



Note

Securing Food Supply and Livelihoods in Pandemic Times

Developing Countries' Experience and Thoughts for the Trade Rulebook

By Julien Grollier

Summary

This note examines how small developing countries have used trade-related and support measures to protect their food supply and agricultural livelihoods from the shock caused by the Covid-19 pandemic. From the experience of implementing these measures, lessons are drawn for the WTO's agriculture agenda, identifying priorities for negotiating updated agricultural trade rules as well as optimising the use of existing ones.





advantage of international trade for their development.



Introduction

The pandemic and its effects on agricultural markets and incomes induced concerns over food security and nutrition worldwide. The agricultural markets reacted to the pandemic through, *inter alia*, rising food prices (at their highest level since July 2011), and significant increase in food import bills which are barely covered by (or even far exceed) foreign exchange earnings from merchandise exports. For Low-Income Food-Deficit Countries (LIFDCs), the 2021 rate of growth in food import bills compared with 2020 exceeded 20 percent. Among underlying drivers have been rising input prices (e.g. imported fertilizers), transportation bottlenecks etc.

Despite the remarkable resilience of the agri-food sector, the economic downturn and increased poverty arising from the pandemic contributed to the largest single year increase in global hunger in decades (768 million globally in 2020).² In fact, global hunger in 2030 is projected to be above the level it would have been had the pandemic not occurred.

Around the world, governments took emergency response measures to contain the spread of the pandemic and protect their citizen's health, but also to secure their access to food and protect their jobs (which in least developed and low-income countries remain mostly in the agriculture sector).³ Such measures included various forms of support to businesses and consumers, as well as trade-related measures to mitigate or prevent disruptions in food and other supply chains.

Beyond the pandemic crisis, the most vulnerable communities could be severely affected by other future shocks, particularly in developing countries and LDCs which are mainly net food importers and are faced with a complex global agricultural trade regime including rules governing support to agriculture. The experience of these countries during the Covid pandemic can provide useful lessons for them to more efficiently deal with such future shocks.

About this note

This note examines how small developing countries have used trade-related and support measures to protect their food supply and agricultural livelihoods from the shock caused by the Covid-19 pandemic. Lessons are also drawn for the WTO's agriculture agenda.

The analysis is based on a dataset covering over 1600 measures taken by governments around the world in response to Covid-19, combining: (i) a World Bank list of SME support measures in response to Covid-19;⁴ and (ii) UNCTAD's COVID-19 Non-Tariff Measures (NTMs) database, last updated in August 2021.⁵ The measures shortlisted in the dataset focus on those bearing relevance to securing food availability, affordability and livelihoods (excluding those exclusively targeting supply of medical products).

The main objectives pursued by the shortlisted measures can be broadly categorised into: (i) measures aimed at securing food supply for consumers, and its affordability for them; and (ii) measures aimed at protecting businesses and their workers, including those involved in the food value chain. The following sections will analyse what support and trade-related interventions were taken by governments in pursuance of these two objectives, particularly focusing on case examples from small developing countries.⁶

¹ FAO, IFAD, UNICEF, WFP and WHO. 2021. The State of Food Security and Nutrition in the World 2021. Transforming food systems for food security, improved nutrition and affordable healthy diets for all. Rome, FAO ² Ibid.

³ In 2019, 59% in low-income countries and 55% in LDCs. Source: ILO (2021), ILOSTAT database.

World Bank (2020). Map of SME-Support Measures in Response to COVID-19. URL: https://bit.ly/37B27H5
 UNCTAD (2021). COVID-19 and NTMs. URL: https://bit.ly/3wgWYyf

⁶ This term refers to countries falling into the following World Bank income groups: Least Developed (LDC), Low-Income (LIC), and Lower-Middle Income Countries (LMIC).



Securing Consumers' Access to Food

With the outbreak of the Covid-19 pandemic, large numbers of people became at risk of food insecurity as a result of reduced economic activity, containment measures and supply chain disruptions. For instance, a high incidence of sickness among farm workers could have significantly impacted agricultural production and food availability, particularly in developing countries where the sector is labour-intensive. Similarly, reduced activity could lead to loss of jobs and income for both business owners and employees, creating pressure affordability. Therefore, many governments put high priority on securing food availability and affordability for consumers as part of their Covid-19 immediate response measures.

As shown in Figure 1 below, the bulk of governments' efforts to secure consumers' food consumption during the pandemic consisted in ensuring food affordability through various forms of support measures (e.g. wage subsidies) to secure consumers' jobs and incomes. The second type of measures targeted food availability by securing food supply chains, mainly through export restrictions (e.g. bans, quotas) and import relaxation measures (e.g. lower authorization and licensing requirements, tax exemptions). These aimed to prevent shortages of essential staples, as well as facilitate access to agricultural inputs (e.g. pesticides, veterinary medicines). Finally, governments also strived to reduce the risk of potential disease carriers entering the domestic market, by imposing import restrictions and stricter SPS regulations on certain products (e.g. animals). UNCTAD estimated approximately 43% of all trade restrictive NTMs had been terminated as of August 2021.

Figure 1: Tree Map of Main Measures Taken by Governments to Secure Food Consumption during Covid-19 (all countries), as of August 2021



Source: Author's analysis, based on lists of measures compiled from: UNCTAD (Non-Tariff and Tariff measures) at https://bit.ly/3wgWYyf; and (ii) World Bank (SME support measures), at https://bit.ly/37B27H5.



Securing Food Supply Chains

Food supply chains experienced disruptions caused by a variety of bottleneck, including increased production and distribution costs; more difficult access to agricultural inputs; reduced workforce availability: logistical and bottlenecks transportation etc. Many governments have taken steps in support of food producers and processors (discussed in the second part of this note), as well as measures to mitigate supply chain disruptions such as facilitating food logistics and transportation.

Logistics and transportation

Border closures and additional procedures have led to congestion and delays which affected the transit of perishable foods. While sea freight bulk shipments (e.g. cereals) experienced relatively limited disruptions during the pandemic, perishable food products usually transported by air (e.g. fruits, vegetables, seafood) have been severely affected with skyrocketing air freight rates. 8

Among other logistics and transportation measures taken by governments for the food sector, priority lanes were created for transporting agriculture products; exemptions from quarantine were adopted for truck drivers; and digital tools were leveraged to facilitate border procedures and reduce delays (e.g. by accepting electronic copies of SPS certificates).9

• Food Export restrictions

Export restrictions represented 46% of government measures geared towards securing food supply chains. These mainly took the form of export bans, export quotas, export licensing and

registration requirements, as well as measures on re-export.

Among 30 such measures identified in the dataset, the majority (16) were taken by small developing countries including Cambodia, Egypt, El Salvador, Honduras, India, Jordan, Jordan, Kyrgyzstan, Kyrgyzstan, Myanmar, Pakistan, Philippines, Sudan, Syria, Tajikistan, Vietnam.

Export bans and quotas applied by these countries focused on basic foodstuffs such as cereals and grains (e.g. wheat, rice, barley, maize, sorghum), vegetables (e.g. beans, peas, lentils) and animal products (e.g. fish, chicken eggs, live animals like bovines, sheep, goat and poultry). For instance, Cambodia banned exports of rice and fish to ensure local food security during the coronavirus crisis; while Pakistan imposed a 3-week export ban on all edible items to ensure adequate food supply.¹⁰ The only identified measure on re-export was applied by Jordan, which suspended export and re-export licenses for food products.

Among more advanced upper-middle and highincome developing countries, Argentina and Kuwait chose to tighten licensing requirements to export food products.

Facilitating Food Imports

Import-related measures represented 52% of measures applied to secure food supply chains, mainly in the form of tax and tariff reductions or exemptions, as well as relaxed rules governing Sanitary and Phyto-sanitary (SPS) rules and other technical requirements (e.g. certification) on basic foodstuffs. The majority of the 34 such measures identified in our dataset were taken by small developing countries.¹¹

WTO (2020). Report on G20 Trade Measures. URL: https://www.wto.org/english/news_e/news20_e/report_trdev_ju n20_e.pdf

⁸ FAO and ECLAC. 2020. Food systems and COVID-19 in Latin America and the Caribbean: Trade performance during the crisis. Bulletin 12. Santiago, FAO. https://doi.org/10.4060/cb0583en

⁹ WTO (2020). Report on G20 Trade Measures. URL: https://www.wto.org/english/news_e/news20_e/report_trdev_ju n20_e.pdf

¹⁰ UNCTAD (2021). COVID-19 and NTMs. URL: https://bit.ly/3wgWYyf

¹¹ Cambodia, Egypt, El Salvador, El Salvador, Honduras, India, Indonesia, Indonesia, Indonesia, Indonesia, Jordan, Jordan, Kenya, Kyrgyzstan, Kyrgyzstan, Mali, Mauritania, Myanmar, Pakistan, Philippines, Sudan, Syria, Tajikistan, Vietnam,



For instance, fiscal incentives (tax and tariff exemptions/reductions) on such imports were adopted by countries like El Salvador, Mali, Mauritania and Kenya; e.g. with Mauritania reducing customs duties on rice and milk, and Kenya reducing VAT from 16% to 14% on all goods. Among countries easing technical requirements on food imports, Indonesia temporarily lifted certification requirements on onions and garlic; and authorization requirements on white crystal sugar.

Eliminating Potential Disease Carriers

Striving to reduce the risk of potential disease carriers entering their markets, a number of governments applied import restrictions and stricter SPS regulations on certain animal- and plant-based products as well as used textiles. Out of 24 such measures identified in our dataset, the majority were taken by high- and upper-middle income developing countries such as China, Costa Rica, Hong Kong, Korea, Mauritius and South Africa.

Nevertheless, a number of small developing countries also implemented such measures including Bhutan, Cambodia, Egypt, Jordan, Kenya, Uganda, Vietnam and Zimbabwe among others. For instance, Bhutan banned imports of *inter alia* fruit, vegetables and meat to curb the spread of coronavirus in the country; while Egypt temporarily suspended imports of garlic, carrots and green ginger from China.¹²

Financial Support and Relief Measures Directed to Consumers

As noted from Figure 1 above, 75% of measures from our dataset taken to secure consumers' food consumption consisted in various types of support measures to jobs and incomes. These

mainly took the form of wage subsidies, support for informal or self-employed workers; unemployment benefits; caps on layoffs and frontloading of retirement funds.

While developed countries were the category most prominently resorting to such measures (123 out of 259) thanks to their financial capacities and established welfare systems, some small developing countries also adopted similar support measures.¹³

In Vietnam for instance, the Ministry of Labour, Invalids and Social Affairs issued measures whereby employees who have stopped working (e.g. are under quarantine) can negotiate their salaries for no less than the regional-based minimum wage stipulated by the government.

In addition, a number of governments have provided additional food assistance to vulnerable populations, and released timely information about the availability and safety of food stocks in a bid to prevent panic buying and hoarding.¹⁴

Supporting Food Producers, Processors and other Businesses

As shown in Figure 2 below, governments' efforts to support businesses during the Covid-19 crisis consisted in providing them with financial support and facilitation in the form of debt finance, business advice, reduction of business costs etc. Some measures were also specifically directed at food producers and agro-processors. These took the form of government support (e.g. subsidies for purchases of agricultural inputs) as well as traderelated measures which either restricted (e.g. import restrictions on some food products) or facilitated trade flows (e.g. waived export duties, relaxed import finance regulations).

Bolivia, Chad, El Salvador, El Salvador, Mauritania, Mongolia, Morocco, Uzbekistan

Mongolia, Morocco, Nepal, Philippines, Tunisia, Vietnam, Zimbabwe

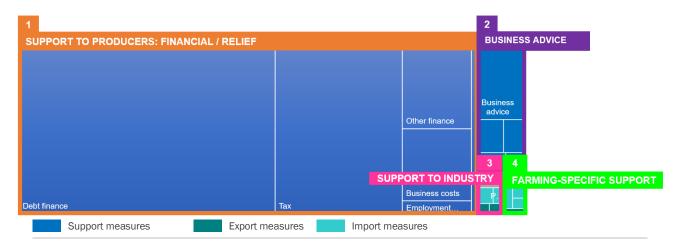
¹² UNCTAD (2021). COVID-19 and NTMs. URL: https://bit.ly/3wgWYyf

¹³ Armenia, Bangladesh, Bolivia, Cabo Verde, Cambodia, Egypt, El Salvador, Georgia, India, Indonesia, Jordan,

¹⁴ WTO (2020). Report on G20 Trade Measures. URL: https://www.wto.org/english/news_e/news20_e/report_trdev_ju n20_e.pdf



Figure 2: Tree Map of Main Measures Taken by Governments to Support Producers during Covid-19 (all countries), as of August 2021



Source: Author's analysis, based on lists of measures compiled from: UNCTAD (Non-Tariff and Tariff measures) at https://bit.ly/3wgWYyf; and (ii) World Bank (SME support measures), at https://bit.ly/37B27H5.

Support to Farming and Agroprocessing Livelihoods

Producers and processors of food and agricultural products faced supply chain disruptions during the pandemic, which risked hampering not only their ability to respond to consumers' food demand but also their own livelihoods.

In small developing countries, agriculture is largely composed of smallholder farmers and micro-, small and medium-sized enterprises (MSMEs) which are vulnerable to supply chain disruptions, particularly given their reliance on a limited number of suppliers. In some cases, disruptions downstream from farms also caused surpluses to accumulate, straining storage and processing facilities and increasing food losses. This labour-intensive sector, which often relies on seasonal workers, was also negatively affected by restrictions on the movement of people and workers' sickness.

To support these agricultural livelihoods,

governments took a number of support, facilitation and trade-related measures specifically targeted at them.

Support measures

Most notably, many countries supported and facilitated producers' access to agricultural inputs and raw materials through input subsidies and other assistance programmes for smallholder farmers. For instance, Bangladesh launched a BDT 90 billion subsidy program for fertilizer purchases by farmers. There, BDT 1 billion was also allocated to the Ministry of Agriculture for mechanization of rice paddy processing. ¹⁶ Similarly, Senegal increased by 50% its funds allocated to the distribution of agricultural inputs and equipment to smallholder farmers. ¹⁷

Some countries have also taken steps to facilitate access to finance for agricultural producers, particularly as the reach of commercial banks to small farmers tend to be limited in some small developing countries. For instance, Bangladesh launched a BDT 50 billion loan program for the

¹⁵ WTO (2020). Report on G20 Trade Measures. URL: https://www.wto.org/english/news_e/news20_e/report_trdev_jun20_e.pdf

¹⁶ World Bank (2020). Map of SME-Support Measures in Response to COVID-19. URL: https://bit.ly/37B27H5

¹⁷ FAO (2021). Agricultural Trade & Policy Responses During The First Wave of the Covid-19 Pandemic in 2020. URL: https://www.fao.org/3/cb4553en/cb4553en.pdf



agricultural sector, with 5% interest rate.

Financial relief measures specifically directed at farmers were also taken in some countries, e.g. through the postponement of rural debt payments. Also, the government of Montenegro contributed to agricultural workers' insurance costs. ¹⁸

Other countries provide interesting examples of facilitation support leveraging digitalisation. In Turkey for instance, the government established an online marketplace to facilitate direct transactions between farmers, agro-processors and buyers. In India, the government introduced significant agricultural marketing reforms aimed at facilitating direct links between farmers and buyers, as well as inter-state trade, including through digital platforms.¹⁹

Trade-related measures

Trade-restricting measures geared towards supporting farming and agro-processing livelihoods included some countries increasing import tariffs on essential food products (Iraq, Seychelles), or imposing temporary import bans. This was the case of Nigeria, which banned imports of maize "to increase the local production, stimulate a rapid economic recovery, safeguard rural livelihoods and increase jobs."²⁰

On the other hand, many countries adopted facilitative trade measures in support of their agro-industries, in the form of waived export duties on some products (e.g. Argentina on hides and skins), or by easing import finance regulations. For instance, Bangladesh extended the usance period for imports of: (i) life-saving products; (ii) agricultural implements and chemical fertilizers; and (iii) inputs imported by

industries. The bill of entry submission period was extended from 120 days to 180 days. ²¹ Similarly, Georgia provided a subsidy to importers selling wheat flour at a specified price. ²²

General Financial and Facilitation Support to Businesses

More generally, financial support (e.g. debt finance, employment support) was extensively provided by governments to producers and businesses, including 42 small developing countries which accounted for 360 out of the 909 such measures identified in our dataset. Such measures were often complemented by business facilitation measures (e.g. business advice, reduction of fees and compliance requirements). This was particularly the case in developed countries (44 out of 92 measures identified), but also in some small developing countries such as Cambodia. Ghana. Mozambique. Tunisia, Vietnam and Zimbabwe.

Debt finance measures were particularly leveraged (57% of identified general business support measures), in the form of incentives for banks to increase lending to SMEs; credit guarantees; reduced interest rates on existing lending; lowered collateral requirements etc. Small developing countries which implemented such measures included Bangladesh, Cambodia, Egypt, Ethiopia, Côte d'Ivoire, Jordan, Kenya, Lao PDR, Nepal and Pakistan among others.²³ In Haiti for instance, the central bank eased conditions in the financial system by reducing the refinance reference rates. reducing requirements on domestic currency deposits, and suspending fees on interbank transactions.

Many countries also relaxed the fiscal pressure on

 ²² FAO (2021). Agricultural Trade & Policy Responses During The First Wave of the Covid-19 Pandemic in 2020. URL: https://www.fao.org/3/cb4553en/cb4553en.pdf
 ²³ Also Angola, Armenia, Bolivia, Cabo Verde, Chad, El Salvador, Georgia, Ghana, Guatemala, Guinea, Haiti, Honduras, India, Indonesia, Madagascar, Mongolia, Morocco, Mozambique, Myanmar, Nicaragua, Nigeria, Papua New Guinea, Philippines, Rwanda, Senegal, Sri Lanka, Tunisia, Ukraine, Uzbekistan, Vietnam

 $^{^{\}rm 18}$ IISD (2021). How Could Trade Policy Better Address Food System Shocks? Available at:

https://www.iisd.org/system/files/2021-04/trade-policy-address-food-system-shocks-en.pdf

¹⁹ FAO (2021). Agricultural Trade & Policy Responses During The First Wave of the Covid-19 Pandemic in 2020. URL: https://www.fao.org/3/cb4553en/cb4553en.pdf

²⁰ UNCTAD (2021). COVID-19 and NTMs. URL: https://bit.ly/3wgWYyf

²¹ Ibid.



businesses by reducing corporate tax, expediting tax reimbursements, waiving or deferring tax payments, simplifying tax procedures etc. This was the case in Bolivia, Cambodia, Chad, Egypt, El Salvador, Georgia, Ghana, Guatemala and Guinea among other small developing countries.²⁴

Also, measures aimed at reducing business costs and administrative burdens (e.g. waived administrative fees, lowered cost of utilities, tax concession for suppliers/landlords etc.) represented 13% of all measures taken in support of businesses. For instance, Morocco cancelled late payment penalties for companies which have concluded public contracts and been affected by the coronavirus crisis for a maximum duration of 6 months.²⁵

Finally, facilitation measures were taken to improve the business climate, such as changes to bankruptcy, insolvency and other regulations. For instance, Zimbabwe amended its Exchange Control Regulations to allow any person to pay for goods and services chargeable in Zimbabwe dollars, in foreign currency using his or her free funds at the ruling rate on the date of payment. The payment may be done electronically through a foreign currency account or in cash or through any electronic payment platform.²⁶

Spillover Effects of Measures: Thoughts for the Trade Rulebook

As reviewed above, governments around the world have strived to secure food supply to their citizens in the face of the pandemic, through government support and trade-related measures (mainly trade facilitating, and at times trade restricting). Besides their intended effect on the domestic market, some of these measures may also have an impact on consumers or producers elsewhere. The role of the WTO is precisely to

provide a fair, rules-based system for trade to flow, setting boundaries for the use of trade policy instruments which may adversely impact trade and economies of other countries. WTO rules nevertheless allow the use of some traderestrictive measures, e.g. to prevent critical shortages of foodstuffs, in certain circumstances.

For over two decades, updating the trade rulebook on agriculture has been among the top priorities of WTO members, particularly developing ones which consider that current rules unfairly disadvantage their producers. The talks have however proved difficult for many years, and profound divergences remain. Ministers at the 12th WTO ministerial conference scheduled this June are expected to provide guidance on the way forward.

One could hope that the lessons learnt from tackling the risks posed by Covid-19 on food supply chains could inform the discussions on several topics. As remarked by the then-chair of agricultural negotiations during the first year of the crisis: "The COVID-19 crisis has brought to the fore some particular needs and imbalances. This is particularly so in relation to food security. Therefore, how the COVID-19 experience, as dramatic as it is, could provide new ways to look at some negotiating topics and might assist in building convergence should be explored."²⁷

As of 2022, the main topics on the agricultural negotiations table remain seeking agreement among members on: (i) how to discipline domestic subsidies; (ii) enable the World Food Programme to deliver food to those in need in times of crisis; (iii) a work programme on export restrictions; (iv) exploring the possibility of extending the interim agreement to shield public stockholding programmes for food security in developing countries; (v) assist developing countries and LDCs to temporarily increase tariffs beyond their bound duties through a special safeguard

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²⁴ Also Honduras, India, Indonesia, Côte d'Ivoire, Mali, Mongolia, Morocco, Mozambique, Myanmar, Papua New Guinea, Senegal, Tunisia, Vietnam, Zimbabwe.

²⁵ World Bank (2020). Map of SME-Support Measures in Response to COVID-19. URL: https://bit.ly/37B27H5
²⁶ Ibid.

²⁷ JOB/AG/187



mechanism; and (vi) explore issues of tariff simplification, non-tariff barriers, preference erosion, special products, and tariff escalation for agricultural products.²⁸

Domestic Support

During the crisis, and as reviewed above, many members put in place domestic support measures in order to stabilise markets or mitigate Covid-19 effects on farmers and consumers. Most of the adopted measures had limited tradedistorting effects (e.g. consumer subsidies), and either fell within the "Green Box" category or were outside the scope of WTO rules.

Nevertheless, the number of agricultural domestic support measures linked to prices and production did increase during the pandemic. In addition, the inability of many small developing countries to match some of these packages financially is a reminder of the importance of addressing existing imbalances in agricultural trade rules, including by further disciplining domestic support while preserving policy space for development.²⁹

Export restrictions

Export restrictions were among the measures adopted by governments during the crisis in a bid to secure access to food. Yet, such restrictions have the potential to endanger food security in other countries (particularly if imposed by a major food exporter) by limiting food availability and increasing prices for consumers abroad. Fortunately, most export restrictions imposed at the start of the crisis were short lived and are no longer in place.

Nevertheless, the initial trend revealed an ambiguity in the WTO's agricultural rulebook which Deputy Director-General Alan Wolff said was a "wake-up call", urging WTO members to

"bullet-proof" the WTO Agreement on Agriculture so as to avoid unpredictability of global food supply in future crises.³⁰ In negotiating new disciplines in this area, members should consider exempting LDCs and Low-Income Food-Importing Countries (LIFICs) from such rules, given their minimal impact on global markets.

Among possible decisions being explored in this area, members have been considering a proposal to exempt food purchases by the World Food Programme (WFP) from any export restriction. While multilateral consensus on this matter still remains elusive, the proposal is being supported by about two-thirds of the WTO's membership and 79 members have pledged in 2021 not to impose such restrictions on WFP purchases anyway.

Public Stockholding

The COVID-19 crisis highlighted the role of public food stockholding programmes in addressing food security concerns during emergency situations. As reported by the chair in 2020, many members called for an accelerated pace of work to find a permanent solution, which should cover both existing and future programmes.³¹

Conclusion

The experience of the pandemic has highlighted the importance of securing food supply chains, and the critical role that trade plays in this regard. While Covid-19 severely tested the multilateral trading system and exposed some needed adjustments, food supply chains showed remarkable resilience. It is also reassuring that trade-facilitative measures adopted by members on agriculture-related products outnumbered trade restrictive ones in this area.

Nevertheless, the crisis also made clear that small developing countries remain extremely vulnerable to shocks, and will need to build

²⁸ Maonera, F. (2022). Multilateralism at the COVID-19 Pandemic Crossroad: the 12th WTO Ministerial Conference in Focus. Geneva: CUTS International, Geneva. URL: https://bit.ly/3CwC0MP

²⁹ JOB/AG/187

³⁰ WTO news. 10/02/2020. Available at :

https://www.wto.org/english/news_e/news20_e/ddgaw_02oct20 e.htm

³¹ JOB/AG/187



greater preparedness and resilience.³² Covid-19 is unlikely to be the last systemic crisis to stresstest these countries' food supply chains, particularly in light of the worsening effects of climate change. It is high time for governments to

take a forward-looking approach to policy making, ensuring global trade rules and national trade policies promote greater resilience to future shocks.



CUTS International, Geneva

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³² Maonera, F. (2022). Multilateralism at the COVID-19 Pandemic Crossroad: the 12th WTO Ministerial Conference