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Impacts of the COVID-19 Pandemic on Food Trade in the Commonwealth

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Abstract

This paper explores the impacts of the COVID-19 pandemic on trade in food products in Commonwealth countries. Firstly, it provides an overview of agricultural and food trade of Commonwealth member countries and identifies potential vulnerabilities to trade disruptions. It then identifies immediate impacts of the pandemic on trade. Thereafter, it outlines policy initiatives different Commonwealth countries have adopted to ensure adequate supplies of food and access to food by their populations. In conclusion, it recommends measures Commonwealth countries could take to maintain trade flows in agriculture and food products and to build resilience to protect against future crises.

JEL Classifications: F10, I15, O24

Keywords: Commonwealth, COVID-19, food, trade disruption, trade policy

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Abbreviations and Acronyms

EU	European Union
FAO	Food and Agricultural Organization
GDP	gross domestic product
HS	Harmonized Commodity Description and Coding System
IFAD	International Fund for Agricultural Development
IMF	International Monetary Fund
LDC	least developed country
LIFDC	low-income food-deficit country
NIFDC	net food-importing developing country
OECD	Organisation for Economic Co-operation and Development
PPE	personal protective equipment
SDG	Sustainable Development Goal
SITC	Standard International Trade Classification
TFA	Trade Facilitation Agreement
WFP	World Food Programme
UK	United Kingdom
UNCTAD	United Nations Conference on Trade and Development
UNGA	United Nations General Assembly
UNICEF	United Nations Children's Fund
VAT	value added tax
WHO	World Health Organization
WTO	World Trade Organization

1. Introduction

The COVID-19 pandemic and the measures adopted to contain the spread of the virus have affected the food and agriculture sector in many ways. Restrictions on movements and partial border closures implemented around the world immediately affected food supply, demand and value chains, and led to short-term disruptions to international trade. Although there are currently no signs of a global food crisis, these disruptions may exacerbate the food security situation in specific locations or countries that were already under pressure prior to the outbreak of the virus. The Food and Agricultural Organization (FAO) estimates that the COVID-19 pandemic may add up to 132 million people to the ranks of undernourished in the world in 2020 (FAO et al., 2020). The World Food Programme (WFP) has warned of potential widespread hunger that could push an estimated 270 million people to the point of starvation by the end of this year (WFP, 2020a). Fourteen Commonwealth member countries are especially at risk of food insecurity and require external assistance for food.¹

The severe effects of the pandemic on all economic activity, and resulting reductions in income and rising unemployment rates, are expected to affect access to food and food demand also, beyond the immediate disruption of value chains. These effects may lead to downward pressure on agricultural prices and, in the medium term, adjustments in the quantity and structure of agricultural production. A prolonged or protracted pandemic could further strain global food supplies (Torero, 2020) and raise the prospect of escalating export restrictions on food, leading to a decline in supplies and a rise in world prices (Espitia et al., 2020).

The Commonwealth's 54 member countries differ significantly in their levels of economic development, their agro-climatic conditions and their integration in international trade and global value chains. Most Commonwealth members are developing countries, including 14 least developed countries (LDCs) and 32 net food-importing developing countries (NFIDCs) as of 2018.² These countries are most vulnerable to any disruptions to agriculture and food production and supply chains resulting from the COVID-19 pandemic, in both the short and the medium to long term.³

The global agriculture and food sector suffered from two distinct crises that followed each other in the late 2000s. A combination of supply and demand shocks within the global agriculture and food sector led to the 2007–2008 food price crisis, which saw a drastic rise in food prices and culminated in social unrest in several developing countries (see Bellemare, 2015; Weinberg and Bakker, 2015). This was followed by the global financial crisis: the sharp contraction in overall economic activity in 2009 created an external demand shock in agriculture and food (FAO, 2018).

While the shocks that characterised these two crises affected the world food economy significantly, a COVID-19-induced global food crisis appears rather unlikely at the time of writing this report. Food production prospects are favourable, food stocks are well filled, global food prices are low, trade is more diversified and policy-makers are more experienced in dealing with global crises (Schmidhuber, 2020; Schmidhuber and Qiao, 2020).

However, the effects on workers and logistics in the agriculture and food sector as a result of the pandemic may still involve further and more sustained supply chain and trade disruptions, and the economic slowdown following the pandemic is expected to rein in food demand.

A protracted pandemic is likely to disrupt trade in agriculture considerably, adversely affecting the participation of Commonwealth developing countries in global trade. This would affect the ability of these countries to use trade for recovery purposes and to support the wider growth and transformation of their economies. It will also have implications for achieving Sustainable Development Goal (SDG) target 17.10–12, which recognises the link between trade and the realisation of the other SDGs as well as trade as a means of implementation of SDGs. More critical is the implication for SDG target 17.11, which calls all countries and stakeholders to increase the exports of developing countries significantly, and double the LDC share of global exports by 2020 (UNGA, 2015). Besides, some Commonwealth LDCs, such as Vanuatu, which is scheduled to graduate from LDC status in 2020, and Bangladesh, which is on the path to graduation in the next few years, may see their graduation prospects reversed.

This working paper explores the impacts of the COVID-19 pandemic on trade in food products in Commonwealth countries. Section 2 gives a brief overview of agricultural and food trade of Commonwealth member countries and identifies potential vulnerabilities to trade disruptions. Section 3 identifies immediate impacts of the pandemic on trade. It also provides an overview of potential impacts on

demand and prices. Thereafter, Section 4 outlines policy initiatives different Commonwealth countries have adopted to ensure adequate supplies of food and access to food by their populations. Section 5 concludes and recommends measures Commonwealth countries could take to maintain trade flows in agriculture and food products and to build resilience to protect against future crises.

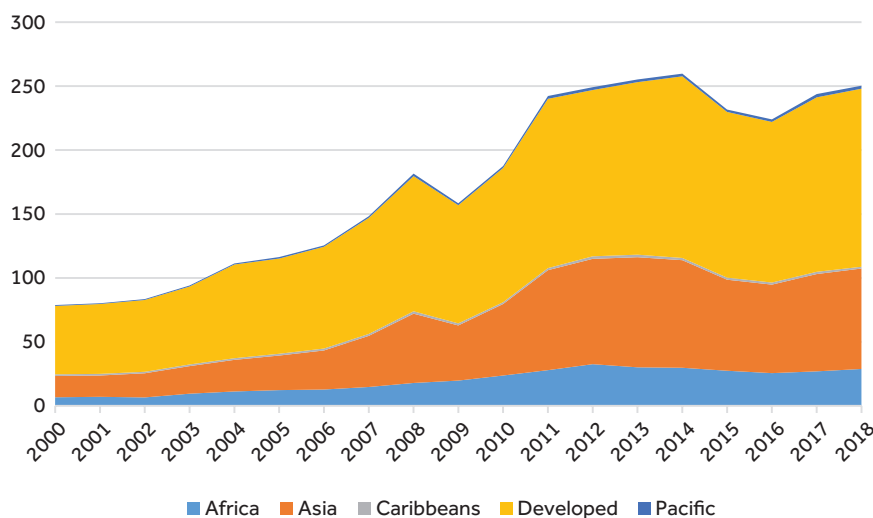
2. Patterns of agricultural and food trade of Commonwealth countries

As a result of their dispersion around the globe, Commonwealth countries cover a wide range of agro-climatic conditions and produce a large variety of agri-food products, which is also reflected in their trade patterns.⁴

The value of agri-food trade involving Commonwealth countries evolved in line with global patterns of agri-food trade between 2000 and 2018. The value of agri-food exports and imports grew strongly between the beginning of the 21st century and peaked along with the food price crisis in 2007–2008. The global financial crisis that followed led to a recession and a steep decline in agri-food trade in 2009. Growth rates rebounded between 2010 and 2011 and have been levelling off since then (Figures 1 and 2).

In 2018, total agri-food exports of the Commonwealth were valued at US\$250 billion (Figure 1). Commonwealth countries imported agri-food products worth \$225 billion in the same year (Figure 2). The majority of agri-food products were traded by developed Commonwealth countries, comprising Australia, Canada, Cyprus, Malta, New Zealand and the UK (see Table A1 for a classification of the Commonwealth member countries). The share of developed Commonwealth countries in total Commonwealth agri-food exports was 68 per cent in 2000 and 56 per cent in 2018. Between 2000 and 2018, the share of Asian Commonwealth countries in total Commonwealth agri-food exports increased from 21 per cent to 31 per cent.

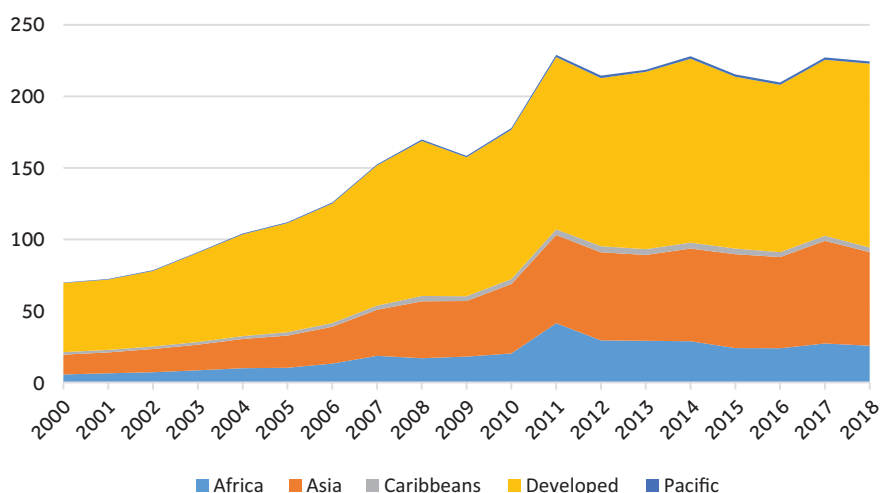
Figure 1. Evolution of agri-food exports by Commonwealth region, 2000–2018 (US\$ billion)



Note: Countries grouped following the classification of Commonwealth member countries in Table A1. Developed Commonwealth member countries are not included in the regional aggregates.

Source: Own calculations using UN Comtrade data (accessed May 2020).

Figure 2. Evolution of agri-food imports by Commonwealth region, 2000–2018 (US\$ billion)



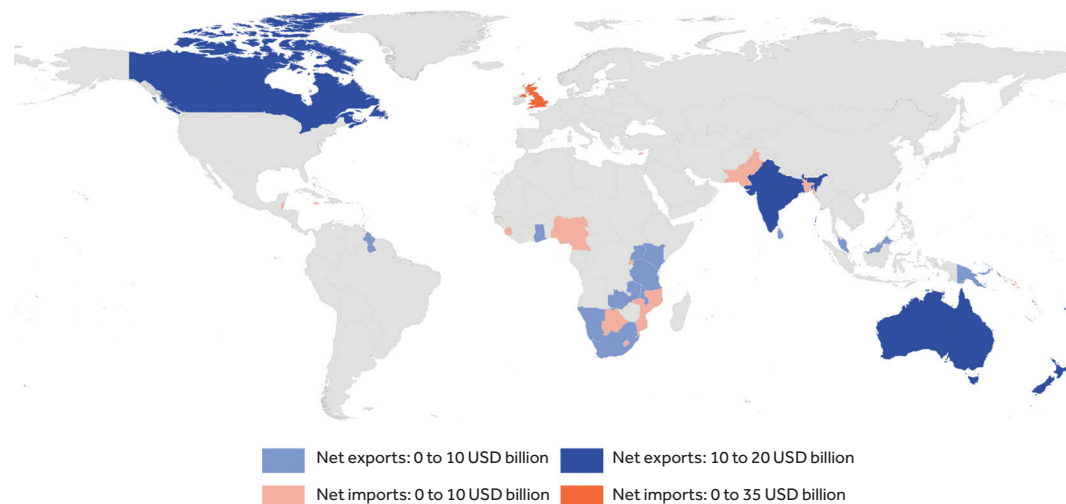
Note: Countries grouped following the classification of Commonwealth member countries in Table A1. Developed Commonwealth member countries are not included in the regional aggregates.
Source: Own calculations using UN Comtrade data (accessed May 2020).

The share of African Commonwealth countries in total Commonwealth agri-food exports increased from 8 per cent to 12 per cent between the two years. The exports of Caribbean Commonwealth countries contributed, on average, 1 per cent to total agri-food exports of the Commonwealth, while those of the Pacific Commonwealth region contributed, on average, 0.9 per cent between 2000 and 2018.

Although, the Commonwealth as a group is a net food exporter, 36 member countries are net food importers. The leading net food importer in absolute terms is the UK, followed by Bangladesh, Nigeria, Pakistan, Cyprus and Botswana, in that order (Zhuawu et al., 2020) (Figure 3). The

group of net food-importing Commonwealth countries includes three developed countries (Cyprus, Malta and the UK), nine African countries (Cameroon, Botswana, Lesotho, Mauritius, Mozambique, Nigeria, Rwanda, Sierra Leone and The Gambia) and four Asian countries (Bangladesh, Brunei Darussalam, Maldives and Pakistan). All Caribbean countries except Guyana are net food importers; in the Pacific, the net importers are Kiribati, Nauru, Samoa, Solomon Islands, Tonga, Tuvalu and Vanuatu (Table A2). In turn, the leading net food exporters in the Commonwealth, in absolute terms, are Australia, Canada, India, Malaysia, New Zealand and South Africa.

Figure 3. Net exporters and net importers of agri-food products in the Commonwealth, 2018



Source: Own calculations using UN Comtrade data (accessed May 2020).

At the same time, some Commonwealth member countries are highly dependent on agri-food exports. In Grenada, Kenya, Malawi, Maldives, New Zealand, Saint Vincent and the

Grenadines, Seychelles and Uganda, and some of the Pacific islands, agri-food exports account for more than half of total merchandise exports (Table A2).

3. Impacts of COVID-19 on food supply chains of selected Commonwealth countries

Measures to contain the spread of COVID-19 abruptly disrupted international merchandise trade and also affected trade in food, although to a relatively lesser extent. National and regional lockdowns resulted in the interruption of most economic activity affecting consumer incomes and food demand. In the medium term, the severity and persistence of these effects will crucially depend on the development of the pandemic and the progress made in its treatment and containment.

3.1 Immediate effects on trade

The first lockdown was imposed by the central government of China on Wuhan and other cities in Hubei in order to contain the outbreak of the virus on 23 January 2020. This was followed by partial or economy-wide lockdowns in many countries in the world, starting with Italy on 9 March 2020. The lockdowns led to a significant decline in international merchandise trade and also affected international agri-food supply chains through, among others, disruptions at borders; more stringent hygiene requirements on food products/packing; disruptions to logistics and distribution services; and closure of processing facilities. The World Trade Organization (WTO) initially projected a 12–32 per cent fall in merchandise trade alone, depending on the shape of the recovery (WTO, 2020a), but later revised it to a drop of 9.2 per cent. Recent estimates indicate a drop in the volume of merchandise trade by 3 per cent year on year in the first quarter of the year and around 18.5 per cent in the second quarter (WTO, 2020b).

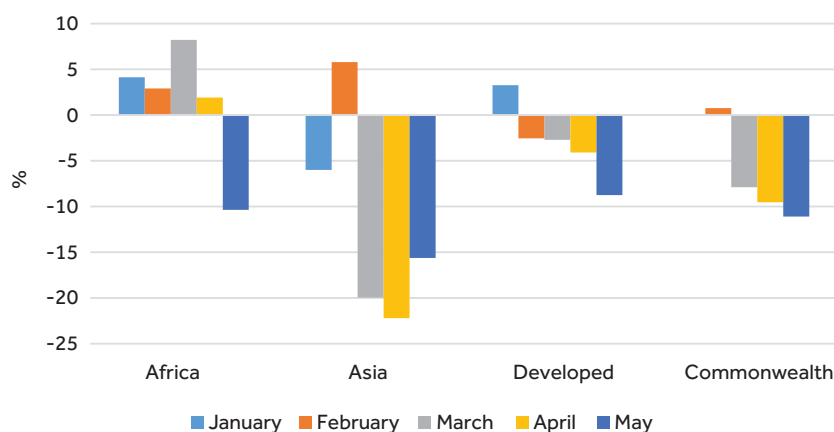
At the time of drafting this report, data on agri-food trade for January to May 2020 were available for 23 Commonwealth countries (see the full list of countries in Table A3), which cover around 95 per cent of the total agri-food trade of all Commonwealth countries.

Trade of these countries in the first five months of 2020 was affected by national lockdowns that affected domestic economic activity, supply chains and export and import logistics. The exports and imports of the countries were also affected by the measures taken by their trading partners to contain the spread of the virus.

Figures 4 and 5 show the change in total agri-food exports and imports from January to May 2020 compared with the equivalent monthly averages across 2018 and 2019. Exports of the developed Commonwealth countries were higher than in the previous years in January but lower in the following months, dropping by 4 per cent in April and almost 9 per cent in May relative to previous years. Exports of Asian Commonwealth countries surged in February 2020 but were much lower than in previous years in March (–20 per cent) and April (–22 per cent). They were still lower in May 2020 than in 2018–2019 (–16 per cent). The COVID-19 pandemic arrived in Africa only later and lockdowns were imposed from March 2020 onwards (Table A4). Agri-food exports of the African Commonwealth countries were higher than in previous years throughout January to April 2020 and dropped only in May (by 10 per cent) relative to 2018 and 2019.

Agri-food imports followed a similar pattern. Throughout January to May 2020, they were lower than in 2018 and 2019 in developed Commonwealth countries. Asian Commonwealth countries exhibited a stark increase in their imports in February 2020. The growth rate of aggregate agri-food imports of the Asian countries turned significantly negative compared with previous years only in May 2020. Imports of African Commonwealth countries remained a bit lower than in previous years but fairly stable in January to April 2020. They declined by 26 per cent compared with previous years in May 2020.

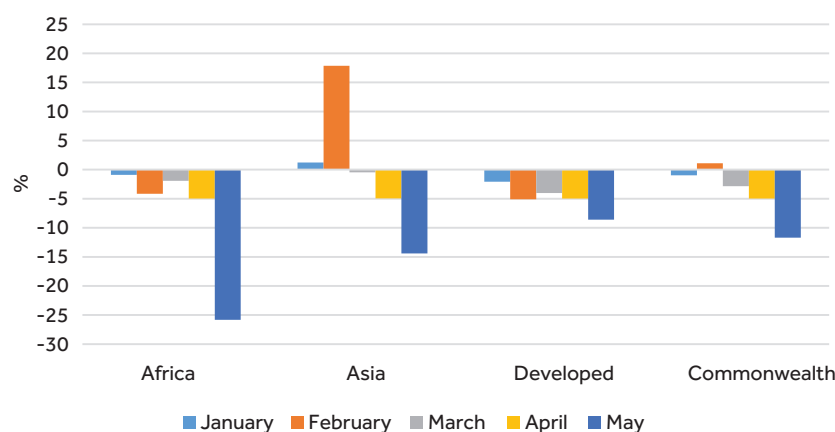
Figure 4. Agri-food exports by Commonwealth region (% change 2020 versus same month average of 2018–2019)



Note: Countries are grouped following the classification of Commonwealth member countries in Table A1. Developed Commonwealth member countries are not included in the regional aggregates. The analysis is based on 23 of 54 Commonwealth countries. Barbados and Belize are considered in the Commonwealth aggregate but not shown as Caribbean countries independently as they cover only a smaller part of total agri-food trade of the Caribbean and their trade has been rather volatile.

Source: Own calculations based on UN Comtrade and TDM (accessed September 2020).

Figure 5. Agri-food imports by Commonwealth region (% change 2020 versus same month average of 2018–2019)



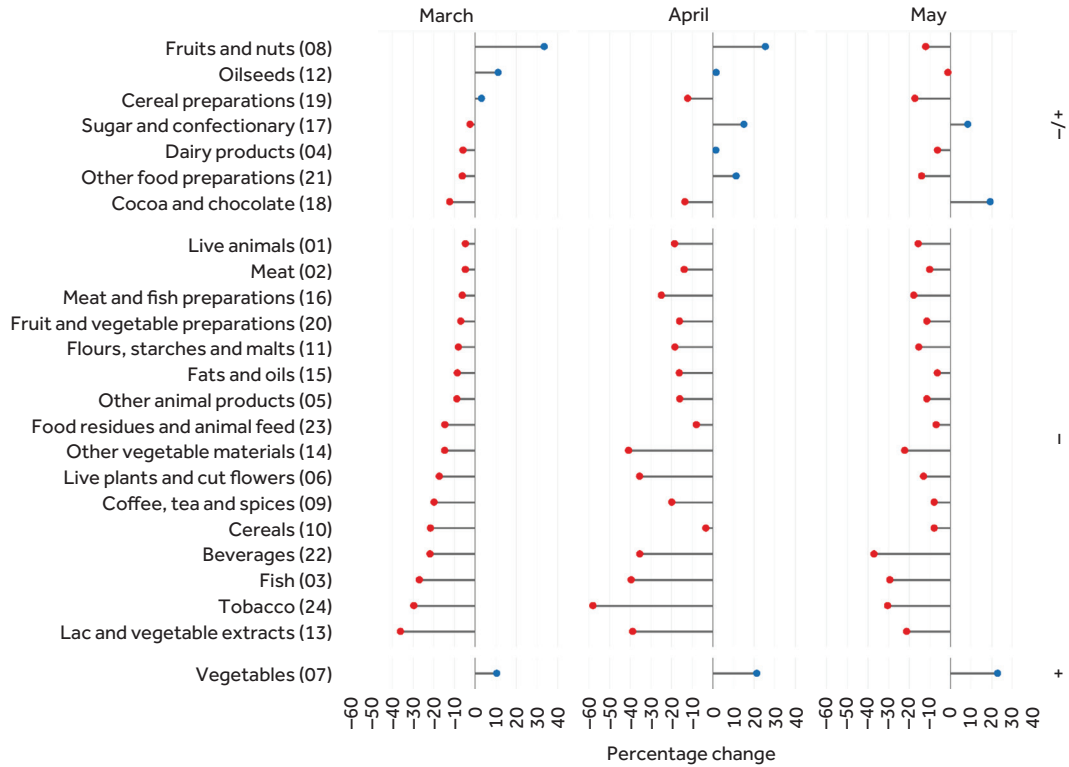
Note: Countries are grouped following the classification of Commonwealth member countries in Table A1. Developed Commonwealth member countries are not included in the regional aggregates. The analysis is based on 23 of 54 Commonwealth countries. Barbados and Belize are considered in the Commonwealth aggregate but not shown as Caribbean countries independently as they cover only a smaller part of total agri-food trade of the Caribbean and their trade has been rather volatile.

Source: Own calculations based on UN Comtrade and TDM (accessed September 2020).

In general, COVID-19 did not exert any significant impacts on international value chains of non-perishable commodities such as cereals and oilseeds (FAO, 2020b). However, across the Commonwealth regions, trade disruptions can be observed for products that were affected by policy restrictions (e.g. trade in live animals, see Box 2), non-food products (e.g. cut flowers and tobacco), beverages and perishables such as meat and fish (Figures 6 and 7).

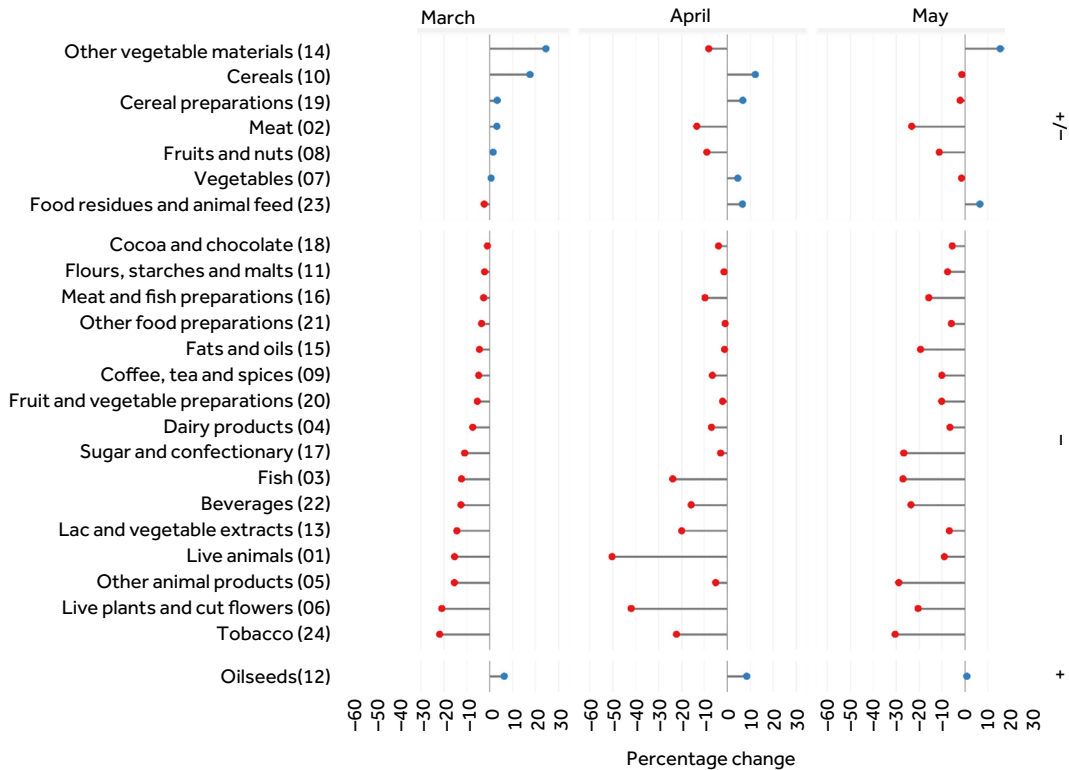
International restrictions on movement and transport also affected the shipment of goods, including food products, around the world (Nicola et al., 2020). Partial border closures, together with delays and disruptions in global logistics caused by COVID-19, contributed to reduced exports as well as delays to food distribution in importing countries. These measures affected the supply and distribution of imported inputs for the production of some food items,

Figure 6. Agri-food exports of Commonwealth countries in aggregate, by HS chapter (% change 2020 versus same month average of 2018–2019)



Note: Analysis based on 23 of 54 Commonwealth countries.
 Source: Own calculations based on UN Comtrade and TDM (accessed September 2020).

Figure 7. Agri-food imports of Commonwealth countries in aggregate, by HS chapter (% change 2020 versus same month average of 2018–2019)



Note: Analysis based on 23 of 54 Commonwealth countries.
 Source: Own calculations based on UN Comtrade and TDM (accessed September 2020).

Box 1. Examples of the impact of shortages of agriculture inputs on production in Commonwealth countries

- In Bangladesh, agricultural inputs such as insecticides, seed and fertilisers, as well as agricultural services, were not readily available, except by a few providers that remained open, until the government decided to allow all agricultural input shops to stay open at specific times to support farmers. The government also decided to ensure uninterrupted supply chains for agricultural inputs during the COVID-19 lockdown. Bangladesh imports about three-quarters of its chemical fertiliser requirements (Nuhara, 2020).
- Transport and logistics disruptions in Mozambique led to challenges in the transportation of resources and inputs such as pesticides, sprays and fertilisers, which held up agriculture activities. To safeguard and promote food production FAO outlined several activities, such as distributing inputs to farmers in rural areas and distributing seed and tools for peri-urban market gardening activities (FAO, 2020c).

such as fertilisers and pesticides, thereby disrupting food production (Box 1).

COVID-19 also affected the availability of trade finance as the risk perception regarding non-payment increased, leading banks to increasingly become reluctant to take on payment risk in several countries where conditions were worsening (WTO, 2020c). Trade finance constraints also affect trade in food because exporters and importers lack the means to finance these transactions, which could be especially devastating for countries that rely on food imports. Many developing countries already faced considerable trade finance gaps before the outbreak of the pandemic, which led to the issue being identified under the WTO's Aid for Trade umbrella as a supply-side constraint, together with efforts to boost the availability of trade finance for development (WTO, 2007). Currency devaluations further exacerbated these effects, especially for low-income countries that are net food importers and had to pay imports in US dollars.

Soon after the coronavirus outbreak, several Commonwealth countries experienced panic-buying caused by consumer uncertainty and fear of food shortages. The situation was made worse by the restrictions on movement and the inability of farmers to distribute food to the market (hotels, restaurants, the catering sector and retail outlets), which also contributed to wastage and food dumping.

Localised food supply disruptions affected the supply of fresh food, and perishable food such as vegetables, meat and fruits, as production and distribution activities came to a halt, leading to limited availability of food and poor dietary choices. For example, in India, rural-urban supply chains characterised by highly

integrated rural hinterlands and peri-urban and urban areas fed primarily by perishables experienced disruptions that could affect India's food security in the short term (Narayaman and Saha, 2020). This was also expected to affect the whole food production sector from the farmer to the agri-food processing enterprise and rural-urban food labour markets, especially for perishable products such as milk, fruits and vegetables (*ibid.*).

The closure of schools in some countries exposed many children to the threat of food insecurity and malnutrition. WFP (2020b) estimated that about 370 million children missed out on nutritious school meals, which may have had negative impacts on their immune system responses to COVID-19.

3.2 Immediate effects on trade in selected Commonwealth countries

The impact of the pandemic on agri-food trade is explored in more detail for four case study countries: Belize, New Zealand, South Africa and Sri Lanka. For these countries, data were available from January to July 2020 at the time of drafting this report. These countries cover a wide geographical range, include both developing and developed countries, and include one small island developing state (Table 1).

Overall, the pattern of agri-food trade of the four case study countries did not differ significantly in the time period from January to July 2020 from the situation in the same time period in previous years (Figure 8). For Belize, as a small country, monthly imports and exports were fairly volatile in all three years (2018, 2019 and 2020). The exports of South Africa appear to have experienced a relatively sharper

Table 1. Overview of the case study countries

Country	World Economic Situation and Prospects Classification	Commonwealth analytical region	Small state	Small island developing state	LDC
Belize	Developing	Caribbean	Yes	Yes	No
New Zealand	Developed	Developed	No	No	No
South Africa	Developing	Africa	No	No	No
Sri Lanka	Developing	Asia	No	No	No

decline in April 2020 compared with the previous years. Exports of Sri Lanka had already dropped in March 2020. Exports of both South Africa and Sri Lanka started rebounding in May and overtook the level in the previous years in June and July 2020. Monthly agri-food imports were higher than in the previous years in New Zealand in the second quarter of 2020 and lower in South Africa. They were also lower in Sri Lanka in the same time period but rebounded in July 2020.

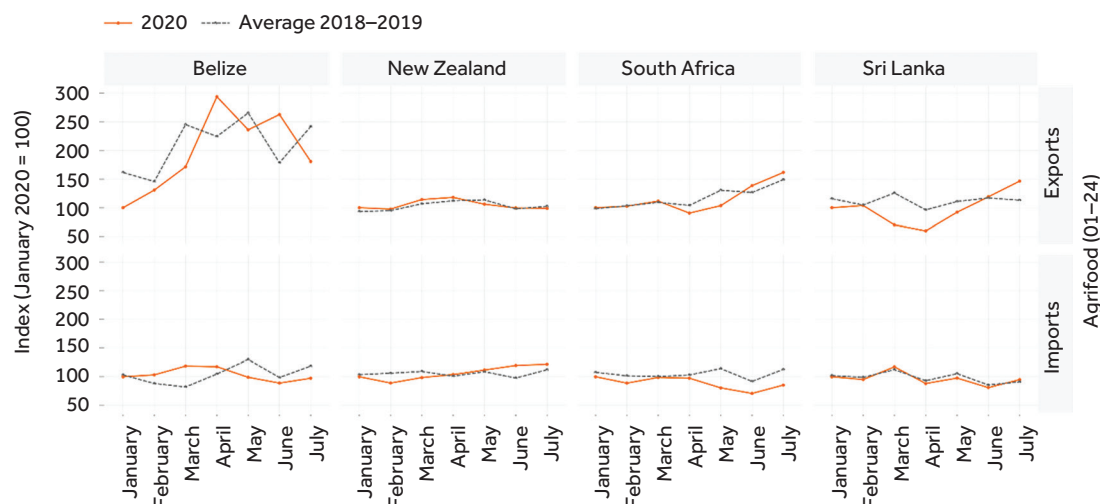
The aggregate patterns of total agri-food trade may mask important changes in specific product categories. As mentioned previously, COVID-19 generally has not exerted any significant impacts on international value chains of non-perishables such as cereals and oilseeds (FAO, 2020b). In addition, the 2020 monthly data for the case study countries do not reveal strong deviations from the trade patterns of non-perishable products in previous years. However, trade in perishable products of animal origin such as meat, dairy products and fish declined significantly

as a result of the impacts of the measures to contain the spread of COVID-19 on logistics, as well as weak demand. Anecdotal evidence suggests that trade in perishable products was affected by worldwide lockdowns, their effects on supply and demand, and trade restrictions that some countries imposed temporarily (see Box 2). Demand for fresh fish, for example, was particularly hit as a result of the closure of restaurants (FAO, 2020d).

Exports of live animals clearly remained below the levels of previous years in the first half of 2020 in Belize (Figure 9). Imports of live animals remained also below average in South Africa and Sri Lanka.

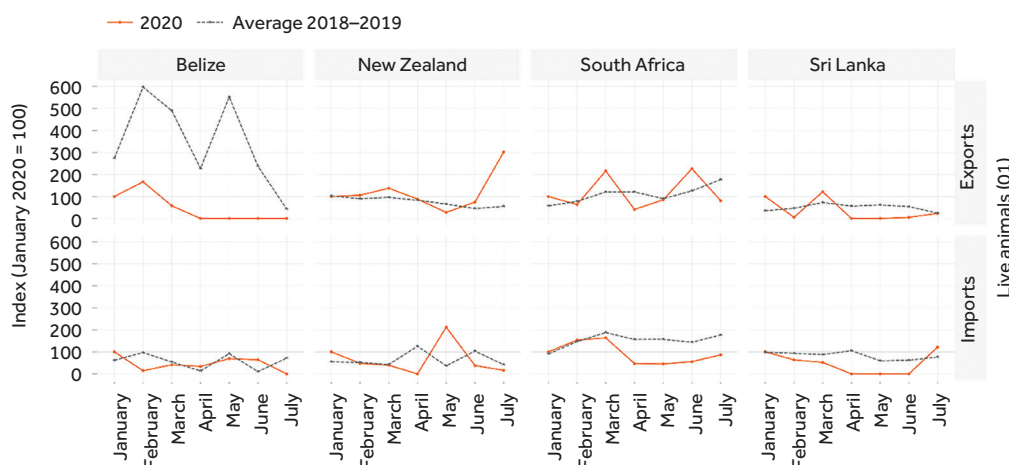
Clear differences in trade patterns in the previous years were also observed for trade in meat (Figure 10). Imports of meat have remained below average since the beginning of 2020 in, South Africa and later in Sri Lanka. Exports of fish remained below average in New Zealand, South Africa and Sri Lanka in the first six months of 2020 (Figure 11).

Figure 8. Development of monthly agri-food trade of the four case study countries, index, January–July, 2018–2020



Source: Own calculations based on TDM (accessed September 2020).

Figure 9. Development of monthly trade in live animals (HS01) of the four case study countries, index, January-July, 2018–2020



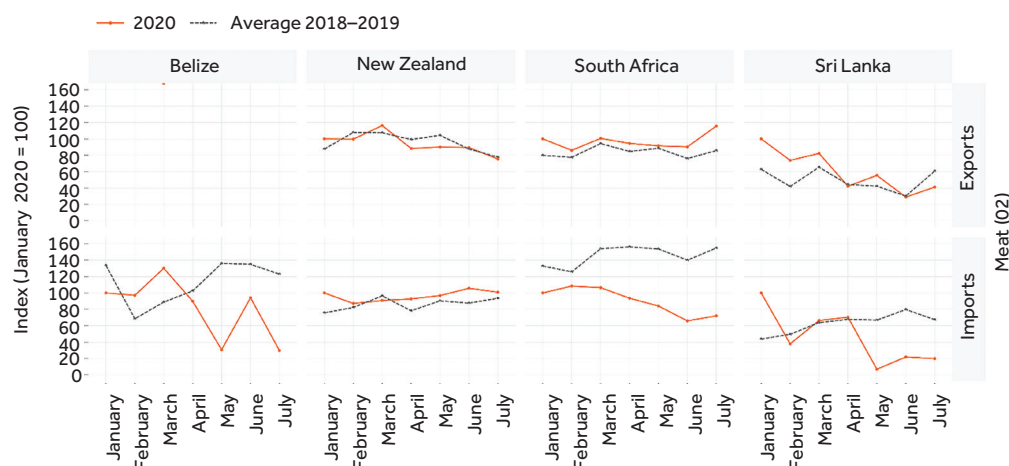
Source: Own calculations based on TDM (accessed September 2020).

However, exports of fruits in all countries under consideration did not differ much from the previous years (Figure 12). In fact, exports of fruits from New Zealand rather increased in 2020 compared with the previous years (see Figure 12), mainly because of a bumper harvest of kiwifruit and targeted measures to keep supply chains and transportation routes open (Skerrett, 2020; The Economist, 2020). Imports of fruits decreased sharply in Sri Lanka in May and June 2020.

While, in general, trade disruptions resulting from COVID-19 appear to have affected animal-sourced food groups more significantly than plant-based products, the pandemic has also affected specific categories of

non-food vegetable products. An example is the trade in live plants and cut flowers in the case study countries (Figure 13). New Zealand’s, South Africa’s and Sri Lanka’s exports in this product category remained far below average in the first half of 2020. All case study countries also saw below average imports in this product category in 2020. In some instances, the deterioration in trade flows has had particularly severe implications for inclusive trade. For example, the closure of European flower markets affected women who worked in the flower production industry in Kenya, many of whom lost their jobs and could no longer access adequate food (Bhalla and Wuilbercq, 2020).

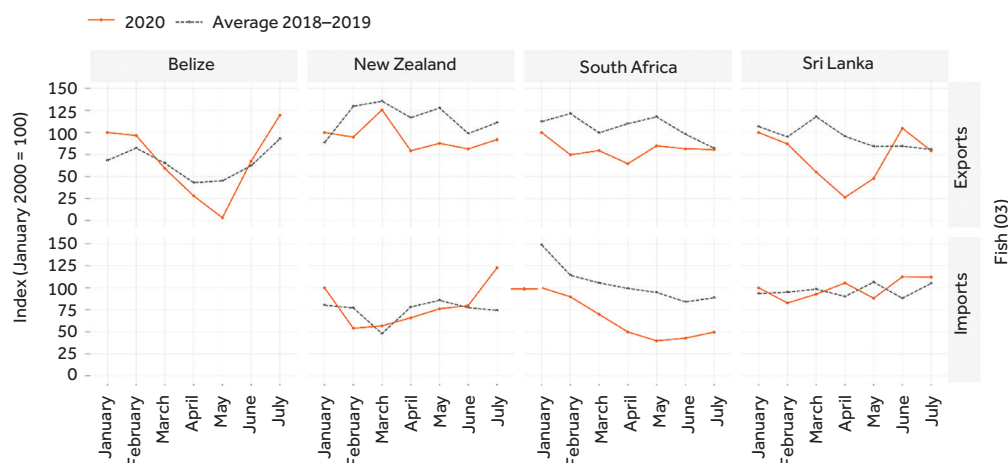
Figure 10. Development of monthly trade in meat (HS02) of the four case study countries, index, January-July, 2018–2020



Note: Exports of Belize not shown owing to high volatility.

Source: Own calculations based on TDM (accessed September 2020).

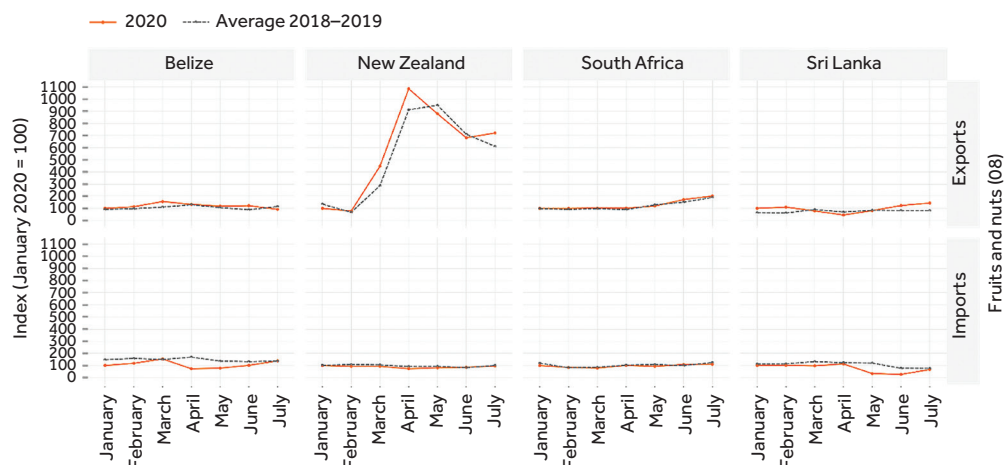
Figure 11. Development of monthly trade in fish (HS03) of the four case study countries, index, January–July, 2018–2020



Note: Imports of Belize not shown owing to high volatility.

Source: Own calculations based on TDM (accessed September 2020).

Figure 12. Development of monthly trade in fruits (HS08) of the four case study countries, index, January–July, 2018–2020



Source: Own calculations based on TDM (accessed September 2020).

Among the case study countries, the pandemic appears to have affected exports of agri-food products from South Africa particularly severely. Box 3 explores these effects further.

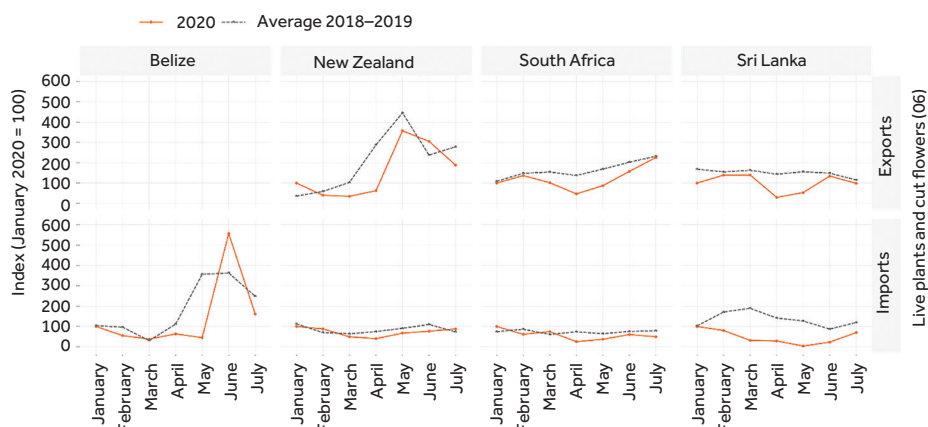
3.3 Projected effects on demand and prices

While the acute effects of the global lockdowns – including limitations on movement of people and goods and temporary trade restrictions – on global food supply chains have, so far, remained relatively limited, the macroeconomic shocks the pandemic has induced are expected to affect food markets much more severely. Moreover, a protracted pandemic could have impacts on the supply and

availability of food in the short and medium term and undermine the long-term food security of countries.

As a result of falling incomes and rising unemployment, food demand is expected to weaken, and this may lead to downward pressure on agricultural commodity prices. In addition, falling oil prices could reduce agricultural production costs as a consequence of lower fuel and fertiliser costs and lead to a further reduction in agricultural commodity prices. The 2020 edition of the Organisation for Economic Co-operation and Development (OECD) and FAO Agricultural Outlook compares a scenario considering some of these effects on the global economy to the Outlook projections without COVID-19 assumptions (the baseline) over

Figure 13. Development of monthly trade in live plants and cut flowers (HS06) of the four case study countries, index, January-July, 2018–2020



Note: Exports of Belize not shown owing to high volatility.
 Source: Own calculations based on TDM (accessed September 2020).

Box 2. Changes related to food standards and regulations notified by countries

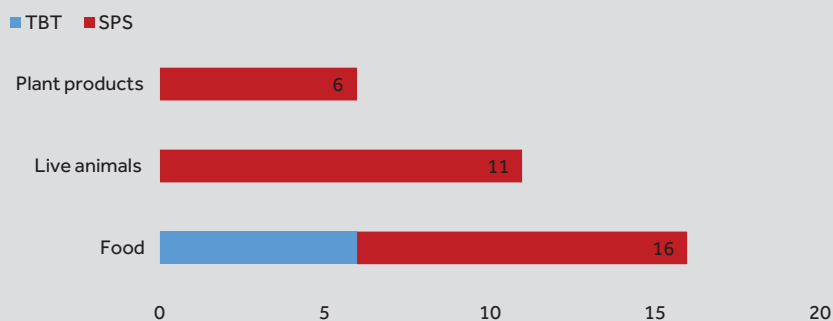
As of 8 May 2020, the WTO had received 85 notifications on COVID-19 from 27 WTO members. Two-thirds of the COVID-19-related notifications referred to standards and regulations (52 Technical Barriers to Trade and 33 Sanitary and Phytosanitary measures). Most new regulations apply to personal protective equipment (PPE), followed by food, with 16 measures. In addition, 11 measures apply to live animals and another six to plant products (Figure 14).

At the beginning of the pandemic, a few WTO members imposed temporary restrictions on the importation of live animals and animal products, or certain species, such as exotic and decorative animals. Other members also notified measures on plants or specific import certification requirements. Some of these measures were restricted to imports from highly affected regions.

Several members also notified the WTO that they were temporarily relaxing certain aspects of technical regulations for specific food products in order to facilitate their importation while ensuring food safety. Indonesia, for example, temporarily suspended fortification and quality requirements for food staples (flour, cooking oil and sugar) and Switzerland relaxed food labelling requirements on certain food ingredients and packaging material for six months (WTO, 2020d).

Between mid-October 2019 and mid-May 2020, G20 economies introduced 154 new trade measures, 60 per cent of which were COVID-19-related – 65 trade facilitation measures and 28 restricting trade measures. By mid-May 2020, the G20 had repealed about 36 per cent of the COVID-19 trade-related restrictions (WTO, 2020a). Data from the European University Institute-Global Trade Alert-World Bank show that, as of 21 June 2020, 29 jurisdictions out of 195 in the world, including four Commonwealth countries, had introduced 47 export restriction measures (32 export curbs and 13 licences, quotas and export duties) on agriculture and food products, including cereals such as wheat. Out of the 32 introduced export curbs, 15 have lapsed, some of them having been introduced by large producers of specific food products. Whether countries will continue relaxing restrictive measures or not renew curbs may depend on the duration of the pandemic and other global factors affecting the market for basic foodstuffs, such as the anticipated global economic contraction in 2020 and food supply running short (FAO, 2020e).

Figure 14. Product coverage of WTO notifications related to food standards and regulations



Source: Adapted from WTO (2020d).

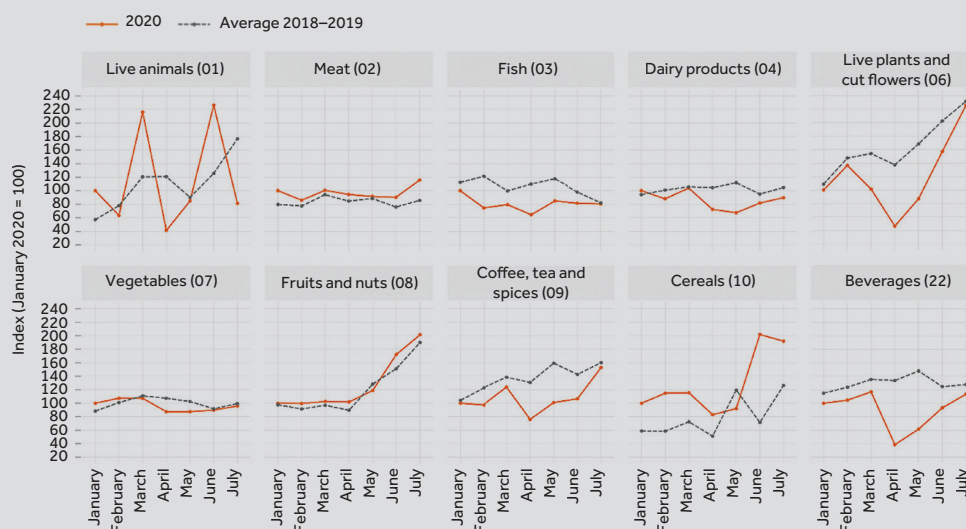
Box 3. Export disruptions in South Africa

South Africa imposed strict lockdown measures at the end of March 2020 in order to contain the spread of COVID-19, with exports of South Africa declining considerably in many food groups, especially between March and April 2020 (Figure 15).

While South African fruit and cereals exports remained relatively stable, exports of coffee and tea, dairy products, fish, live plants and cut flowers, and beverages declined sharply.

In fact, South African exports of agri-food products appear to have been severely affected by delays and bottlenecks related to COVID-19 disruptions in the port of Cape Town. The disruptions owed partly to a high COVID-19 infection rate in the Western Cape province, which resulted in labour shortages and led farmers to divert some exports to Eastern Cape ports to avoid delays (Ngcakani, 2020; Philip, 2020). In addition, under alert level five of the national lockdown, the purchase and export of alcohol were banned, which might explain the sharp decline in exports of beverages (Ngcakani, 2020).

Figure 15. South Africa's exports of different food groups



Source: Own calculations based on TDM (accessed September 2020).

the period 2020–2023 (see Box 4 for a scenario description).

The lower economic growth path in the COVID-19 scenario is projected to be associated with reduced growth in demand for agricultural commodities. Along with a decline in GDP and a subsequent rebound, agricultural commodity prices are projected to drop in 2020 and partly recover in 2021 (see the example for Pakistan in Box 5). Based on the assumed economic recovery, world market prices in real terms and demand are projected to gradually return to levels close to the baseline scenario over the following years.

While the GDP decline is projected to reduce food demand, lower commodity prices can partly buffer the demand shock. The interplay of this mechanism determines the outcome and can vary between agricultural products, countries, and wealthy and poor population groups within countries.

As food is essential for all, demand for food in general is relatively inelastic – that is, it varies relatively less than the change in income. Nevertheless, a significant drop in income as assumed in the COVID-19 scenario can lead to a reduction in demand, especially for high-value agricultural products, while the demand for staples is generally less affected. This effect may be stronger in poorer countries, where income losses of vulnerable populations translate more directly into changes in food demand.

The OECD/FAO Agricultural Outlook projects that, overall, the medium-term impact on average food consumption globally will be not particularly strong, but LDCs appear to be more at risk and the impact will be even larger for the poorest segments of the population.

To illustrate the anticipated effects in the Commonwealth, total food demand in four Commonwealth countries – India, Pakistan, South Africa and the UK – is projected to

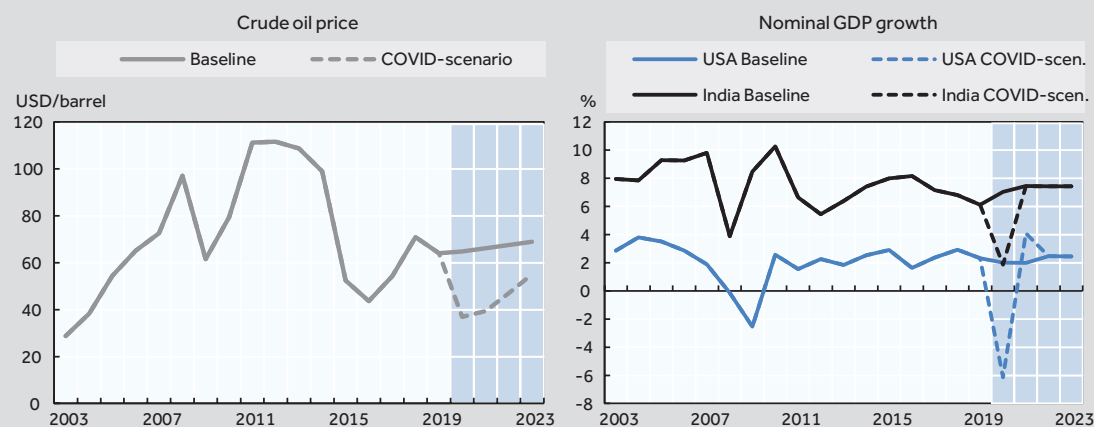
Box 4. COVID-19 scenario in the OECD/FAO Agricultural Outlook 2020-2029

Each year, the OECD/FAO Agricultural Outlook provides a baseline projection on the potential development of global agricultural markets over a 10-year time horizon. The 2020 edition of the Agricultural Outlook additionally considers a scenario simulating possible impacts of the COVID-19 pandemic on agricultural markets over the time horizon 2020–2023.

This scenario focuses on the pandemic's potential macroeconomic impacts rather than on the immediate disruptions related to the restrictions of movement of people and disruption to transport and logistics. The COVID-19 scenario is based on the April 2020 projections from the World Economic Outlook of the International Monetary Fund (IMF) for gross domestic product (GDP) growth, inflation and the world crude oil price for the next two years.

The April 2020 IMF World Economic Outlook projected the global economy to contract by 3 per cent in 2020, which is a larger GDP decline than experienced during the 2008–2009 financial crisis. It then assumed a fading-out of the pandemic in the second half of 2020 and gradual relaxation of containment measures. Global economic growth was expected to rebound at a growth rate of 5.8 per cent in 2021, as economic activity normalises. Developed countries were projected to experience a stronger GDP decline (–6.1 per cent) than emerging markets and developing countries (–1 per cent) in 2020.⁵ The average crude oil price is projected to be US\$37/barrel in 2020 and \$40/barrel in 2021, down from \$64/barrel in 2019. Thereafter, the crude oil price recovers to baseline values in 2025. Figure 16 illustrates some of the scenario assumptions relative to the macroeconomic assumptions underlying the baseline.

Figure 16. COVID-19 scenario macro assumption



Source: OECD/FAO (2020); OECD Agriculture Statistics database (<http://dx.doi.org/10.1787/agr-outl-data-en>).

This initial COVID-19 scenario provides some preliminary insights into the impacts of the current pandemic on agricultural markets and, in particular, on agricultural prices and food demand.

As the economic, social and political fallout of the pandemic is complex and still evolving, future scenario updates will need to assess additional aspects in order to be able to provide a more complete picture of the effect of the pandemic. These may include structural changes to food demand, policy measures affecting national and global food chains, and the depth and length of the macroeconomic shock and the recovery path. Also not considered in this initial COVID-19 scenario are feedback loops with other sectors of the economy, households and potential government measures.

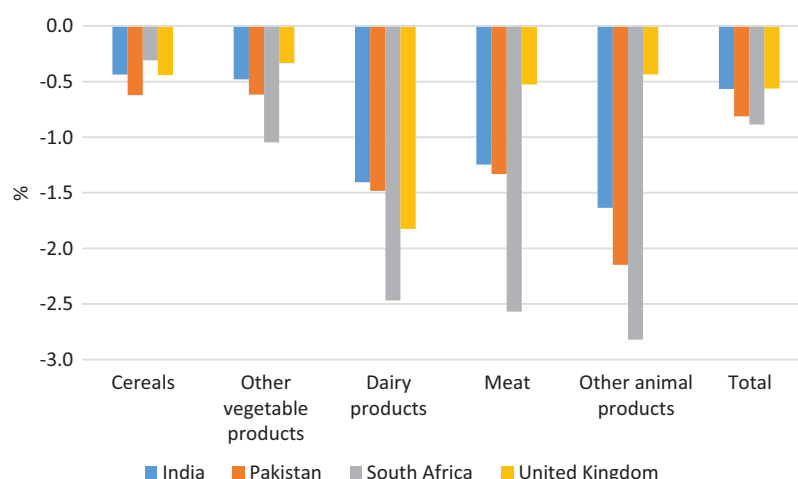
Source: OECD and FAO (2020).

decrease by between 0.6 and 0.9 per cent in the period 2020–2021 (Figure 17). Food consumption of animal products decreases more strongly than demand for staples (cereals and other vegetable products including pulses, roots and tubers). Among the four Commonwealth countries, the reduction in food demand is projected to be strongest in South Africa, especially in the

higher-value food categories based on animal products.

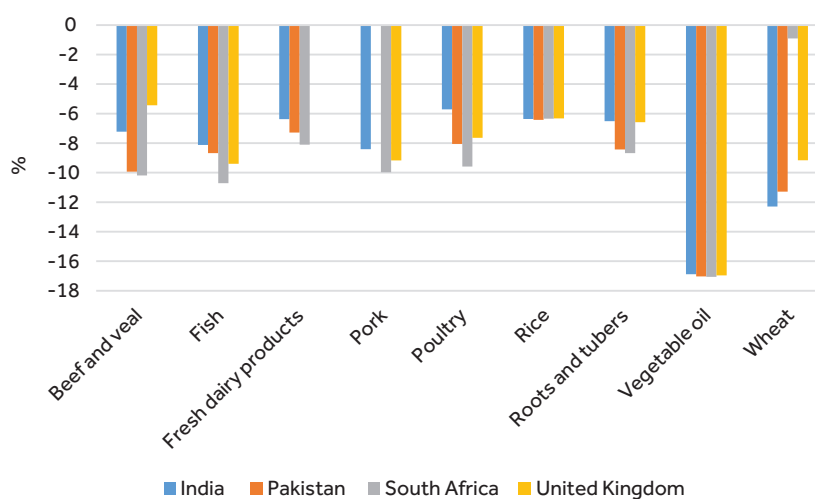
The decline in demand for agricultural products, along with a reduction in production costs (owing to the contraction of the crude oil price), leads also to decreasing producer prices (Figure 18). If the price-depressing effect of the reduction in food demand exceeds the reduction in

Figure 17. Food consumption in 2020–2021, COVID-19 scenario versus baseline (%)



Source: Own calculations based on data from OECD and FAO (2020).

Figure 18. Producer prices in 2020–2021, COVID-19 scenario versus baseline (%)



Source: Own calculations based on data from OECD and FAO (2020).

production costs, this could negatively affect farmers in these countries who may not be able to immediately adjust their production and investment decisions to the new market environment (e.g. by reducing herd size). Farmers in developing Commonwealth countries who, in general, use fewer inputs such as fertilisers and energy may be disproportionately affected by the drop in demand, which could exacerbate the impacts on the poor in these countries.

Along with the assumptions on macroeconomic development, food consumption and prices are projected to drop strongly immediately after the shock in 2020 and recover in the following years (see the example for Pakistan in Box 5).

3.4 Food trade, food security and the SDGs

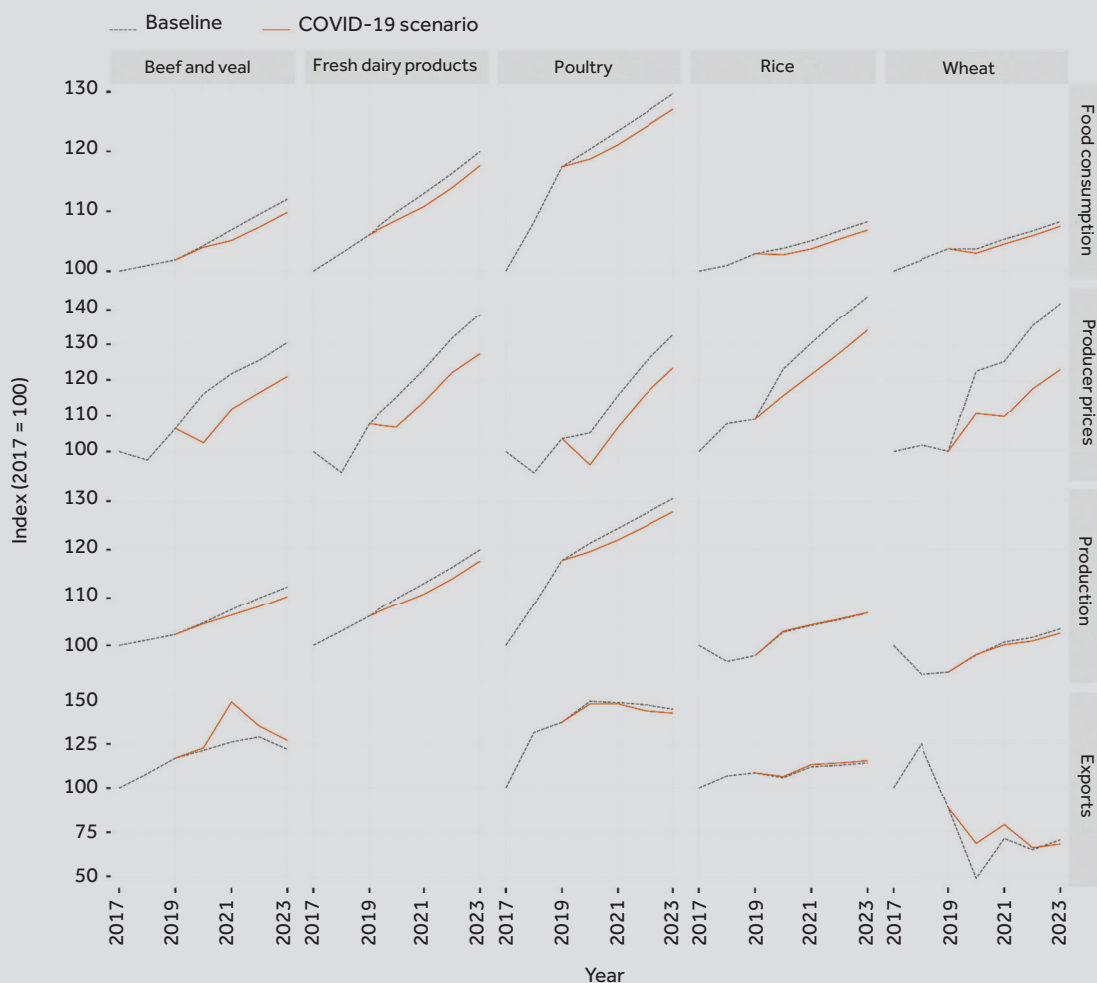
Although COVID-19 has not induced a global food crisis, a protracted pandemic could further disrupt global agriculture and food supply chains, leading to food shortages, price spikes and increased price volatility in specific locations or countries. A second wave of infection in some countries may lead to renewed panic-buying. The food loss and waste caused by supply chain disruptions could increase food security risk and lead to further economic losses (WTO, 2020e).

Furthermore, in some countries, supplies of crucial agricultural inputs will continue to be

Box 5. Projected COVID-19 impacts on the agriculture sector in Pakistan

As in most countries, food demand in Pakistan is projected to drop relatively strongly as an immediate impact of the crisis in 2020–2021 and this effect is stronger for animal-sourced products than for staples (Figure 19). Demand is projected to rebound in the following years. Producer prices are projected to develop along with demand patterns, with a relatively steep decline in 2020–2021 and a recovery afterwards. However, production in Pakistan is projected to remain relatively unchanged. Together with a reduction in demand and the drop in agricultural prices, this could lead to increased exports of some products to other countries.

Figure 19. Evolution of food demand, producer prices, production and exports in Pakistan, 2017–2023 (projected values 2020–2023, COVID-19 scenario versus baseline)



Source: Own calculations based on data from OECD and FAO (2020).

disrupted, affecting agriculture and food production and investment for the next season, making it challenging for these countries to maintain production levels in the medium term. A persistent pandemic will also affect labour supply to the production and distribution of food.

The world’s poorest and most vulnerable countries will be the worst affected by a prolonged pandemic, including their agricultural workers and informal traders, who will find it increasingly challenging to provide food for

their families. Many Commonwealth countries, particularly LDCs and NFIDCs, could experience severe consequences, which will hinder efforts to progress towards the SDGs, especially SDG 2 on ending hunger and improving food security and SDG 12 on sustainable production and consumption. This will, in turn, affect medium- to long-term nutrition security, particularly among younger people.

Commonwealth countries that are experiencing some form of natural hazard or humanitarian

Box 6. Food supply disruptions in Commonwealth countries experiencing natural or humanitarian crises

COVID-19 affected the speed of the response to the humanitarian crisis in Fiji, Solomon Islands, Tonga and Vanuatu after Cyclone Harold in April 2020. The slowdown in the delivery of humanitarian aid may have had considerable impacts on the food security of affected people.

Bangladesh faces the additional challenges of addressing the plight of the Rohingya people and recovery from Cyclone Amphan in the Bay of Bengal. WFP projects that it will be necessary to support 1.1 million more people through the development of urban safety nets in urban slums in Dhaka and Chittagong. WFP has also provided food to children (take-home rations) since the closure of school feeding programmes.

Kenya has experienced locust invasions, and WFP intends to complement government assistance to urban families by providing food to 250,000 people living in informal settlements in Nairobi. The agency also plans to introduce a cash transfer programme aimed at giving relief to 63,000 urban families facing a loss of income and livelihoods.

In Pakistan, which has also experienced locust invasions, WFP is reallocating funds to assist about 120,000 vulnerable rural people affected by the COVID-19 pandemic through the provision of cash. The agency also provides food and nutrition support to many people.

Sources: FAO (2020f); WFP (2020c).

crisis will also be affected severely, with these impacts expected to exacerbate the already significant impacts of the COVID-19 pandemic

(Box 6). Timely delivery of human aid and other forms of development support will be vital to mitigate the worst impacts on these countries.

4. Commonwealth policy responses to ensure food availability and security

Commonwealth countries have adopted a range of policies to ensure access to and availability of food and to maintain food security, particularly in the short term and depending on their circumstances. These responses include reducing import tariffs and cutting taxes, stabilising prices together with food distribution initiatives, relaxing lockdown measures for workers in the food production sectors and implementing stimulus packages. The international community has also assisted with support measures, including debt relief to strengthen social sectors and to enable countries to provide social safety relief packages for the most vulnerable, such as subsistence allowances, distribution of food and cuts in water bills. Outlined below are examples of some of the measures several Commonwealth member countries have introduced.

4.1 Export restrictions

Despite global markets for agriculture and food remaining balanced in the face of the COVID-19 pandemic, some Commonwealth countries did introduce trade restrictions to ensure sufficient

domestic food supplies and avoid domestic price increases of staple food. During the 2007–2008 food price crisis, panic-driven policy responses, such as export bans and rapid escalation in food stock procurement through imports, exacerbated market disruptions. Such responses, if taken by countries with large trade shares, can have negative impacts on the world market, including in terms of instigating episodes of price volatility. They can also harm traditional trade partners and NFIDCs that rely on the global market for ensuring their food security.

However, the introduction of such measures does not guarantee enough supplies in the event of a second wave of infection. Moreover, as the pandemic continues to spread globally, some trading partners may retaliate by also imposing export bans.

4.2 Tariff reduction and tax cuts

Some Commonwealth LDCs and NFIDCs have introduced import-easing measures, such as the temporary elimination of tariffs to ensure food access and availability. For example, St Kitts and

Nevis eased imports on fruit and vegetables, and Samoa did the same for a list of agriculture and fishing products. South Africa exempted essential food products from VAT. Kenya reduced the VAT on all goods from 16 to 14 per cent, starting from April 2020. Kenya also authorised the import of 4 million 90 kg bags of maize to avoid shortages during the pandemic.

4.3 Trade facilitation

To ensure undisrupted supply chains, including the quick movement of agriculture and food products and agricultural inputs, some Commonwealth countries implemented measures to facilitate the cross-border flow of goods. For example, Australia provided emergency funding of A\$110 million (US\$67.4 million) to subsidise air freight for agri-food exports following disruptions resulting from cross-border restrictions (FAO, 2020e). Commonwealth EU members, Cyprus and Malta, implemented measures aimed at ensuring the continuity of economic activity within the regional bloc, such as maintaining transport and mobility of goods and services (via, for instance, “green lanes” and priority corridors for freight transport) and banning new additional certification processes for goods circulating within the EU single market (European Commission, 2020).

4.4 Floor prices

In response to domestic market shocks and to avoid price spikes, some Commonwealth countries introduced price stabilisation measures, particularly on essential food products. For example, on 10 April 2020, Sri Lanka fixed the maximum retail prices for rice to protect consumers from food price hikes. Furthermore, rice mills were declared essential services to ensure the availability of rice during the pandemic. Controls for vegetables were also introduced on 27 March 2020. On 24 March, The Gambia introduced maximum prices for staple foods, including rice, maize, millet and bread.

4.5 Food distribution initiatives

To avoid localised disruptions arising as a result of logistical issues, some Commonwealth countries introduced measures to ensure minimum interruption to the storage, transportation and sale of food. The South African government allowed informal traders to trade in April 2020

after they had been previously prohibited from doing so during the national lockdown. On 28 March 2020, Rwanda launched a food distribution initiative targeting vulnerable households. On 8 April, the president of Nigeria approved the distribution to needy families of 46,000 tonnes of smuggled rice, which customs services had seized during the border closure last year. This aimed at limiting shortages and price hikes for rice resulting from the COVID-19 pandemic.

4.6 Cash transfers

In some Commonwealth countries, governments adopted stimulus packages to support production and demand, primarily as a result of anticipated consumer hoarding and the transmission of price fluctuations to farmers along food supply chains. Canada provided a fund of CAD50 million (US\$36 million) to assist farmers, fish harvesters and all food production and processing industries to introduce measures necessary to implement the mandatory isolation period applicable to all temporary foreign workers. Canada also availed CAD 100 million (US\$72 million) to support national food banks and other food rescue agencies to help improve access to food during the pandemic. On 26 March 2020, the Indian finance minister announced the allocation of INR 1.7 lakh crore (US\$22 billion) to the Prime Minister’s Gareeb Kalyan Scheme, which includes both cash transfers and food distribution. One of the components of the scheme was the distribution of 5 kg of wheat or rice and 1 kg of pulses to 800 million daily workers.

While the injection of public funds may be a necessary response that contributes to addressing some of the domestic food supply issues such as price support mechanisms and easing of cash flow to farmers, governments must ensure that the injection of money does not become a source of distortions in trade in food in the future, in both domestic and international markets. Governments should also intensify efforts to ensure supply chain resilience.

4.7 Exemption of agricultural workers from lockdown

Some countries adopted measures to minimise disruptions to the domestic production of agricultural and food products. In this regard, they took steps to maintain physical distance, reduce interaction among co-workers and provide

enough hygiene products to ensure health and safety, while also screening and monitoring workers for COVID-19. Some Commonwealth countries exempted agricultural labourers/workers from movement restrictions. For example, South Africa classified agricultural labourers as system-essential service providers and

exempted them from movement restrictions (FAO, 2020g), while India provided passes to farmers to facilitate wheat harvesting and procurement (Sharma, 2020). Similar measures are also crucial in the transportation and logistics sectors to ensure the wellbeing of workers moving food products and other tradable goods.

5. Conclusions

As the world continues to grapple with the COVID-19 pandemic, countries have responded by adopting various measures to contain the spread of the virus. These measures have contributed to disrupting agriculture and food production and supply chains, affecting countries in different ways. As a group, Commonwealth countries are large traders of food products, with 32 of the 54 members classified as NFIDCs as of 2020.

Although there are currently no signs of a global food crisis, Commonwealth countries together with other WTO members have been at the forefront of initiatives to maintain agriculture and food supply chains during the COVID-19 crisis. To this end, Singapore and New Zealand issued a Declaration on Trade in Essential Goods for Combating the COVID-19 Pandemic, which outlined their commitment to maintaining open trade and supply chains in several agricultural and food products, in which the two countries undertook to remove tariffs and refrain from imposing export restrictions (WTO, 2020e). A joint Ministerial Statement was issued at the WTO by 47 countries including 15 Commonwealth countries,⁶ which, among other things, stressed the need for the international community to maintain agriculture supply chains to preserve countries' food security. The countries also pledged not to introduce export restrictions and to avoid adopting unjustified trade restrictions on agriculture and food products in response to the coronavirus pandemic, so as to preserve members' food security (WTO, 2020f).

On 29 May 2020, Australia, Canada, Malawi, Malaysia, New Zealand, Singapore and the UK jointly issued a statement with other WTO members stating the importance of WTO members adopting trade measures that do not adversely affect trade in agriculture and

agri-food products (WTO, 2020g). The countries also encouraged WTO members to implement temporary trade facilitation measures, such as the use of scanned copies or electronic copies of certificates of origin to facilitate trade in agriculture and food products. In their statement at the WTO on 16 June 2020, the Ottawa Group, which comprises five Commonwealth countries – Australia, Canada, Kenya, New Zealand and Singapore – took the lead to withdraw any emergency measures including trade restrictions they introduced in response to the COVID-19 pandemic that may adversely affect trade in agriculture as quickly as possible (WTO, 2020h).

These interventions have played an important role in sustaining trade in agricultural and food products throughout the COVID-19 pandemic. Even so, Commonwealth countries will need to intensify their efforts to ensure the continued operation of agriculture and food supply chains and avert any future food crises. To this end, Commonwealth governments can look to:

Maintain open trade and undisrupted supply chains

The considerable uncertainty caused by the evolution of the COVID-19 pandemic, particularly in terms of its containment period, makes it difficult to precisely determine its impact on access to and availability of adequate global food supplies during and after the pandemic. Given that no single country can be self-sufficient in food, and recognising that all countries rely on trade for essential dietary requirements for their populations and to source critical inputs and equipment (WTO, 2020i), there is a need for countries to refrain from introducing trade-restricting measures and to open trade to complement domestic food requirements and supplies and prevent food shortages.

Where trade-restricting measures are adopted in response to the emergency nature of the situations in individual countries, such measures must be consistent with WTO rules by being targeted, temporary, proportionate, science-based (where relevant) and transparent (*ibid.*). This will help to ensure open and predictable food and agriculture markets and preserve the operation of supply chains.

Resist trade protectionism

To ensure food security after COVID-19, countries should continue to avoid protectionism in trade in agriculture and food products and, at the same time, advance the agriculture reform process in the WTO to try and achieve negotiating outcomes on all three pillars of the agriculture negotiations. This will contribute to creating a predictable and market-based agricultural trading system (WTO, 2020i). Trade is an essential tool for economic recovery post-COVID-19. As such, consideration must be given to medium- and long-term measures to build resilience and ensure inclusive global trade, which take into account the trade-related developmental challenges facing developing countries.

Enhance trade facilitation measures

Countries should consider adopting measures that facilitate trade and logistics to enable the smooth and quicker movement of food across borders and support distribution of food and agricultural products to the most vulnerable. Consideration should be given to the implementation of paperless trade facilitation measures to make cross-border transactions more

convenient and clearer, while at the same time ensuring regulatory requirements are met. Actions that facilitate trade and consider the health and wellbeing of workers will help ensure the flow of agriculture and food products across borders and that these products are available to the most vulnerable people in the short to medium term. Countries must also consider expediting the implementation of the Trade Facilitation Agreement (TFA), as this would be timely in the context of COVID-19. The TFA provides a framework with practical solutions for speeding up and streamlining the release and clearance of goods, and this can be even more crucial when dealing with essential products, or when transport and logistics have been severely affected (and thus are limited). Governments must consider ways to ensure that domestic logistics and transport services operate with minimum disruption – a shortfall in these services affects food distribution, especially to remote places.

Embrace smart agriculture

Amid the accelerated push towards digitisation necessitated by COVID-19, countries should look to harness digital technologies to enhance agricultural productivity and boost yields during and after the COVID-19 recovery phase. This can help improve the long-term sustainability of agriculture sectors in Commonwealth countries, but will require targeted interventions to ensure farmers are adequately prepared to deal with the pace of change and harness technological and digital farming solutions effectively.

Notes

- 1 These countries include Bangladesh, Cameroon, Kenya, Lesotho, Malawi, Mozambique, Namibia, Nigeria, Pakistan, Sierra Leone, Eswatini, Uganda, Zambia and the United Republic of Tanzania (FAO, 2020a).
- 2 As of 24 September 2020, 32 Commonwealth countries are included on the World Trade Organization (WTO) list of NFIDCs for the purpose of the Marrakesh Ministerial Decision on measures concerning the possible negative effects of the reform programme on LDCs and NFIDs. Fourteen Commonwealth countries are classified as low-income food-deficit countries (LIFDCs) by FAO (<http://www.fao.org/countryprofiles/lifdc>).
- 3 As of 1 September 2020, Commonwealth countries had 2.3 million infections, with a relatively large number of cases in Asia.
- 4 Agri-food trade includes agricultural commodities and food based on chapters 01-24 of the Harmonized Commodity Description and Coding System (HS) of the World Customs Organization. It largely corresponds with the United Nations Conference on Trade and Development (UNCTAD) definition that includes goods classified under the Standard International Trade Classification (SITC) (0+1+4+22). The analysis of exports and imports in this paper is based on current

- values of trade. These reflect both changes in quantities traded and changes in export and import prices.
- 5 The October 2020 update of the IMF World Economic Outlook projects an even steeper global GDP decline, of 4.4 per cent, in 2020 and a weaker economic recovery, of 5.2 per cent, in 2021.
 - 6 Australia, Barbados, Canada, Guyana, Jamaica, Kenya, Mauritius, New Zealand, Nigeria, Papua New Guinea, Saint Lucia, Seychelles, Singapore, Solomon Islands and the UK.

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Annex

Table A1. Classification of Commonwealth member countries

Commonwealth Member Countries							
Sr.	ISO 3	Economy	Economic	Geographical	Small States	SIDS	LDCs
1	AUS	Australia	Developed	Developed	No	No	No
2	CAN	Canada	Developed	Developed	No	No	No
3	CYP	Cyprus	Developed	Developed	Yes	No	No
4	MLT	Malta	Developed	Developed	Yes	No	No
5	NZL	New Zealand	Developed	Developed	No	No	No
6	GBR	United Kingdom	Developed	Developed	No	No	No
7	BWA	Botswana	Developing	Africa	Yes	No	No
8	CMR	Cameroon	Developing	Africa	No	No	No
9	SWZ	Eswatini	Developing	Africa	Yes	No	No
10	GMB	Gambia	Developing	Africa	No	No	Yes
11	GHA	Ghana	Developing	Africa	No	No	No
12	KEN	Kenya	Developing	Africa	No	No	No
13	LSO	Lesotho	Developing	Africa	Yes	No	Yes
14	MWI	Malawi	Developing	Africa	No	No	Yes
15	MOZ	Mozambique	Developing	Africa	No	No	Yes
16	NAM	Namibia	Developing	Africa	Yes	No	No
17	NGA	Nigeria	Developing	Africa	No	No	No
18	RWA	Rwanda	Developing	Africa	No	No	Yes
19	SLE	Sierra Leone	Developing	Africa	No	No	Yes
20	ZAF	South Africa	Developing	Africa	No	No	No
21	TZA	Tanzania, United Republ	Developing	Africa	No	No	Yes
22	UGA	Uganda	Developing	Africa	No	No	Yes
23	ZMB	Zambia	Developing	Africa	No	No	Yes
24	BGD	Bangladesh	Developing	Asia	No	No	Yes
25	BRN	Brunei Darussalam	Developing	Asia	Yes	No	No
26	IND	India	Developing	Asia	No	No	No
27	MYS	Malaysia	Developing	Asia	No	No	No
28	PAK	Pakistan	Developing	Asia	No	No	No
29	LKA	Sri Lanka	Developing	Asia	No	No	No
30	MDV	Maldives	Developing	Asia	Yes	No	No
31	MUS	Mauritius	Developing	Africa	Yes	Yes	No
32	SYC	Seychelles	Developing	Africa	Yes	Yes	No
33	SGP	Singapore	Developing	Asia	No	Yes	No
34	ATG	Antigua and Barbuda	Developing	Caribbeans	Yes	Yes	No
35	BHS	Bahamas	Developing	Caribbeans	Yes	Yes	No
36	BRB	Barbados	Developing	Caribbeans	Yes	Yes	No
37	BLZ	Belize	Developing	Caribbeans	Yes	Yes	No
38	DMA	Dominica	Developing	Caribbeans	Yes	Yes	No
39	GRD	Grenada	Developing	Caribbeans	No	Yes	No
40	GUY	Guyana	Developing	Caribbeans	Yes	Yes	No
41	JAM	Jamaica	Developing	Caribbeans	Yes	Yes	No

Table A1. Classification of Commonwealth member countries (*Continued*)

Commonwealth Member Countries							
Sr.	ISO 3	Economy	Economic	Geographical	Small States	SIDS	LDCs
42	KNA	Saint Kitts and Nevis	Developing	Caribbeans	Yes	Yes	No
43	LCA	Saint Lucia	Developing	Caribbeans	Yes	Yes	No
44	VCT	Saint Vincent and the Gr	Developing	Caribbeans	Yes	Yes	No
45	TTO	Trinidad and Tobago	Developing	Caribbeans	Yes	Yes	No
46	FJI	Fiji	Developing	Pacific	Yes	Yes	No
47	KIR	Kiribati	Developing	Pacific	Yes	Yes	Yes
48	NRU	Nauru	Developing	Pacific	Yes	Yes	No
49	PNG	Papua New Guinea	Developing	Pacific	Yes	Yes	No
50	WSM	Samoa	Developing	Pacific	Yes	Yes	No
51	SLB	Solomon Islands	Developing	Pacific	Yes	Yes	Yes
52	TON	Tonga	Developing	Pacific	Yes	Yes	No
53	TUV	Tuvalu	Developing	Pacific	Yes	Yes	Yes
54	VUT	Vanuatu	Developing	Pacific	Yes	Yes	Yes

Table A2. Food trade by country and region

Region/Country	Total trade (US\$ M)		Agri-food exports		Agri-food imports		Agri-food net exports (exports-imports)
	Exports	Imports	Value (US\$ M)	%	Value (US\$ M)	%	
World	19,414,008	19,670,072	1,565,375	8.06	1,580,634	8.04	● (15,259)
Commonwealth	2,550,474	2,937,646	250,145	10	224,587	8	● 25,558
Developed	1,238,039	1,425,897	139,211	11	128,603	9	● 10,608
Australia	252,776	235,519	30,648	12	15,912	7	● 14,736
Canada	450,278	459,866	51,485	11	38,042	8	● 13,443
Cyprus	5,065	10,813	531	10	1,439	13	● (907)
Malta	3,012	6,323	318	11	893	14	● (575)
New Zealand	39,839	43,736	24,495	61	5,133	12	● 19,362
United Kingdom	487,069	669,640	31,735	7	67,184	10	● (35,449)
Developing	1,312,435	1,511,748	110,934	8	95,984	6	● 14,950
Africa	222,480	234,911	28,891	13	25,696	11	● 3,196
Botswana	6,573	6,169	121	2	740	12	● (619)
Cameroon	3,838	6,053	1,033	27	1,039	17	● (5)
Eswatini	1,838	1,813	504	27	364	20	● 140
Gambia	102	551	5	5	155	28	● (150)
Ghana	14,868	11,880	4,462	30	2,467	21	● 1,996
Kenya	6,050	17,377	3,513	58	2,476	14	● 1,037
Lesotho	1,175	2,184	24	2	369	17	● (345)
Malawi	1,046	2,795	937	90	187	7	● 749
Mauritius	2,372	5,669	753	32	1,214	21	● (461)
Mozambique	5,196	6,786	628	12	1,091	16	● (463)
Namibia	5,395	8,289	1,289	24	943	11	● 346
Nigeria	62,400	43,012	1,255	2	4,880	11	● (3,625)
Rwanda	1,126	2,518	151	13	390	16	● (239)
Seychelles	569	1,137	409	72	316	28	● 93
Sierra Leone	554	1,354	81	15	335	25	● (254)
South Africa	93,570	92,579	10,521	11	6,785	7	● 3,736
Uganda	3,087	6,729	1,783	58	811	12	● 972
United Republic of Tanzan	3,669	8,554	850	23	620	7	● 230
Zambia	9,052	9,462	571	6	515	5	● 56
Asia	1,062,861	1,245,850	78,416	7	65,369	5	● 13,047
Bangladesh	38,471	60,495	967	3	6,926	11	● (5,959)
Brunei Darussalam	6,574	4,164	14	0	509	12	● (496)
India	322,492	507,616	35,277	11	19,715	4	● 15,562
Malaysia	247,324	217,358	20,704	8	15,982	7	● 4,722
Maldives	339	2,961	178	53	518	17	● (340)
Pakistan	23,631	60,163	5,421	23	6,139	10	● (718)
Singapore	411,743	370,504	13,426	3	13,298	4	● 128
Sri Lanka	12,288	22,589	2,430	20	2,281	10	● 148
Caribbean	15,297	23,838	1,487	10	3,371	14	● (1,884)
Antigua and Barbuda	87	501	6	7	158	31	● (152)
Bahamas	655	3,543	109	17	421	12	● (312)

Table A2. Food trade by country and region (*Continued*)

Region/Country	Total trade (US\$ M)		Agri-food exports		Agri-food imports		Agri-food net exports (exports-imports)
	Exports	Imports	Value (US\$ M)	%	Value (US\$ M)	%	
Barbados	458	1,600	99	22	364	23	● (265)
Belize	452	958	181	40	195	20	● (14)
Dominica	20	307	8	42	37	12	● (29)
Grenada	31	456	30	96	59	13	● (29)
Guyana	1,487	1,825	417	28	279	15	● 138
Jamaica	1,879	6,126	360	19	836	14	● (476)
Saint Kitts and Nevis	54	335	6	11	38	11	● (32)
Saint Lucia	133	693	18	14	91	13	● (72)
Saint Vincent and the Gren	44	354	29	66	94	27	● (65)
Trinidad and Tobago	9,997	7,140	224	2	800	11	● (577)
Pacific	11,796	7,150	2,139	18	1,548	22	● 592
Fiji	1,041	2,720	464	45	446	16	● 18
Kiribati	13	120	13	100	31	26	● (18)
Nauru	16	118	1	7	17	14	● (15)
Papua New Guinea	10,041	2,600	1,469	15	684	26	● 785
Samoa	46	363	29	62	103	29	● (75)
Solomon Islands	569	601	115	20	134	22	● (19)
Tonga	15	269	10	67	61	23	● (51)
Tuvalu	0	36	0	61	6	15	● (5)
Vanuatu	55	323	38	68	66	20	● (28)

Source: Own calculations using total trade values from UNCTAD and food trade information from the UN Comtrade database and UNCTAD.

Table A3. Countries for which monthly data were available for January–May 2020

Africa	Asia	Caribbean	Developed
Botswana	Brunei Darussalam	Barbados	Australia
Ghana	India	Belize	Canada
Kenya	Malaysia		Cyprus
Mauritius	Pakistan		Malta
Mozambique	Singapore		New Zealand
Namibia	Sri Lanka		UK
Rwanda			
South Africa			
Zambia			

Table A4. Number of COVID-19 cases by country and region (as of 25 November 2020)

		No of COVID cases	Internal restrictions		Int. travel ban on all regions or total border closure		
			Start date	End date	Date closed	Date opened	
Developed	Australia	27,835	19-Mar		20-Mar	15-Oct	
	Canada	337,555	20-Mar		18-Mar	11-Aug	
	Cyprus	8,947	24-Mar	20-May	15-Mar	08-Jun	
				3-Nov			
	Malta	8,560					
	New Zealand	1,675	23-Mar	13-May			
				12-Aug	30-Aug	20-Mar	
	United Kingdom	1,527,495	22-Mar				
			1-Aug	5-Jul			
			1-Nov				
Africa	Botswana	9,594	02-Apr	13-Aug	19-Mar	13-Aug	
	Cameroon	23,528	18-Apr				
	Eswatini	6,233	27-Mar	17-Aug	27-Mar		
	Gambia, The	3,726	23-Mar				
	Ghana	50,941	30-Mar	18-Apr	22-Mar		
	Kenya	77,785	27-Mar	06-Jul	17-Mar	31-Jul	
	Lesotho	2,086	18-Mar	05-May	29-Mar		
	Malawi	6,009					
	Mauritius	494	19-Mar	07-Jul			
	Mozambique	15,109	17-Jun		29-May	12-Jul	
				7-Aug	28-Jul	29-Jul	4-Aug
	Namibia	13,897	27-Mar	04-May			
				2 June	22-Jun	24-Mar	25-Jul
	Nigeria	66,439	29-Mar	30-Jun			
				14-Aug	24-Aug	23-Mar	13-Aug
	Rwanda	5,726	21-Mar				
				24 June	03-May	21-Mar	
	Seychelles	166	08-Apr	03-May	04-May	31-May	
	Sierra Leone	2,406	05-Apr	07-Jun	28-Mar	21-Jul	
	South Africa	769,759	26-Mar	17-Aug	26-Mar		
Tanzania	509	12-Apr	17-May				
Uganda	18,165	30-Mar					
			12-Jun	03-Jun	22-Jun	09-Jul	
	Zambia	17,454	14-Apr	07-May	27-Mar	01-May	
Asia			19-Mar				
	Bangladesh	449,760	16-Jun	13-May			
	Brunei	148	24-Mar				
	India	9,177,840			22-Mar		
				20-Mar	25-Aug	1-Jul	17-May
	Malaysia	56,659	18-Mar				
			3-Aug	09-Jun	23-May	18-Jun	
	Maldives	12,758					

Table A4. Number of COVID-19 cases by country and region (as of 25 November 2020)
(Continued)

		No of COVID cases	Internal restrictions		Int. travel ban on all regions or total border closure	
			Start date	End date	Date closed	Date opened
	Pakistan	379,883	24-Mar	3-Jun		
			2 July	9-Aug	21-Mar	20-May
	Singapore	58,165	08-Apr	18-Jun		
	Sri Lanka	20,508	18-Mar	07-Jun	19-Mar	31-Jul
			2-Nov			
Caribbean	Antigua and Barbuda	139				
	Bahamas	7,413	24-Mar			
	Barbados	260	28-Mar	30-Jun		
	Belize	5,249	01-Apr	31-May	20-Mar	
			7-Aug	24-Aug		
	Dominica	77	01-Apr	26-Jun	01-Apr	14-Jul
	Grenada	41				
	Guyana	5,133	03-Apr	27-Aug	27-Mar	
	Jamaica	10,343	13-Mar		21-Mar	14-Jun
	Saint Kitts and Nevis	20				
	Saint Lucia	223				
	Saint Vincent and the Grenadines	84				
	Trinidad and Tobago	6,475	27-Apr	08-Jun	23-Mar	
			17-Aug			
Pacific	Fiji	35	19-Mar	21-Jun	29-Mar	
	Kiribati	–				
	Nauru	–				
	Papua New Guinea	604	24-Mar	12-May	21-Mar	24-Apr
			7-Aug	16-Aug		
	Samoa	–				
	Solomon Islands	16	10-Apr	11-Apr	28-Jul	11-Aug
	Tonga	–				
	Tuvalu	–				
	Vanuatu	1	26-Mar	10-Apr	26-Mar	
		13,193,927				

Source: Commonwealth COVID-19 Data Dashboard and Oxford COVID-19 Government Response Tracker (github.com/OxCGRT/covid-policy-tracker or bsg.ox.ac.uk/covidtracker).