

# WORKSHOP REPORT 4

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# **“The Impacts of COVID-19 Responses on the Political Economy of African Food Systems”** **Workshop Report 4**



**22 June 2021**



**Canada**

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Full Team Workshop 4 Programme	3
1. Introduction	5
2. Update on latest impacts under Covid-19	5
3. Project status and systems	6
4. Political economy of the food system	7
5. Food flows in the food system	12
6. Relationships in the food system	17
7. Next steps for the project	18



## Covid-19 and African Food Systems

### Full Team Workshop 4 Programme

**Tuesday 22 June 2021**

Time: 13.00-16.00 (South Africa)

11.00-14.00 (Ghana)

14.00-17.00 (Tanzania)

Zoom link: <https://uwc.zoom.us/j/92208376552>

#### **Session 1: Opening session**

**15 mins**

- Status update on COVID-19 in our countries

#### **Session 2: Project status & systems**

**15 mins**

- Status update on project: logframe & timelines
- Core team role & thematic analysis
- Additional questions on social reproduction for in-depth interview
- Food diaries: Excel template for data capture

#### **Session 3: Political Economy**

**30 mins**

Team: Ruth, Dzifa, Emmanuel, Andries

- What do we mean by political economy?
- What questions do we want to find answers to?
- What are we looking for in our data?

Analytical workshop: 29 June.

#### **Session 4: Food Flow**

**30 mins**

Team: Moenieba, Marc, Louis, Luitfred

- What do we mean by food flow?
- What questions do we want to find answers to?

- What are we looking for in our data?

Analytical workshop: 14 July.

### **Session 5: Relationships**

**30 mins**

Team: Dzodzi, Francis, Joe

- What do we mean by relationships in the food system?
- What questions do we want to find answers to?
- What are we looking for in our data?

Analytical workshop: 29 July

### **Session 6: Workplan**

**30 mins**

- Literature review
- Data analysis & written reports
- Academic roundtable
- Films + animation
- Infographics
- Webinars
- Podcast episodes
- Briefing papers

### **Session 7: Next steps**

**15 mins**

- Reporting formats
- Conferences
- Policy spaces & dissemination strategies
- Any other business



## 1. Introduction

A virtual workshop for a project commissioned by the International Development Research Centre (IDRC) on “The Impacts of Covid-19 Responses on the Political Economy of African Food Systems” was convened by the Institute for Poverty, Land and Agrarian Studies (PLAAS) on 22 June 2021. Attended by project team members from Ghana, South Africa and Tanzania, the meeting featured updates on the latest situation in relation to the pandemic in each country. It also considered key aspects of the progress on the project, including:

- The project’s status and systems, including in relation to its log frame and timeline; the role of the core team; and technical issues around the ways in which the research is being conducted, such as additional questions that may need to be asked of respondents and templates for capturing data;
- Next steps, including in relation to reporting formats, attendance at external conferences, engagement in policy spaces and dissemination strategies; and
- The workplan, providing updates on the progress being made on the literature review; data analysis and written reports; the schedule for the academic roundtable and thematic webinars; and the production of films and animation, infographics, podcast episodes and briefing papers.

The meeting also considered three of the four themes for organising and analysing the research: political economy; food flows; and relationships. The nature of these themes was discussed in relation to their meaning; the kinds of question that should be asked under each; and the kind of data required to explore them properly. A fourth theme on social reproduction was not considered at the workshop since it had already been the subject of a separate webinar.

## 2. Update on latest impacts under Covid-19

### *Ghana*

The daily number of Covid-19 cases and deaths has fallen, although a new variant of the virus has emerged. There remains a high incidence of the virus in the Ghanaian capital, Accra, which accounts for 52,000 cases (more than half of the country’s total of about 95,000), although other parts of the country have reported fewer cases – for example, there have been only 215 in total in North East region. In addition, the pandemic continues to affect men more than women, with men accounting for 57% of deaths from the virus.

In general, the pandemic has had little impact on the recent research activities undertaken for the project. Most of the fieldwork and some face-to-face interviews have been completed; and the team continues to adhere to social distancing and other safety protocols in their work.

### *Tanzania*

Under the government led by President Samia Suluhu Hassan, the threat posed by Covid-19 has been acknowledged in contrast with the previous state of denialism under former president John Magufuli. The country’s new leader wears a mask at all times in public and the population has been encouraged to take precautions and adhere to health and safety protocols to combat the spread of the virus. Official statistics show that there have been hospital admissions for Covid-19. However, with the

arrival of a third wave and lockdowns being imposed in neighbouring Kenya and Uganda as infection rates rise, the president of the Medical Association of Tanzania (MAT), Dr Shedrack Mwaibambe, has called on the government to publish complete statistics on the pandemic. The argument is that it is not enough merely to announce the arrival of a new wave; detailed information on the numbers of cases and deaths needs to be released as part of public education efforts to encourage the population to take appropriate protective steps.

The political shift has made it easier to conduct research. People on the ground no longer become upset when confronted with members of the research team wearing masks. In addition, official clearance for research, for example, in the form of a visit to a local market in Dar es Salaam, has been obtained quickly and with greater cooperation than previously. Meanwhile, under the new dispensation, as the official and popular responses to the pandemic have shifted, evidence of new kinds of impacts have begun to emerge.

#### *South Africa*

The arrival of a third wave in South Africa and an increase in infections and deaths from Covid-19 has led to some public institutions and hospitals being overwhelmed and the imposition of more stringent regulations by the government. In addition, the longer-term impacts of the country's economic stagnation, which have been exacerbated by the government's imposition of stringent restrictions in response to the pandemic, have become increasingly visible and a major topic of discussion. The job and livelihood losses have mounted fueling widespread desperation and protests, which may also be related to upcoming municipal elections.

The third wave of the pandemic has had some impacts on the research for the project. For example, an outbreak at Johannesburg's main fresh produce market will affect how long the research team here can stay in the field and verify information previously received so far. In other instances, however, the research methodology had already been adapted, for example, by using WhatsApp and phone calls to obviate the need for face-to-face contact. At the same time, the research subjects compiling the food diaries face a number of challenges on the ground as the situation fluctuates both in response to the shifting regulations and in relation to accessing customers.

### **3. Project status and systems**

The principal investigator (PI) team has been expanded to ensure representation from Ghana, Tanzania and South Africa. In addition, separate teams with members from the three countries have been established to guide the data analysis for the project's four key research themes: social reproduction; political economy; food flows; and relationships in the food system.

In preparation for the academic roundtable, which should provide a space for critical discussion on the written outputs from the project's key findings, at least two and as many as four papers should be produced for each of the Ghanaian, Tanzanian and South African case studies. The themes for these papers, which will seek to answer the key research questions posed by the project, should be chosen according to their relevance and importance to the particular country. In addition, consideration should be given to producing some cross-country comparative analyses, for example, in relation to the four key research themes, as well as an overview paper outlining the purpose of the project. These may not be prepared in time for the roundtable, but they are crucial to the project design. The

research may also give rise to other written outputs which may be produced for a different audience and do not necessarily form part of the collection of work required for the current project. The roundtable will include the researchers from the project and other initiatives commissioned by the IDRC on Covid-19 and food systems, as well as other contributors presenting external papers. The aim is to produce some mutual benefit, sharing and discussion of ideas and perspectives.

A set of questions on social reproduction has been drafted and distributed by the team in Ghana. These will be adapted and deployed in South Africa and Tanzania as part of a series of final, in-depth interviews with the food diarists which may be conducted virtually or over the phone on an individual or group basis. This approach may produce a better sense of change over time, given the relatively late introduction of social reproduction concerns into the research methodology. In South Africa, the adapted questions covered: household composition; work and incomes; remittances; food consumption; food procurement and preparation; state and community support; child care; illness and care work; and the pandemic and coping. The interviews may be undertaken as part of a process of engagement with women food diarists in which the researchers have sought to monitor how they are doing and act in solidarity with them. Those coordinating the food diaries should be contacted and briefed so that the additional interviews can be arranged.

Although the information being produced by the food diaries was not intended to form part of a database for statistical analysis, compilation of the findings in the form of a spreadsheet would be of great use. This data-mining can help the researchers to identify broad patterns of buying and selling over time, as well as some common storylines and key insights relating to the project's four key themes, which may form the basis for further enquiry. For example, street traders have recounted some interesting experiences of migration and remittances, which may lead the researchers to interrogate this issue further, including by conducting follow-up interviews. The framework may also be used for filtering and organising some of the insights from the in-depth interviews. Centralisation of this data in one place would be useful to facilitate identification of patterns and common responses or trends, as well as divergent experiences. At the same time, the analysis, which may be contingent on a range of particular local and national factors, should be decentralised.

#### **4. Political economy of the food system**

What is meant by political economy as a field of study as opposed to economics or politics? To which questions are answers being sought by political economy as a research approach? What data are required to provide these answers?

Political economy offers an interdisciplinary social science perspective which looks at how economics and politics shape one another. It considers how power and resources are arranged among people, the state and government institutions, and the market, within an overall economic system. Typically, it considers how capitalist systems, in which there is private ownership of the means of production, operate. In Marxist terms, political economy as a field of study is concerned with how surpluses are produced and appropriated, in other words how capital is accumulated and, as a result, class formation takes place and inequalities arise. The political economy approach is different from that adopted in orthodox and neoclassical economics because it places at its centre the understanding that economics and politics cannot be divorced. In other words, the nature of the



present economic structure informs the politics of the day which, in turn, are organised around preserving the current economic system with, as necessary, some tinkering.

In line with this approach, sociologist Henry Bernstein proposed four key questions for understanding the political economy of agrarian change:<sup>1</sup>

- Who has what? This concerns resource ownership, access and rights.
- Who does what? This relates to questions of labour.
- Who gets what?
- What do they do with it? In other words, how are the benefits shared? Are they consumed or invested? Are they taken away or are they paid back? The answers to these questions may relate to issues of finance and banking.

The argument underpinning the political economy approach is that the close relationship between politics and economics is neither neutral, that is, value-free, nor coincidental. In this light, this project's consideration of the economic outcomes of the Covid-19 regulations seeks to produce an understanding of the politics of these rules, including the factors that drove the politics behind the establishment of the rules and how the regulations have subsequently shaped the distribution of benefits and risks at a local level.

In this regard, the kinds of questions that are asked in political economy analysis are:

- Who are the powerful agents and how has power and control been exerted? At a case study level or at a national level, a key aim is to map the important actors and institutions shaping decisions. So, for example, although fieldwork can reveal the outcomes of the decision-making, it is important to trace back where the decisions came from, and whose interests and perspectives are driving them. Otherwise, the analysis will deal only with the symptoms and how people are coping and responding.
- What are the different forms of power and control being exerted in relation to the decision-making? It is important to recognise that not all the dynamics are top-down; there are multiple layers and levels of power and control.
- How have the power dynamics shaped the decisions and outcomes?
- How have people contested, resisted and strategised in response?
- How have power, control and benefits been redistributed as a result?

The political economy perspective is particularly important for understanding the idea of scarcity in relation to food systems – that is, how forms of hunger and deprivation, including inadequate incomes with which to buy food, can co-exist alongside abundance. In this regard, three main views or ideas of scarcity have been produced: absolute scarcity; relative scarcity; and political scarcity, each of which is associated with different responses.<sup>2</sup> One view, which is adopted under neoclassical economics, is that scarcity is just a reality – an absolute fact of life. There is only so much land and only so much food available for the population. Another view is that scarcity is relative. There are

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<sup>1</sup> Henry Bernstein. (2017). Political economy of Agrarian change: Some key concepts and questions. *RUDN Journal of Sociology*, 17, 7-18. Doi: 10.22363/2313-2272-2017-17-1-7-18.

<sup>2</sup> Ian Scoones, Rebecca Smalley, Ruth Hall and Dzodzi Tsikata. (2019). Narratives of scarcity: Framing the global land rush. *Geoforum*, 101, 231-241. Doi: 10.1016/j.geoforum.2018.06.006.

some limits to the availability of food, but if resources are allocated more efficiently, the problem can be resolved.

Third, there is the idea of scarcity as a political phenomenon. The contention is that scarcity is produced, reproduced and distributed politically, particularly at moments of crisis – such as under Covid-19 with the introduction and implementation of new regulations. Under this view, scarcities have always existed, but the real point of interest is how scarcities are redistributed or how new scarcities are created – and how particular decisions drive these processes. So, for example, governments acknowledge that there are particular problems of scarcity and make policy choices and regulatory decisions accordingly, weighing up the risks and benefits to society and the economy. The effect of these decisions is that scarcities are redistributed. In this regard, scarcity should not be viewed as a natural phenomenon, but a contingent one that arises from and influences the politics of the day. As a result, there is resource redistribution across gender, class and generations and in line with racial and ethnic classifications. In this context, the ways in which markets are produced and reproduced and technology is developed and deployed are value-laden, framed by successive policy choices which assume positional scarcities and seek to redistribute them.

The political economy perspective, which sees scarcity as a political phenomenon, has become increasingly important in shaping the global agenda. In this regard, the international discourse has been increasingly shaped by the idea of “food systems”, which recognises how inequalities of power produce scarcities. A United Nations (UN) High Level Panel of Experts on Food Security and Nutrition (HLPE-FSN) promoted the concept as crucial to understanding the challenges of food security and nutrition faced around the world. It argued that it is the ways in which food systems are organised and governed that is producing food insecurity and vulnerability. Following the publication of the panel’s report in 2020,<sup>3</sup> a UN summit on the topic of “food systems” was scheduled for September or October 2021. Previously, the agenda had largely been shaped by the need to increase production to foster greater food security. In this regard, the idea that the nature of food systems comprises a matter of national concern worthy of multilateral debate marks a new approach to the topic, which had previously centred around the more limited and arguably politically partial idea of “food security”.

The HLPE report identified a number of key themes, including one around political and institutional trends. Under this theme, the report considered the kinds of disjunctures that can occur among the various political and institutional role-players within food systems – for example, when, notwithstanding the production of national goals on addressing hunger, the efforts of a particular ministry to promote small-scale farming may be out of alignment with actions being taken at the municipal level. In this regard, the report noted that weak, fragmented national food system governance has resulted in policy inertia which threatens progress. At the same time, public-sector investment in food and agriculture has declined, raising questions about the appropriate balance between the roles of the public and private sector in supporting food systems; and civil strife and conflict have continued to affect the food security of millions of people around the world.

The HLPE report also considered the impacts of socio-cultural trends on food systems. It noted that inequalities persist, impeding efforts to reduce poverty and improve food security, especially among

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<sup>3</sup> High Level Panel of Experts (HLPE). (2020). Food security and nutrition: Building a global narrative towards 2030. A report by the High Level Panel of Experts on Food Security and Nutrition of the Committee on World Food Security, Rome.

marginalised people, including small-scale food producers, women, youth, indigenous populations and vulnerable food-system workers. In particular, the report noted that there has been slow progress on women's empowerment, which has affected food security in important ways due to the multiple roles that women play in food systems.

Generally, there has been increasing recognition in the international academic and political discourse that the food system shapes outcomes and that power-politics and inequality shape how this system is governed. Attention to political economy concerns – that is, how the basic factors of production affect engagement in, and the development of, the food system – is now considered crucial to understanding food crises. These factors include access and rights to natural resources, including on land and at sea; access to labour; and access to capital.

There is also a set of “biopolitical” concepts for analysing the food system which do not derive from the Marxist framework. These relate to the politics of life itself and address questions about who has rights to life and how competing interests for life and nutrition can produce contestation as well as new negotiated arrangements. The framework provides a strong understanding of the politics that were adopted to justify and implement Covid-19 lockdowns – that is, the politics of who may be allowed to die and whose lives should be prioritised; of what can be risked and what must be preserved in society. In response to the pandemic, the risk of death was traded against opportunities to continue to reproduce life in a number of ways. For example, some people who held private medical insurance may have been less fearful of the consequences of contracting the virus than those dependent on the overstretched public sector.

In seeking to produce a political economy analysis for the current project, the research teams should consider four key categories of activity:

- Public and institutional regulations;
- Government mitigation efforts;
- Private regulation, including supermarket and company requirements on food safety and mobility; and
- Networks and forms of patronage and how these are expressed in the informal world of politics.

In particular, the political economy and biopolitical lenses may usefully be applied to analyse the decision-making about which services were considered to be “essential” and which service providers were accordingly exempted from certain lockdown regulations. Such analysis should consider the ways in which permits were designed and accessed and how the licensing process was conceived, organised, implemented and experienced. It may entail research into corruption and patronage networks and how lobbying by some sectors influenced government decisions on which economic role-players should be protected and defended. It should further consider how some private sector actors, such as, for example, importers and exporters, have themselves implemented provisions and requirements alongside those produced by public institutions.

The political economy perspective may also be applied to government mitigation efforts. In Ghana, for example, a programme to offer free water and electricity which was supposed to be universal, only really benefited those with assets and access to amenities. Financial support offered to small- and medium-scale Ghanaian businesses depended on the production of official paperwork and so failed to benefit unregistered businesses in the informal sector; and a national programme of short-term food distribution promoted has allegedly been deployed as a form of patronage rather than a

purely needs-based initiative. In South Africa, the terms of the lockdown and who receives what support from the government have also been shaped by political concerns. Producer relief was offered to small-scale farmers, but not fishers; and bailouts were provided to a number of big businesses. In Tanzania, the government under former president John Magufuli resisted offers of loans and grants from the International Monetary Fund (IMF) which were made on condition that Dodoma provide data on the spread of Covid-19 in return for financing, and thus preserved national control over the (lack of) response to the pandemic.

The political economy perspective may further be applied to issues around networks, patronage and graft. In Ghana, for example, there was a lack of accountability over the huge sums spent by the government on the food that was to be distributed under the country's initial partial lockdown. In South Africa, important questions need to be asked about the politics behind the official responses, including in relation to the conceptualisation, design and membership of the public-private Solidarity Fund which took on responsibility for distributing food parcels and overseeing the allocation of loans to subsidise the wage bills of small businesses. While in Tanzania, the government's response appeared to be mainly concerned with protecting economic gains, ensuring continuity for ongoing investments in a number of large-scale strategic projects and even taking advantage in regional markets by implementing few or no restrictions after an initial partial lockdown – although this approach has now changed under Samia Suluhu Hassan. Under Magufuli the message was: “You keep producing and we will sell to those under Covid-19 lockdown”. In other words, the official response to the pandemic was not a neutral one.

The political economy analysis may also seek to produce an understanding of how crisis governance differs from “normal” politics. For example, in the way that the pandemic has been used as cover for ulterior motives; and how the politics of exceptionalism have been deployed to produce regulations that may enable particular individuals and groups to achieve in the moment of crisis what they had been unable to previously.

Another aspect of the political economy analysis may concern how crucial crops have played a central role in tussles over political legitimacy and how the discourse over the availability of such produce has thus been managed in the governance of the crisis. In Ghana, these crops have included tomatoes, onions, maize and cassava; in Tanzania, the foodstuffs have included sugar, maize, rice and cooking oil; and in South Africa, they have included maize, bread, fish and fresh produce.

In applying a political economy lens to the research, a number of key questions need to be asked and answered, including:

- What are the competing views of the nature of the crisis and the logic of the responses?
- What has shaped the policy responses? A difficulty here is that much of the activity that has shaped the policy responses is not visible. For example, it may not be possible to learn who was lobbying for what at the time that a particular regulation was changed.
- What activities have been deemed essential and been licensed?
- How have interpretations of the various rules differed and how has enforcement been practised?
- How do regulations on paper and on the ground differ?
- How do responses and control actually operate and interact at the national, provincial and local levels of government, among non-state authorities and at borders?

- How has power and control been reshaped as a result? Who has benefited and who has lost out in the food system?

The research teams may find answers to some of the questions about how the decisions were made regarding the regulations and mitigation efforts in the key informant interviews. For example, decision-makers in a fresh produce market may talk about how they have interpreted or are going to interpret the government regulations and how they may or may not adapt these. The in-depth interviews can also provide an understanding of how people have experienced the regulations and the different kinds of support on offer; how the rules of the game have changed; how people have lost or made money, resources and control, and how their decision-making has changed as a result.

Beyond the in-depth interviews, the research teams should interrogate other sources including the media, political statements, and published evidence of political activities and how the political parties have positioned themselves. In this regard, it is also important to try and identify the roles that have been played by private sector associations or particularly powerful individual actors, investigating where the power resides and who is influencing the high-stakes decisions that are being taken.

In addition, some of the big themes relating to political economy should be described and analysed in the literature review, including, for example, the issue of biopolitics and the importance of livelihoods. The review should include a critical analysis of the recent literature on the political economy of Covid-19 and food systems.

In relation to the project outputs, each country team should produce an overview of the national political response to Covid-19 which should include a timeline of the regulations. They should also produce specific case studies, characterising the particular politics at play in their country; mapping the important actors; identifying the specific regulations or efforts (as well as the exemptions and exceptions to these) and the interests driving these initiatives; describing the outcomes; and detailing the responses to the actions taken and their outcomes. The analysis should further compare the conditions for food production, distribution and marketing that have been created either directly or indirectly under Covid-19 with the conditions that existed before the outbreak.

## **5. Food flows in the food system**

What is meant by food flows? To which questions are answers being sought? What data are required to provide these answers?

Analysis of food flows considers inputs, production, markets, demand and prices, as well as where the food is going and to whom. It entails interrogation of the drivers of the changes in relation to these factors.

Food flows take place within a food system. This system is comprised of a number of elements: the environment; people; inputs; processes; infrastructures; institutions; activities that relate to the production, processing, distribution, preparation and consumption of food; and the outputs of these activities, including socio-economic and environmental outcomes. The idea is to adopt a holistic view of the whole system and what makes it function and what prevents it from functioning. Analysis of the system entails consideration of the availability and use of food; the stability and sustainability of food supply; and issues of access and agency in relation to food. Taken together these factors define

whether a system offers a universal right-to-food framework, which should be the goal of a functioning food system. From the point of view of this kind of approach, the Covid-19 measures adopted and promulgated by government and other national stakeholders represent policy and governance interventions in the food system.

Within the overall food-system framework, analysis of food flows attends to:

- The factors supporting food production;
- The actual production itself and the ways in which the food is distributed and sold;
- Consumer behaviour and diets, including outcomes in terms of nutrition and health; and
- The broader social and economic impacts of the ways in which food flows take place.

Adopting a holistic perspective, the two main aspects of food systems, that is the relationships among the stakeholders and the food flows themselves, may be linked and interpreted with reference to the political economy, that is how power operates upon and within the system, creating points of accumulation and winner and losers. Under Covid-19, such analysis necessarily entails consideration of policy and governance interventions and how these may have re-shaped the food system to the advantage of particular stakeholders.

A strong evidence base must be established in order to deploy the food-system model to help identify the drivers of change under Covid-19. Data must be collected on all the main elements of the food system from a range of sources. For example:

- Information on the provision of **support for production** may be sourced from interviews with farmers; market data provided by authoritative bodies, such as, for example, the National Agricultural Marketing Council in South Africa; and news reports. As far as possible, the data should describe the availability, prices and actual costs of inputs; on-the-ground perceptions and experiences of these factors; and who has been involved and heard in political and economic decision-making around input supplies.
- In relation to **food supply chains, including production and processing activities and markets**, data may be obtained from interviews with farmers and traders detailing their experiences, and from information on production levels and markets provided by industry bodies.
- Data on **consumer behaviour and diets** may be sourced from interviews with traders, which can reveal changes in terms of what they are buying and not buying and thus eating, as well as official food-basket and inflation statistics. In all of this, the aim is to find data that show changed behaviour, and how this may have been influenced by factors such as food prices and affordability, as well as particular government and other initiatives.
- Similarly, information on **nutrition outcomes and broader socio-economic impacts** may be derived from official data on food inflation and poverty and unemployment levels, as well as interviews with traders, all of which may indicate trends relating to the accessibility and affordability of food.

In general, data triangulation drawing on a range of information sources is required in order to identify and track with some certainty the kinds of change that have taken place in the food system under

Covid-19, and the drivers of these changes.

Adopting the food systems approach and applying it to the South African case, the evidence indicates that a number of changes have taken place in food flows. When the political economy ramifications of these changes are considered, a number of key drivers for the changes may be identified. So, for example:

In relation to **supporting production**, the changes that have taken place include: increased input prices, with the cost of urea fertiliser climbing by more than 50% between February 2020 and February 2021 on the international market, although it rose only 26.2% in South Africa (as a result of exchange-rate fluctuations and a lag in supply and demand due to accumulated stock); and sharp rises in seedling prices, which have even doubled in some cases. This information was provided by the farmers themselves and verified by input-price data provided by the National Agricultural Marketing Council. In addition, there have been disruptions to input supplies with some farmers unable to acquire seedlings, although at present this data, which came from farmer interviews, has not yet been corroborated by a second source.

Analysis indicates that the drivers of these changes have included global commodity price fluctuations; exchange rate fluctuations; and international and domestic transport and supply disruptions caused by lockdown restrictions. In addition, it has been difficult for small-scale informal operators to acquire permits to continue their businesses as usual.

In relation to **food supply chains, production and processing activities and markets**, the changes that have taken place include: a drop in production caused by disruptions in the supply of inputs and labour; a fall in demand from restaurants and hotels, which have reduced or stopped orders; a suspension of operations among street and bakkie traders who were unable to move around under hard lockdown; and reduced demand from poorer eaters. The evidence for these changes was gleaned from interviews, news reports, published regulations, interviews with traders and poverty statistics.

Analysis indicates that the drivers of these changes have included: lockdown regulations, including restrictions on movement and transportation, as well as general fear and uncertainty which have produced behavioural changes. The lockdown regulations did not take into account the needs of smallholder farmers and street and bakkie traders, who had little say in the production and implementation of the rules. By contrast, the large-scale commercial farmers and their representatives sat at the table with the minister at bi-weekly meetings. In general, corporate power and interests in the food system were protected, and the pressures resulting from changes in food flows were passed to the consumers and the farmers. For example, farmers told of how they were being squeezed by higher input prices, while the prices offered for their produce were pegged; while, at the other end of the supply chain, consumers were being squeezed by higher prices. This analysis was verified by national price data, which enabled comparison of the retail prices for key produce, such as tomatoes, against the prices being received by the farmers.

In relation to **consumer behaviour and diets**, the changes that have taken place include: significant food price inflation; and a reduction in the amount of food being eaten by poor people, while the wealthy have continued to eat as well as before. The evidence for these changes was provided by interviews and national statistics. Analysis indicates that the drivers of the changes have included: global food price increases; Covid-19 restrictions; and economic decline and job losses as businesses have been forced to close, with the poorest workers in the smallest and most informal businesses being the worst affected and receiving the least government and other support.

Closer interrogation of the data on particular aspects of the food system can offer important insights into the kinds of benefits and disadvantages that can accrue from shifting food flows. So, for example, in South Africa:

- From February 2020 to April 2021, the average price for onions across the country was R16.42 a kilo; meanwhile, at Johannesburg Fresh Produce Market, which is the largest such market nationwide, the average price was R4.24 a kilo over the same period. In other words, the retail price represented a mark-up of almost 300% after commission and transport costs are taken into account – indicating that someone has been taking huge profits which they managed to protect during the crisis.
- A street trader in Ivory Park generally sells her produce for about half the price charged by the supermarkets. For example, in April 2021, she was selling onions for R7.66 a kilo, which may be seen as a reasonable mark-up on the farmer's selling price of R3.83 a kilo, particularly when compared with the supermarket price of R14.35 a kilo. In this way, the street trader with her narrower profit margins plays a key role in making fresh produce accessible in the local community. However, the regulations imposed under the country's initial hard lockdown have hit such street traders hard, while leaving other larger, more formal retail outlets relatively unscathed – depriving poorer local communities of important sources of affordable fresh produce.

#### *Asking the right questions*

In adopting a holistic, food-system approach to analysis of food flows, a number of key questions need to be asked.

In broad terms, it is important to identify how regulations and mitigation measures have affected the functioning of the food system, including food flows and pricing, as well as their impacts on the full range of stakeholders in the formal and informal sectors, including input suppliers; producers; transporters; aggregators; traders; and financiers, paying particular attention to the impacts on women and other marginal actors.

In order to identify these effects, the data produced by the baseline interviews, food system diaries, and in-depth and key-informant interviews needs to be mined carefully; and additional secondary sources such as official numbers on prices and market activity must be interrogated.

Food flow changes can be described through vignettes which may, for example, tell the story of a particular trader under lockdown by threading together key events and developments and how the individual adapted to these and sought either to mitigate the impacts or leverage the changes to their advantage.

In terms of the data analysis, the research teams should decide how best to categorise the information at their disposal. For example, should the food flows be described in terms of units and volumes, or price? The answer will be shaped by the purpose of the particular analysis.

In considering the units of measurement that may be used to describe quantity, the research teams should aim to adopt some common standards to enable comparison, while acknowledging the socio-cultural and economic importance of more informal units of measurement, such as the bundle, the bag, the crate or the number of pieces.

Seasonality needs to be factored in when considering the significance of price hikes and reductions under Covid-19.



The teams also need to consider how their research can address the issue of nutrition and malnutrition and the kinds of secondary data that may need to be sourced to address this more explicitly.

In considering the actual food flow elements, the research teams should decide which species, crops and grains are of particular significance and the nature of that significance – that is, which are consumed by, for example, poor people; and which are sold, including for export, to access cash. This analysis should identify the demand for, and value of, staple foods and key commodities, such as soy, maize and fish, differentiating between what may be considered low-value and high-value produce and species. The analysis should also address the question of oversupply, if there is any, and how this may have been distributed.

In relation to the impacts of Covid-19 regulations on sales volumes and prices, the researchers should interrogate the impacts of the restrictions on tourist arrivals, the hospitality sector, and the prices of commodities generally produced to earn cash. In addition, how have school closures affected food prices and volumes – and what have been the impacts of this for small traders?

Extraordinary price rises – such as the doubling of the price of tomatoes In Ghana – should be noted and the possible reasons for these identified. For example, how has the rotation of market days in Ghana affected sales and prices? The research teams should also interrogate whether customers are being charged higher prices when they are sold food on credit – and if this has affected how much is being bought.

More generally in relation to consumer behaviour, how have purchasing patterns changed? For example, have consumers changed the quantities or the kinds of food that they are buying?

In relation to mobility and transportation, what have been the impacts of movement restrictions on the distribution and sale of goods? Have there been price increases as a result? What limitations and checks have been imposed on cross-provincial and -border transport and trade? And what other factors, such as exchange-rate fluctuations and the threat of robbery on the road, have had an impact on distribution and trade? How have the changing conditions affected the supply and prices of goods?

In the context of reduced production, has there been a change in the amount and kind of outputs that have been consumed or traded domestically and internationally? In cases where national borders closed and exports stopped, what happened to the surplus stock that was being produced and purchased? Was it stored, frozen, processed and, if so, how? In this regard, what traditional methods were used to preserve fish? Have local producers been able to access cold-chain storage to preserve their outputs?

In terms of financial arrangements, what kinds of new credit arrangements have emerged between producers and traders, and traders and consumers; how have these reshaped food flows; and what have been the relative benefits and disadvantages of these?

In terms of local mitigation efforts, have small-scale farmers and fishers contributed to feeding schemes in the community, at schools, hospitals and prisons, and if so, how?

There has been a clear transition to digital sales platforms under Covid-19. How have such platforms been used to sell products? Who are the sellers, who are the customers and what kinds of prices have been charged at various times? Which producers and traders have been able to transition to digital platforms – and how has this been shaped by issues of class and gender? Has the transition to the

virtual marketplace been sustainable? To what extent has it persisted with the easing of Covid-19 restrictions on movement?

The research also needs to address a number of key issues framing the international and national debates around food flows, including the impacts of climate change; the subsidies, tariffs and quotas that shape the international trade system under the direction of the World Trade Organisation (WTO); and the ways in which the financialisation of the food system has developed under Covid-19.

In general, the research must frame its interrogation of food flow changes in the context of a number of broad observable dynamics in the national food systems in the three countries under study. In this regard, the research teams should seek to identify any noticeable general hardships; any broadly influential factors beyond the regulations imposed by the various governments; and any major discrepancies between the proclaimed goals of state efforts and their actual effects.

### *Mapping*

In mapping food flows there has been a focus on both the markets and the destinations for food. The mapping has entailed identifying the production areas for key food items and crops; and key trading areas, including domestic end markets and export destinations. The mapping names the key sites, identifies where they are and describes their size and key features, including the kinds of food that may be sourced or traded there.

So, for example, in the case of the market at Mabibo in Tanzania, the information provided would include: the location, which is Ubungu District; the main food that is traded there, which is bananas, potatoes and tomatoes; whether the market is big, moderate or small in size; the sources of the food traded there, which is Kilimanjaro, Mbeya and Iringa districts; and the areas to which the food from the market may be exported, in this case, the Comoros, the Democratic Republic of the Congo (DRC) and Kenya. A map is then produced from this data.

Thus, the mapping provides a visual understanding of where the main markets are; the products that they trade; where these come from and where they go, including the linkages among the various domestic markets, as well as the flow of particular food products. The maps can also show the export destinations for particular key food products/items. In general, the maps provide a physical and spatial context for understanding food flows.

## **6. Relationships in the food system**

What is meant by relationships in the food system? To which questions are answers being sought? What data is required to provide these answers?

Analysis of the relationships in the food system seeks to interrogate the interactions among the formal and informal actors in the agri-food system, which includes those involved in the production, distribution and regulation of the system, as well the consumers. These interactions could be contractual, social or regulatory; long-term or episodic; structured or unstructured. The work in this area draws on both political economy and food systems analysis.

The key actors in the system may operate at a range of scales and in a number of different ways. Their businesses may be large, medium or small scale, they may be formal and/or informal. (In this regard,

certain scales and levels of formality/informality may be more prevalent in one country than the others.) The key actors include: input suppliers and traders; farmers and fishers; food traders and distributors, including retailers and wholesalers; transporters; market porters; food processors; cooked food sellers and restaurant owners; credit and savings agencies and agents; different types of consumers; and local authorities and government agencies.

In order to identify the key role players and analyse the relationships among them, a number of questions need to be asked:

- Who are the key value-chain actors in the agri-food system, particularly in the fields of production, distribution, consumption and regulation? Who are the most vulnerable and why? What kinds of risks do they face?
- How are these actors organised? Are they operating formally, informally or in hybrid ways?
- What are the formal/informal, contractual, social and regulatory relationships among them? Can a web of these relationships and positionings in the agri-food system be produced showing the relationships between and among the key actors?
- What are the common terms of payment – for example monetary, in-kind, social capital – among these actors? What forms and systems of credit are being used by them? How is trust embedded in these credit relationships?
- How are the key food actors repositioning themselves in response to Covid-19 and Covid-19 measures?
- How has this repositioning affected relationships, contracts, risks and rewards?
- Who are the winners and losers?
- To which actors' voices are the governments and other authorities listening; and what kinds of narratives are framing the food system and the Covid-19 crisis?
- To what extent are vulnerable and marginalised actors, such as small-scale farmers and informal food traders, able to mobilise, articulate their concerns and take collective action? How may this be demonstrated by the data?

The main sources of data will be: the information used for the food flows mapping; the food diaries; the key informant interviews; and secondary literature and official sources. A particular concern is to source data on actors within the food system who have not played a central role in the research methodology to date – for example, those within the formal sector in Ghana.

## **7. Next steps for the project**

The focus for the four key project themes – social reproduction; political economy; food flows; and relationships within the food system – needs to be clarified and the questions for each need to be compiled. In particular, any areas of overlap between the themes, such as between the analysis of food flows and relationships, should be identified and addressed. Although some of the same points may be repeated under the four themes, it is important not to duplicate the analytical work undertaken.

It should be noted that the relationships theme stands at the intersection between the political economy and food flows themes (for example, in relation to the issue of credit arrangements), indicating how these two themes articulate. One way of managing the potential overlap in the

research undertaken would be to delimit the work covered under the relationships theme, trusting that the food flows analysis will deal with the issues around scale and the broad shifts within the system; and the political economy analysis will address the fundamental issues of causality. The relationships analysis would then be primarily concerned with the nature of the transactions themselves and how these are shifting, for example, in relation to collective efforts; trade operations; and the formulation and implementation of new contracts, payment terms and forms of credit. The factors inform food flows and are shaped by political economy concerns, but are distinct from them as a focus for analysis.

Another way of understanding the distinction between the four themes is to consider the scales at which the subject matter for each operates. The political economy theme may be seen as providing an overarching framework, which requires a form of analysis that goes beyond specific cases, although local examples may be used to illustrate particular points. The subject matter of social reproduction analysis is more generally located at the micro level in empirical terms; while the food flows and relationships analyses concern the interactions between the macro and micro levels, in other words, how the two levels articulate. This is not meant to imply that political economy analysis does not have significance at the local level, or that social reproduction is not a national-level issue.

Consideration of the scope of analysis under each theme should indicate where there are gaps in the data, as well as in the understanding of the data. For example, insufficient attention appears to have been paid in the research to date to the issue of capital, that is whose wealth is growing and how and why, and who has been forced into debt. This issue, which may be found at the intersection of the political economy, food flows and relationships analyses, has been identified in the interviews conducted with small-scale traders and farmers who have faced increased indebtedness, but has not been explored sufficiently from the various lenders' points of view. For example, in Tanzania, leading banks have reported significant profits despite the pandemic;<sup>4</sup> while the government-owned Land and Agricultural Development Bank of South Africa (the Land Bank) has been in crisis.<sup>5</sup> Accordingly, a number of key informant interviews with financial institutions and bodies in both the formal and informal sectors should be arranged. In addition, macro-level data on levels on indebtedness should be sourced so that the information received during the interviews can be triangulated and the analysis can be strengthened.

In practical terms, the present focus should be on analysing and presenting the research data in the form of academic papers before moving to produce further communications outputs, including podcasts, short documentaries and written articles. Future work will also include identifying and highlighting the key messages from the research which should be disseminated through these outputs and the reports and policy briefs that also need to be produced. The project also has capacity to produce infographics on key findings that may be included in these outputs.

The country teams should brainstorm among themselves to decide which papers and additional outputs will be presented at the academic roundtable. They may also suggest other projects and individuals who could be invited to collaborate at this meeting. At least two papers should be

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<sup>4</sup> Top Tanzanian banks' profits up despite Covid-19 pandemic. (2020). *The Citizen*, August 03. Accessed at <https://www.thecitizen.co.tz/tanzania/news/top-tanzanian-banks-profits-up-despite-covid-19-pandemic--2713736>

<sup>5</sup> Roxanne Henderson and Paul Vecchiatto. (2021). Land bank of South Africa seeks support for split to repay debt. Bloomberg, August 24. Accessed at <https://www.bloomberg.com/news/articles/2021-08-24/land-bank-of-south-africa-seeks-support-for-split-to-repay-debt>

produced by each country team. However, this quota should not be regarded as prescriptive. The national teams should be encouraged to develop other writing initiatives and explore additional publishing opportunities in an effort to disseminate analysis of further issues of interest that may emerge during the course of the research.

Meanwhile, work on the literature review, including the production of a short report from this, should continue. In addition, the project stakeholders need to coordinate among themselves on the extent and kind of their engagement with the UN food systems summit and other common policy spaces at the regional and continental levels.