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Position Paper

African agriculture in the context of COVID-19: Finding salvation in the devil

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Abstract

The world is facing unprecedented challenges from COVID-19, which is disrupting lives and livelihoods. The pandemic could profoundly affect the African continent and wipe out hard-won development gains, as sub-Saharan Africa heads into its first recession in 25 years. Beyond the multi-spatial impact of the coronavirus in Africa, its effects on the agriculture and food system is of particular interest, as food security could be the most affected area and, at the same time, agriculture could be the sector that could help African economies recover quicker from the impact of COVID-19.

This paper supports the view that COVID-19, as devilish as it may be, offers an opportunity to revive interest in the agricultural sector. The COVID-19 pandemic has placed immense pressures on African countries to raise additional resources, and consequently Africa's growing public debt is again coming back to the centre stage of the global debate. The conversation on African debt sustainability has begun to dominate the scene and will flood the debate in the near term. While the observed, growing calls for debt relief for African countries are legitimate, we support in this paper that one should not divert attention from the long-term solutions needed to strengthen Africa's resilience. These long-term solutions lie where they always have: in agriculture. *With COVID-19, shipping agricultural inputs and food products from other continents to Africa has become disrupted and is accelerating the trend towards shortening supply chains. This will leave a potential market for inputs and food produced on the continent. COVID-19, together with the launching of the African Continental Free Trade Area (AfCFTA), have aligned the stars in favour of a decisive transformation of the agriculture sector on the continent.*

Agriculturalists and development experts need to be aware of their responsibility at this time, as they need to advocate for the topic of agricultural development to return to the centre and the heart of the agenda of discussions on how to respond to the consequences of Covid-19 in Africa. In this sense, and unexpectedly, COVID-19 is an opportunity for the agricultural sector.

1. Background

1.1 COVID-19: The upsurging of the spectre of hunger in Africa

COVID-19 is changing the world and represents a challenge for the African agricultural sector. What seemed to be a public health issue has now translated into a confirmed economic problem. The COVID-19 pandemic is having a major impact on economies as a whole. Although no economic sector is escaping the disruption, the impact is different from one sector to another. Hence the importance of understanding the unique impact it is having on particular sectors and the distinct needs it generates. Beyond the sectoral impacts of COVID-19, the consequences of these impacts are also a matter of interest. For some sectors, a small disruption might lead to disastrous consequences in some regions. This is the case of the food and agricultural sector in Africa.

In Africa, food security has always been a silent pandemic that kills hundreds of thousands of Africans every year. Prior to the emergence of COVID-19, the Global Report on Food Crises (IFPRI 2000) reported that, in 2019, 135 million people in the world were experiencing hunger so severe that it threatened their lives and livelihood, and of these, 76 million were from Africa. According to the FAO *et al*. (2019) State of Food Security and Nutrition in the World report, hunger is on the rise in almost all African sub-regions, making the continent the region with the highest prevalence of undernourishment, at nearly 20%. Food insecurity and hunger are caused by many factors, often being intertwined with one another. These causes of hunger include poverty, conflict, climate and weather, lack of investment in agriculture, and unstable markets. But a key cause remains inadequate food production. Hence agriculture is a key to food security in Africa, as it contributes to food security by reducing food prices, creating employment, improving farm income and increasing wages.

1.2 COVID-19 threatens an already stricken agricultural sector in Africa

Agriculture is the backbone of the African economy, with the sector accounting for about 16% of the continent's GDP, 60% of its labour force and 20% of its total merchandise exports. It is also the main source of income and work for 90% of the region's rural population. With around 600 million hectares of uncultivated arable land (60% of the world's uncultivated arable land) and 10% of renewable freshwater, Africa's immense agricultural potential can help feed itself and feed the world.

While the continent has this tremendous opportunity, its productivity lags far behind other regions because of its low use of agricultural inputs. The use of agricultural inputs – that is, improved seeds, inorganic fertilisers, insecticides and pesticides – has been much lower in Africa than in other parts of the developing world. Crop yields are low as a result of the low use of agricultural inputs and a dependence on rainfed agriculture. Only 6% of Africa's cultivated land is irrigated (in contrast to 37% in Asia). As a result, crops in Africa rely on rain – despite irregular and insufficient rainfall, frequent drought, and the existence of ample, untapped water resources. Average fertiliser consumption in sub-Saharan Africa is estimated at 17 kg of nutrients per hectare of cropland, much lower than the 141 kg ha^{-1} in South Asia, 154 kg ha^{-1} in the European Union, 175 kg ha^{-1} in South America, and 302 kg ha^{-1} in East Asia, and the global average of 135 kg ha^{-1}.

Untapped agricultural potential has contributed to persistent poverty and deteriorating food security, resulting in a projected increase in the number of undernourished people from 240 million in 2015 to 320 million by 2025 (AfDB 2016). At the same time, increased food demand and changing consumption habits driven by demographic factors such as population growth and urbanisation are leading to rapidly rising net food imports, which are expected to grow from US$ 35 billion in 2015 to over US$ 110 billion by 2025 (AfDB 2016).

1.3 Food Security and COVID-19

With COVID-19 or without COVID-19, food insecurity will continue to be observed on the continent in the short and medium term. In Sahel, insecurity has already taken the limited resources and the agricultural sector is already suffering. This year, the unprecedented locust outbreak in the horn of Africa could results in $8.5 billion in crop and livestock losses (Simon 2020), and since last year, the Sahel and southern Africa region have been severely affected by climate change, which could also hurt agricultural production. Now, COVID-19 poses challenges on top of this picture of risk and vulnerability. According to the World Bank, COVID-19 alone has the potential to create a severe food security crisis in the region in 2020, as it is estimated that agricultural production could contract by between 2.6% and 7% in a scenario with trade blockages, directly affecting family incomes and their investment in education, health and other necessities (Zeufack *et al*. 2020). Crop harvests would be compromised due to the small labour force and the restriction in movements, which might affect the supply of or access to essential farm inputs such as fertilisers and pesticides. In addition, as movement restrictions coincided with planting periods for most of the staple crops, and this is likely to exacerbate food security challenges in many countries. Many poor and marginalised communities may now fear hunger as a greater or more immediate threat than the coronavirus.

Another notable factor is that most African countries rely heavily on food imports. Two-thirds of African countries are net importers of food. Africa's food and agricultural imports amount to between $45 billion and $50 billion a year – along with $6 billion a year in imports of agricultural inputs. A Zeufack *et al*. (2020) report estimated that food imports would decline substantially (as much as 25% or as little as 13%) due to a combination of higher transaction costs and reduced domestic demand.

At the same time, currency depreciation – coupled with low foreign currency reserves, falling prices for export and cash crops, and plummeting revenues from stalled industries such as oil and tourism – is affecting several countries' food-purchasing power. African countries are also reporting shortages and price spikes for domestic food crops such as millet, sorghum and maize. Rising food prices will contribute to lower purchasing power among both rural and urban consumers, given the rising share of food that is purchased (rather than grown), even by smallholder farmers – about 60 % of the food consumed on the continent is purchased from traditional and modern retail outlets in both rural and urban areas (Simon 2020).

2. Mitigating the short-term effect is not the endgame

Alarmed by a potential rise in food insecurity during the COVID-19 pandemic, many countries and organisations have mounted special efforts to ensure the proper functioning of agriculture and food distribution. National policy responses to limit the impact of COVID-19 on food markets in Africa have varied, from the removal of value-added taxes on food products to export and price restrictions on key food items. For example, *South Africa* introduced, on 19 March, price regulation on a range of food items and, on 27 March, it announced the value added tax (VAT) exemption on imported essential goods, which include food products. On 24 March, *the Gambia* introduced price ceilings on key staple foods, including rice, maize, millet and bread. *Nigeria* approved, on 1 April, the release of 35 000 tonnes of maize, 25 000 tonnes of sorghum, 5 000 tonnes of millet and 5 000 tonnes of gari (cassava-based flour) from the National Grain Reserve to be distributed to the most vulnerable households. *Kenya* authorised the import of four million 90 kg bags of maize for food and feed use to ensure sufficient market availabilities during the pandemic (UNCTAD 2020).

These actions, together with the calls by and interventions from international organisations (the World Bank, FAO, IFAD, WFP and AfDB; World Bank 2020b) have helped to ensure that Africa's agricultural and food systems are largely still functioning. Moreover, tailwinds are helping to mitigate the disruption in the agricultural and food sector. Analysis by McKinsey (2020) suggests that, prior to the COVID-19 crisis, African agriculture was experiencing several tailwinds. After years of drought, many major growing regions – including South Africa and large parts of East and West Africa – had high rainfall, which contributed to strong harvests in late 2019. In South Africa for example, maize production in 2020 is projected to be more than 30% higher than in the previous years (its highest summer crop projections for three years). Moreover, in East and West Africa, the major planting seasons had largely begun before COVID-19 escalated, and agricultural inputs had already been distributed.

More generally, global agricultural markets remain stable as food trade has remained more resilient than overall trade. Global production levels for the three most widely consumed staples (rice, wheat and maize) are at or near all-time highs and trade at prices that are close to their January 2020 levels.

Prices in African markets are broadly stable, despite initial price hikes caused by panic buying (McKinsey 2020).

Although the negative effects of the crisis on the agricultural sector have been mitigated in the short term, there are strong reasons to believe that this will not be the case in the medium and long term. Existing vulnerabilities in Africa's agricultural and food systems, combined with demand and supply shocks likely to flow from COVID-19, could be heightened unless mitigating actions are taken now. Beyond the immediate responses, therefore, the pandemic and its food insecurity consequences highlight the longer-term efforts needed to strengthen the agricultural sector and the food system on the continent. It is critical that policymakers continue taking steps to build resilient and competitive agriculture and food systems.

Key steps include traditional recommendations for a more competitive agriculture sector that will lead to faster structural transformation processes across Africa, which implies, among others: increasing investment in agriculture and dissemination of productivity-increasing technology and inputs, and a more critical role for the public sector in setting right policies and sound regulatory and institutional frameworks. For many decades now, one of the most pressing development challenges in Africa has not changed: increasing farm productivity in the light of an expanding population, smaller farm sizes and increasing levels of soil degradation. In the international development community, there appears to be consensus that overcoming this challenge is the key to reducing poverty, generating nonfarm employment, and triggering a process of structural transformation.

African countries will also need to reduce their commodity dependence, which has been among the key factors increasing their vulnerability to food insecurity at this time of COVID-19. African countries are already well aware of how vulnerable this dependence on food imports leaves them. In 2007, a set of weather shocks in Asia set off a cascade of actions that spiked the price of rice on the international market, with ripple effects on other cereals on the continent. From 2016 to 2018, Africa imported about 85% of its food from outside the continent, leading to an annual food import bill that is forecast to reach $110 billion by 2025. The United Nations predicts that Africa may produce only 13% of its food needs by 2050. This heavy reliance on world markets is detrimental to food security, especially at a time of acute crisis. The diversification of the commodity base of African countries and value addition will be critical in achieving this, particularly if effectively augmented by a significant increase in agricultural productivity. Hence the importance of the recently signed agreement on the African Continental Free Trade Area (AfCFTA).

3. AfCFTA AND COVID-19: The stars are in alignment for the agricultural sector

3.1 AfCFTA, African trade and the food market

One of the most significant socio-economic events of recent months in Africa was the advent of the African Continental Free Trade Area (AfCFTA). In just eight years, since 2012, the project to create an African continental free trade area has gained pace in a manner never seen before on the continent in the field of integration and development. Signed by 54 member States of the African Union (only Eritrea has yet to sign), and so far ratified by 30 countries, the AfCFTA is a trade agreement that foresees the creation, by 2028, of a single continental market for goods and services, with free movement of businesspersons and investments, and thus paves the way for accelerating the establishment of the Customs Union.

The African Continental Free Trade Area Agreement has committed countries to remove tariffs on 90% of goods, progressively liberalise trade in services, and address a host of other non-tariff barriers. If implemented successfully, the agreement will create a single African market of over a billion consumers, with a total GDP of over $3 trillion. This will make Africa the largest free trade area in the world. The scope of AfCFTA exceeds that of a traditional free trade area, which generally focuses on trade in goods, to include trade in services, investment, intellectual property rights and competition policy, and possibly e-commerce. The AfCFTA is complemented by other continental initiatives, including the Protocol on Free Movement of Persons, the Right to Residence and Right to Establishment, and the Single African Air Transport Market (SAATM). Once implemented, the AfCFTA will also expand intra-Africa trade through better harmonisation and coordination of trade liberalisation and facilitation and instruments across the Regional Economic Communities (RECs), and across Africa in general.

African trade is still characterised by its high dependence on the rest of the world. The AfCFTA is expected to lead to a 33% increase in intra-African trade within a decade (up from 18% to 25%), an increase of about $35 billion per year. According to UNCTAD (2019), intra-Africa trade, defined as the average of intra-Africa exports and imports, was around 2% during the period 2015 to 2017, while comparative figures for America, Asia, Europe and Oceania were 47%, 61%, 67% and 7% respectively. The intra-Africa exports were 16.6% of total exports in 2017, much lower compared with 68.1% in Europe, 59.4% in Asia and 55.0% in America. The only other region with a higher export dependence in the rest of the world is Oceania, at 7.0%. Total trade from Africa to the rest of the world averaged US$760 billion in current prices in the period 2015 to 2017, compared with $481 billion from Oceania, $4 109 billion from Europe, $5 140 billion from America and $6 801 billion from Asia.

Africa is much less affected by the COVID-19 pandemic than its partners, and protecting itself from contamination could mean greater economic isolation. The continent has deep trade linkages with Europe, China and the US, with these partners accounting for over half of Africa's total exports and imports. Since 2000, Africa's direction of trade has shifted from the USA and Europe to China and Asia more generally. As those economies wither under COVID-19, import and export from and to Africa and supply chains will become disrupted. The coronavirus pandemic will fundamentally reshape trade, accelerating the trend towards shortening supply chains. Shipping agricultural inputs and food products from other continents to Africa will be more difficult. This will leave a potential market for inputs and food produced on the continent. To tap into this market, Africa will need to strengthen African integration. Hence the importance of working to strengthen AfCFTA. A robust Africa integration would also support agriculture and a resilient food system.

The African food market continues to grow, with World Bank estimates showing that it will be worth US$1 trillion by 2030 – up from the current US$300 billion. Demand for food is also projected to at least double by 2050. These trends, combined with the growing continent's food import bill, confirm that an opportunity exists for smallholder farmers – Africa's largest entrepreneurs by numbers – who already produce 80% of the food we eat to finally transition their enterprises into thriving businesses. This massive potential for increased production and savings was already attracting a growing amount of private-sector investment.

Along with more rapid growth, Africa's food composition is also changing. National diets are shifting away from food staples like grains towards more horticultural and livestock products, and processed and pre-cooked foods. Food systems are becoming more urban based and consumer driven, with a premium on quality and food safety. Driving these changes are rapid urbanisation, rising incomes, globalisation, population growth, and a growing share of young people. Nutrition transition is characterised by a shift in rapidly growing economies to highly refined diets high in fat, salt and caloric sweeteners and low in fibre. More generally, as developing markets mature and gain wealth, their populations' diets shift toward higher meat consumption, and this could lead to increased demand for protein-rich foods and alternative meat products.

3.2 COVID-19, AfCFTA, and African agriculture

The implementation of the African free trade area will open a large market for African agricultural raw and processed products. Africa's annual food import bill is projected to rise to $110 billion by 2025, which largely out-passes the value of importation from within Africa. Intra-Africa agricultural trade is particularly underexploited owing to high import tariffs, other non-tariff barriers (such as health and safety standards), low productivity, and a lack of rural connectivity. In 2017, total intra-Africa agricultural trade was valued at US$24.4 billion (US$13.2 billion exports and US$11.1 billion imports), representing some 19% of total intra-Africa exports and 18% of intra-Africa imports (Tralac 2020). This shows the existence of a large margin and untapped potential on which an agricultural transformation strategy could be built. South Africa is the main exporter of agricultural commodities to the rest of the continent, followed by Niger and Egypt. South Africa, Kenya and Namibia are the main intra-Africa agricultural importers. Intra-Africa agricultural exports are mainly palm oil, sugar, maize, rice and cigarettes. The main agricultural products Africa exports to countries outside Africa include cocoa beans, nuts and coffee. Agricultural transformation means that more agricultural products and the export potential existing in other countries will be developed and boosted, allowing the continent to feed itself and export the surplus of agricultural products.

The AfCFTA agreement is also expected to facilitate the movement of goods, services and people across the continent, while boosting agricultural and industrial exports by 7% and 5% respectively, thereby enhancing local "Made in Africa" production. Hence, the implementation of the agreement offers exceptional conditions to further and accelerate the transformation of agriculture on the continent. Modelling by the Economic Commission for Africa (Songwe 2020) projects that intra-Africa trade in agricultural products will be between 20% and 30% higher in 2040 with the AfCFTA in place, with particular gains in sugar, vegetables, fruit, nuts, beverages and dairy products. AfCFTA would provide access to markets at the regional and international levels, which would then generate state revenue, increase farmer income and expand both farmer and country capacity to invest in modernising the sector through processing and mechanisation. Ratifying AfCFTA would shore up Africa's food security and contribute to overall economic growth through the agricultural sector. With the expansion of COVID-19, the condition is even more favourable to further revitalise the agricultural and food sectors on the continent.

The agricultural sector would be the main engine for the implementation of the AfCFTA, but at the same time could be the main beneficiary of a successful implementation of the AfCFTA. Agriculture is expected to be one of the most positively affected sectors. Economic exchanges are a powerful element of economic policy and strategy. For centuries, trade has been at the heart of economic challenges around the world. Undeniably, trade is an important, if not vital, instrument for economic growth and social progress, and it has a strategic dimension. While trade is an essential element of strategy and economic policy in developed countries, it does not yet appear to have taken on this dimension in developing countries, particularly in Africa.

However, trade liberalisation will not lead to inclusive and equitable agricultural development on the continent by itself. Liberalisation must be accompanied by policies and programmes, and reform measures to counterbalance some of the negative effects associated with liberalisation reforms. Small-scale farmers make up a large portion of the continent's population. The liberalisation of agriculture has been shown to favour economies of scale, and therefore large industrial farms, particularly those using monocrop techniques for the cash crop export market. Subsistence farmers and those growing *food crops* for domestic consumption may be dislocated by industrial farms, leading to intensified urbanisation and proletarianisation, increased food prices, decreased food security, and the loss of biodiversity. A reduction in food crop production capacity on the continent will simply serve to open the market for food imports derived from large agribusinesses, both African and non-African.

In the light of the advent of AfCFTA, one of the bigger questions confronted by policymakers is whether they should let the system go for a food system transformation led mainly by large commercial farms and large agribusinesses, as in many advanced countries. Or should they go for an "inclusive" transformation based on commercial smallholder farms and SMEs along value chains? But an inclusive approach would require greater public sector involvement and investment, and hence government commitment to the transformation agenda. A large farm, large agribusiness approach would leave millions of small farms and businesses without adequate livelihoods, whereas an inclusive approach could engage more of them in productive employment, create more attractive jobs for young people, help reduce poverty, inequality and food insecurity, and contribute to better nutrition outcomes.

AfCFTA's objectives and the intended effect of the African agricultural sector are convergent in the light of the continent's development goals. The creation of the African continental free trade area is a vital instrument for economic growth and social progress on the continent. On the other hand, it is largely recognised that African transformation can only happen if pulled by the agricultural sector. More generally, agriculture is a proven path to prosperity. No region of the world has developed a diverse, modern economy without first establishing a successful foundation in agriculture. This is going to be critically true for Africa where, today, close to 70% of the population is involved in agriculture as smallholder farmers working on parcels of land that are, on average, less than two hectares big. As such, agriculture remains Africa's surest bet for growing inclusive economies and creating decent jobs mainly for the youth.

4. Conclusion: COVID-19, an opportunity for the agricultural sector

COVID-19 has placed immense pressure on African countries to raise additional resources. The region's revenues from some of the most important sources – tourism, commodity exports and remittances – are at their lowest. Coupled with capital outflows, this has led to huge currency depreciations (for example, the Botswana pula and the South African rand have lost about 8% of their value against the US dollar and the euro since the outbreak of the pandemic; Sallent 2020) and an increase in debt service payments, pushing African countries into further risk of a debt crisis. An African Union (AU) study on the economic impact of COVID-19 released in April 2020 showed that the continent could lose up to $500 billion and that countries may be forced to borrow heavily to survive after the pandemic. Insecurity in the Sahel and the locust outbreak in the Horn of Africa further complicates the situation.

Africa's growing public debt is again coming back to the centre stage of the global debate. Many African countries could default on debt payments due to increasing repayment costs, precipitated by weak currencies – a ripple effect of the pandemic. The conversation on African debt sustainability has begun to dominate the scene and will flood the debate in the near term. Calls have risen for the implementation of immediate debt relief for African countries.

While calls for debt relief are legitimate, given that the continent lacks the necessary safety net to deal with an impending socio-economic crisis that would accompany the health emergency, we ask in this paper not to divert attention from a long-term solution. Beyond the immediate responses, the pandemic and its economic fallout highlight the longer-term efforts needed to strengthen Africa's resilience. The long-term solution lies where it has always been: in agriculture.

Africa's annual food import bill decimates its agriculture and exports jobs on the continent. Dependence on food imports is depressing domestic currencies and driving up inflation, while causing huge unemployment in rural areas, especially among the youth. The Covid-19 crisis has amply shown us how easily the African's economic, political, and environmental system can reach its limits as a result of low-productive agriculture and the dependence of the food system. The Covid-

19 crisis appears as another wake-up call to intensify investment in an inclusive agricultural transformation in Africa, which should start with productivity growth within the farming system.

Agriculturalists and development experts need to be aware of their responsibility at this time, as they need to advocate for the topic of agricultural development to return to the centre and the heart of the agenda of discussions on how to respond to the consequences of Covid-19 in Africa. In this sense, COVID-19 offers an opportunity to revive interest in the agricultural sector as the best way to boost African economies.

With the signing of the AfCFTA, the stars are in alignment in favour of a drastic boosting of African agriculture. The implementation of the AfCFTA offers exceptional conditions to further and accelerate the transformation of agriculture on the continent. The agricultural sector would be the main engine for the implementation of the AfCFTA, but at the same time could be the main beneficiary of a successful implementation of the AfCFTA. The ability of small-scale farmers to earn a living income is critical to ensure their viability and economic success. The free trade context will bring about more possibilities for farmers to trade their products, and earn more income, while also improving the share of market price they receive.[1]

In Africa, regional integration has long been viewed as a catalyst for long-term prosperity. With COVID-19 placing severe strain on economies across the continent, agriculture can help the continent to capture a large portion of the global value chain. AfCFTA's success will also be judged in the light of the transformation of the agricultural sector. Hence the need to fuel the debate and feed policymakers with ideas and indications on how to better position the agricultural sector so that the sector could better/fully play its role as a push factor for AfCFTA implementation. At the same time, it will help prepare the sector to make the most of the advent of AfCFTA.

Implementation of the AfCFTA Agreement was due to commence on 1 July 2020, but as a result of the COVID-19 global pandemic, this date has been postponed to January 2021. Delaying the implementation of the AfCFTA because of COVID-19 is not necessarily a good strategy, as managing COVID-19 and supporting post-pandemic recovery would be much smoother if regional integration was encouraged and implemented. Policymakers must maintain the momentum toward the implementation of the AfCFTA. With Covid-19, the time has come to accelerate the implementation of AfCFTA and boost the agriculture and food systems, which are exactly the stimulus Africa needs to cope better with the pandemic.

Food security and agriculture in African countries will probably benefit from the effective implementation of the AfCFTA, and even more in the light of the COVID-19 pandemic situation. This benefit will come through greater economic diversification (value addition and intra-Africa trade), and the creation of jobs and revenue to fight poverty and food insecurity. Moreover, the AfCFTA can support the procurement of food from closer regional markets. All these factors could go a long way to enhance the continent’s food security and reduce vulnerability to current and emerging shocks, and thus support Africa’s overall economic development. To do so, the agricultural sector must again be brought back to the forefront of discussions on measures to deal with the consequences of COVID-19.

[1] Compared with the 70% to 85% that Asian farmers receive, African farmers typically receive only 20% to 25% of the final market price of their goods. This low percentage is mainly attributable to high transportation costs, a factor related to transport infrastructure, and the thinness of the volume of production and marketable surplus.

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