, along with the economic recession induced by this health crisis, continue to have a severe impact on the food security and nutrition situation in Africa. This catastrophe has become a significant threat to ending extreme poverty and eradicating hunger and risks wiping out the modest gains made towards achieving the Sustainable Development Goals (SDGs), the 2014 Malabo Declaration and the African Union (AU) Agenda 2063.
2. The full scope and impact of this disease are yet to be determined. Still, the direct health impact of the COVID-19 pandemic and the various control measures to stop its spread have disrupted economic and livelihood activities within services and other sectors such as tourism, transport, commodity exports and imports, markets and commodity value chains. Based on both pre-COVID-19 pandemic (October 2019) and recent (July 2021) estimates of the International Monetary Fund (IMF), the pandemic may have reduced the 2020 gross domestic product (GDP) growth rate in sub-Saharan Africa (SSA) by 5.5 percentage points. The World Bank characterises the 2020 economic slowdown as the "deepest recession since the Second World War" for the global economy and the "deepest contraction on record" for SSA. Small Island Developing States (SIDS) have been disproportionately affected by the COVID-19 pandemic due to their tourism-dependent economies.
3. While the global economic recovery continues even as the pandemic resurges, divergence among economies persists, reflecting stark differences in vaccine access and policy support. Economic recovery in SSA remains timid and fragile as the slow pace of vaccination exposes the region to emerging Coronavirus strains, holding back economic performance. At the current rate, a return to pre-pandemic output trends will take longer for the continent. According to the World Bank, the economic damages from the pandemic are expected to be protracted.
4. In collaboration with partners at national, regional and global levels, FAO acted swiftly to help countries take decisive actions in response to COVID-19. The FAO COVID-19 Response and Recovery Programme enabled donors to leverage FAO's convening power, real-time data, early warning systems and technical expertise to direct support where and when it is needed most. It has enabled the mobilization of initial investments to provide an agile and coordinated global response to ensure nutritious food for all, both during and after the pandemic. In the Africa region, FAO collaborated with the African Union Commission (AUC) and other key partners to convene high-level regional dialogues and meetings to identify concrete actions and solutions to respond to the pandemic. FAO developed guidelines and supported implementation of in-country assessments to evaluate the impact of the COVID-19 pandemic on agrifood systems and issued policy briefs along with other knowledge products to support policy analysis, investments and programming of interventions. FAO recently published a synthesis report on the impact of the COVID-19 pandemic on agriculture and food security in Africa.¹

Impact on Crop, Livestock and Fisheries Production

5. Restrictive measures implemented to limit the spreading of COVID-19 continue to impact, directly and indirectly, the timely use of land, labour and other key inputs such as seeds, fertiliser, and transportation and processing services, ultimately affecting the quantity and quality of crop harvests overall. Examination of the generalised cropping calendar reveals an overlap of some farming activities and the disruptive control measures implemented during the early period of the COVID-19 pandemic (March to June 2020), especially in the West and East Africa subregions. The primary cropping season had just begun, and the main operations were disrupted.
6. Cereal production estimates published by FAO indicate that nine of the 24 major producing countries (referred to in the FAO report) had a reduced cereal output in 2020 compared to 2019; twelve countries had a similar experience in 2021 over 2020 due to the adverse impact of various critical factors of production. The countries with a decline in production were mainly in North and Central Africa for 2020, whereas in 2021 they are mainly in West and East Africa. In 2020, countries in the

¹ <https://www.fao.org/publications/card/en/c/CB5911EN>

East and West Africa subregions recorded slight increases in aggregate cereal production over 2019 levels and the previous five-year average. The Southern Africa subregion has seen significant growth due to favourable rainfall conditions during the last two years.

7. Livestock represents a primary source of income, savings and food for pastoralists and agro-pastoralists across Africa. Pastoral livelihood sustainability faces many challenges, including adverse weather due to climate change, the worst Desert Locust invasion in 25 years in the Greater Horn of Africa, security and conflict instability, insecure land tenure and animal diseases. Various studies suggest that the adverse effects of COVID-19 are taking a toll on livestock-based livelihoods throughout the continent. Recent evidence also suggests that women's assets, including small animals, were among the first to be sold as households struggled to sustain their livelihoods.
8. Field surveys indicate that fewer animals were owned by households in 2020 due to the distress sale of animals and other harmful coping mechanisms. Producers experienced constrained access to markets, animal feed, pasture, water, veterinary services and other inputs, while drugs and animal feed prices increased. In East Africa, there was a significant decline in livestock exports after June 2020 due to the closure of the Kingdom of Saudi Arabia borders to international travellers seeking to participate in *Hajj*, thus reducing the demand for sheep, goats and cattle by restaurants. Pastoralists have been unable to sell animals in markets due to COVID-19 related closures and increased transportation costs. Milk production, transport costs and overall access to critical inputs have all been adversely affected, primarily due to the pandemic.
9. Available evidence indicates that COVID-19 control measures such as reduced boat capacities and partial closing of wharfs and restaurants affected the fisheries and aquaculture sectors in the selected fish-producing countries in Africa. These led to a loss of earnings for fisherfolk and others dependent on the industry. Notably, women working in small-scale fish processing and marketing, SMEs and the informal sector bore the brunt of the negative consequences of the pandemic.²

Impact on Small and Medium-sized Enterprises (SMEs) in the Food Processing sector

10. The restrictive measures taken to curb the spread of the COVID-19 pandemic affected the supply chains in Africa, including SMEs in the food processing and agro-processing sectors. According to a joint FAO/United Nations Industrial Development Organization (UNIDO) study covering agrifood-processing SMEs in Côte d'Ivoire, Ethiopia, Kenya, Madagascar, Nigeria and Zambia, the COVID-19 containment measures had a crippling effect on SMEs' production and sales activities in the food system. The COVID-19 restrictions affected companies' sales as well as their ability to procure inputs and other essential ingredients for agro-processing. With the double supply and demand shocks, SMEs across SSA were forced to reorganize their operating and management methods, including closing points of sale/establishments, temporary shutdown or reduction in activity and parallel decreases in the number of employees. Thus, the reduction in activities led to unemployment in the food processing sector.
11. SMEs in Somalia experienced difficulties in financial flow due to the spill over effect from the affected diaspora community that provided the major source of finance for the agro-processing sector.
12. In addition, informal workers, especially women, whether wage workers or self-employed, were disproportionately affected by job and income losses, resulting in rising extreme poverty and deteriorating food security outcomes.

Impact on Staple Food Prices

13. According to the findings of agricultural household surveys conducted by FAO's Office of Emergency and Resilience (OER) in the selected African countries, a significant percentage of farmers experienced unusual problems with the sale of their agricultural products across the

² <https://www.fao.org/publications/card/en/c/CB5911EN>

continent, including in the Democratic Republic of the Congo, Niger, Sierra Leone, Somalia, and Zimbabwe.

14. There were widespread food price hikes across Africa due to the panic buying of food triggered by the announcement of COVID-19 lockdown measures. General and food consumer price indices and inflation rates indicate that the COVID-19 pandemic has pushed food prices up in many countries, and the depreciation of the national currency made imported food and agricultural inputs more expensive, which also contributed to sustained inflation in food prices. In Western Africa, for instance, the food consumer prices index increased to 14.4 percent in 2020 due to the COVID-19 pandemic.³ Macroeconomic challenges, persistent insecurity and supply concerns supported higher food prices in several countries, reducing food access for the poorest segments of the population.
15. After initial hikes, prices stabilised in several markets driven by the gradual lifting of restrictions, lower demand caused by the substantial declines in purchasing power and incomes and improved domestic supplies with the start of harvest periods in some areas. Governments also introduced measures such as price controls and price interventions on staple commodities to limit the impact of potential disruptions on food supply chains and prices.
16. The continuous rise in international food prices over the last two years poses new threats to food security in African countries, such as increasing domestic food prices, particularly in countries highly dependent on food imports, as is the case of many low-income and landlocked countries and Small Island Developing States (SIDS). Rising global prices of agricultural inputs, including fertilizers, will compound the already precarious situation.

Impact on Food Security and Nutrition

17. According to FAO's recent report on *The State of Food Security and Nutrition in the World (2021)*, undernourished people in SSA increased by more than 44 million over the previous year, reaching 264.2 million in 2020. The prevalence of undernourishment continued to increase to 24.1 percent in 2020 from 20.6 percent in 2019. In addition to 323.2 million people suffering from severe food insecurity in SSA, 401.2 million people suffer from moderate food insecurity.
18. Similarly, Africa remains the continent most affected by food crises in 2020, with 97.9 million people facing acute food insecurity, 24.9 million more than in 2019. Hunger and undernourishment are primarily driven by multiple and often overlapping shocks and stresses, including conflict, insecurity, climate extremes exacerbated by climate change, economic swings and shocks, plant and animal diseases, Desert Locusts, and compounded now by the socio-economic impact of COVID-19, which affect the already vulnerable agricultural livelihoods and food production systems. Over 875 million people in SSA, primarily residing in rural areas, cannot afford the cost of a healthy diet. The result is reflected in high levels of food insecurity and widespread micronutrient deficiencies, overweight and obesity emerging as significant health concerns in many countries. In 2020, 45.4 million children under five years (6.7 percent) were wasted. Nearly one-quarter lived in sub-Saharan Africa. Thirty percent of children in Africa are stunted. Africa had the largest increase in the cost of a healthy diet from 2017 to 2019 – 12.9 percent.
19. The FAO report *Access to food in 2020 - Results of twenty national surveys using the Food Insecurity Experience Scale (FIES)* presented evidence of the broad perception that the COVID-19 pandemic has exacerbated the difficulties in accessing food. Despite the magnitudes of the increase in food insecurity between 2019 and 2020 being relatively modest, the study showed a statistically significant increase in moderate or severe food insecurity – for instance in Mozambique, Sierra Leone, South Africa and Zimbabwe – and in severe food insecurity, for instance in Burkina Faso, Ethiopia, Niger, and Nigeria.⁴

³ FAO 2021. FAOSTAT Analytical Brief 21, "General and food consumer price indices and inflation rates". <https://www.fao.org/3/cb4770en/cb4770en.pdf>

⁴ Boero, V., Cafiero, C., Gheri, F., Kepple, A.W., Rosero Moncayo J. & Viviani, S. 2021. Access to food in 2020. Results of twenty national surveys using the Food Insecurity Experience Scale (FIES). Rome, FAO. <https://doi.org/10.4060/cb5623en>

20. In 2020 and 2021, conflicts continued to drive displacement and robbed people of their livelihoods; currency devaluation and escalating food prices curtailed access to food and natural hazards, including flooding, dry spells and Desert Locusts, threatened food production and availability.
21. The economic downturn faced by the region has resulted in negative GDP growth, job losses, rising poverty and reduced remittances, leading to losses in household incomes and livelihoods, reducing their purchasing power and ability to access food. Rising food prices made food less affordable and difficult to access for many people.
22. Many households have downshifted to so-called "inferior goods" as a cost-saving measure during the COVID-19 pandemic to more shelf-stable goods (which could be more processed and less nutritious foods) and lower quantity, quality and variety of foods. Ample evidence shows that women are more likely to be food deprived than other household members when food becomes scarce. Indeed, data shows that the gender gap in food and nutrition security has grown even more prominent in the wake of the pandemic. With increasing vulnerability and deprivation, informal and traditional social networks have been declining, further deteriorating or lacking improvement in the presence of COVID-19 measures.
23. Various field assessments in the continent suggest that vulnerable groups, including small-scale farmers, pastoralists, fisherfolks, migrants, urban poor, informal workers, internally displaced persons (IDPs) and communities, and women and youth within these groups, have been significantly affected by COVID-19 containment measures.
24. Women form a significant part of the workforce in the tourism, service industry, fish processing sectors and cross-border trade. The COVID-19 containment measures have disproportionately impacted women, mainly due to their overrepresentation among informal workers and in some of the most affected sectors.
25. To facilitate recovery and build resilient agrifood systems in Africa, in line with the humanitarian-development-peace nexus (HDPN), countries should implement concrete policy actions in the following areas:
 - a) In the short-term, policy actions are needed to continue to ensure coverage of the immediate needs of vulnerable populations and of their agriculture and food-based livelihoods, while contributing to address root causes of risks and vulnerabilities, including through social protection schemes, ensuring better functioning of local and regional food markets and supply chains and supporting smallholder farmers, herders and fisherfolk to increase productivity and production through appropriate technologies, inputs, practices and approaches.
 - b) Medium to longer-term measures aiming to build resilience and sustainability in food and agricultural systems, including continuing data collection and analysis to enhance risk understanding, as well as guide risk governance and decision-making for the implementation of preventive and anticipatory actions, as well as preparedness to support the response and recovery processes for the agrifood systems, implementation of vulnerability reduction measures, strengthening domestic markets and promoting intra-regional trade in agrifood products.
 - c) Supporting a vibrant private sector is critical for creating businesses and quality jobs that are necessary for an inclusive and sustainable pathway towards recovery from the pandemic and other colliding shocks and stresses, especially for SMEs that are hardest hit by the COVID-19 pandemic. Similarly, accelerating innovation and Africa's digital transformation is an important priority for the continent's recovery and growth agenda.
 - d) Public expenditure on food and agriculture remains low in SSA, despite the Comprehensive Africa Agriculture Development Programme (CAADP) and Malabo commitments to further enhance it. On the other hand, fiscal constraints and inter-sectoral competition for limited budgetary resources abound. Nevertheless, there will be no short cut to agrifood systems transformation without supporting the scaling-up of financing mechanisms and investments. It is critical.

II. Expected Outcomes

26. The Ministerial Roundtable offers an opportunity to take stock of the impacts of COVID-19 on agrifood systems in Africa and highlight how the deteriorating food security situation in the region, driven mainly by the combined effects of climate variability and extremes, conflict and economic slowdowns and downturns, has been exacerbated by the COVID-19 pandemic.
27. Participants will share experiences and identify best practices, innovations and lessons learned to support inclusive and resilient recovery in African countries. The Roundtable will highlight promising policies and investment interventions that can stimulate an inclusive recovery to help rebuild better, resilient and inclusive agrifood systems.
28. Furthermore, the Roundtable will contribute to advocacy and country programming by policymakers and other decision-makers designing and implementing COVID-19 response and recovery policies, programmes and investments in Africa.

III. Roundtable organisation

29. The Roundtable will be a moderated interactive session. A presentation by FAO will set the scene for interactive discussions among Members and partners. Participants will share experiences, best practices, innovations and lessons learned to support inclusive and resilient recovery.

Issues that could guide the discussion:

- a. How has the COVID-19 pandemic uniquely affected agrifood systems on the continent?
- b. What are the specific challenges faced by countries and groups (e.g., SIDS, Landlocked Developing Countries [LLDCs], countries in crises, SMEs, policy makers, farmers' organisations, women, etc.) and other most-affected vulnerable groups?
- c. What are examples of best practices and solutions from countries in building agrifood systems resilience?
- d. What are the key policies and investment priorities that need to be prioritized for an inclusive and resilient recovery?

Agenda and Participants

30. The target audience includes member countries, the African Union Commission (AUC), Regional Economic Communities (RECs), international financial institutions (IFIs), UN Agencies and development partners, as well as relevant national and regional stakeholders contributing to and coordinating recovery efforts across Africa.

5 minutes	Welcome and introduction	Moderator
15 minutes	Keynote presentation	FAO
30 minutes	Interventions of selected Panellists	AU Commissioner, Ministers, EU, UN Agency, IFI, CSO representatives
30 minutes	Experience sharing on best practices and solutions from member countries in building resilient and inclusive agrifood systems	Moderated discussion
10 minutes	Wrap-up, closing remarks	Moderator

