Photo: Judy Kithinji

Synthesis

RAPID ASSESSMENTS OF THE IMPACT OF COVID-19 on agricultural sectors and food systems in Africa

Deeply concerned by the disruption that the COVID-19 pandemic brought to our food system, Wageningen University & Research (WUR), together with global and national partners carried out rapid assessments to evaluate the impact of the COVID-19 crisis on the functioning of a wide range of agricultural sectors.

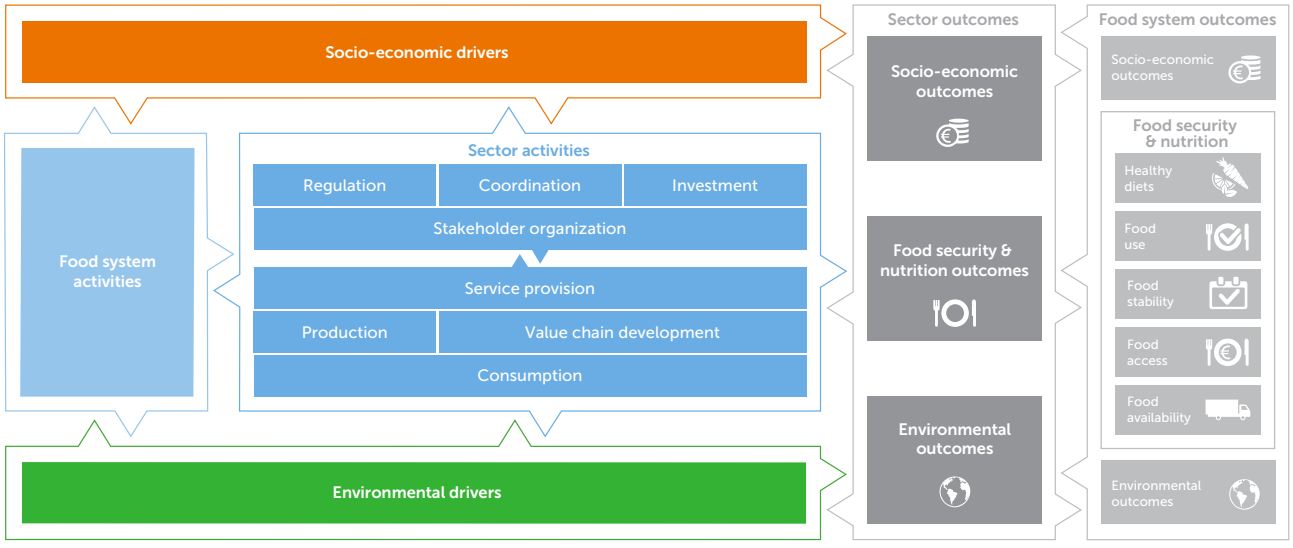
The rapid assessments were conducted at national level through remote surveys and focus group discussions (FGDs). The current report synthesizes at food system level the outcomes of 14 rapid assessments in eight sectors and covering eight African countries.

We first share common patterns the crisis impacted through agricultural sectors on food security and nutrition and socio-economic food system outcomes. Secondly, we seek general and specific ways sector activities were impacted and share common remedial and preventative actions proposed by stakeholders. Finally, we provide general context and methodology used for the synthesis.

Abbreviations

CT/BFA
Cotton sector of Burkina Faso
DA/KEN
Dairy sector in Kenya
FS/GHA
Fisheries sector in Ghana
FL/KEN
Floriculture sector in Kenya
HO/CIV-GHA-RWA
Horticulture sector in Côte d'Ivoire, Ghana and/or Rwanda
PO/RWA
Potato sector in Rwanda
SD/NGA-UGA
Seed sector in Nigeria and/or Uganda
SS/ETH
Sesame sector in Ethiopia

Figure 1. Integrated food system and sector framework



Food System Outcomes

1. **Income of farmers**
2. **Income and health of labourers**
3. **Revenues of small and medium-sized enterprises and services**

Income of farmers

- In all sectors where we conducted rapid assessments, there was a reduction in the income of both small- and medium-scale farmers resulting from the COVID-19 pandemic.
- The income of large-scale farmers and private companies in the floriculture sector also decreased (FL/KEN).
- Higher production costs, lower prices, and fewer market outlets for their commodities resulted in less revenues for farming and fishing families. Production costs increased across all sectors owing to limited availability and higher prices of inputs and equipment, delays in transport, and disruption in labour.
- The measures put in place to prevent the spread of COVID-19 hampered access to regional and international markets. Border closures between countries and within countries - between states, provinces, counties, or districts – affected the trade of perishable products in particular, such as fruits and vegetables, dairy, and fish (DA/KEN; FS/GHA; HO/CIV-GHA-RW).
- The significant decrease in air-cargo capacity, combined with the drop in demand for certain food items (HO/CIV-GHA-RW) further eroded the income of farmers, who faced an increase in shipment costs. Because of an expected reduction in exports, outgrowers had fewer contracts (HO/CIV-GHA-RW).
- Limited availability and affordability of airfreight led to a decrease in the export of specialty products such as cut flowers (FL/KEN).
- International commodity prices dropped, leading to a reduction in revenues and farm-gate prices (CT/BFA).
- Farmers, fishers, traders, and processors in all sectors were hindered in marketing their products, which caused disruptions in the volume of sales. They had to market produce in domestic value chains, sometimes at lower prices. Some farmers experienced a total loss of sales (HO/CIV-GHA-RW).
- Sales also declined in specialty and institutional markets, due to the closure of restaurants, hotels, and schools. As the restrictions or lockdown measures were enforced, the demand for products from hotels, restaurants, catering, and cafés collapsed, severely impacting the income of farmers marketing their products in the catering industries (DA/KEN; HO/CIV-GHA-RW).
- Due to trade restrictions and lockdowns in Europe, the export of flowers was hampered for a couple of months (FL/KEN).
- The change in consumer orientation towards staples (i.e., cereals) and non-perishable food products further undermined the income of farmers producing perishable commodities (DA/KEN; FS/GHA; HO/CIV-GHA-RW).
- Restricted access to formal financial institutions obliged farmers to use other sources. Delayed payments to farmers and their organizations prevented new loans or contributed to higher debts (CT/BFA).
- Shortage of cash at peak moments (food purchase, health, and school costs) affected resource-poor households especially. Those households became more dependent on informal money lenders or traders, who offered credit at very high interest rates. In some cases, these money lenders or traders also pre-financed household expenses in their farmers' networks (SS/ETH).

Income and health of labourers

- The rapid assessments revealed that the drop in production and processing of agricultural products resulting from the measures put in place to reduce the spread of COVID-19 led to a decrease in the income of labourers across all sectors.
- The assessments further indicated higher levels of unemployment, fewer opportunities for seasonal work, and an increase in work-related expenditures for labourers, such as travel to/from work. Both seasonal and permanent workers were affected in this manner.
- The disruption of transportation, restrictions in internal movement, lockdowns, and curfews limited migrant and seasonal employment.
- More household labour was available at home due to lockdowns (DA/KEN). Young people returned to their homes in rural areas, providing an alternative source for labour (SS/ETH).
- In other cases, the restrictions resulted in labour shortages (CT/BFA; HO/CIV-GHA-RWA). Weeding, harvesting and post-harvesting operations were affected, undermining agricultural productivity.
- Credit or cash shortages of farmers jeopardized the payment of wages, while at the same time labourers suffered an increase in their living expenditures.
- In one case, a rapid assessment reported that during the initial period of the pandemic, temporary labourers spent three or four times more than usual on living costs (SS/ETH).
- Due to reduced availability of produce and a drop in the volume of sales, businesses in value chains were forced to decrease their workforces. Thousands of employees were placed on technical or partial unemployment (CT/BFA; DA/KEN; FL/KEN). Businesses reduced the number of workers, forcing some to take compulsory leave, halving salaries of essential staff and laying off non-essential staff (DA/KEN).

Sesame purchase, cleaning and bagging at local spot markets in Amhara and Tigray (Photo: Flo Dirks)

- A collateral, contra-productive effect was that because of the high transport and living costs labourers were obliged to travel or seek accommodation in larger groups, making social distancing impossible and increasing the risk of spreading COVID-19 (DA/KEN; SS/ETH).

Revenues of small and medium-sized enterprises and services

- For all sectors in which we conducted rapid assessments, we observed that since the beginning of the COVID-19 pandemic, the incomes and revenues of various value chain actors diminished. This was caused by the disruption of market, processing, and trade activities.
- Mobility restrictions affected seed production and marketing (SD/NG-UGD). The income of potato-seed multipliers decreased sharply, with some going out of business (PO/RWA).
- Trade restrictions, higher prices at international markets, and transport costs hampered input delivery to farms and thus the revenues of input providers, as well as farmers' organizations who provide such services to their members (CT/BFA).
- Input providers or retailers working with input-credit agreements (input payments after harvest) did not receive – or only partly received -repayments from farmers (FI/GHA; HO/CIV-GHA-RWA; SD/NG-UGD).
- Revenues of traders fell as a result of limited availability of produce, drop in prices, and higher transaction costs.
- The volume of milk decreased, and transporters needed to cover longer distances, due to limited production per dairy farm (DA/KEN).
- Artisanal and industrial agribusinesses faced a decrease in availability of primary products (DA/KEN) and by-products (CT/BFA), as well as a disruption in demand for their products (FL/KEN; HO/CIV-GHA-RW).
- Related service providers - e.g., transport operators, petty traders, market (food) vendors, village-based loan and credit operators, waitresses and waiters, taxi and truck drivers and sex workers - felt the collateral effects of the COVID-19 crisis in the agricultural sectors. Mobility restrictions, lockdown measures, and a decrease in production and (industrial) processing, caused a reduction in demand for services of these often-informal businesses. Moreover, lower purchasing power of farmers and labourers further aggravated the situation.

Food System Outcomes

1. **Food availability**
2. **Food access**
3. **Food use and healthy diets**

Food availability

- In those agricultural sectors with crops that are global commodities (CT/BFA; SS/ETH), a surging number of farmers shifted attention to other (food) crops, such as vegetables or cereals (maize, sorghum, millet). This led to an increase in household food stocks and local food markets. In Ethiopia, agricultural professionals and authorities advised farmers to grow staple crops like sorghum instead of sesame (SS/ETH).
- In other cases, products for international and regional markets were diverted to local or domestic markets where they were either sold at lower prices or were wasted because of limited demand (HO/CIV-GHA-RWA; FL/KEN). Infrastructure for storage was inadequate, which led to considerable product losses.
- Rapid assessments noted that the lack of financial reserves needed to purchase inputs, in addition to the shortage of labour and restrictions in transport, would undermine upcoming production seasons, causing food production shocks, and affecting farmers' incomes and food availability.
- Imports of perishable goods from other countries to complement local production and match national demand proved difficult due to border closures; Ghana and Kenya, for example, normally rely on imports from other countries for cereals, frozen and canned fish, and powdered milk (DA/KEN; FS/GHA).

Food access

- Food access was affected by restrictions in movement and the temporary closure of mostly informal food markets, which disturbed several value chains. Fresh products did not reach consumer markets in (peri-) urban settings, particularly at the onset of the pandemic and during the strict lockdowns. The outreach of such informal food markets is huge, and their closure limited access to nutritious food for the majority of urban and rural consumers. High- and middle-income urban consumers could still buy their food in supermarkets.
- The COVID-19 measures also affected food prices; the extent of the impact varied depending on product or country. In Ghana, smoked fish was sold at cheap prices in nearby local markets instead of being transported to destinations further afield for sale at higher prices (FS/GHA). In Ethiopia, sesame farmers sold their sorghum at relatively low prices after harvesting (SS/ETH). The price of fresh domestic horticultural produce dropped because the domestic market had been flooded with produce that could not be sold regionally or internationally (HO/CIV-GHA-RWA).
- As the pandemic worsened, price trends shifted. In general, staple food prices increased at most food markets. Cereal price trends in Burkina Faso have remained above the five-year averages, although there have been no signs of reduced cereal production since the onset of the pandemic (CT/BFA). Panellists in several countries indicated that export restrictions on strategic staple foods or disruptions in transportation (delays in shipping) may lead to even higher prices and food security concerns.
- The fear of getting infected deterred aggregators from purchasing at the farm gate (DA/KEN), affecting costs and incomes of farmers and processors. Milk consumer price was not affected at local shops and supermarkets (DA/KEN).
- The limited availability of storage facilities or cold stores affected the price and marketability of products (FS/GHA; HO/CIV-GHA-RWA).

Food use and healthy diets

- The crisis posed challenges for many households, including limited stocks of staple foods, variable purchasing power and unstable income. Panellists in several of the rapid assessments indicated that many households had to buy food in small quantities.
- The rapid assessments showed a decrease in demand for perishable products, alongside a sharp increase in the consumption of staple food and non-perishable products, as a consistent trend across the sectors we covered. Consumers prioritized staples that can be stored during lockdowns or movement restrictions. In the dairy sector, we observed a shift from pasteurised to long-life milk, mainly among middle-income, urban consumers (DA/KEN).
- Movement restrictions, uncertainty and anticipated shortages of goods and services explained this consumer behaviour. Poorer households have variable, sometimes unstable, income sources; they purchase food at informal food markets and have restricted access to supermarkets. Anticipated or actual food shortages reshaped their demands and consumption patterns.
- Declining income and uncertainty led to consumption changes. Various rapid assessments revealed that poorer households reduced the number of meals per day and/or reduced consumption of nutritious or expensive food. Expenditures were directed towards cheaper and sometimes less nutritious food, as well as to essential health and education needs.
- The COVID-19 outbreak hindered access to adequate, nutritious food for many children. Due to school closures, students benefitting from school meal programmes lost access to nutritious food.

Sector Activities

Production

1. Access to and costs of inputs and logistics services

2. Availability and cost of labour for production

Access to and costs of inputs and logistics services

- Rapid assessments across all sectors indicated that restrictions in the movement of goods and people impeded farmers' access to inputs, e.g., seed, fertilizer, feed, and veterinary products; their access to equipment and fuel was also hindered.
- Restricted access to pre-production finance hampered farmers' ability to acquire quality inputs at an affordable price.
- Many farmers turned to less reliable or lower quality inputs. The rapid assessments indicated that disruptions in the supply of inputs was one of the main factors leading to reduced agricultural production in 2020.
- The rapid assessments revealed delays in transport as well as an increase in transport costs in all the sectors assessed. Value chain actors operating with perishable or high-value products, such as fruits and vegetables, cut flowers, dairy, and fish, were affected to a larger extent, for example:
  - Disruptions in the transport of cotton from villages to ginners contributed to delays in payments to farmers (CT/BFA).
  - Small and medium-sized enterprises operating in fruit and vegetable sectors suffered a sharp increase in shipment costs (HO/CIV-GHA-RWA).
  - Due to mounting competition over limited air-cargo capacity, medium- and large-scale flower producers experienced the same problem (FL/KEN).
- In the Kenyan dairy sector, the volume of milk per farm decreased, forcing transporters to cover longer distances and consequently face a sharp increase in costs (DA/KEN).
- Rapid assessments in some sectors illustrated the emergence of new market opportunities; for example, packaging and transportation of processed fish to major markets without an accompanying fish trader, or the use of new forms of payments via electronic means, such as mobile money transfers, on receipt of goods (FS/GHA).
- Rapid assessments in all sectors reported problems in the supply of inputs to farmers, including an increase in prices, limited availability, delays in delivery, and sometimes reduced quality.
- In some cases, partial payments were made to providers selling inputs based on input-credit agreements (FS/GHA; HO/CIV-GHA-RWA; SS/ETH).
- Fishers often lease equipment from fishmongers and boat owners. Debt has become a major issue for fishers (FS/GHA).
- In a highly regulated and institutionalized sector such as cotton in Burkina Faso, the sector board ('interprofession') negotiated input delivery with suppliers and farmers, and was largely able to build on the stocks of the ginners in 2020/21. The board anticipated shortages for the 2021/22 production season, because input providers predicted problems with purchasing inputs at international markets.
- The import of seed potatoes from overseas into Rwanda decreased significantly, which affected seed producers and seed users (PT/RWA).
- Due to transport restrictions, closed borders and reduced cargo, agro-dealers in the horticulture sector faced challenges in replenishing their stocks with imported inputs such as seed and fertilizers (HO/GHA-RWA).
- Processing activities in the sectors worsened because of the increased cost of inputs.
- Fish processors and traders in Ghana indicated that access to, and affordability of, ice and wire mesh were negatively affected by COVID-19. Firewood became scarce at the start of COVID-19 due to travel restrictions, and firewood sellers were quick to raise their prices (FS/GHA).

Actions proposed by stakeholders

- Panellists participating in focus group discussions (FGDs), part of the rapid assessments, recommended that governments through institutions such as sector boards (CT/BFA) and agricultural banks (FS/GHA) provide standardized and quality inputs. They further proposed that governments invest in value addition equipment and promote the role of agricultural insurance for farmers.
- In several rapid assessments, panellists suggested that farmer cooperatives and companies increase their buffer stocks of inputs to cushion their members in crises such as the current pandemic. A particular recommendation was made to explore the possibility of establishing public-private partnerships to enhance the availability and distribution of feed and fodder (DA/KEN).
- Panellists proposed that national governments and organizations support continuity in value chain operations, particularly in areas that are critical to the food supply in vulnerable urban areas. This entails encouraging the setup up of collection and direct transfer channels between producers with consumers or processing companies, with particular regard to perishable products critical to nutrition, such as fruit, vegetables, milk, and fish.
- It was further recommended that businesses improve the quality of locally manufactured inputs and equipment with the aim of reducing import dependency.
- In various assessments, panellists proposed that businesses invest in infrastructure development to facilitate the online sale and trade of inputs and products with the aim of reducing the movement of traders, consumers, and other value chain actors.

Flower worker at the Tulaga flower farm Kenya (Photo: Fairtraid.org.uk)

Availability and cost of labour for production

- Limitations on the mobility of labourers resulted in a significant shortfall in labour across all sectors. Higher transport costs combined with rising concerns on health and safety issues led to labour shortages for sowing, weeding, harvesting and/or pest and disease management (CT/BFA; HO/CIV-GHA-RWA; SD/NGA-UGD; SS/ETH).
- Assessments reported that transport services were allowed to operate at only half their capacity, and consequently labourers, traders and other travellers were expected to pay a higher price. In the sesame sector, the spike in transport costs negatively impacted the availability of labour. Passengers were required to pay three or four times the regular price, which deterred many labourers from traveling to rural production zones (SS/ETH).
- Due to travel restrictions in Ghana, fishers could not easily migrate to fishing grounds along the coast. They had to present a travel permit to security officers before being allowed to travel. Moreover, a reduced number of industrial vessels were willing to go fishing due to fear of contracting the virus (FS/GHA).

Actions proposed by stakeholders

- FGD panellists urged governments to inform labourers through mass media (radio, TV, brochures) about how the virus is spread, and create awareness on the importance of using protective equipment.
- The panellists encouraged large-scale sesame producers to arrange safe travel to and from the farm areas and sites, and to provide the necessary financial support to help cover the additional costs incurred. They called on those farmers to start an early campaign to mobilize labourers for weeding and harvesting periods (SS/ETH).
- Recommendations were made across various sectors that government, or bodies involved in coordinating the sector, organize the movement of labourers during the peak time of the season, and facilitate safe transport services for labourers at reasonable cost.
- It was suggested that government or sector bodies use established patterns of movement and informal communication mechanisms. One proposal was to provide labourers with accommodation in the proximity of farms until harvest time, thereby reducing unnecessary travel.

Sector Activities

Service provision

1. Access to advisory extension services

2. Access to financial services

Access to advisory extension services

- In all sectors, the rapid assessments reported that the mobility restrictions affected the timely delivery of extension services, hampering farmers' ability to maintain production levels of previous seasons.
- Extension officers as well as farmers' organizations experienced difficulties in reaching the farmers. Activities such as demonstrations, exchanges and trainings were put on hold.
- Restrictions in movement, as well as health and safety measures, hindered input providers from delivering technical advice and support, and deterred them from conducting field visits (all sectors, except FS/GHA).
- The initial costs for adapting the delivery of advisory services to the new circumstances were high; farmers' organizations and companies had to retrain workers. At the same time, they needed to invest in digital technologies.
- Due to the fear of contracting COVID-19, farmers were not willing to meet extension service providers (SS/ETH).

Actions proposed by stakeholders

- In the FGDs, panellists recommended extension service providers facilitate and ensure adherence to social distancing and hygiene measures, and provide advice in villages through public announcements using microphones, as opposed to face-to-face interactions.
- Panellists recommended extension service providers balance safety measures (e.g., limitations in gatherings and mandatory tests) with field-level activities such as demonstrations and trainings.
- It was suggested that technical staff of government extension agencies provide virtual extension services to farmers through, for example, phone calls, WhatsApp, or radio and television programmes.
- Panellists recommended that extension service providers design a new extension service model for efficient and better use of their expertise during periods of limited mobility, i.e., distribute training materials and posters on good agricultural practices to cooperatives.

Access to financial services

- Financial institutions that normally provide training and conduct farm visits before advancing credit, ceased face-to-face training sessions following the implementation of lockdown measures.
- Banks and financial institutions restricted short-term loans and cash withdrawals during the lockdown period.
- Financial institutions offered alternative banking services, such as online payments and the use of mobile apps to apply for loans.
- Banks developed a digital lending product for farmers to access loans (DA/KEN). However, farmers faced challenges in accessing the online service given their limited digital literacy.

Actions proposed by stakeholders

- Panellists recommended that financial institutions develop innovative ways to reach farmers during lockdowns and periods of restricted mobility; they proposed novel mobile-based applications or farmer-to-farmer extension methods. To strengthen digital literacy across farmers, it was suggested that financial service providers set-up schemes partnering farmers who have harnessed digital tools with those who have not.
- The panellists recommended financial institutions accelerate the transition to digital services for farmers and other value chain actors, and invest in enhancing the digital skills of farmers and actors, paying particular attention to strengthening their bookkeeping expertise, which is essential for presenting the financial status of a business.

Distributing hybrid coconut seedlings to farmers in Ghana (Photo: GKV Investments Limited)

Sector Activities

Investment

1. **Credit for farmers and value chain actors**
2. **Financing and investments**

Credit for farmers and value chain actors

- In various sectors, the rapid assessments revealed that access to credit for off-takers and aggregators had decreased because of the COVID-19 crisis, consequently limiting the amount of produce they could trade. For example, aggregators and off-takers in the dairy sector, who play a critical role in the purchase of milk from farmers in remote locations for distribution to processing plants, had to decrease the volume of milk they traded because they did not have sufficient credit to finance their operations (DA/KEN).
- Dwindling access to finance also impeded the production of potato seed, putting a strain on the potato seed production system (PO/RWA).
- Farmers could not get adequate credit to finance their operations. Funding accessibility was an issue in all the sectors, but particularly in those sectors that had a high rate of loan debts before the COVID-19 crisis (FS/GHA; HO/CIV-GHA-RWA). Limited availability of resources or late payments prevented farmers from pre-financing production assets for the next planting season (CT/BFA).
- The fisheries sector in Ghana relies heavily on loans. The major sources of credit are fish mongers and traders (about 70%), local money lenders and financial institutions. The increased risk of loan defaults or delays in loan repayments during the crisis led to a spike in interest rates from 30% up to 100% (FS/GHA).

Actions proposed by stakeholders

- FGD panellists recommended governments keep on supporting farmers to ensure effective supply of critical inputs, and ease the conditions for the repayment of loans.
- It was suggested that governments facilitate access to national recovery funds for farmers and small and medium-sized enterprises; ensure financial institutions provide the necessary support; and promote secure pre-financing for the upcoming season.
- It was further recommended that financial institutions and non-governmental organizations (NGOs) provide financial, educational and management support to enable farmers and small and medium-sized enterprises to manage their incomes and develop a savings habit.

Financing and investments

- Due to uncertainties related to the availability and cost of market demand and prices, financial institutions perceived higher risks in providing credit. They restricted access to credit due to the risk of insolvency of farmers, processors, and other actors.
- The rapid assessments across all sectors showed that private sector capacity for investment in farming, fisheries, and related industries was severely hampered. Uncertainty surrounding the negative impact of COVID-19 measures on farming or industrial activities led to a decrease in investments in the sectors.
- Farmers and investors were dissatisfied with the limited profitability of the 2019 sesame production season because of higher production costs and lower market prices. Stakeholders fear that the pandemic will amplify and continue this trend (SS/ETH).
- Planned investments for expanding or upgrading horticultural companies were put on hold due to uncertainty. Discouraged by the COVID-19 crisis and with losses piling up, some horticultural producers and businesses started to reduce investments and considered switching to less risky value chains or commodities (HO/CIV-GHA-RWA).
- The depth of the crisis hampered the ability of private investors and entrepreneurs to invest in sectors, and to expand and develop their farm or business.
- The economic consequences of the crisis reduced farmers' access to cash and their ability to invest in inputs such as quality seed. This hindered seed companies from generating revenues and making strategic re-investments (SD/NGA-UGD).
- Farmers engaged in fruit production did not have access to the necessary funds to invest in the maintenance of their orchards (HO/CIV).
- Diminished revenues and reduced access to finance impeded the purchase of inputs for upcoming seasons and limited re-investments in vegetable production (HO/RWA).
- National recovery funds established loan schemes at low interest rates, but eligibility criteria have made it difficult for small-scale farmers and small and medium-sized enterprises to take advantage of such schemes (HO/RWA).

Actions proposed by stakeholders

- Panellists in FGDs noted that farmers and investors need to be reassured on the implications of COVID-19 on the sectors; they recommended that governments give advance notice of lockdowns to stakeholders to allow them to make adequate preparations.
- They further proposed that governments approach banks and other financial institutions to see what options are available for financing businesses and activities in agricultural sectors during crises such as the COVID-19 pandemic.

Sector Activities

Stakeholder organization

- All rapid assessment briefs mention a decrease in physical communications among stakeholders. Cooperatives and farmers' groups were particularly affected, since their boards rarely met and consequently decisions were not made. Whilst before the pandemic farmers could meet in large groups and organize field days, the government measures put in place to combat the spread of COVID-19 meant that stakeholders required more time to meet farmers in smaller groups in order to respect social distancing.
- In the dairy value chain, members of self-help groups could not meet due to mobility restrictions (DA/KEN).
- Unions and cooperatives had inadequate access to marketing credit. Limited collateral and poor credit repayment history prevented unions and cooperatives from accessing loans from financial institutions (SS/ETH).

Actions proposed by stakeholders

- All rapid assessment briefs mentioned the need to increase the use of online services for meetings. To achieve this, panellists recommended that stakeholder organizations enhance their skills and increasingly use digital communication. To assure this is an inclusive process, panellists recommended they sensitize their stakeholder and/or farmer members in the use of those communication tools.

Sector Activities

Coordination

- Restrictions in mobility and face-to-face meetings disrupted the functioning of sector platforms and governing bodies. They impeded the mechanisms for sector alignment and coordination at moments that were crucial for adapting and responding to new circumstances.
- Government measures hampered the ability of the platforms to coordinate a joint and effective response to the crisis, contributing to a further fragmentation of the stakeholders in the sector (HO/GHA-RWA).
- Government and other stakeholders critical to seed sector regulation were hindered in convening, making decisions on, and ensuring the implementation of regulations on seed quality assurance, variety release and seed imports (SD/NGA-UGD).
- The functioning of platforms and governing bodies in several sectors was severely disrupted due to restrictions in gathering and mobility; actors found it difficult to meet online, coordinate and respond to the new conditions (DA/KEN; PO/RWA).
- The rapid assessments revealed that due to weak stakeholder coordination and collaboration in the sesame sector, unions received directions from different government agencies with limited policy alignment (SS/ETH).
- Governments and stakeholders were hampered in the coordination of specific seed sector functions, such as early generation seed production and supply, seed quality assurance and variety release (SD/NGA-UGD).

Actions proposed by stakeholders

- Participants in the FGDs called on governments, regulatory bodies, and sector stakeholders to establish online forums with stakeholder representatives.
- The panellists in the rapid assessments conducted in the early stages of the pandemic recommended sector representatives reach out to security and health authorities to consider including agricultural inputs as an essential service given its importance to food security, and subsequently raise awareness among security staff on its implementation.
- The panellists highlighted the need to strengthen networks in which stakeholders share information, and to reinforce the communication lines between government and value chain actors via established sector platforms, with the aim of sector alignment.
- The panellists suggested that the government take on the responsibility of promoting and speeding up the development of new information management tools, favouring virtual meetings for decision-making on coordination and regulatory sector functions.

Sector Activities

Regulation

- Rapid assessments in several of the sectors revealed an absence of political commitment or decisiveness to find structural solutions to the impact of COVID-19 on sectors. In some cases, governments put forward measures to support sector activities (DA/KEN; PO/RWA).
- Incentives such as tax breaks offered by governments at the onset of the pandemic were often too limited in duration in the face of the ongoing pandemic, leaving the sectors vulnerable and exposed. Examples of incentives include:
  - Establishment of a recovery fund for the potato sector in Rwanda, although it has not yet reached the whole sector (PO/RWA).
  - Temporary reduction in tax for employed workers in Kenya, increasing their disposable income (DA/KEN).
  - Input subsidies for cereals in Burkina Faso were sometimes granted to non-farming actors (CT/BFA).
  - Creation of a seed subsidy scheme in Nigeria as a palliative measure supporting farmers (SD/NGA).
- Rules and systems that govern seed markets, production systems, service delivery and coordination were severely affected by the COVID-19 measures. Government and other stakeholders crucial to seed sector regulation were hindered from convening and ensuring the implementation of regulations relevant to seed quality assurance, variety release and seed imports (SD/NGA-UGD).
- Prior to COVID-19, Ghana had been dealing with persistent illegal, unreported and unregulated fishing practices. Law enforcement was hindered, resulting in largely unsupervised fishers using these practices. For industrial fisheries that enforced COVID-19 protocols, the distance to testing centres, the high cost of the tests, and delays in obtaining test results were limiting factors.
- The cotton sector in Burkina Faso was able to mitigate negative effects of the crisis by drawing on financial reserves. The sector board applies a price-setting mechanism that was designed to absorb world price shocks; a mitigation fund ('fond de lissage'), set up to protect farmers from the adverse effects of crises such as the COVID-19 pandemic, was used. The decrease in farm-gate price was less than expected but is projected to rise in 2021/22 (CT/BFA).

Actions proposed by stakeholders

- The rapid assessment briefs for various sectors indicated the need for governments to strengthen traditional institutions for sector coordination, and support their activities through appropriate legislation.
- It was recommended that regulators streamline and encourage coordination or management among sector institutions. It was further suggested that community watchdog groups be established and supported to ensure compliance with fisheries regulations (FS/GHA).
- In all sectors, it was proposed that government structures promote and create awareness on the use of electronic signatures.

Poor yield of groundnut basic seed field in Dokolo District Uganda, caused by late drought due to late planting as a result of COVID-19 lockdown (Photo: NaSARRI)

COVID-19 rapid assessments

The COVID-19 pandemic has seriously affected the functioning of agricultural sectors across the globe. Several countries designed mitigation strategies to reduce exposure to and contain the effects of the pandemic. The measures put in place to curb the spread of the virus often resulted in challenges in the functioning of the food system and severely impacted the performance of agricultural sectors.

Deeply concerned by the disruption that the pandemic brought to our food system, Wageningen University & Research (WUR), together with global and national partners in different countries, carried out rapid assessments to evaluate the impact of the COVID-19 crisis on the functioning of a wide range of agricultural sectors. We conducted the assessments to gain an immediate understanding of the impact of the crisis, and determine the urgent actions required to mitigate the challenges identified during the initial months of the pandemic in Africa (May-October 2020), in the seed, sesame, fertilizer, horticulture, and potato sectors. These are sectors where WUR, SNV Netherlands Development Organisation and other partners are active. Between March and May 2021, we carried out rapid assessments of the cotton, dairy, floriculture, and marine fisheries sectors. They reflected on the impact of the crisis on the sectors since the onset of the pandemic, thus taking a longer perspective, and proposed both short-term and strategic actions. The series of rapid assessment briefs can be found on a dedicate website of WUR, which can be accessed through this link. The current report synthesizes the outcomes of 14 rapid assessments carried out by WUR and partners between May 2020 and June 2021 in eight sectors and covering eight African countries (Table 1).

Rapid assessment methodology

The rapid assessments were conducted at national level through remote surveys and focus group discussions (FGDs). The integrated food system and sector framework developed by WUR (see also Figure 1)[1] provided a structure to the analysis. Further information on the methodology of the rapid assessments can be found here.

Figure 1. Integrated food system and sector framework

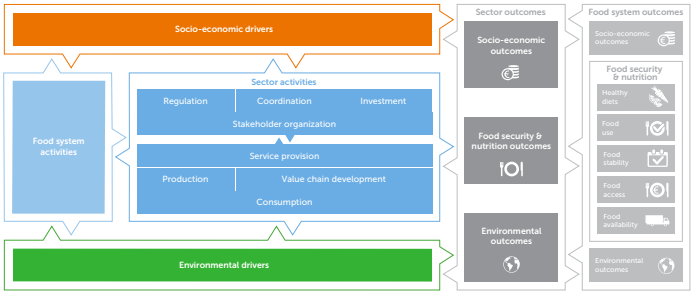


Table 1. Rapid assessments included in the synthesis

Sector	Country	N°/assessments	Month-year
Seed	Nigeria	2	May, June 2020
	Uganda	2	May, June 2020
Sesame	Ethiopia	3	May, August, September 2020
Horticulture	Côte d'Ivoire	1	September 2020
	Ghana	1	September 2020
	Rwanda	1	September 2020
Potato	Rwanda	1	October 2020
Cotton	Burkina Faso	1	May 2021
Dairy	Kenya	1	May 2021
Floriculture	Kenya	1	May 2021
Fisheries	Ghana	1	May 2021

1] Borman, G.D., De Boef, W.S., Dirks, F., Saavedra Gonzalez, Y., Subedi, A., Thijssen, M.H., Jacobs, J., Schrader, T., Boyd, S., Ten Hove, H.J., Van der Maden, E., Koomen, I., Assibey-Yeboah, S., Moussa, C., Uzamukunda, A., Daburon, A., Ndambi, A., Van Vugt, S., Guijt, J., Kessler, J.J., Molenaar, J.W., Van Berkum, S., 2021. Putting food systems thinking into practice: integrating agricultural sectors in a multi-level analytical framework. Global Food Security [submitted].

Cotton market in Ména (Photo: Joost Nelen)

Purpose of the rapid assessments

- To conduct a synthesis of the impact of the COVID-19 crisis on the food system and agricultural sectors in which WUR and partners conducted the rapid assessments
- To provide a set of options to help countries and stakeholders identify common patterns of remedial and preventative actions required to support the agricultural sectors in coping with the COVID-19 crisis.

Rapid assessment synthesis

Methodology

The synthesis of the rapid assessments followed an iterative process that encompassed four steps:

1. For each rapid assessment, we identified and subsequently coded the mitigation strategies in place to contain the pandemic (lockdowns, mobility restrictions, social distancing) and the effects of such measures on society and the economy. We distinguished recurring themes that emerged from the synthesis of each rapid assessment.
2. We were foremost concerned with understanding how the strategies in place to contain the pandemic impacted different sector activities, so we conducted a systematic analysis of the impacts following the integrated food system and sector framework (Figure 1). This helped us to gauge, in a rigorous way, a common view of cause-effect patterns and their impact on sectors activities. Furthermore, it allowed us to determine the short-term and strategic actions and interventions required to mitigate each impact, as recommended by panellists during the FGD part of the rapid assessments.
3. Subsequently, to get a more general, wider perspective at the level of food system outcomes, we confronted patterns emerging from the various rapid assessments, going back and forth. By zooming out from sector activities we were able to identify major implications for food security and nutrition, as well as socio-economic outcomes. Environmental factors and outcomes were not included in the analysis due to the lack of relevant information gathered in the rapid assessments. Moreover, the duration of the crisis and focus of the assessments was too short to assess the medium- to long-term environmental effects.
4. Throughout the data analysis, we paid specific attention to insights gathered during previous scientific work and in discussions with sector experts who were involved in conducting the rapid assessments. A panel of food systems scholars and practitioners provided inputs to the structure of the methodology and reviewed the synthesis.

Limitations to the synthesis methodology

- The rapid assessments provided a snapshot of sector dynamics during the COVID-19 crisis, and their results are closely tied to the agricultural season in which they were conducted.
- The surveys identified categories of stakeholders (up to 70 people, covering different areas of the sectors), but did not record individual data (per household, per business).
- The speed of the assessments did not allow for corroboration of the findings with quantitative data.
- There were major differences in outreach and scope between the sectors (number of people affected, volume of production or sales, seasonality, economic importance).
- The assessments lacked a clear point of comparison (i.e., pre COVID-19 baselines).
- The assessments were almost entirely based on declarations and perceptions of a large group of sector stakeholders gathered through stakeholder surveys and FGDs; however, triangulation of insights and perspectives enhanced the reliability of the outcomes.
- The country teams were not able to verify, nuance, or amend the information with secondary data, as these were rarely available when compiling the synthesis report.

Smoking fish at Cape Coast (Photo: Benjamin Campion)

Partnership

The synthesis of the rapid assessments is facilitated by Wageningen Centre for Development Innovation (WCDI), part of Wageningen University & Research, and SNV Netherlands Development Organisation.

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Source: FAO (2021). Assessing the impact of the COVID-19 pandemic on agriculture, food security and nutrition in Africa. Retrieved from https://www.fao.org/publications/card/en/c/CB5911EN
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