



## Regional Note

# The Impact of COVID-19 on Agricultural Trade and Employment of Selected South and Southeast Asian Countries

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### Summary

This note summarises the impact of COVID-19 on the agricultural sectors of seven South and Southeast Asian countries. It analyses the impact of COVID-19 on the trade of agri-food products through trade volumes and policies and identifies challenges and opportunities for agricultural trade brought by the pandemic. The note also analyses the potential impact of COVID-19 on agricultural employment, particularly for Micro, Small, and Medium Enterprises (MSME's). Finally, the note provides an overview of opportunities for delegates to the WTO to take some key issues forward in relevant WTO discussions/negotiations on agriculture to facilitate the development of the agricultural sectors of respective countries in the context of COVID-19.

## Introduction

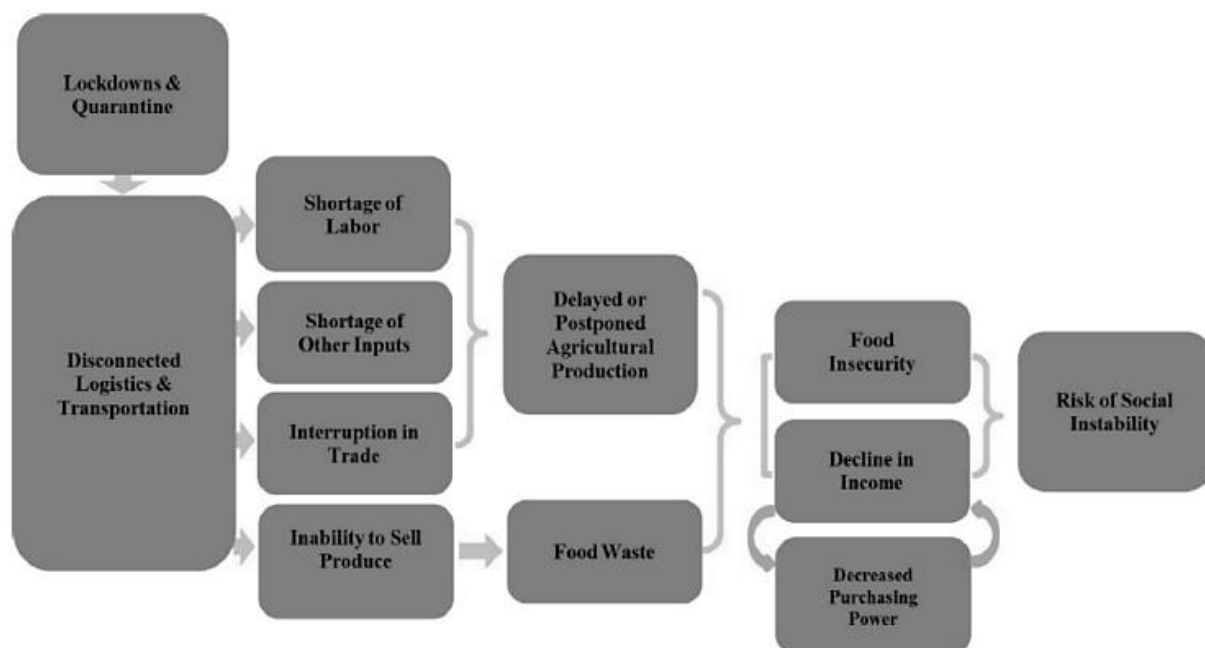
The COVID-19 pandemic has decimated the global economy, leading to unprecedented declines in global trade and employment<sup>1</sup>. While the brunt of this impact was borne by the manufacturing and services sectors, the agricultural sector was relatively resilient given its insulation from the effect of various lockdown and containment measures. The agri-food supply chain is classified as an essential sector by all South and South-East Asian Countries, and thus was/is exempt from most economically damaging policy responses. This resilience also extends to the trade in agricultural commodities, with global agri-food trade increasing in 2020<sup>2</sup> due to an inelasticity of global demand for agri-food products, as well as relatively minimal supply disruptions given the sector's policy insulation.

The agri-food sector employs an average of 30.5% of workers in Asia and is a major source of employment for women<sup>3</sup>. Employment in the sector has also been resilient, with the sector expected to absorb displaced workers from the industrial and service sector. However, the bulk of

this employment is informal and/or subsistence agriculture, and thus often falls outside the scope of formal labour market institutions and statistical reports<sup>4</sup>. The creation and release of statistics themselves have been affected by COVID-19, with over 50% of Asian countries unable to conduct annual agricultural surveys in 2020<sup>5</sup>. While this makes measuring the impact of Covid-19 on agricultural employment difficult to discern with certainty, this note will supplant the lack of employment data with anecdotal survey evidence to provide an impression of the employment challenges businesses and individuals have faced.

While the macro impact of the pandemic on the agri-food sector is slight, facets of both agri-food trade and employment have been indirectly affected in several ways. For example, the trade of perishables in 2020 declined significantly due to the grounding of commercial aviation<sup>6</sup>, while employment in the sector has been impacted by restrictions on movement and transport which prevented the movement of seasonal workers, reduced access to markets, and undermined the availability of agricultural inputs<sup>7</sup> (See figure 1).

**Figure 1: The impact of COVID-19 on agri-food systems in the Asia-Pacific Region**



Source: <http://www.un-csam.org/publications/csam-policy-brief-issue-no2-november-2020-impact-covid-19-agriculture-asia-pacific>

## The Effect of COVID-19 on Agri-food Trade and Employment in South and South-East Asian Countries

### Bangladesh

The agricultural sector is an important part of the Bangladeshi economy, contributing 13.3% to its GDP. Bangladesh was one of few countries which grew in 2020, with GDP growing by 5.2% while the agricultural sector grew by 3.1%. However, this was after a 0.8% decline in the agricultural growth rate in 2019, though growth is expected to rebound in 2021 to 3.5% on the back of increased government agricultural subsidies<sup>8</sup>. Overall, the disruptive effect of COVID-19 is expected to have cost the sector over \$625 million in 2020<sup>9</sup>.

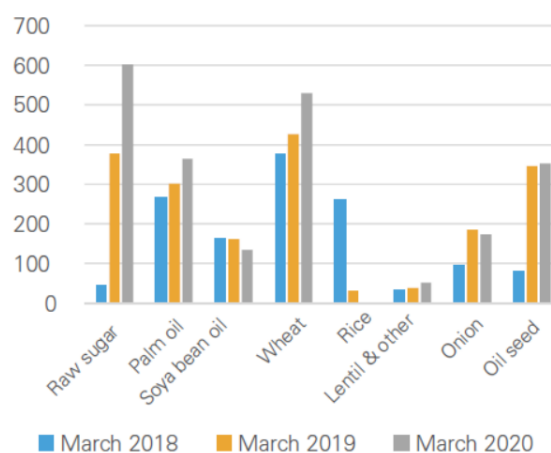
Agri-food exports were worth \$713.5 million in 2020, contributing 1.7% of total exports but declining in value by 5.36% since 2019. The primary exported agricultural goods were shrimp (47% of agri-food exports), vegetables (15%), and dry foods such as cereals (8.4%)<sup>10</sup>.

Survey data indicates that exports were 3% of 2019 levels for some fruit and vegetable firms due to lack of space on cargo planes. Upon the resumption of commercial flights, firms were still being charged 3x as much as previously<sup>11</sup>. Additionally, the potato industry reported a 35-40% drop in exports in the first half of 2020 due to a 30% increase in trucking fare<sup>12</sup>. These logistical challenges point to the disruptive effects of lockdown measures on trade, common to all countries in this note.

Agricultural imports were worth \$3.2 billion in both 2020 and 2019. Agri-food imports in 2020 primarily consisted of palm oil (27%) and sugar (20.6%), each having grown by 21% and 14% relative to 2019, respectively. Bangladesh had a negative agri-food trade balance of \$2.5 billion, rendering food security import dependant<sup>13</sup>. This is reflected by the increased import of essential

commodities in early 2020 to allay food insecurity fears, as shown in figure 2.

**Figure 2: Monthly Imports of Staple Foods**



Source: <http://www.fao.org/3/cb1018en/cb1018en.pdf>.

At the time of writing Bangladesh has not implemented any agri-food import or export restrictions in response to COVID-19<sup>14</sup>. However, the Bangladeshi government has provided trade-related fiscal support: a stimulus package was released in September 2020 which provided \$215 million for export incentives, while advance import taxes for animal feed and other agricultural inputs were waived in the interests of food security<sup>15</sup>.

Nearly 50% of Bangladeshi workers are employed in the agricultural sector<sup>16</sup>, of which 60% are women<sup>17</sup>. 87% of rural households depend on agriculture for income<sup>18</sup>, with these households reporting a 20-30% reduction of income from COVID-19<sup>19</sup>. This reduction was due to both demand and supply constraints: 93% of farmers<sup>20</sup> sold products to local markets which were closed by the pandemic, forcing them to sell perishables at 25-50% of production cost<sup>21</sup>. This lack of market access was compounded by a drop in demand due to the closure of restaurants and hotels. In addition, economy-wide reductions in income meant consumers were spending less on food, further impacting income<sup>22</sup>. By May 2020 50% of broiler farms were out of business, while only 10% of rice mills were in operation due to a shortage of seasonal labour<sup>23</sup>. Labour scarcity also affected 90% of rice farmers, with millions of

daily wage labourers confined to urban areas during lockdown periods. This labour shortfall caused the wage labour rate to increase by 20%, further increasing pressure on businesses in the sector<sup>24</sup>. The loss of income combined with rising costs forced 87% of farmers to rely on savings or to borrow from friends<sup>25</sup>, as only 20% of farmers had access to formal banking channels<sup>26</sup>.

To assist farmers the Government of Bangladesh issued \$3.6 billion in low interest loans to MSME's in the agricultural sector<sup>27</sup>, spent \$12 million<sup>28</sup> on the procurement of 2.15 million tons of rice to stabilize prices<sup>29</sup>, and provided \$4.4 million in various subsidies for 154 000 marginal and landless farmers<sup>30</sup>. This was followed by the provision of \$1 billion in fertilizer subsidies at the end of 2020<sup>31</sup>. To deal with labour scarcity the Ministry of Agriculture provided free combine harvesters and reapers for rice harvests, as well as facilitated the transport of labourers from urban areas<sup>32</sup>.

In addition, to help rural farmers overcome local market closures and access larger markets, the Food and Agricultural Organisation (FAO) has created the "Missing Middle Initiative", which consists of 57 virtual call centres in 8 districts. Farmers only require a cellular device to participate, through which they are connected to suppliers of inputs and wholesalers. Purchased goods are collected and transported via rickshaw, and payments are made through mobile banking. The initiative has benefitted 30 000 agricultural MSME's, 46% of which are owned by women<sup>33</sup>.

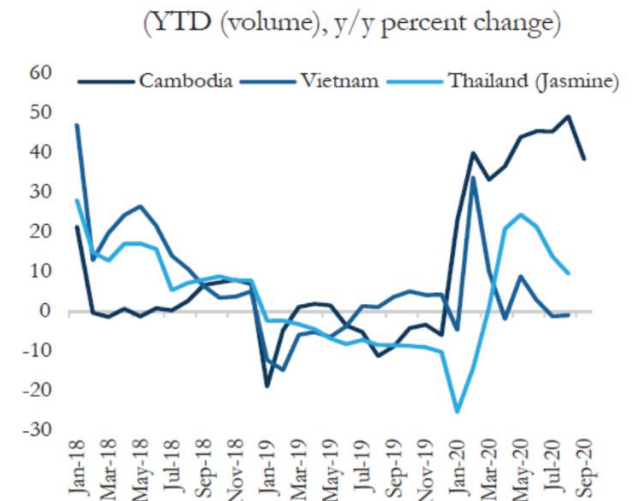
## Cambodia

The COVID-19 pandemic drove Cambodia into a recession in 2020 as its GDP shrank by 3.1%, though the agricultural sector (which constitutes 22.1% of GDP) grew by 0.5% due to positive environmental factors. It is expected to grow by 1.3% in 2021 due to the adoption of a free trade agreement (FTA) with China<sup>34</sup>.

Cambodian agri-food exports constitute 3.6% of total exports and were worth \$635 million in

2020. Most of this value came from rice, which was worth \$460.3 million and 72.4% of all agri-food exports<sup>35</sup>. Rice is one of Cambodia's most competitive exports, growing 11% compared to 2019 and at a faster rate than those of regional competitors (See figure 3)<sup>36</sup>.

**Figure 3: Regional Comparison of Milled Rice Exports**



Source:

<https://documents.worldbank.org/en/publication/documents-reports/documentdetail/986491608013945613/cambodia-economic-update-restrained-recovery-special-focus-adapting-to-covid-19-in-an-uncertain-world>

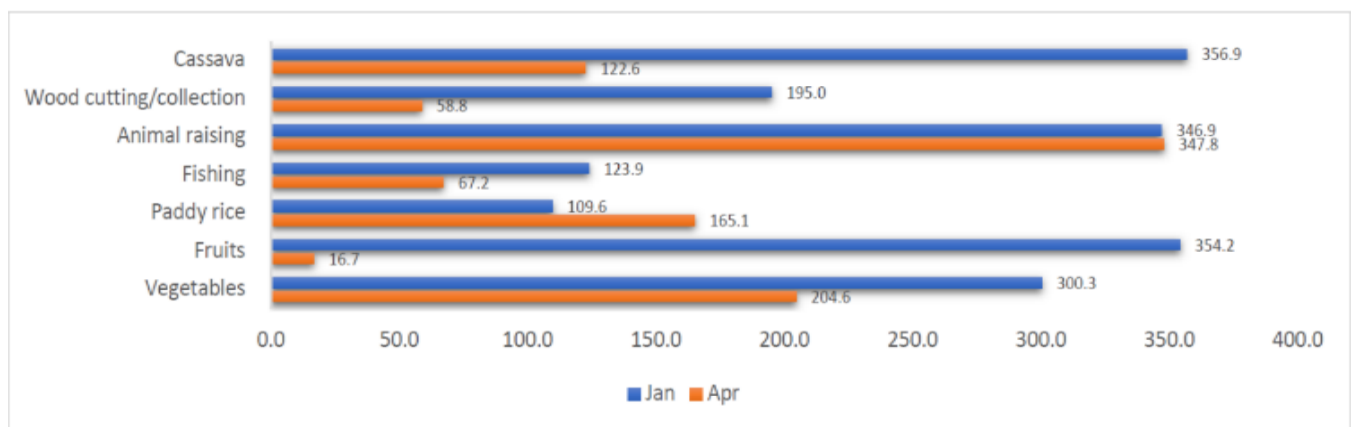
The rice industry maintained strong growth despite the imposition of a temporary rice and fish export ban in April 2020 to allay food security concerns<sup>37</sup>. However preliminary data in 2021 shows that rice exports have dropped by 33% in the first half of the year due to increasing container costs, with the cost of shipping rice from Cambodia having increased 500% in the last five years. This is severely hampering trade with overseas markets, such as the EU<sup>38</sup>.

The other noteworthy export product is vegetables, which despite being the third largest agri-food export only constitutes 4.4% of its total value. However, the export of vegetables expanded by 212% from 2019, with growth likely to continue given recent investments in developing the vegetable production chain as a new Cambodian export industry<sup>39</sup>.

Agri-food imports were worth \$1.4 billion in 2020 and primarily consisted of processed foods and tobacco, while animal feed was the third primary import worth \$123 million<sup>40</sup>. Although Cambodia ran a \$784 million agri-food trade deficit in 2020, the Government of Cambodia has identified several opportunities to increase agri-food exports. The agricultural sector has explicitly been identified as a key way out of the pandemic, with the government facilitation of foreign direct investment (FDI) in the sector more than doubling from 2019<sup>41</sup>. This prompted the implementation of the New National Cassava Policy 2020-2025, which identifies cassava as a key export cash crop for the future. The development of the cassava industry is projected to contribute 3-4% of GDP by 2025, employ 90 000 rural MSME's, and reach \$728 million in exports<sup>42</sup>.

Last, Cambodia signed its first bilateral FTA with China in October 2020. This is likely to develop Cambodia's rice production chain through trade-facilitated technology transfer, as well as deepen access to the Chinese agri-food market which already is the largest importer of rice from Cambodia (35.5%)<sup>43</sup>. Through this FTA Cambodia is preparing to increase rice exports to China by 500 000 tons in 2021<sup>44</sup>, which offers an opportunity for the rice industry to partially offset the impact of growing container shipping costs. The agriculture sector employs 38.2% of Cambodia's labour force, of which 52% are women<sup>45</sup>. The sector was negatively impacted by the pandemic as incomes declined by an average of 30% in Q1 2020, as lockdown measures prevented farmers from selling crops at markets<sup>46</sup>. This was especially problematic for producers of perishables such as fruit and vegetables (see figure 4 below).

**Figure 4: Change in Farm Income by Product (USD), January to April 2020**



Source: <https://www.futureforum.asia/app/download/15567344/The+Effect+of+Covid-19+on+Farming.+v4.pdf>

As many as 99.8% of firms in Cambodia are MSME's<sup>47</sup>, with 60.1% owned by women<sup>48</sup>. Most agri-food MSME's lacked access to requisite capital needed to sustain themselves due to the loss of income<sup>49</sup>, with most having to sell livestock or land to survive. 30% of farmers turned to microfinance loans, which often have excessively high interest rates<sup>50</sup>. It is worth noting that Cambodia has the highest microfinance debt-per-capita in the world at more than double its annual

GDP, with more than 75% of borrowers being women<sup>51</sup>.

In response to these credit-related problems, Government of Cambodia allowed farmers to suspend payments to micro-finance institutions<sup>52</sup>, and established a new public bank to offer concessionary loans to MSME's<sup>53</sup>. It also launched the Business Recovery Guarantee Scheme in 2020, which provided \$80 million in credit guarantees for agricultural MSME's<sup>54</sup>.

## Lao PDR

The agricultural sector accounts for 15.5% of Lao's GDP which contracted by 0.5% in 2020. The sector was the sole source of growth in the economy at 2.1%, which was double the 2019 growth rate. This impressive growth is attributed to fewer agricultural imports during protracted lockdowns, which reduced competition for the domestic agricultural sector<sup>55</sup>. As a result, agriculture is expected to drive growth in the next few years, as the manufacturing and services sectors gradually recover to pre-pandemic levels<sup>56</sup>.

The Laotian economy is heavily export dependant as exports contribute 33% to GDP<sup>57</sup>. 3.3% of exports are agri-food products, worth a collective \$211 million in 2020. These were primarily unprocessed low value commodities, with rice exports worth \$61.7 million, followed by \$60.2 million of coffee and \$52.5 million of cereals<sup>58</sup>. On the other hand, agri-food imports were worth \$583.9 million, leaving Lao with a \$372.9 million agri-food trade deficit in 2020. Imports were primarily beverages, followed by \$48.5 million of animal feed and \$24.4 million of rice<sup>59</sup>.

Cash crops are 33% of total agri-food exports but are not widely grown given the prevalence of subsistence agriculture. Transforming the sector towards the cultivation of cash crops has the potential to uplift large swathes of the population, especially if complimented by government support and export promotion policy. Coffee has been identified as the most promising cash crop for export as the Laotian climate is perfectly suited to its cultivation<sup>60</sup>. In addition, while coffee exports did grow by 27% in 2020<sup>61</sup>, market assessments show that 69% of coffee export potential to other ASEAN countries remains untapped<sup>62</sup>. The sector has also been earmarked as a source of women and youth empowerment, though extensive trade facilitation is needed to realize this potential<sup>63</sup>.

Lao remains an agrarian society as 69% of the workforce is employed in the agri-food sector, of

which 48% are women<sup>64</sup>. However, 54% of the total population depends on subsistence agriculture<sup>65</sup> meaning an overall 75% of all households are at least partially dependent on farming for income. This dependence has increased due to COVID-19 as the agricultural sector absorbed 10% of all workers laid off in other sectors<sup>66</sup>. Subsistence farming was extremely resilient to the effects of the pandemic, as farms only rely on local labour and inputs, and do not require access to markets. The prevalence of subsistence farming and its resilience is reflected in figure 5.

**Figure 5: Farmers Reporting Change in Agricultural Activity during COVID-19**



Source:  
<https://docs.wfp.org/api/documents/WFP-0000116698/download/>.

Unfortunately, the very reasons for the resilience of subsistence farming rendered commercial farmers more vulnerable to the impact of the pandemic: 35% reported a lack of seasonal labour supply, 43% were unable to source critical inputs, and 82% were unable to access markets through traders<sup>67</sup>. Additional survey evidence indicates that 60% of commercial farmers suffered a 30% decrease in income, 43% had to temporarily lay off staff, and 40% had to suspend wage payments during 2020<sup>68</sup>.

As in Bangladesh and Cambodia, many Laotian farmers were forced to borrow to offset the effects of the pandemic. However, 68% of those surveyed were unable to access formal credit, while 50% had no cash or savings to fall back on<sup>69</sup>. To help address the lack of capital the Government of Laos promoted access to the SME Promotion Fund, which channels concessional loans to MSME's through commercial banks. Interest

repayments on loans are subsidized by 3-5%, and agriculture is deemed a priority sector<sup>70</sup>. Additionally, the Government waived numerous income taxes and loan repayment windows were extended<sup>71</sup>.

## Nepal

Nepal's GDP contracted by 1.9% in 2020, while the agricultural sector grew by 2.2% to contribute an all-time high of 25% to annual GDP. Sectoral resilience is expected to continue in 2021 with 2.4% growth, which reflects the general resilience of agriculture identified in this note.

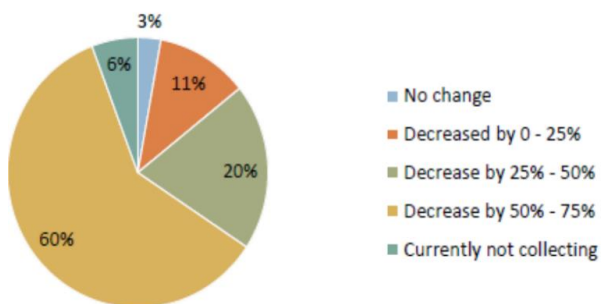
Agri-food exports were worth \$342 million in 2020 and contributed a relatively high 38.2% to total export value, reflecting the importance of the sector to Nepal's GDP. 60.1% of this export value came from soya bean oil, which grew 277% from 2019 and was almost solely exported to India. This was followed by palm oil, which contracted by 77% from 2019<sup>72</sup> as processors pivoted towards soya bean oil due to tightening Indian regulations<sup>73</sup>. Neither soya nor palm are grown in Nepal, but are rather imported, processed, and exported to other members of the South Asian Free Trade Area (SAFTA). This allows Nepal to circumvent India's high tariffs on the import of both products, as these tariffs do not apply to other members of the SAFTA. However, this strategy is not sustainable given that Nepal does not have a competitive advantage in either sector<sup>74</sup>.

Nepal imported \$654.8 of agri-food products in 2020, consisting mostly of rice (34%), maize (17%) and rice paddy (15%)<sup>75</sup>. Therefore, as with most countries in this note, Nepal has an agri-food trade deficit of \$312 million. However, the external dependence of its domestic food security is particularly acute, as it imports 80% of the cereals it consumes with agri-food imports having grown 62% in the last five years<sup>76</sup>. This reflects the fact that only 14% of Nepal's land is arable due to its mountainous geography which hampers the development of large-scale commercial farms<sup>77</sup>. COVID-19 has reignited this debate

around food self-sufficiency, particularly as food prices increased due to the depreciation of the Nepalese Rupee<sup>78</sup>. This prompted some local governments to prioritize and promote MSME small-scale farms, providing subsidies to those which cultivate and reclaim fallow land as 30% of all arable land in Nepal is fallow<sup>79</sup>. These agricultural MSME's employ 58.5% of the workforce, 94% of which are employed informally<sup>80</sup> with 80% of all agricultural holdings smaller than one hectare<sup>81</sup>. This continued support of fledging small-scale farms will be crucial to ensure that the agricultural sector is able to absorb the 1.3 million unemployed migrant workers expected to return to Nepal due to COVID-19<sup>82</sup>.

Unsurprisingly most agricultural activity is subsistence farming, with only 12% of farms selling to markets. Small-scale subsistence farming was the foundation of the sector's resilience to COVID-19, as these farmers could rely on local labour and inputs and did not need access to markets<sup>83</sup>. However, commercial farms were more heavily impacted by the pandemic: 12% of daily wage labourers lost their jobs, while 33% earned a reduced income<sup>84</sup>. Those which produced perishable cash crops were the most heavily affected, as reduced demand from restaurants, market closures, and transport restrictions forced farmers to let crops rot in fields. This led to an estimated loss of more than \$42 million in wastage<sup>85</sup>, and significant losses in revenue (See figure 6).

**Figure 6: COVID-19 Impact on Revenue of Fruit and Vegetable Farmers**



Source:  
<https://www.casaprogramme.com/wp-content/uploads/CASA-Rapid-Market-Assessment-May-2020.pdf>.

61.5% of commercial farmers felt as though they were unable to cope with this income shock<sup>86</sup>, and 86% reported taking loans and/or drawing on savings to attempt to stay in business<sup>87</sup>. To attempt to mitigate some of these challenges, the Government of Nepal created rapid response teams which provided commercial farmers with assistance in sourcing inputs and accessing markets<sup>88</sup>. A refinancing facility worth \$837 million was established to provide low interest loans to the agricultural sector, while informal workers who had lost their jobs were offered employment in public works programmes<sup>89</sup>. Provincial governments also implemented a number of mitigation policies, including fruit and vegetable procurement programmes, free wheat threshers, and 'agricultural ambulances' to transport perishables to markets<sup>90</sup>.

## Pakistan

In 2020 Pakistan's agricultural sector grew by 2.7%, an increase from 0.6% growth in 2019 mainly thanks to the provision of large subsidies for agricultural inputs. The sector contributed 19.3% to Pakistan's GDP, which contracted by 0.4% in 2020<sup>91</sup>.

Pakistan exported \$2.8 billion of agri-food products in 2020, worth 12.6% of total exports. This was primarily made up of different forms of

rice, which were collectively worth \$2.1 billion, or 74% of all agri-food exports<sup>92</sup>. However, rice exports declined by 19% compared to 2019, while the export of perishables such as mangos declined by up to 40% due to lockdown-related border closures<sup>93</sup>.

Agricultural imports were worth \$3 billion, 67% of which was palm oil worth \$2.1 billion<sup>94</sup>. As with most countries in this note Pakistan is a net-importer of agri-food products, worth \$229.8 million. This external dependence of national food security during the pandemic prompted the imposition of several agri-food trade policy responses. First, the export of all agri-food products was banned for three weeks in April to ensure short term food security<sup>95</sup>. Second, the 2% tariff on the import of pulses was removed, while the import of soya bean, canola, palm, and sunflower oil were all exempt from advance import duties<sup>96</sup>. Last, a 60% tariff on wheat was removed, and the annual quota for the private import of wheat was expanded to 2.5 million tons<sup>97</sup>.

Food security is problem in Pakistan as 20% of the population is estimated to be undernourished<sup>98</sup>. The development of the domestic rice industry has been identified as crucial to tackling the food insecurity problem, as well as to promote female economic empowerment<sup>99</sup>. Some argue that COVID-19 offers the opportunity to re-shore the production of agricultural technologies, such as tractors and ploughs, which would help agricultural MSME's mechanize and commercialize<sup>100</sup>.

The agricultural sector employs 39% of the labour force<sup>101</sup>, of which 66% are women<sup>102</sup>. 90% of farms are MSME's, which are mostly involved in subsistence agriculture<sup>103</sup>. 33% of surveyed farms reported a loss of income due to market closures and lack of inputs, with many also struggling to find buyers for their crops (See figure 7 below)<sup>104</sup>



**Figure 7: Farmers Reasons for Being Unable to Sell**



Source:  
<https://www.adb.org/sites/default/files/publication/624751/covid-19-farm-households-punjab-pakistan.pdf>.

70% of farms rely on migrant day labourers during harvest season, none of which were able to travel during the lockdown<sup>105</sup>. This labour deficit, combined with losses in income is estimated to have placed 2.9 million agricultural workers at risk of losing employment<sup>106</sup>.

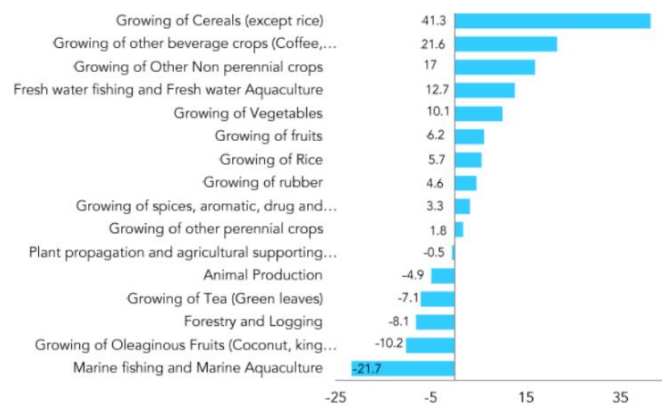
The Government of Pakistan has implemented several policies to assist the agricultural sector during COVID-19. \$635 million was allocated towards relief for MSME's and the agricultural sector<sup>107</sup> in the form of low interest rate loans, power bill deferments, and \$223 million in fertilizer subsidies<sup>108</sup>. A further \$1.3 billion was later provided as general relief for the sector<sup>109</sup>, while \$1.8 billion was spent on wheat procurement to prop-up prices<sup>110</sup>. Finally, commercial banks were mandated to defer principal loan repayments for agricultural loans for up to one year, and \$765.7 million was spent on servicing the debt of 1.72 million microfinance borrowers<sup>111</sup>.

## Sri Lanka

Sri Lanka's GDP shrank by 3.6% in 2020, while the agricultural sector (which is worth 8.4% of GDP) contracted by 2.4 % from 1% growth in 2019<sup>112</sup>. While Sri Lanka is the only country in this

note to have experienced a contraction of the agricultural sector in 2020, it is expected to rebound in 2021 with 3.7% growth due to a larger planted area of rice and cereals<sup>113</sup>, with the latter already having experienced record growth in 2020<sup>114</sup> (See figure 8 below).

**Figure 8: Comparison of Percentage Growth Rates of Agricultural Activities in 2020**



Source:  
[http://www.statistics.gov.lk/NationalAccounts/StaticInformation/Reports/detail\\_note\\_2020q4\\_en](http://www.statistics.gov.lk/NationalAccounts/StaticInformation/Reports/detail_note_2020q4_en).

Agri-food exports were worth \$1.2 billion in 2020 and constituted 10% of total exports. Tea exports contributed just under 60% of agri-food exports at \$712 million but suffered a 6% contraction from 2019<sup>115</sup>. This contraction is reflected in figure 9 and was attributed to bad weather conditions during Q1 of 2020, which contributed to the 7.4% contraction of total agri-food exports compared to 2019<sup>116</sup>.

Agri-food imports totalled \$1.3 billion in 2020. Wheat was the largest import worth \$284.3 million, followed by milk worth \$273.9 million<sup>117</sup>. If one excludes tea (which does not contribute to food security) Sri Lanka would have an agri-food trade deficit worth \$655.2 million. To attempt to address this deficit Sri Lanka banned the import of all non-essential items for three months from April 2020, including all agri-food products which could be produced locally. The ban intended to help develop Sri Lanka's domestic agri-food

sector as well as reduce pressure on Sri Lanka's falling foreign exchange reserves<sup>118</sup>.

26.8% of Sri Lanka's labour force is employed by the agricultural sector<sup>119</sup>, of which 40% are employed in rice cultivation which is the staple crop<sup>120</sup>. Most agricultural firms are MSME's, with 83% reporting a significant loss of income due to severe labour shortages, lack of inputs, and price collapses<sup>121</sup>. This placed an estimated 2.1 million Agri-dependant households at risk of losing their livelihoods<sup>122</sup>. However, the overall level of employment in the sector increased in 2020 as it absorbed significant employment losses in the industry and services sectors, with many furloughed workers resorting to subsistence agriculture to survive<sup>123</sup>.

The Sri Lankan Government implemented several policies to reduce pandemic-related pressure on the sector. It provided guarantees on low interest loans to farmers, provided tax incentives for investments into the agricultural sector, and implemented fruit and vegetable procurement programmes to assist farmers which could not access markets<sup>124</sup>. It also facilitated the transition of national tea and coconut auctions to digital platforms, as well as created virtual trade fairs for domestic agricultural exporters<sup>125</sup>.

## Vietnam

Vietnam's excellent COVID-19 containment policy contributed to 2.9% GDP growth in 2020, while the agricultural sector (which contributes 15.5% to GDP) grew by 2.9%, a 0.9% increase in growth from 2019. This growth is expected to accelerate in 2021 as Vietnamese agri-food exports gain greater market access through the recently implemented Regional Comprehensive Economic Partnership (RCEP) and EU FTA<sup>126</sup>.

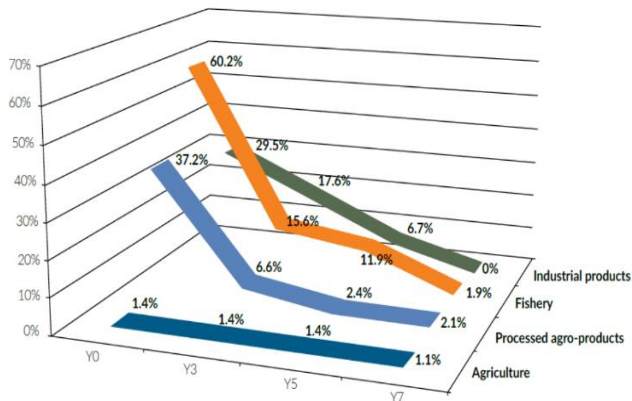
Vietnamese agri-food exports were worth \$15.3 billion in 2020, 4.4% of total exports. The largest export was shrimp at \$2.9 billion, followed by cashew nuts at \$2.6 billion and coffee at \$2.2 billion. While Vietnam is the fifth biggest rice exporter in the world, rice was only the fourth

largest agri-food export in 2020 at \$1.8 billion<sup>127</sup>. Exports of shrimp, cashew nuts and coffee all contracted slightly compared to 2019, while the export of rice grew by 23% despite the imposition of a month-long export ban in April. This ban caused the global price of rice to increase by 20%, though it subsided within a month once the ban was lifted in May<sup>128</sup>. In addition, as 24% of Vietnamese rice is exported, the ban led to a supply surplus, significant downward pressure on domestic prices, and thus temporary income losses for farmers<sup>129</sup>.

Vietnam imported \$14.7 billion of agri-food products in 2020. The primary import was \$2 billion of maize, though maize imports contracted by 10% since 2019<sup>130</sup>. In addition to the rice export ban, Vietnam also implemented import restrictions in response to COVID-19: the import of wildlife and wildlife products have been banned since July 2020 to lower the risk of future pandemics<sup>131</sup>, while Sanitary and Phytosanitary (SPS) regulations for the import of animal feed have been tightened<sup>132</sup>.

Sporadic lockdowns and social distancing measures have fuelled the adoption of virtual exchange centres (similarly to Sri Lanka) and e-commerce, with many agri-food suppliers reporting increasing income during the pandemic by selling through online marketplaces<sup>133</sup>. In addition, the Government of Vietnam has recognized the role of technology in creating a high value-added and sustainable agricultural industry. A \$4.4 billion package for high-tech agricultural loans was disbursed, which contributed to the opening of 18 new agri-food processing facilities in 2020<sup>134</sup>. The impetus behind the transition towards value-added agriculture was reinforced with the signing of an FTA with the European Union in August 2020, which both expanded quotas on agricultural commodities and slashed tariffs on processed agri-food products (see figure 9). The need to take advantage of this opportunity was explicitly recognized in Vietnam's first COVID-19 fiscal relief package<sup>135</sup>, especially as a means to diversify agricultural exports away from dependence on China<sup>136</sup>.

**Figure 9: Tariff elimination by the EU for Vietnamese Products**



Source:  
[https://trade.ec.europa.eu/doclib/docs/2016/june/tradoc\\_154622.pdf](https://trade.ec.europa.eu/doclib/docs/2016/june/tradoc_154622.pdf).

32% of the Vietnamese workforce is employed in agriculture, of which 46% are women<sup>137</sup>. As with other countries in this note the agriculture sector was relatively resilient to the impact of COVID-19: only 26.4% of workers reported being negatively affected by the pandemic, as opposed to 71.6% and 64.7% of workers in the service and industry sectors respectively<sup>138</sup>. The agricultural sector has also been the quickest to recover in Q1 of 2021, reporting the largest average growth in wages compared to other sectors<sup>139</sup>.

Nevertheless, the sector did not escape the disruptive effects of COVID-19 completely, especially for the 90% of agricultural enterprises which are MSME's<sup>140</sup> of which 24% were forced to suspend operations at least partially in the first half of 2020 due to lockdown measures<sup>141</sup>. Rural agricultural MSME's were particularly affected: 51.7% of surveyed enterprises dismissed employees, while 24.7% were forced to reduce wages to avoid shutting<sup>142</sup>. This led to an additional 85 000 people being pushed into subsistence agriculture by the pandemic, 2/3 of which were women<sup>143</sup>.

By the end of Q2 2020 over 1.3 million people employed in the agricultural sector had lost their jobs, accounting for 10% of all workers. 99% of those who lost employment worked in the

informal sector as these jobs were outside the realm of formal labour market institutions. However, data shows that these employment losses were mostly offset by strong growth in Q3 & Q4 of 2020<sup>144</sup>.

In response to the needs of MSME's, the Government of Vietnam implemented several measures to mitigate the effects of the pandemic. Loan and land rental repayments were suspended, while low-interest rate loans were provided to affected enterprises (including agricultural MSME's)<sup>145</sup>. In addition, the Government subsidised zero-interest rate loans for employers who did not have the financial means to support employees<sup>146</sup>.

## Similarities and Best Policy Practices for South and South-East Asian Countries

While the economies of the countries discussed in this note superficially differ according to the respective contribution of the agricultural sector to GDP and exports, they are all similarly reliant on this sector for economic resilience during the COVID-19 pandemic. Additionally, each country's agricultural sector was impacted by the pandemic in similar ways, which allows the identification of best practice responses to each of these shared challenges.

First, lockdown measures hampered the ability of farmers to purchase inputs and sell to markets, leading to losses in income and forcing farmers to borrow to survive. The creation of virtual coordination centres through the "Missing Middle Initiative" in Bangladesh and the transition to virtual agricultural auctions in Sri Lanka demonstrate how digital technology can alleviate this challenge<sup>147</sup>. However, virtual coordination efforts need to be complemented by physical delivery mechanisms, such as the provision of "agricultural ambulances" in Nepal<sup>148</sup>.

Second, movement restrictions prevented seasonal labourers from accessing fields, creating large labour deficits for commercial farmers. This greatly affected production, led to income losses for farmers, and increases in the price of food estimated to be around 20% for staple grains in Laos PDR, Sri Lanka, and Pakistan<sup>149</sup>. Bangladesh's provision of free combine harvesters and sponsored transport of labourers is an example of a proactive policy which could be used to tackle the labour deficit, though affordability will vary by country<sup>150</sup>.

Last, the agri-food exports of studied countries are similarly reliant on unprocessed commodities, while domestic food security depends on importing processed agri-food products. Vietnam is the sole exception to this trend, prioritizing the development of a hi-tech, value-added agricultural industry since 2016<sup>151</sup>. It points to the opportunity for other countries to similarly develop their agricultural sectors, which would boost local productivity, increase export value, and remove dependence on imports. Providing targeted support for cultivating cash crops — such as for coffee in Lao PDR and cassava in Cambodia — is a move in the right direction. Governments should also facilitate investment in processing facilities to encourage the export of value-added agri-food products.

## **Ways forward at the WTO to ensure a sustainable and inclusive recovery of the agri-food sector**

There exist multiple ways for delegates to the WTO to address the trade and employment impacts of COVID-19 on the agricultural sector. In this section, each of these potential opportunities is individually discussed, and possible actions towards the Twelfth WTO Ministerial Conference (MC12) declarations are identified.

### **Negotiate on agri-food export restrictions.**

Delegates can participate in the ongoing discussions on food-export restrictions. Given the dependence of the concerned S&SEA countries on agri-food imports for food security, these countries are particularly vulnerable to agri-food export restrictions in other countries. They can reduce the quantity of available food on international markets and cause global food prices to increase. Moreover, export restrictions may lead to a cascading effect whereby importing countries are forced to implement their own export restrictions to ensure domestic food security. This effect is particularly acute in the international rice trade, which again highlights the vulnerability of countries in this note<sup>152</sup>.

In recognition of these harms, member states of ASEAN agreed in a special COVID-19 summit to "remain committed to keeping ASEAN's markets open for trade and investment and enhance cooperation among ASEAN Member States and also with ASEAN's external partners with a view to ensuring food security ... and strengthening the resiliency and sustainability of regional supply chains, especially for food and ... essential supplies"<sup>153</sup>. Delegates to the WTO could draw from this ASEAN commitment to advocate for the well-defined limitation of agri-food export restrictions, particularly during times of heightened vulnerability. They could participate in discussions in the Committee on Agriculture, which is busy negotiating towards the exemption of World Food Programme (WFP) humanitarian food purchases from export restrictions<sup>154</sup>. This exemption has been identified as a possible realistic output from MC12<sup>155</sup>.

### **Address export competition in the Agri-food sector**

Export subsidies are market-distorting measures that undermine competitiveness in both exporting and importing countries. From the perspective of countries in this note, agricultural export

subsidies in other countries exert downward pressure on world agricultural prices, which reduces incomes and undermines the development of domestic export-oriented agri-food industries. Agri-food export subsidies may also lead to a form of a zero-sum game, as competing domestic agri-food industries may require subsidies of their own exports to remain competitive.

For these reasons, export subsidies were generally prohibited by the 2015 Nairobi Decision on Export Competition, though it did contain a few exceptions<sup>156</sup>. However, in the meeting of the Committee on Agriculture on 18<sup>th</sup> of June 2021 it was noted that only 12 out of 16 members with export subsidy reduction commitments have certified revised subsidy schedules<sup>157</sup>. The next meeting in September will have a dedicated discussion on export competition as part of the triennial review of the Nairobi Decision and is an opportunity for delegates to review the disciplines on export competition and potentially strengthen and enhance notification obligations<sup>158</sup>. S&SEA country WTO delegates could also contribute to creating a work programme for post-MC12 negotiations on export competition which – along with enhanced notification obligations – has been identified as a possible realistic output from MC12 by the Chair of the Committee of Agriculture<sup>159</sup>. Overall, enhancing notification obligations and integrating the interests of developing countries in a future work plan (particularly those which are net agri-food importers) will make domestic agri-food exporters more competitive and help grow the sector as part of COVID-19 recovery plans.

### **Encourage the recognition of equivalence of sanitary and phytosanitary standards.**

In the context of sanitary and phytosanitary (SPS) standards, equivalence refers to recognizing another country's SPS standards as acceptable even when different from one's own, provided it provides an equivalent level of protection.

Member states are legally bound to recognize equivalence under Article 4.1 of the SPS Agreement<sup>160</sup>, yet this rarely occurs in practice as agri-food exports from developing countries are often hampered by the perceived unwillingness of importers to recognize equivalence<sup>161</sup>. Recognizing equivalence would reduce technical barriers to agri-food exports (often substantial given the difficulty and cost of ensuring compliance for developing countries) and contribute to the growth of agri-food sectors. New Zealand has recently tabled a proposal to create a procedure that monitors the process of international harmonization<sup>162</sup>. There is an opportunity for delegates to negotiate for the inclusion of equivalence obligations in a future SPS work plan, thereby creating a mandate for discussions on the implementation of equivalence obligations.

### **Enhance transparency**

Transparency is a cross-cutting issue of the three areas described above. Transparency on the implementation of new export restrictions, export subsidies, and changes to SPS measures is needed to ensure that market actors have access to the information to make efficient economic decisions. The International Labour Organisation (ILO) notes that the "transparent dissemination of information will strengthen governments' capacity to ensure the effective management of the food market, prevent panic buying, and guide agricultural enterprises in making rational production decisions. In this context, it [transparency] will be critical to ensure the free flow of international trade, while guaranteeing quality jobs in food systems"<sup>163</sup>.

Within the Committee on Agriculture, members have identified increasing transparency and enhancing compliance as a 'low hanging fruit' for a possible MC12 outcome, as mentioned above in the context of export competition<sup>164</sup>. Two critical transparency enhancing measures have been identified: transparency of member's applied tariffs (particularly for shipments en route) and notifications of Covid-19 export

restrictions<sup>165</sup>. Delegates could work towards enhancing transparency as a meaningful outcome of MC12, which would indirectly facilitate the growth of agri-food exports of domestic economies.

## **Renew push for domestic support reform**

Domestic support remains an area of great concern to all S&SEA countries covered in this note. They have little fiscal space to provide larger domestic subsidies to their domestic agriculture sectors while remaining within the WTO limits. On the other hand, several countries, particularly a few major developed countries, continue to provide substantial domestic agricultural subsidies. As with export competition subsidies, these depress the international prices of heavily subsidised agricultural products, denying S&SEA countries their competitive advantage in agriculture and impacting the incomes of farmers.

Moreover, imports of subsidised agricultural products pose serious and unfair competition for domestic agriculture, which have been exacerbated by the impact of COVID-19.

Unfortunately, the WTO negotiations on agricultural domestic support reform have remained stuck. MC12 provides an opportunity to revive these negotiations. The S&SEA delegates therefore should renew the push for the adoption by MC12 of a meaningful and balanced work plan to conclude the WTO agriculture negotiations on domestic support reform by MC13.



## CUTS International, Geneva

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