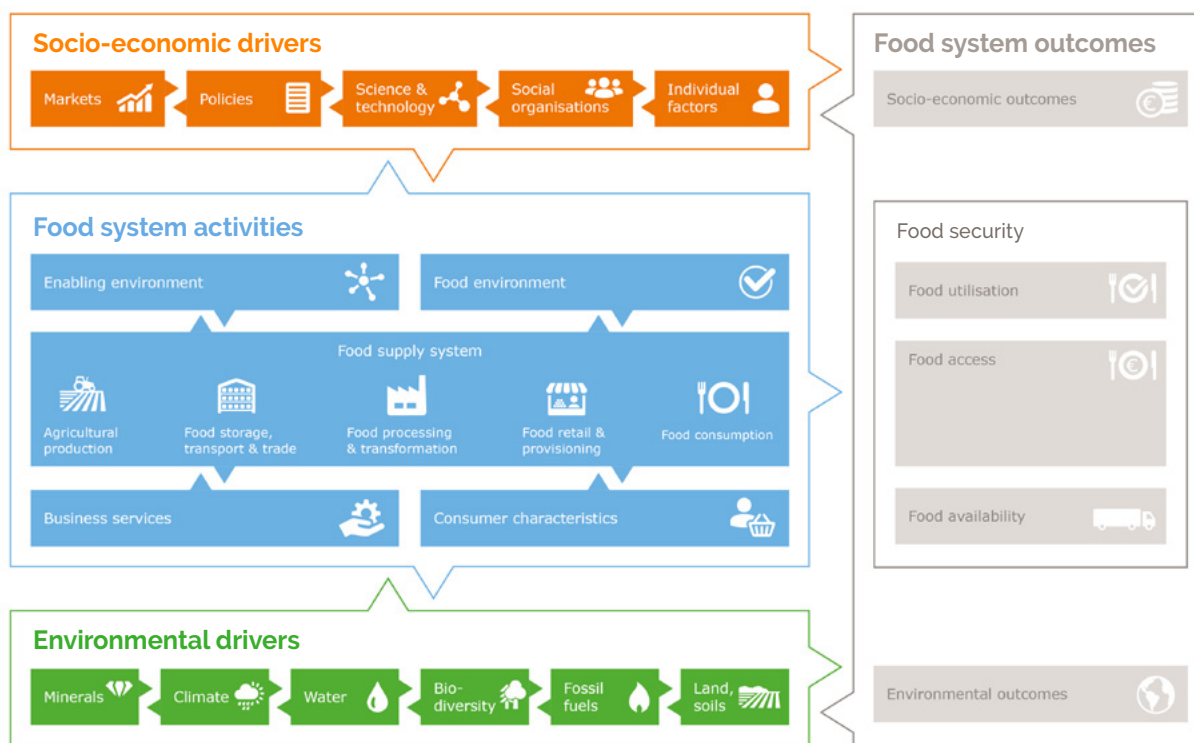


Ethiopia

Women cleaning sesame seeds. (Photo: Flo Dirks)



The impact of COVID-19 on the food system

Over the past months, governments and their health agencies have been trying to combat the spread of the COVID-19 pandemic with mobility restrictions and social-distancing measures. We value their efforts to protect people's lives, health and livelihoods, as these measures contribute to a reduction in the likelihood of human mortality, severe health consequences and the spread of the disease, especially among vulnerable people and communities.

However, these efforts have also resulted in challenges in the functioning of food systems in low- and middle-income countries. This rapid country assessment was set out to synthesise available secondary data in relation to the impact of the COVID-19 crisis and prioritise short-term challenges and actions required in Ethiopia. In this report we present the key impacts of the COVID-19 crisis on the food system, the effects of the lockdown measures on the most vulnerable groups, gaps identified in the data analysed and in government responses to the crisis, and actions required to address short-term priorities and challenges. The initial findings were reviewed by several experts. More information on the methodology can be found on [page 13](#).

The analysis is based on the food systems approach outlined by Van Berkum et al. (2018)¹. An overview of relevant food system drivers, activities and outcomes can be [found here](#).

Key impacts on the food system

Impacts of the COVID-19 crisis can be divided into **immediate health effects and effects resulting from the measures taken. We concentrate on the latter as the vast majority of impacts are linked to the measures taken to stop the spread of COVID-19 in Ethiopia.**

Impacts on the agricultural sector will affect the entire economy

- The agricultural sector is pivotal in Ethiopia's economy, generating about 73% of employment², and absorbing large amounts of informal labour (including family labour, labour exchange and casual labour). The effects of the lockdown measures and the reduction in economic activity in the agricultural sector will have ripple effects on the entire economy and across the food system.

The poverty rate is increasing

- While the economy has been growing steadily over the past decades, the mobility restrictions have reportedly slowed down economic activity, and this is expected to lead to an increase in (extreme) poverty.
- It is anticipated that the beneficiaries of the Productive Safety Net Programme (PSNP) and the Urban Productive Safety Net Programme (UPSNP) will increase from 9 to 10 - 15 million people³.
- Income from remittances has declined, because the diaspora residing in other countries face income and job losses due to the measures taken.
- The national poverty rate rose by 9% during the lockdown period; an additional 10 million people were recorded as temporarily living below the poverty line - 1.90 United States dollars (USD) a day - between March and May 2020⁴.

Demand for high-value perishables is shrinking

- As people lose jobs, firms cut production, the government diverts investment to relief response, and the overall demand for perishable food products falls. Demand for more expensive and perishable products that are often consumed in hotels and restaurants has fallen sharply (e.g. milk, butter and meat), as has the demand for products that are believed to increase susceptibility to COVID-19 (e.g. cabbage and tomato). This, in turn, leads to even more job losses along these value chains.

Reduced productivity and production puts the financial sector at risk

- If no measures are taken, it is inevitable that monetary and multidimensional poverty will increase, and the gains the country has so far achieved in terms of development objectives, could potentially be lost.
- In particular, (informal) small- and medium-sized enterprises (SMEs) will not be able to survive for long before defaulting on bank loans or having to reschedule their repayments. If a high percentage of businesses in the agricultural sector are unable to repay their bank loans, then the financial sector will be under pressure.
- Remittances account for a considerable amount of the country's foreign exchange. Mobility restrictions in other countries have resulted in a significant decrease in remittances to Ethiopia.
- Anticipated reductions in the production, productivity and exports of agricultural commodities (such as coffee, sesame and livestock) this year will have a direct effect on the already limited foreign currency reserve. This is a serious bottleneck in the economy as it implies that the government will not be able to import required inputs, goods and other basic materials in 2021.

Youth are facing job losses

- Economists predict severe job losses will continue in the coming months, both in the formal and informal sector. Currently, casual labourers, of which the majority are people under 35, will experience the heaviest job losses^{3, 5, 6}.
- A monitoring survey of 3,107 households, conducted by the World Bank in April and June 2020, indicates that 38% of casual labourers have lost income and/or their job. This is mostly in the service sector, but also in agriculture (e.g. street vendors, food processors)⁷.
- Another major loss of income is expected among (young) casual labourers who cannot work or go to their workplace due to restrictions in movement. The majority of casual labourers in the agriculture sector are young male students, young landless farmers, and young women (the latter mostly in export sectors)^{4, 7}.

Availability of food is not an issue (yet), affordability is...

- Surveys show that approximately one fifth of the entire population has experienced not having enough food. The aforementioned World Bank survey indicates that among those households that could not buy enough food, higher prices or less regular income were the main causes. 90% of the households surveyed indicated that affordability is a concern⁷.
- People in such situations eat less and have less diverse diets (e.g. more staples, less vegetables and proteins). This affects the long-term health of household members, particularly children.
- It is estimated that wasting will increase by 11-15% as result of the COVID-19 crisis⁹; severe acute malnutrition (SAM) is expected to increase by 10-15%³.



Casual labourers waiting for employers. (Photo: Ted Schrader)

Key impacts on vulnerable groups

Although the COVID-19 crisis indiscriminately affects all segments of society and sectors, population subgroups are expected to be vulnerable to the crisis in different ways. The following groups have been identified based on the above synthesis of information consulted; they are mentioned specifically in multiple sources as being the groups most heavily impacted by the COVID-19 crisis.

Groups identified and their vulnerabilities in relation to the COVID-19 crisis

Young casual labourers in agricultural production	Street vendors and small retailers (particularly youth and women)	Ultra-poor
<ul style="list-style-type: none"> Casual labourers are often resource poor farmers (mostly young males) or students who depend on casual work to support their families for some months of the year. The government does not have a robust social safety net for these groups. Due to the absence of regular salaries or income, agricultural labourers, migrants, and other informal labourers were among those hit hardest during the five-month period of lockdown and state of emergency. Due to mobility restrictions, casual labourers are not able to travel to places where there is work. For those who can work, living and working conditions are not in line with prevailing social-distancing and hygiene measures. These workers do not have savings as most of the income is needed to cover expenses for basic needs such as food. Loss of income directly affects their food security and that of their families. Daily labourers in export industries (e.g. floriculture) are also losing their jobs and thus becoming part of this growing group with uncertain and vulnerable livelihoods. 	<ul style="list-style-type: none"> Out of the total national workforce more than 80% are informal labourers²; this includes agricultural labourers, but the majority work in hospitality, transport and agri-food services. Street vendors and retailers have reported being out of work. This implies income loss for these already vulnerable groups, in addition to hampering effective food supply. The government does not have robust social safety nets for informal labourers. 	<ul style="list-style-type: none"> PSNP and UPSNP have been in place to support ultra-poor households. However, it is expected that 1-4 million more people will be in need of food aid and financial support than those who are currently targeted by PNSP and UPSNP³. Ultra-poor have insufficient assets and limited options to cope with shocks such as loss of income, restricted mobility or being infected by COVID-19. They have limited (informal) social safety nets. Ultra-poor acutely malnourished women and children are the groups that most urgently need food support.

Gaps identified ...

... in the reports analysed

- Available data on economic impacts are biased towards the formal sectors. Because informal labour is not taken into account, the expected impacts on job losses and losses in productivity have been underestimated.
- In the reports available, we found limited data on the effect of the mobility measures on the food and nutrition security of poor, pregnant and lactating women with children under 2 years old. It is well known from other crises that these groups are particularly vulnerable.
- We received mixed messages concerning the impacts on urban versus rural areas. Some reports emphasise that urban areas have been most affected by job losses and food insecurity, while others stress that the overall impact of the COVID-19 crisis is most clearly noticeable in rural areas where people are falling back into extreme poverty.

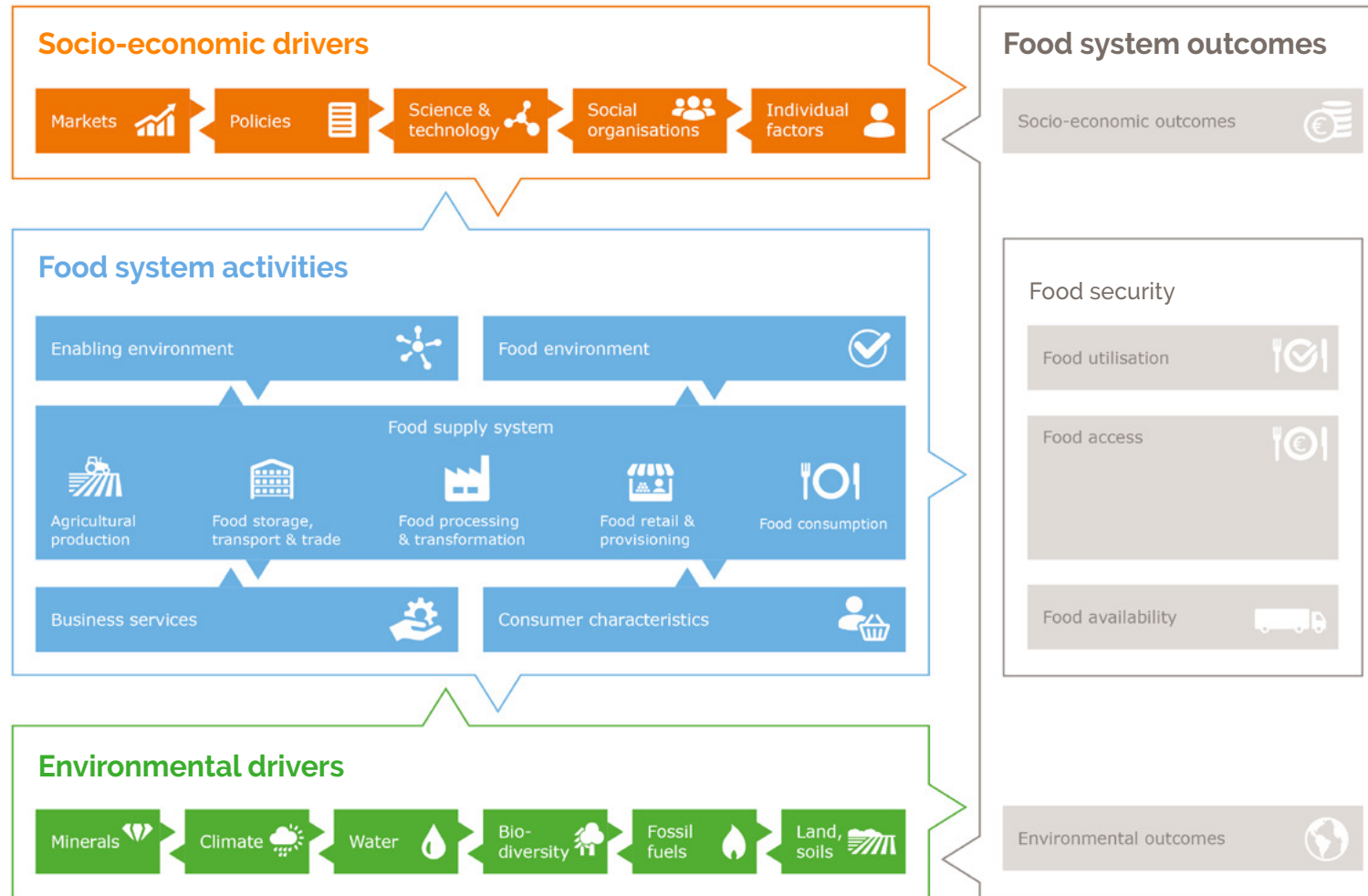
... in government responses

- Current support measures of the government do not specifically target casual labourers in the agricultural sector. Some reports mention that – informally – funds are being raised by local communities (including local authorities) to support severely affected households.
- The national agricultural COVID-19 response strategy prioritises crop production with a strong focus on cereals and cash crops (maize, wheat, rice, sorghum, sesame, soybean, mung bean, onion, tomato, pepper, potato, and sweet potato). Crops are mainly selected for their ease and reliability of production, their export value, or import substitution value. High-nutritional crops are not specifically prioritised.
- We note that there is a risk that the COVID-19 crisis will be used to prioritise certain policy directions. While there may be good reasons for this, we would like to emphasise the importance of evidence-based policy, also in the context of COVID-19. In some cases, we found no relationship between the data in reports and the proposed recommendations. For instance, the suggested actions in some reports promote the role of cooperatives in food distribution and microfinance, while the findings in the reports do not show that transport is an issue, and earlier research shows mixed results on the effectiveness of cooperatives in microfinance.

Short-term actions required

- Ensure that inputs are available and affordable for the coming season. To achieve this, quality seed production needs to be prioritised (including inputs, labour and the necessary transport to deliver seed).
- Make appropriate finance available for small-scale farmers, through reliable microfinance institutions. The National Bank of Ethiopia, other banks, regional governments and international donors could support this financially. Besides input finance, it is crucial that repayment terms for ongoing loans are adjusted so that agricultural productivity will not be negatively affected in upcoming seasons, and small-scale farmers will generate sufficient income and have enough food next year.
- Exempt food trade from travel bans in order to keep food trade flowing and thus make sure food is available and affordable. This should include safe passes for staff working in small agricultural businesses in cases of city-wide lockdowns.
- Ensure that casual labourers can work safely. This could be done by **(1)** closely monitoring demand for and offer of labour at woreda level; **(2)** reducing labour movements by hiring permanent labourers or using alternative sources of labour, such as hiring people from local areas of high unemployment; **(3)** arranging safe transport to move casual agricultural labourers to areas where there are labour shortages; and **(4)** enforcing healthy and safe working conditions in light of COVID-19.
- Support the expanding group of extremely poor and vulnerable people (including self-employed, casual labourers, temporary labourers, ultra-poor pregnant and lactating women) by continuing existing cash transfers and scaling up this type of support. The existing PSNP structures could be used for this.
- Maintain core childbirth interventions and treatment of common child illnesses to prevent a large proportion of avoidable deaths.

Food systems approach



Food System drivers

Socio-economic drivers



Economy and markets

- Due to low foreign exchange reserves and significant unfavourable pressure on the exchange rate of the Ethiopian Birr, an increase in debt distress is anticipated, resulting in low levels of domestic resource mobilisation, high inflation and rising unemployment. The government has devalued the Birr significantly (100 Birr = 2,84 USD)¹⁰.
- General inflation rate is currently 23%, while food price inflation is 26%¹⁰.
- Government debt is over 55% of gross domestic product (GDP); this does not take into consideration recent pledges of support from international donors¹⁰.
- The export-import gap was already significant in past years. Ethiopia imports five times the value of what it exports¹⁰. This gap is likely to increase this year as the international demand for export crops is dropping (except for coffee).
- Although most people work in agriculture, the service sector has outgrown the agricultural sector in terms of its contribution to GDP growth (46%)¹⁰, and to urban employment (about 70%). Consequently, the impact of the COVID-19 crisis on the service sector will have far-reaching implications for total GDP growth as well as for urban unemployment.
- The majority of the population (81%) is multidimensionally poor, with little or no savings, limited ability to deal with shocks and inadequate access to basic services¹¹.
- A COVID-19-driven poverty trap is emerging. Despite massive improvements over the past decades, Ethiopia's health system was not ready for a large-scale crisis. Its readiness to deliver routine health services was rated at 55% of what was needed in 2018³. 58% of the population lack access to clean water, 89% live without hygienic toilets, 56% survive without electricity, and 48 million people live further than 2km from all-weather roads². The vulnerability of the population to the virus further depresses productivity and increases healthcare costs, leading to increased poverty and, again, more disease¹¹.

Politics and policies

- The government has banned mass gatherings, announced the closing of schools and introduced social distancing to prevent the disease from spreading.
- It has imposed bans on certain types of business activities, such as restaurants, shops, etc.; travel is discouraged.

Environmental drivers



- Transport service providers have to reduce the number of passengers by half and charge double the normal rate for their services.
- Mobility restrictions hinder casual labourers from traveling to areas where there is work.
- Lay-offs have been officially prohibited in Ethiopia to protect incomes.
- Budgets have been created to support the most vulnerable, but it remains unclear how these funds will be distributed.

Social organisation

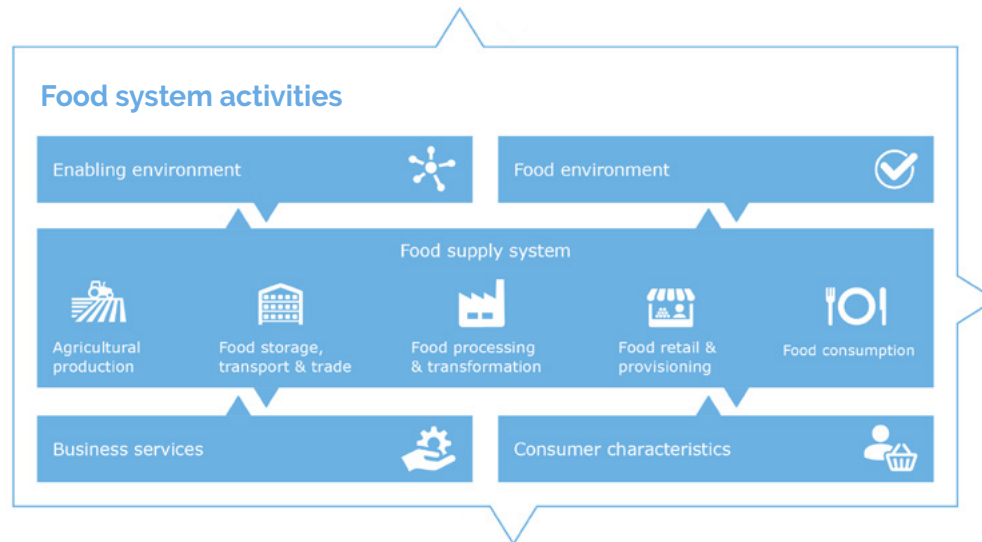
- Social unrest, triggered by longstanding issues that could be aired in a new and more open civic and political environment, has led to conflicts, the loss of lives and property and, at the last count, 1.7 million internally displaced persons (IDPs)³.
- The recent murder of the activist singer Hachalu Hunessa sparked new violence and unrest in the country (particularly in Oromia).
- Firms and local organisations are taking precautionary measures, such as temporarily closing premises and stopping the delivery of services. This has resulted in lost wages for workers, especially in the informal economy where there is no paid leave.

- It is customary that in times of need most people turn to friends, neighbours and relatives for help.
- Local agricultural production relies on informal social networks. During the high agricultural season, groups of 10-100 people are mobilised to work together. This form of labour sharing may be affected due to the restrictions in movement.

Environmental drivers

- The COVID-19 crisis has hit Ethiopia at a time when the country is facing a major ongoing desert locust infestation, which will impact the livelihoods of an estimated one million people³. This infestation was expected to significantly and negatively affect agricultural productivity during the Belg season (February – May 2020)¹².

Effects of COVID-19 on food system activities



General

- GDP contributions from the agriculture sector dropped by 5.2% in the first 7 weeks of the COVID-19 outbreak in Ethiopia (March – May 2020); the largest decline was in exports such as beverages, coffee, sugarcane, sesame and other oilseeds, and flowers⁴.
- It is estimated that over the course of 2020, GDP will fall by 5.6-16.7 %¹³. Contributions to GDP from the agricultural sector are expected to further decline by 0.8-2.4 % in 2020⁴; the service sector is expected to be hit hardest.
- The Jobs Creation Commission estimates that between June and August 2020, 1.41 million jobs will be at risk (using a medium scenario of the duration and magnitude of lockdown measures); income loss for the urban self-employed in the service sector is estimated to be USD 265 million (again using a medium estimate)⁶.

Support services

- Conventional extension services are not possible as a result of mobility restrictions. Instead of working through group mobilisation, extension agents (DAs) move from farm to farm to provide advisory services at an individual level; this reduces their reach¹².
- Access to finance among producers is a key bottleneck. Unions and cooperatives anticipate more difficulties in accessing marketing credit. Financial institutions predict a high risk of defaulting farmer-borrowers. Shortage of cash among smallholders is a fertile ground for the activities of informal money lenders.
- Disruptions to the timely import, transportation and distribution of fertiliser and agro-chemicals, and lack of cash amongst

farmers, have been observed. The Bilateral Ethiopian-Netherlands Effort for Food, Income and Trade (BENEFIT) Partnership, in collaboration with the Realising Sustainable Agricultural Livelihood Security in Ethiopia (REALISE) programme, conducted a study in 60 PSNP woredas in June 2020, which revealed a wide gap in the demand and supply of inputs: 22-51 % of fertiliser (NPS and urea) demand is not being met; 38-73 % of seed demand is not being met¹⁴.

- Mobility restrictions hamper effective seed production, which faces major challenges in transporting and accessing fertiliser, agro-chemicals and other inputs. Lack of farm labour hinders the production of early generation seed (EGS) and quality seed. The crisis distorts important components of the seed sector such as the release and registration of new varieties, the timely supply of EGS and seed quality assurance. It is expected that this will lead to reduced availability of quality seed of varieties in high demand in the upcoming seasons¹⁵.

Agricultural production

- The International Food Policy Research Institute (IFPRI) has observed that the COVID-19 measures have had only a limited impact on the agricultural sector, but this is because the vast majority of agricultural activities are performed by smallholders who produce for self-consumption. There was a 5.2% decrease in value creation in food production between March and May 2020 (7 weeks)⁴.

- By contrast, other reports stress that the supply of casual labour for the agricultural season is being hampered by the restrictions in mobility. This was observed particularly in the sectors that make use of large amounts of informal workers, such as cereals, sesame (a key export crop), and some high value vegetables.
- Farm-level production costs are increasing due to the rising cost of labour.
- Young people, including students and young employees who lost their jobs due to the COVID-19 measures, and previously displaced farmers, are now returning to their rural homes. This creates an alternative source of labour (e.g. in sesame production zones)¹⁶.
- The limited availability of inputs and labour result in delayed planting and possibly a missed season in some cases for several food and cash crops. The effects of this will be noticeable next year: limited output will result in food and income shortages. Production of certain cash crops might fall by 30% if smallholders revert to extensive production systems.
- In sesame production, smallholders depend on hired labour for 60% of their field operations, the remaining 40% is covered by family labour. Investor farmers fully depend on hired labour for farm activities except for ploughing, where tractors are employed⁵.
- The lack of availability of migrant labour in the sesame sector has interrupted land tillage, seeding, weeding and harvesting, particularly across the regions where the farming season started in the month of March¹⁶.

- In the flower sector, farms are laying off the vast majority of their employees as a result of a decrease in demand.

Processing, transport and trade

- GDP loss in food processing was 12% in the first 7 weeks of the outbreak⁴.
- The start-up of agro-industrial parks will be delayed³.
- A monitoring survey of 3,107 households in Ethiopia, conducted in two rounds by the World Bank (in April and June 2020), indicated that labour and distribution costs are higher; urban areas, where shops are running out of stock owing to delays in deliveries, have been most affected (11% of the surveyed households), while rural areas have been impacted by markets not operating (9% of the surveyed households)⁷.
- Community markets (including household-to-household exchange), rural trade centres (farm-gate markets), small towns and woreda markets, and regional and national markets, are functioning at limited capacity¹¹.
- Vegetable value chains are being affected due to the perishable nature of the products, which cannot be transported effectively due to the restrictions in mobility. Vegetable trade and consumption have decreased.
- Farmers in the sesame sector are being discouraged from producing sesame as extension workers encourage food crop production⁵.
- Movement restrictions are expected to affect the pastoral and agro-pastoral communities

since they sustain their livelihoods by migrating in search of food and water for their livestock¹³.

- Due to absence of market outlets for eggs, processed dairy and fish products, these products are not being collected at collection centres. This results in limited supply and loss of income for people working in these respective value chains.
- Poultry meat sales have declined by 80% as restaurants and big hotels are closed².
- Due to lack of demand, poultry and dairy farms are being forced to kill their animals without being able to sell them. Some enterprises have already started burying millions of day-old chicks.

Effects of COVID-19 on the food system outcomes

General

- The agricultural sector is pivotal to Ethiopia's economy, generating about 73% of employment, and absorbing large amounts of informal labour (e.g. family labour, labour exchange and casual labour)².
- The manufacturing sector and the service sector are highly dependent on the agricultural sector as it is a source of inputs and other services. If the agricultural sector is hit hard, this will have ripple effects throughout the entire economy and food system.
- Social-distancing measures and stay-at-home orders affect social relationships both in urban and rural areas resulting in psychological distress, frustration and confusion among people.
- The dire health situation and the capacity challenges for the health system are exacerbated by other public health challenges such as outbreaks of cholera and measles.

Socio economic effects

- National GDP is expected to fall by 5.6 - 16.7% in 2020⁴. The highest impact on GDP loss is anticipated to be in the service sector - hotels, bars, restaurants - and tourist sector.
- The food system is being adversely affected by falling consumer and export demand (11% drop in contribution of agri-food to GDP, despite exemptions)¹⁷.
- **Job and income losses:**
 - Economists forecast that severe job losses will continue until at least October 2020,


because the pandemic is expected to reach its peak between July and September. In the worst-case scenario, 3.2 - 4 million people could lose their jobs².

- A survey of 3,107 households, conducted by the World Bank in April and June 2020, revealed that casual workers are most likely to have lost their jobs (38%), followed by waged employees in the private sector (20%) and the self-employed (11%)⁷.
- The service sector is expected to experience a decline in employment of 57 - 74 %¹¹. This is most serious for people who depend on selling food and beverages on a daily basis.
- Besides the service sector, other sectors often mentioned as being affected by job losses are agro-processing firms, horticulture, flower production, poultry farms, dairy farms, animal fattening, sports, festivals and exhibitions. It should be noted that these figures are biased towards the formal sectors (who actually report on labour lay-offs). Another major loss of income is anticipated among casual labourers who cannot work or go to their workplace due to restrictions in movement.
- The aforementioned household survey recorded a steep reduction in self-reported labour income since the outbreak of COVID-19⁷. About 85% of households that cited non-farm business as a means of livelihood in the past 12 months reported less income from that source (58%) or a total loss of income (28%)¹⁸.

◦ On the other hand, many people who lost income/employment regained casual work or self-employment⁷.


- Reductions in productivity and export have a direct impact on the already limited foreign currency reserves. This is a serious bottleneck in the country's economy as it means that the government will be unable to purchase and import materials required (such as inputs, investment goods, and other basic commodities).
- If no measures are taken, it is inevitable that monetary and multidimensional poverty will increase, and that some of the development gains the country has achieved so far could potentially be lost. In particular, (informal) small- and medium-sized enterprises (SMEs) will not be able to survive for long before defaulting on bank loans or having to reschedule their repayments. If a high percentage of businesses are unable to pay back their bank loans, then the financial sector will be under pressure¹¹.
- **There have been mixed findings on employment and job losses in urban or rural areas:**
 - Most reports emphasise that job losses and loss of incomes are higher in urban areas. The World Bank survey recorded 18% of reported job losses in urban areas as compared to 10% in rural areas⁷; the United Nations (UN) and IFPRI predict that job losses in the urban food economy will continue in the coming months^{2,6}. These reports are biased towards formal employment.


Food system outcomes


Socio-economic outcomes 

Food security

Food utilisation 

Food access 

Food availability 

Environmental outcomes 

- The Ethiopian Economics Association anticipates that the incidence of poverty will be by far higher in rural areas, under all scenarios, than in urban areas⁴¹.
- The World Bank household survey revealed that income from farming, which is usually low in the months of May and June due to seasonality, was down approximately 40% in the households surveyed⁷.
- The same survey also indicated that about 45% of households, which reported domestic remittances as a recent means of livelihood, have seen the reduction or total loss of remittances transferred from within the country. Remittances transferred from abroad have been even more strongly impacted: two thirds of recipient households are concerned. Besides being a source of cash for many Ethiopians, remittances account for a significant fraction of the country's foreign exchange; this will affect the national economy⁷.
- More than half of the households surveyed indicated that their incomes were lower than expected and more than a third reported that they were extremely concerned about the situation. 55% of respondents reported that household incomes had been either reduced or had totally disappeared.
- It is estimated that 2-4 million additional people will fall into poverty as a result of the COVID-19 crisis; it is expected that the number of beneficiaries of the PSNP and UPSNP will increase from 9 to 10-15 million people³.

Food security

• Demand:

- Demand for products usually consumed at restaurants, such as milk, butter, meat and fresh vegetables, is dropping.
- As employees lose jobs, firms cut production, and government investments are diverted to relief response, the overall demand for food (and other commodities) is dropping.
- There are public myths that ginger, garlic and onion may protect people from getting infected with COVID-19, while vegetables like cabbage and tomato are thought to increase susceptibility to infection. This results in price increases for onions for instance.

• Availability:

- According to the World Bank survey, the availability of basic food seemed less of an issue in May and June 2020. In general, most households were able to buy enough food staples such as teff (64%), wheat (72%), maize (83%) and edible oil (77%). Specifically, in rural areas the ability to buy enough wheat deteriorated between April and June 2020⁷.
- Local markets do not seem to be operating for some items, such as edible oil.
- Food supply has not been directly impacted by most restrictions, but it has been indirectly affected by falling consumer demand, global shocks and subsequent price fluctuations.

• Affordability: there have been mixed findings on the prices of agricultural products:

- Overall, the reports tend to expect price hikes in the near future, while actual price increases have not yet been observed. On the contrary, IFPRI mentions that farm-gate prices for fresh fruits and vegetables are decreasing¹⁷.
- Specifically in the horticulture sector, onion and tomatoes have higher prices, while cabbage and green peppers have lower prices in the daily markets (May-June). Prices in Amhara and Tigray are more stable than in Addis Ababa.
- Increasing food prices will be a huge challenge for consumers that have already been affected by the ever-rising inflationary pressure on the economy. The Consumer Price Index (CPI) for 2020 could potentially go well above 20%; food price inflation could reach over 30%³.
- Among those households that indicated they could not buy enough food, higher prices or less regular income was the biggest problem, with about 90% of households citing affordability as a concern, according to the household monitoring survey of the World Bank⁷.
- **Utilisation:**
 - The survey further reports that 23% of the households surveyed had run out of food in the previous 30 days; in 21% of the cases an adult went hungry, while in 14% of the households an adult went without eating for the whole day⁷. The same survey showed

- that in one fifth of the poorest households (20%) an adult household member had gone without food for a whole day, while only 7% of the richest households (20%) had suffered a day without food.
- A common coping strategy (applied by 13% of the households in the World Bank survey) is to eat less food. The total number of people shifting to this strategy is rising⁷. Reducing consumption is worrying as it could affect the long-term health of household members. People shift to cheaper staples and food that can be maintained for longer periods (e.g. macaroni and biscuits, instead of fresh vegetables and milk).
- There is an assumption among some urban residents that consumption of raw vegetables increases the likelihood of contracting and spreading the virus.
- The long-term impacts of lost months of schooling and nutrition will be particularly severe for children in poor families, because it will jeopardise their development of human capital and their earning potential¹⁹.
- Compared to the period just before the COVID-19 crisis (January and February 2020), indicators measuring food security have significantly worsened. It is estimated that wasting will increase by 11-15 % as result of the COVID-19 crisis⁹, while severe acute malnutrition (SAM) is expected to rise by 10-15% rise in⁹.
- No major food insecurity differences between urban and rural areas have been reported.

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Colophon

Rapid country assessment of the impact of COVID-19 on food systems

To avoid a food, nutritional and socio-economic crisis in the aftermath of the current COVID-19 crisis, urgent action is needed to address key challenges in food systems. Low- and middle-income countries are particularly vulnerable to the COVID-19 crisis, as these countries are already struggling with multiple and interrelated problems such as the effects of climate change, food insecurity, political unrest, underfunded health services, and/or persistent poverty among a significant part of the population. Following initial macro-level modelling and scenarios of the actual and potential impacts of the COVID-19 crisis, there is now an urgent need for more specific assessments of its impact on food systems, using 'real', ground-based country data.

Purpose

The first aim of the rapid country assessments is to synthesise available secondary data and point out gaps in data concerning the current impact of the COVID-19 crisis on the food system in general and vulnerable groups in particular. The second aim is to identify priorities for immediate action and possible trade-offs and synergies of proposed actions that would contribute to achieving resilient and more inclusive food systems. The rapid country assessments are conducted in Bangladesh, Ethiopia, Kenya and Mali.

Institutional reference

This rapid country assessment is the result of a collaborative effort between the Community of Practice on Knowledge in relation to the COVID-19 crisis in low- and middle-income countries - an initiative of the Dutch Ministry of Foreign Affairs, the Netherlands Food Partnership (NFP) and the Global Alliance for Improved Nutrition (GAIN) - and several other communities of practice (CoPs), to support joint Dutch responses to the COVID-19 crisis. More information on this can be found [here](#). Funding for the rapid country assessments was provided by the Food & Business Knowledge Platform, which is in transition to the NFP.

Contributing organisations

The rapid country assessment of Ethiopia involved representatives of the following organisations, who provided secondary data and reviewed draft versions of this assessment: Agricultural Transformation Agency (ATA); Agri-ProFocus, Agriterra, Bilateral Ethiopian-Netherlands Effort for Food, Income and Trade (BENEFIT) Partnership, BENEFIT- Sesame Business Network, BENEFIT- Integrated Seed Sector Development Ethiopia, BENEFIT- Realising Sustainable Agricultural Livelihood Security in Ethiopia, Fair and Sustainable Consulting, Global Alliance for Improved Nutrition (GAIN), ICCO/Stichting Woord en Daad, International Food Policy Research Institute (IFPRI), and Netherlands Development Organization (SNV).

Method

In-country networks of the members of the CoP on Knowledge collect relevant secondary data in relation to the impacts of COVID-19 on the respective food systems. The analysis of available data is based on the food systems approach outlined by Van Berkum et al. (2018)¹, and on the notion of vulnerability analysis²⁰. Available data are aggregated and summarised, commonalities and differences (or conflicting messages) are assessed, data gaps are identified, and priority actions mentioned in the available reports are recorded. The initial findings are reviewed by several experts representing different fields of expertise, sectors and stakeholder groups in the food system. In Ethiopia, this assessment coincided with political unrest sparked by the recent murder of the activist and singer Hachalu Hunessa. This situation made it impossible to validate the initial findings through an expert panel.

These rapid assessments synthesise available information for use by practitioners and policymakers, and are conducted under extreme time pressures. The entire process takes three weeks. One of the implications is that due to the speed of the assessment, we have to compromise on the depth of the analysis. The current assessment is a pilot. If successful, we will repeat this process in other countries.

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