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**AFRICAN FOOD
SYSTEMS
IMPLODING:
IMPACTS OF THE
WAR IN UKRAINE**

Policy Brief by Refiloe Joala & Jan Urhahn

POLICY BRIEF

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AFRICAN FOOD SYSTEMS IMPLODING: IMPACTS OF THE WAR IN UKRAINE

POLICY RECOMMENDATIONS TO TURN THE TIDE

POLICY BRIEF BY REFILOE JOALA & JAN URHAHN

CONTRIBUTING EDITORS: EVA WUCHOLD & JEANNE PLANCHE

THE WAR IN UKRAINE: YET ANOTHER CRISIS

If alarm bells are ringing loudly and incessantly it's because governments, civil society, activists, development organisations, and donors are signalling the negative impact of the war in Ukraine on African food systems. The domino effects of the war are manifest in substantial supply shortages, disruptions in supply chains and cargo shipments, particularly from Ukraine, one of the world's food baskets. The greatest impact is on food commodities – wheat, maize, and sunflower products, such as cooking oil, and on fossil-fuel-based inputs such as nitrogen-based fertilisers. The knock-on effects of the Russian invasion have for the third time in just a few years revealed the weakness of worldwide food systems.¹ Rapidly deteriorating global food security seems to be inevitable. In several parts of the world, rising food prices are putting immense economic pressure on lower-income groups, while in the Global South many people are acutely hungry. This is not new. The number of hungry people, currently around 828 million, has increased significantly since 2014, and not just since the Russian war of aggression on Ukraine. In the coming years, the current food crisis will be further intensified by multiple political, economic, and ecological crises. Although hunger has so far been ascribed to a food distribution problem, it may soon become a question of global food availability.

Beyond the soaring fuel prices that were already on the rise in 2021, there are three main channels through which the war in Ukraine is impacting African countries at the back of converging COVID19, conflict and climate crises. These are: 1) higher food prices due to higher commodity prices and speculation; 2) Africa's import dependency in the context of opaque private grain stockpiling and inadequate public food reserves; and 3) high fertiliser prices against the backdrop of a

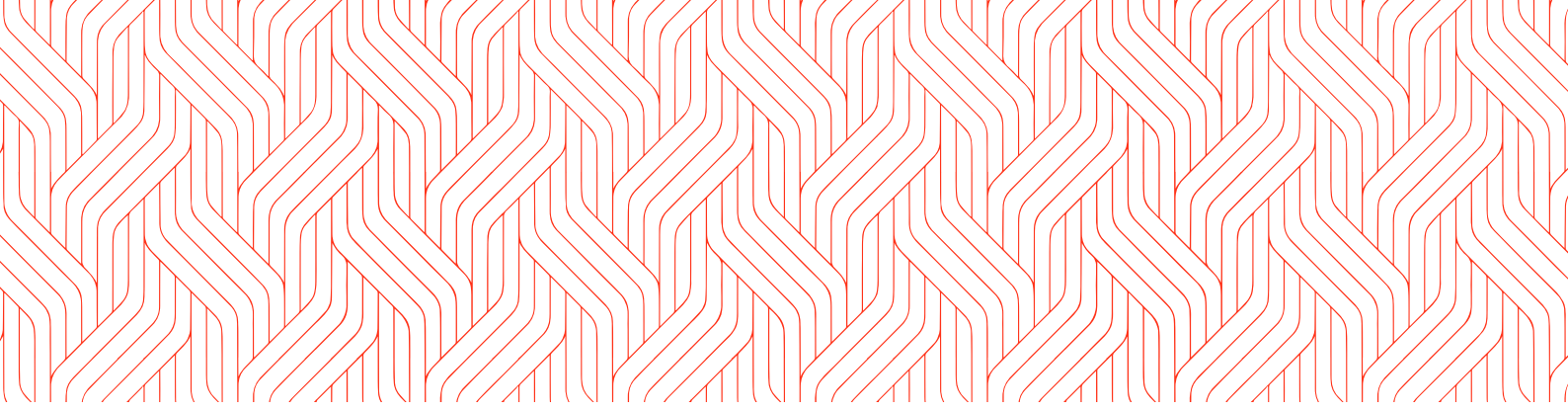
fossil-fuel-based model of agriculture.

How is the war in Ukraine affecting African food systems? What are African governments doing to mitigate the fallout of the Russia-Ukraine war? The need to transform food systems is more pressing than ever before. Governments simply must reduce their dependence on the world market and especially on fossil-fuel-based inputs. States must get involved in food systems or see their people starve.

AFRICAN FOOD SYSTEMS: A BRIEF OVERVIEW

African food systems have undergone substantial and swift changes over the past two decades, with increased capital investment by multilateral and bilateral donors accompanied by greater corporate control of food supply chains.² Agricultural policy reforms since the early 2000s have focused on improving productivity levels, production growth, trade, attracting domestic and international investment, and ensuring conducive conditions for the development of this sector.³ Linked to this, renewed interest in African agriculture following multiple crises of energy, climate change, food, and finance at the turn of the century, has given way to new plans for agricultural development focused on improving productivity levels and increasing the production yields of millions of small- and medium-scale food producers across the continent.⁴ However, at their core, these agricultural development plans have focused on using tech-based best practices and the supply of a Green Revolution package consisting of commercial seeds, synthetic fertilisers, and agrochemicals.⁵

Food production has been affected by changes in land use as well as access to and control of resources including land, water, and seeds. Diverse and nutritious food crops have been



sidelined in favour of maize production. An assessment of the Alliance for a Green Revolution (AGRA) — a billion USD initiative, established in 2006 — found that not only did AGRA fail to double the agricultural yields and incomes of 30 million African small-scale food producers by 2020 as promised, but it also increased cropland ‘extensification’ without significantly improving productivity levels.⁶ Limiting crop diversity for small-scale food producers, who make decisions based on access to markets and inputs, has resulted in greater reliance on food markets for food access.



Photo © Jan Urhahn, Rosa Luxemburg Stiftung

The most recent data available on fertiliser in the region indicates that South Africa’s use of fertiliser is comparable to that of Australia at 73kg per hectare of arable land, Zambia uses 53kg per hectare, while Kenya, Malawi, Tanzania, and Zimbabwe use between 15kg and 40kg. The increase in nitrogen use over the past decade among small-scale food producers can be attributed mainly to the reintroduction of input subsidy programmes (ISPs) in the late 2000s. A primary feature of agricultural development policies during the 1960s and 70s, input support programmes were revived to improve productivity and production yields among small-scale food producers. Fertiliser is central to the Green Revolution push in Africa as expressed in the 2006 Abuja Declaration on Fertilisers for an African Green Revolution, which called for an increase in average fertiliser use on the continent, from 8kg to 50kg per hectare by 2015.⁷

Turning to food consumption patterns in Africa, we see significant changes over the past two to three decades. The African diet changed rapidly in parallel with trade and economic liberalisation that gave rise to large and transnational food and beverage corporations and resulted in the increased consumption of fats, packaged and processed food containing

high levels of salt and sugar.⁸ Based on the 2019 food balance sheets data by the Food and Agriculture Organization of the United Nations (FAO), the typical food basket of households across Sub-Saharan Africa (SSA), broadly consists of two types of staples, cereals and roots, that make up two-thirds of the average caloric intake. The most common and widely consumed cereals are maize in Southern and Eastern Africa and rice in West Africa, alongside wheat across the region. The most popular roots and tubers are cassava, sweet potatoes, and potatoes. The other third consists of edible fats, mainly palm oil and other vegetable oil and oilseeds such as sunflower oil, canola oil, and more recently soybean oil in some countries, as well as fruit, vegetables, meat, and pulses.⁹ Although, the per capita consumption of wheat in SSA remains far lower than in North Africa, which has the highest per capita wheat consumption in the world, it has been rising faster than in any other region globally.¹⁰ Wheat consumption increased from 30kg per capita in 1963 to 47kg in 1993, reaching 49kg in 2017, far outpacing the growth rate of maize and rice consumption.¹¹ Africans are also using more edible fats in home cooking and food manufacturing, mimicking Western diets. Consumption and production of edible oils vary across the continent. Palm oil, which is used in over 50% of processed foods, is mainly produced in West Africa and is the most widely consumed and produced vegetable oil on the continent. Sunflower and soybean production and consumption, both used to produce animal feed, have increased in Southern and East Africa¹² while North African countries have focused on olive oil. Despite increasing sunflower production, as well as expanding the sunflower seed oil intra-trade on the continent, the region continues to rely on imports to meet the growing demand for edible oils and Ukraine is among the top suppliers.¹³

Skyrocketing input prices for synthetic fertiliser and the heavy reliance of African countries on imports driven by increasing demand for imported staple grains and fats, highlight the weakness and fragility of African food systems. African food markets are particularly vulnerable due to the pass-through from global to local food prices.¹⁴ According to a 2020 report on the state of food security published by the FAO, in partnership with other United Nations (UN) agencies, a healthy diet in SSA costs 3.2 times more than the poverty line.¹⁵

Rising food prices threaten the poorest and most vulnerable nations

Africa has witnessed an increase in the poverty level to 39% during the COVID19 pandemic.¹⁶ Barring a few up and down swings, food prices have risen since the 1960s and surged in 2022. According to the FAO Food Price Index (FFPI),¹⁷ prices are 7.9% higher than in August 2021 despite falling since April 2022 for five months in a row.¹⁸ In early 2022, they were even higher than during the global food price crisis in 2007/2008.¹⁹ As global and regional prices filter into local markets, food accessibility in Africa could worsen with the reduction of household purchasing power. This is already the case in East Africa. In May 2022, the average monthly price of the local food basket reached 17 USD per capita across Eastern African countries – representing a 51.1% increase from the previous year (12.2 USD) and 18.4% from pre-war prices (15.1 USD in January 2022).²⁰ For instance, the price of bread (chapatis) in Nairobi, Kenya has doubled.²¹ Rising or volatile food prices severely affect already marginalised groups. The poorest populations in low-income countries spend over 60% of their income on food and even slight fluctuations in food prices mean they are unable to purchase sufficient food.²² Poor households in urban areas are already feeling the brunt of price hikes and are likely to suffer even more because they rely entirely on markets for food.

Food speculation and jumping on the bandwagon

As food prices rise sharply due to sky-high commodity prices as a result of the war in Ukraine, speculative investors are flocking to place their bets on food commodities, creating price bubbles and putting even greater pressure on prices.²³ Futures or exchange markets were originally developed to protect food producers and allow them to bargain with buyers by committing to future exchanges and delivery of grain for cash on a specified future date at a price set in real-time. In today's unregulated financial markets, instead of bargaining, investors enter these markets to speculate and make profits. The overwhelming influx of speculators in futures markets of food staples causes sharp swings in prices.²⁴

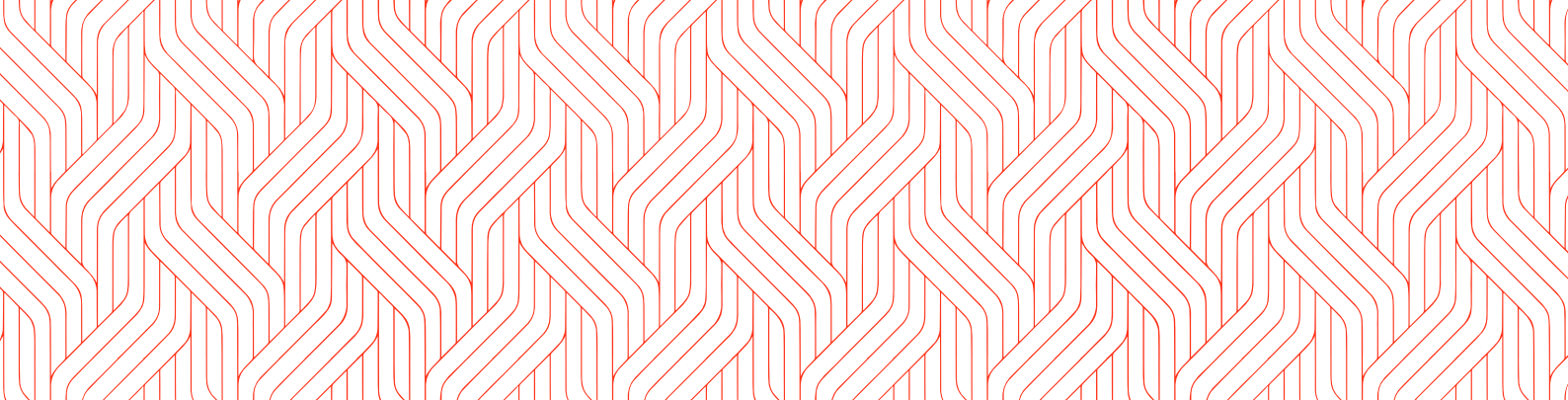
At the height of the evolving food price crisis in May 2022, IPES-Food reports that higher wheat volumes were recorded on the Chicago Mercantile Exchange at the outbreak of the war, driven by financial investors.²⁵ In the Paris milling wheat market, for instance, the benchmark for Europe, speculators' share of buy-side wheat futures contracts increased from

23% of open interest in May 2018 to 72% in April 2022, with seven in ten buyers speculating on wheat futures contracts.²⁶ Speculators included investment firms, investment funds, other financial institutions, and commercial non-hedgers whose primary objective was to profit from rising food prices. Agricultural commodities speculation on the commodity futures exchanges has been identified as one of the underlying causes of food price hikes in the 2007/2008 food crisis alongside significant shifts to biofuels.²⁷ According to preliminary estimates of the FAO, higher prices pushed an additional 40 million people into hunger in 2008.²⁸

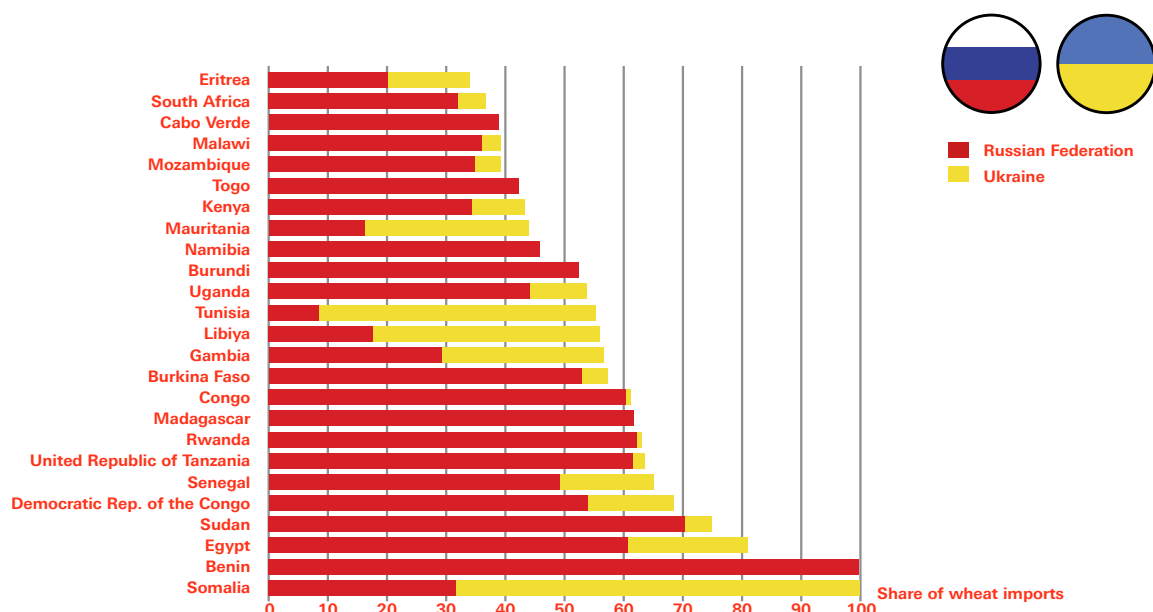
The marked increase in the number of speculators in the futures markets of food commodities shows the influence of speculation on high food prices around the world. As if the causes of the devastating outcomes of 2007/2008 were unknown, the unchecked participation of financial institutions selling ETFs²⁹ and CIFs³⁰ in commodity markets while governments in developing countries take on more debt to avoid food shortages highlights the exploitative nature of international financial markets.

Africa's import dependency

Russia and Ukraine together provide the world with 53% of its sunflower oil and seeds, 27% of its wheat, 23% of its barley, and 14% of its maize.³¹ According to UNCTAD, 25 African countries depend on Russia and Ukraine for at least 30% of their wheat while 16 out of these 25 countries sourced 50% of their wheat from them.³² Many of them are food insecure, such as Benin and Somalia, which get about 100% of their wheat from the two countries, Egypt over 80%, and Sudan over 70%.³³ Between 2018 and 2020, Africa imported 3.7 billion USD in wheat (32% of total African wheat imports) from Russia and another 1.4 billion USD from Ukraine (12%).³⁴ Although wheat/wheat products account for only one-third of average cereal consumption in East Africa, 84% is covered by imports, mainly from Ukraine and Russia.³⁵ Overall, the African continent is dependent on food imports. In 2018, about 85% of the food in Africa was imported.³⁶ Despite these shocking figures, it is important to note that countries are affected quite differently. In general, cereals are largely grown in the countries where they are consumed. For example, 91% of rice is produced where it is consumed. The figure for maize is 84%, while for wheat it is 73%.³⁷



Wheat Dependence in African Countries (in %)



UNCTAD (2022). The impact on trade and development of the war in Ukraine. Available at: https://unctad.org/system/files/official-document/osginf2022d1_en.pdf.

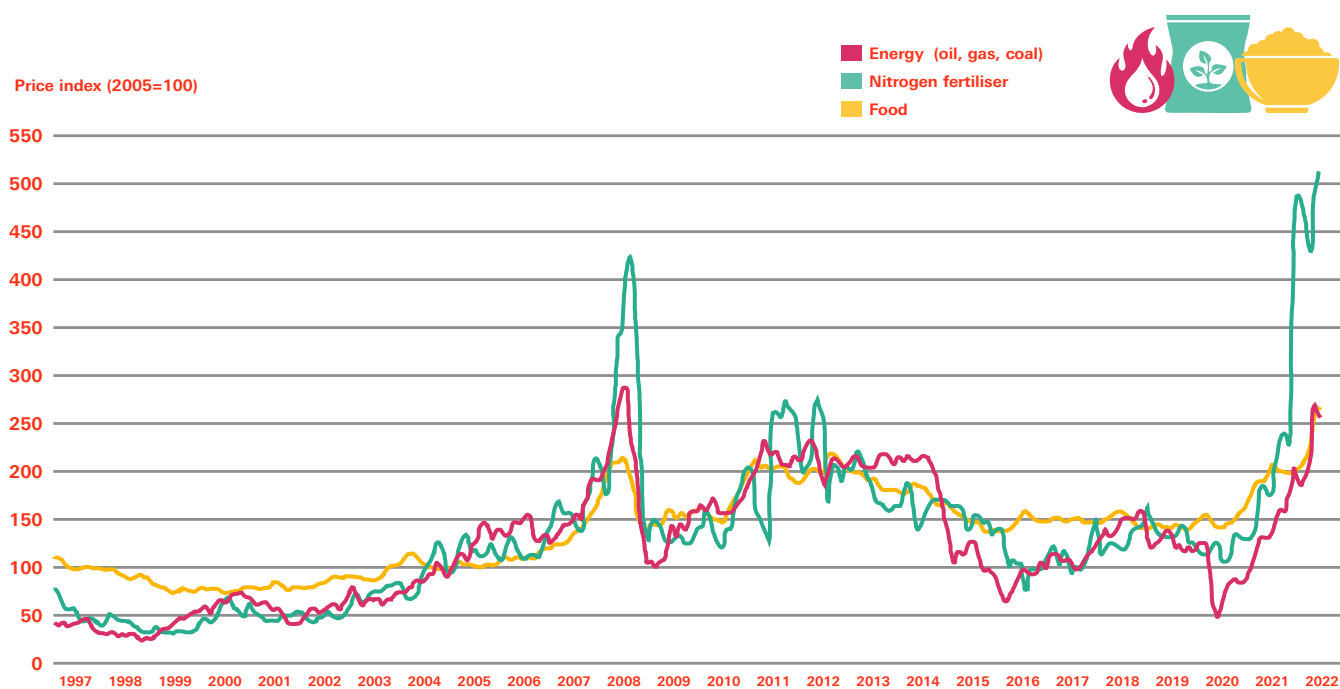
The authors of the above-mentioned IPES-Food report explain that several countries are heavily exposed due to a double dependency: a) on imports of staple crops, and b) on a handful of exporters for a high percentage of those imports.³⁸ According to this report, African countries have become especially food import-dependent following the adoption of Structural Adjustment Programs (SAPs) in the 1980s, which promoted cash crop exports, cheap grain imports, scaled back state support programmes, and dismantled structural foundations of food production.³⁹ This left the provision of food and other related social services to market players. While most countries continue to produce staple crops for domestic consumption, many do not produce enough to meet their needs and have become reliant on large volumes of imports. Furthermore, many food importing countries in developing regions lack the necessary foreign exchange to procure food from international markets. It is worth noting that according to the FAO, the world food import bill for agrarian products was forecast to reach a record high in 2021. By that time, SSA and Low-Income Food-Deficit Countries (LIFDCs) were expected to increase imports of staple foods by more than 20% compared to 2020 import levels.⁴⁰ Food importing countries have also become dependent on a limited number of grain exporters. Global trade in staple crops is dominated by a handful of countries and corporations – leading to significant disruptions when a major exporter reduces its volumes. According to US Department of Agriculture data, just five countries plus the EU account

for almost 80% of the world’s wheat exports.⁴¹ Adding to that, only four companies – the Archer-Daniels-Midland Company, Bunge, Cargill, and Louis Dreyfus, known collectively as ABCD – control an estimated 70-90% of the global grain trade.⁴²

Fertiliser addiction: fossil-fuel-based agriculture

Historically, the industrial agricultural system has been completely dependent on the cheap and continuous supply of energy. A central component of the current food systems, based on fossil fuels, is the extensive use of synthetic fertilisers. Besides the massive negative impacts of fertilisers on the climate as well as on soils and biodiversity, the production of synthetic fertilisers and prices are closely linked to those of fossil fuels such as coal, oil, and gas. Essentially, the fertiliser industry is still closely embedded in the oil, gas, coal, and mining industries today. This is because synthetic fertiliser production is primarily energy and resource intensive. For example, in the production of nitrogen fertilisers through the Haber-Bosch process,⁴³ up to 80% of production costs are determined by the price of oil, natural gas, or coal.⁴⁴ Furthermore, mineral raw materials for phosphate and potash fertilisers in particular are scarce and can only be mined in a few regions of the world.⁴⁵ The high energy and resource requirements of fertiliser production mean that the industry relies on the cheapest and most reliable access to fossil fuels and raw materials possible.

Price of fossil fuels, nitrogen fertilisers and food, 1997 to 2022



INKOTA-netzwerk (2022). Golden bullet or bad bet? Dependencies on synthetic fertilisers and their impacts on the African continent. Data based on IMF 2022. Available at: <https://webshop.inkota.de/file/2265/download?token=umVrlq7X>.

Russia supplies the world with 12.7% of its phosphate and 15.5% nitrogen in the form of urea. More than 30 African countries import nitrogenous, potassium, and phosphate fertilisers from Russia and Belarus. The main fertiliser components imported by African countries are diammonium phosphate, the most widely used phosphorus fertiliser, muriate of potash, and urea, which is made using natural gas or gas, derived from coal. About 80% of fertiliser consumed across SSA is imported. West Africa uses 40% of this while East and Southern Africa use the remaining 60%.⁴⁶ Nigeria is one of the few countries that does not rely on imports to meet its fertiliser demand as it produces approximately 70% of the fertiliser it requires.⁴⁷

Fertiliser costs have been climbing for several years with prices in Africa often higher than the average world price. Among other challenges, the cost of transport is a major factor that makes fertiliser prices higher in Africa. Land transport in West Africa bears the highest cost in the fertiliser supply chain at an average of USD 0.07/mt/km, compared to Europe, which averages USD 0.03/mt/km.⁴⁸ During COVID19, the prices for nitrogen fertiliser more than doubled between January 2020 to December 2021, from 250 USD per ton to 600 USD.

The average world urea price in May 2022 was 549 USD per ton whereas the price in Kenya was 1,233 USD and 1,216 USD in Ghana.⁴⁹ These exorbitant prices are unaffordable for governments that subsidise imports, and for farmers who depend on imported fertiliser. Countries such as Ethiopia, Malawi, and Zambia spend more than 50% of their agricultural budgets on these subsidies, often in the form of Farm Input Subsidies Programmes (FISPs).⁵⁰

The prices of energy, fertiliser, and food are interrelated. A study from 2016 shows that in the long term, a doubling of fertiliser prices led to a 44% increase in food prices.⁵¹ In the short term, the use of fossil-fuel-based fertilisers will dwindle leading to a decline in production levels and threaten food security in those African states largely dependent on synthetic fertilisers. This would spell disaster for states that embraced the Green Revolution as a way to ramp up agricultural production. This is now an ideal opportunity for policymakers to rethink the necessity and suitability of fossil-fuel-driven agriculture. Currently, many farmers in African countries rely heavily on synthetic fertilisers to produce high yields. Crop yields for the 2022/2023 agricultural year could be detrimentally affected if fertiliser prices remain at record highs.⁵²

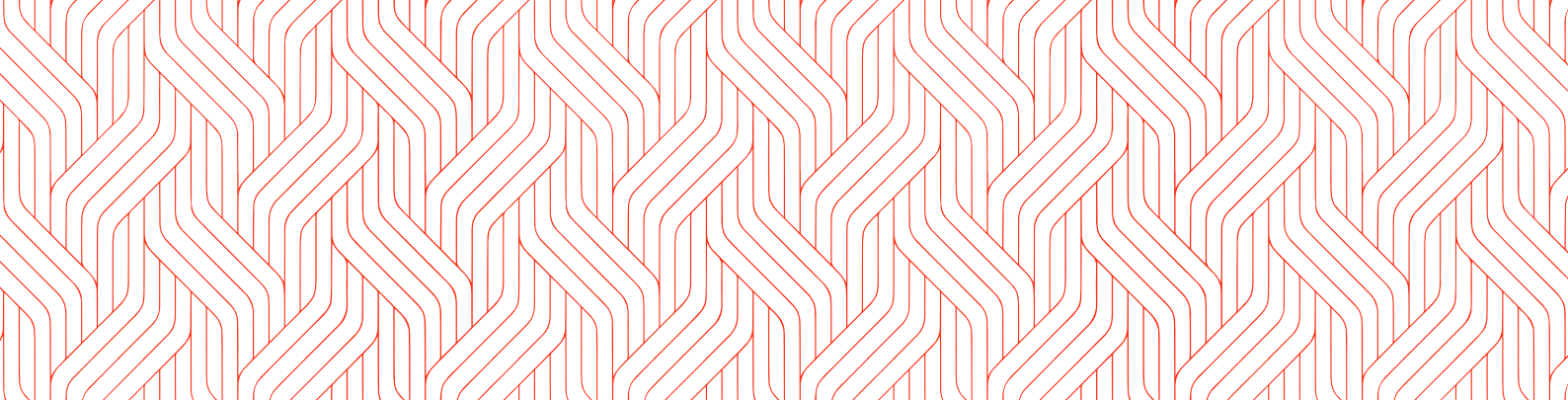


Photo © Jan Urhahn, Rosa Luxemburg Stiftung



Photo © Paul Morgan, flickr, https://www.flickr.com/photos/pauls_travels/2373132010/

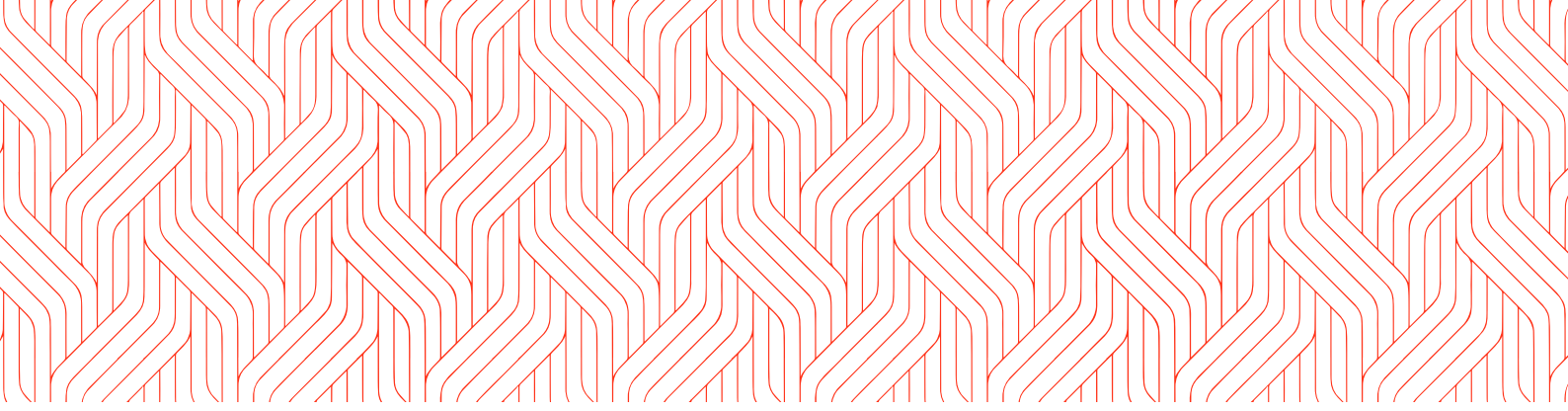
Lack of transparency and insufficient public food stocks

There is a lack of transparency in global grain markets and food markets in general, particularly on stock levels. Ten years ago, a rapid response forum of the G20 Agricultural Market Information System (AMIS) was created to quickly react to threats in world agricultural markets. AMIS was destined to provide reliable data on world agricultural markets but, regrettably, much of the available data is worthless, as hardly any country conducts empirical, comprehensive surveys of grain stocks. The available information is incomplete because of a strategic lack of transparency from many governments.⁵³ For example, China is assumed to hold roughly 50% of global cereal stocks, but these are crude estimates – with domestic legal frameworks helping Beijing to withhold information on its reserves. Furthermore, significant grain reserves are most likely held by the ‘ABCD’ grain trading giants as well as operators of local silos, and even individual farmers. These firms are under no obligation to disclose what they know about global markets, including their grain stocks.

There are three main purposes for countries to hold food reserves: 1) emergency food reserves to meet urgent needs in a disaster, such as a drought or a flood; 2) the release of food reserves in local markets to prevent excessive price fluctuations, and 3) social safety net stocks to provide food for ongoing social protection programmes such as school feeding programmes or food for work schemes. Overall, food reserves and price stability can aid national food self-sufficiency and make the economy more resilient to international shocks.⁵⁴ A strategic food reserve usually involves the government buying crops and taking responsibility for their storage until they are needed to make up for shortfalls.

Nevertheless, the world witnessed a decline in global stocks that occurred mainly due to stock reduction in developed countries. Stocks in these countries decreased from 130 million tons in 2005/2006 to 91 million tons in 2011/2012, a continuation of the trend that began in the early 1990s when – among other things – the Organization for Economic Cooperation and Development (OECD) countries reformed their agricultural policies to comply with the Uruguay Round of the World Trade Organization (WTO).⁵⁵ As a result, most stocks in OECD countries and globally are now held by private entities – farmers, traders, and processors.

Conversely, grain stocks in developing countries followed the opposite trend and more than doubled between the mid-2000s and 2021. About 70% of SSA countries have public food reserves of varying magnitudes and capacities. For instance, Malawi, Nigeria, and Zambia have larger programmes while Burkina Faso, Ethiopia, Ghana, and Mali have relatively small public stocks for emergency relief. Food reserves are typically put in place for emergency releases and in some countries – such as Ghana, Kenya, Malawi, Nigeria, Tanzania, and Zambia – to help stabilise local prices by setting a floor price. In this regard, food reserves are maintained to moderate the prices between international and domestic markets, but also lower inter-seasonal price fluctuations. These reserves are usually increased by buying domestic products at harvest time when prices are low, or via imports, thereby setting the floor price for particular staples and releasing them during the lean season to lower price spikes. Ethiopia and Mali are also examples of successful ‘food governance’ systems in Africa, both of which face highly variable rainfall patterns and rely on rain-fed grain production. Mali, the more arid of the two, has held strategic reserves through the Program for Restructuring the Cereal Market (PRMC) since 1981. The PRMC successfully mitigated the 2004/2005 drought and subsequent locust invasion that



devastated neighbouring Niger. PRMC phased out its role as an intervener in the grain market and bolstered its role as a provider of market information and social safety nets via emergency grain stock. After the 2004/2005 drought, PRMC adjusted its reserves from 35,000 tons to hold 69,000 tons of cereals, rice, and coarse grains. Similarly in Ethiopia, the Emergency Food Security Reserve Administration (EFRSA), an independent government agency, handles emergency food reserves and has stepped in on several occasions with aid since the severe crisis of the 1970s.⁵⁶ Zambia's Food Reserve Agency has played a highly interventionist role in maize since 2005, buying the country's maize surplus, setting maize prices, and holding over 350,000 tons of maize, over one-tenth of the country's production.⁵⁷ Malawi also maintains a sizeable food reserve that has recently been increased while Rwanda initiated measures in 2010 to re-establish a small strategic reserve of maize and beans purchased from small-scale food producers.

Regional food reserves could help back up these national reserves. Existing regional cooperation in Africa is relatively limited beyond trade. One of the very few examples is the Economic Community of West African States (ECOWAS) initiative to establish regional grain reserves for humanitarian purposes in West Africa. However, five years into the scheme in 2021, the results are disappointing: only 42,000 tons of cereals had been accrued in West African regional reserves, only 10% of stocks had been procured from local producer organisations, and multiple and recurring crises have made it difficult for countries to replenish the reserves they have drawn on.⁵⁸

There are myriad challenges facing African countries in designing and implementing effective public food reserves programmes and chief among them are price setting that influences the cost and size of stocks, and storage facilities that have historically stunted progress. Finally, it is important to note that while the WTO exempts food aid stockholding efforts by multilateral aid institutions such as the World Food Programme (WFP) of the UN and the International Committee of the Red Cross (ICRC) to name a few, trade rules constrain how much governments spend on agriculture and what programmes they can spend on.

Other crises: conflict and climate change

The impact of climate change and conflict massively affects food and agriculture. Climate shocks are already afflicting agriculture regularly enough to create persistent vulnerability, as well as injecting a permanent layer of uncertainty into global markets. The Intergovernmental Panel on Climate

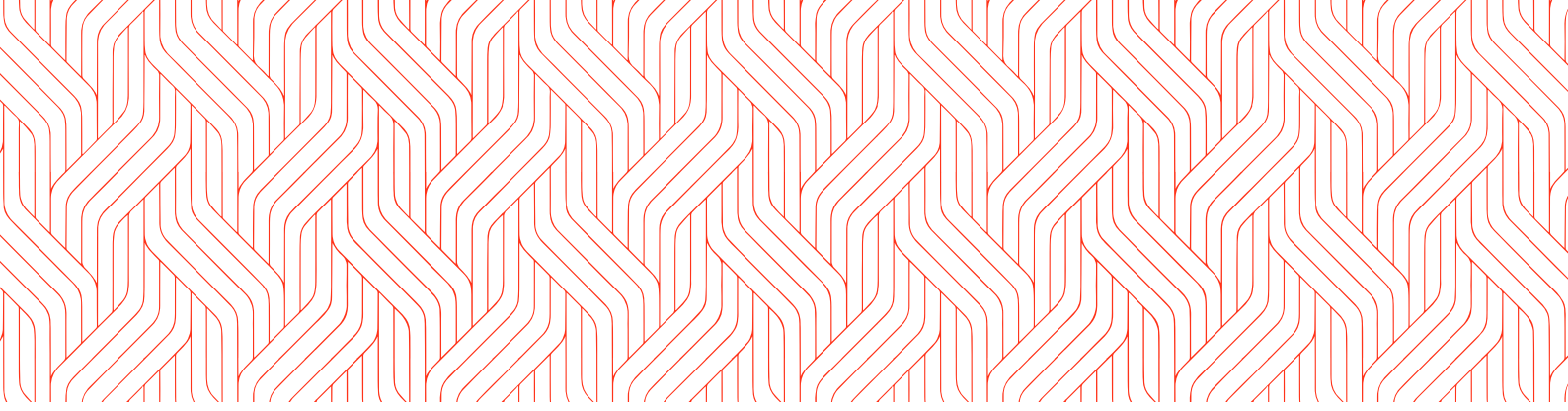
Change (IPCC) estimates that climatic variations have reduced agricultural productivity by 21% since 1961 and by up to 34% in Africa and Latin America.⁵⁹ There are over 40 active conflict zones around the world today, affecting over two billion people – half of whom live in extreme poverty.⁶⁰ Furthermore, multiple research studies report that 60% of undernourished people are located in conflict zones and the Horn of Africa is hit by recurrent droughts.⁶¹ Somalia is one of the top recipients of aid from the WFP and other organisations such as the Islamic Aid Foundation. About 2.7 million people in Somalia received food aid in 2018 and around 500,000 are threatened by famine while about 300,000 are considered undernourished.⁶² The Russia-Ukraine war dents the available budget for food relief and complicates the already dire hunger and famine situation. Together with Kenya, and Ethiopia, Somalia faces recurring droughts that may lead to famine. There is a confluence of the war and climate change fuelling more food shortages in Africa. It is a vicious circle given that corporate-driven industrial agriculture is among the key triggers of the current ecological crisis. This agriculture model is dominant in the Black Sea region. Yet, ensuring food security is a stopgap measure to stave off violent conflict.⁶³

POLICY RESPONSES BY AFRICAN GOVERNMENTS

African governments are adopting wide-ranging policy measures to curb soaring food and fuel prices since the outbreak of the war in Ukraine. This section provides a snapshot of the different approaches being implemented by African governments, some relatively unconventional, to help cushion their populations against the rapidly rising cost of living and reduce hunger levels among the marginalised.

In Southern Africa, one of the regions worst hit by the war in Ukraine, governments have adopted short-term fuel subsidies in South Africa for example, and price ceilings on basic commodities. In April 2022, the Government of Madagascar implemented price ceilings on rice and other basic commodities to help shield households against the higher cost of living. While Malawi and Zambia have committed to maintaining the same level of subsidies to FISPs in 2022, fertiliser accessibility and its impact on production remain a concern for the upcoming 2022/2023 agricultural season.⁶⁴

In East Africa, governments have adopted a raft of agricultural, social, monetary, and fiscal policy measures in response to rising food and energy prices to buffer the population against food and fuel inflation and protect the most vulnerable households. The agricultural policies that governments in the



sub-region adopted include the launch of the government-backed fertiliser subsidy in April 2022 to help farmers manage production costs, and increased large-scale commercialisation of state land. Rwanda has maintained its fertiliser subsidy and is promoting food substitution, strengthening extension services, and increasing the area under wheat production, among others, while Ethiopia is expanding summer wheat production in over 400,000 hectares of land across the country. With regards to trade, Kenya gazetted the importation of 99.1% of non-GMO yellow maize for animal feed, maintained its 25% duty remission for maize imports from five countries, and the duty waiver on maize, wheat, and rice for the next four months. Ethiopia is advancing reforms to unify the official and parallel exchange rates, giving priority to the allocation of foreign currency to manufacturers of edible oil. The government has put in place planned state bulk importation of 150 million litres of edible oil for July to September 2022 and instituted an export ban on major grains. Djibouti, Ethiopia, and Rwanda adopted monetary policies respectively including a tax and VAT exemption on essential foods for March and April (Ramadan), a Central Bank Rate (CBR) at 5%, and a combination of local tax exemption on wheat alongside a VAT waiver on wheat, edible oil, sugar, rice, pasta, eggs, macaroni, and rice. Other measures in the region included price controls on a limited list of food products with fixed prices in Djibouti.

On the other end of the continent, in West Africa, governments are also adopting a combination of policies geared towards reducing agricultural production costs and food prices. In Senegal, 50 billion CFA francs (83 million USD) have been mobilised to subsidise local rice producers and price reduction for essential foods. These include the deduction of 100 CFA francs (0.17 USD) on the price of oil, 25 CFA francs (0.04 USD) on a kilo of 'unflavoured broken' rice, and 25 CFA francs on sugar.⁶⁵ On 6 August, the president of Côte d'Ivoire announced a series of new interventions ranging from increased transportation and housing grants to price ceilings on refined palm oil, sugar, milk, rice, tomato paste, beef, and pasta. The list of price-regulated consumer products and services will be extended.

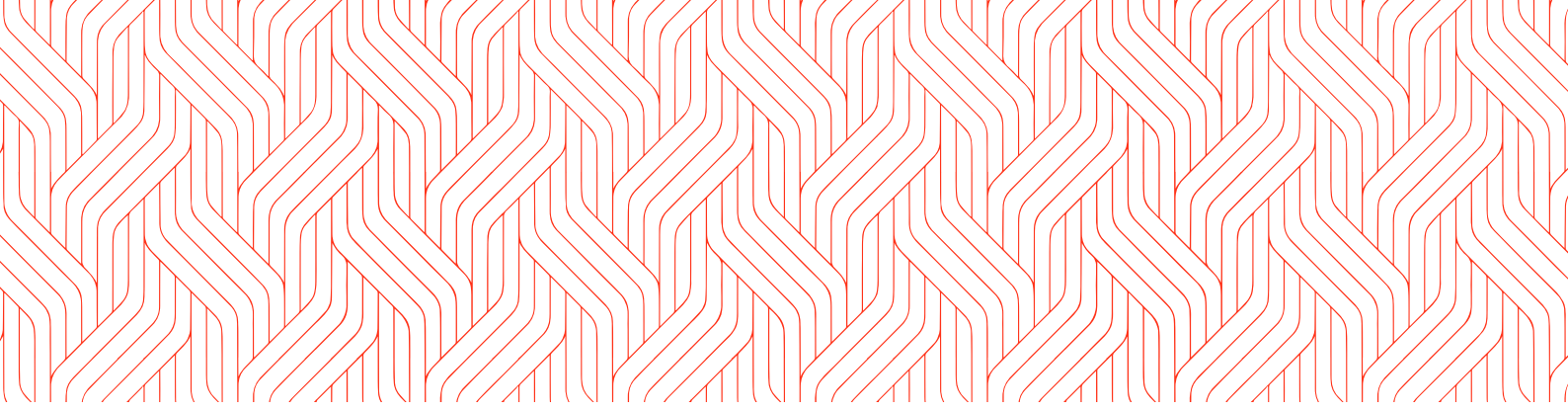
North of the Sahara, where social protection systems are deeply embedded in national politics, and constitutional and policy frameworks, food subsidies are the cornerstone of welfare and development policies. In Morocco, the government adopted a decree in June 2022 to stabilize domestic prices, assigning a 1.75 billion USD subsidy increase on wheat, sugar, and cooking gas, in addition to 1.8 billion USD already earmarked in the

annual budget.⁶⁶ In Egypt, about 70 million people benefit from the ration card system, while 83 million from subsidised Baladi bread, the government also extended the fixed price of flatbread outside the subsidy system to avert the risk of a price rise.⁶⁷ Tunisia's General Compensation Fund has set the prices of certain commodities to boost the purchasing power of the Tunisian people.⁶⁸ In addition, Tunisia's 2022 budget provides for a 71.4% rise in the subsidy of basic products compared to 2021.⁶⁹ The Algerian government allocated 1.3 billion USD of its 2022 budget to subsidise cereals, up 8% compared to 2021. Furthermore, the government set up an unemployment support fund, which provides 89 USD to beneficiaries per month. Other, relatively unconventional responses to the food price crisis were adopted by Tunisia and Algeria. In Tunisia, the president passed a decree, launching a 'war on speculation', with harsh new penalties, ranging from maximum sentences of 10 years for ordinary speculation to 20 years for speculating on subsidised products and hoarding, and up to 30 years for being part of a cartel of speculators, plus hefty fines.

POLICY RECOMMENDATIONS TO TURN THE TIDE

The war in Ukraine not only had a far-reaching impact on rising food prices, but also exacerbated already high fuel and fertiliser prices. It has also prolonged the lingering effects of the COVID19 pandemic by slowing international shipments and stalling whole supply chains. African countries, especially highly import-dependent ones, the lower-middle-income countries such as Egypt and Nigeria, as well as those with low incomes, and conflict zones such as Burkina Faso, DR Congo, and Somalia are feeling the pinch. Growing import volumes and dependency in the context of decreasing crop production diversity for domestic consumption is a recipe for disaster. The weaknesses and fragility of the dominant food systems were laid bare during COVID19 and carrying on business as usual is not an option as growing poverty and hunger levels threaten the stability of the corporations and public institutions that operate and govern these failing food systems. While immediate buffers are urgent for shielding the worst-hit countries and disproportionately affected populations, diversifying food production and building reserves are critical short-term measures that need to be implemented in upcoming planting and harvest seasons.

Beyond these immediate measures, more strategic policies and programmes must be rolled out to transform the food systems. Alternative localised, regional, and intra-regional food systems are imperative. The time is ripe for change considering



the external shocks posed by the broader crises of capitalism with growing uncertainty under worsening geopolitical risks and climate disasters. Concentrated markets are defenceless and fragile to shocks, and crises, leaving citizens with limited options in case of emergency, as we are witnessing with the turmoil in Ukraine. The problem is not only the model of industrialised agriculture but its global concentration, and its adverse environmental impacts.⁷⁰ Even in a world in which trade rules and powerful corporate interests supersede public institutions and human rights and entitlements, the need for national or regional food sufficiency and functioning territorial markets have created the impetus for transforming the food systems. Moving away from prevailing food systems entails reflective policy thinking and political will to explore and invest in pathways to facilitate agroecological food production and new ways of bringing food to people and markets at sub-national and sub-regional levels.

International coordination is key: CFS should lead the way

International efforts to develop solutions to prevent the current food crisis and future food crises while making food systems more resilient need clear international cooperation and leadership. The Committee on World Food Security (CFS) is the political space where this is possible and the CFS must take a global leadership role to develop measures to combat the hunger crisis and transform food systems. The CFS is the only UN agency that also has the mandate to do so. The CFS is particularly important because it represents one of the few and perhaps less contested political platforms where some of the hardest hit countries facing growing hunger levels can have a say in the development of solutions on an equal footing. Moreover, only the CFS works with inclusive processes that enable the perspectives of affected groups to be heard. The work of the CFS is based on the rights-based approach. In addition, the CFS has already developed some important policy recommendations that need to be implemented now especially, more than ever before. These include the CFS policy recommendations on price volatility and food security⁷¹ or the CFS framework for action in protracted crises,⁷² for example that provides a policy framework anchored in human rights and international humanitarian law to address short-term emergency assistance, long-term development and the underlying causes of food insecurity and malnutrition. **For this to succeed, the CFS must be strengthened by donor countries one hand while on the other hand, the existing policy recommendations must be implemented by governments worldwide as soon as possible.**

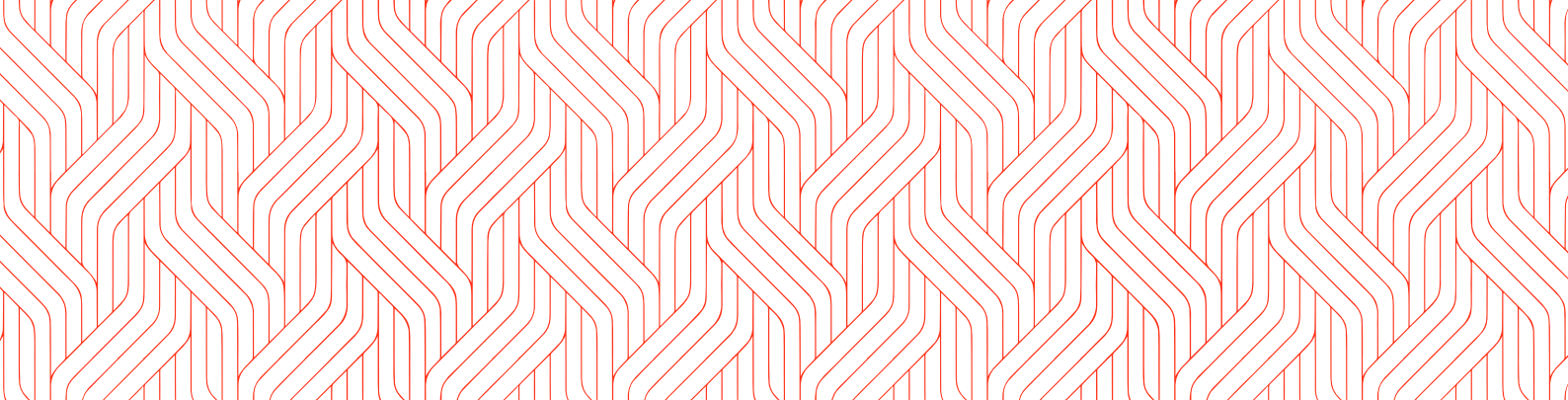
SHORT-TERM INTERVENTIONS

Debt relief and debt cancellation for highly indebted and food-importing countries

In the face of climate change, COVID19, and the Ukraine war, debt relief measures and/or cancellation are essential to allow net food importing low-income countries to pay spiralling import bills, and put social protection systems in place. Whereas in the past, official creditors of African countries were primarily the rich Western states and multilateral institutions like the World Bank and the International Monetary Fund (IMF), the group has now expanded. They currently include new hubs of capital such as Brazil, China, India, and the oil-rich Gulf countries and multilateral institutions like the African Export-Import Bank and the New Development Bank.⁷³ Furthermore, the sheer amount of debt owed to private creditors across the financial landscape of developing countries makes the inclusion of private investors in any debt relief measure critical. There is a compelling need for innovative debt relief or cancellation initiatives for the African continent that consider the specificities of African economies and allow the equal and transparent participation of developing countries in their processes. **There is a need too for human rights-based sovereign debt mechanisms to revolutionise international financial architecture. Therefore, a statutory Sovereign Debt Restructuring mechanism capable of binding participants to the restructuring process should be put in place.**⁷⁴

Social protection systems and grants

Social protection programmes play a vital role in managing and reducing vulnerability. While the right to food has not been fully domesticated in any African country, the right to social security plays a critical role in ensuring people's right to food. During moments of crisis such as the present global food price crisis, the proportion of a population needing assistance to access food and other essential goods and services tends to rise sharply. Cash transfers have been adopted as a measure of reducing vulnerability and hunger in the majority of African countries. A 2016 study by the FAO and UNICEF evaluating eight African countries found that unconditional cash transfers lead to significant social and productive impacts on beneficiary households. The evidence provides a strong case for unconditional transfers in Africa, as opposed to conditional ones, in terms of (i) broad range of impacts across sectors, (ii) flexibility for households to manage their expenditures, and (iii) similar (and in some cases higher) impacts, with lower operational costs.⁷⁵



In terms of direct food provision, school feeding schemes are the most common measure and play a critical role in ensuring that school-going children and youths consume at least one balanced meal a day. In Kenya, more than 1.5 million schoolchildren are fed a hot lunch of maize and legumes each day, the only meal many of them will have. More than 8.8 million South African students receive a cooked mid-morning meal, and those in the poorest provinces are also served lunch. Cabo Verde's national school feeding programme not only provides one hot meal a day to thousands of schoolchildren but also employs more than 1,000 women from within the school communities.⁷⁶ **Expanding the coverage of school feeding schemes is especially important during a crisis as children are often the most food insecure.**

MEDIUM-TERM INTERVENTIONS

Extend and diversify the production of staples to strengthen subnational and national food supply chains

Input support programmes are a form of social protection that raises household incomes and crop production and provide a lifeline that offers beneficiaries an opportunity to build assets and reinvest in income-generating activities. More commonly referred to as FISPs, they are known for their extensive reach compared to other social protection programmes in East and Southern African countries, particularly in rural areas. In countries such as Malawi, Tanzania, and Zambia, the FISPs have been implemented as comprehensive programmes for the adoption of the Green Revolution package of inputs among small-scale food producers to improve productivity and yields and ultimately their incomes. In the few West African countries that implement FISPs, such as Ghana, the programme was used to mitigate high fertiliser prices. In 2013, ten African governments spent roughly 1 billion USD annually on FISPs, amounting to 28.6% of their public expenditure on agriculture but, because of poor outcomes, had very little to show for it.

FISPs have been criticised for draining agricultural budgets and reducing crop diversity among small-scale food producers, however, given that agriculture provides a livelihood for more than 60% of the population in SSA, investment in small-scale food production should remain a priority. Therefore, instead of providing markets for corporate giants to sell inputs to governments and farmers, **African governments must redirect budgets to provide small-scale food producers with appropriate forms of assistance that will empower them to advance sustainable and resilient food production.** Urgent

and substantial public investment to support small-scale food producers and strengthen local food systems include extension services geared towards agroecological production, sustainable irrigation systems, crop storage facilities, better local marketing facilities, and good road and market infrastructures.

Build national and regional food reserves

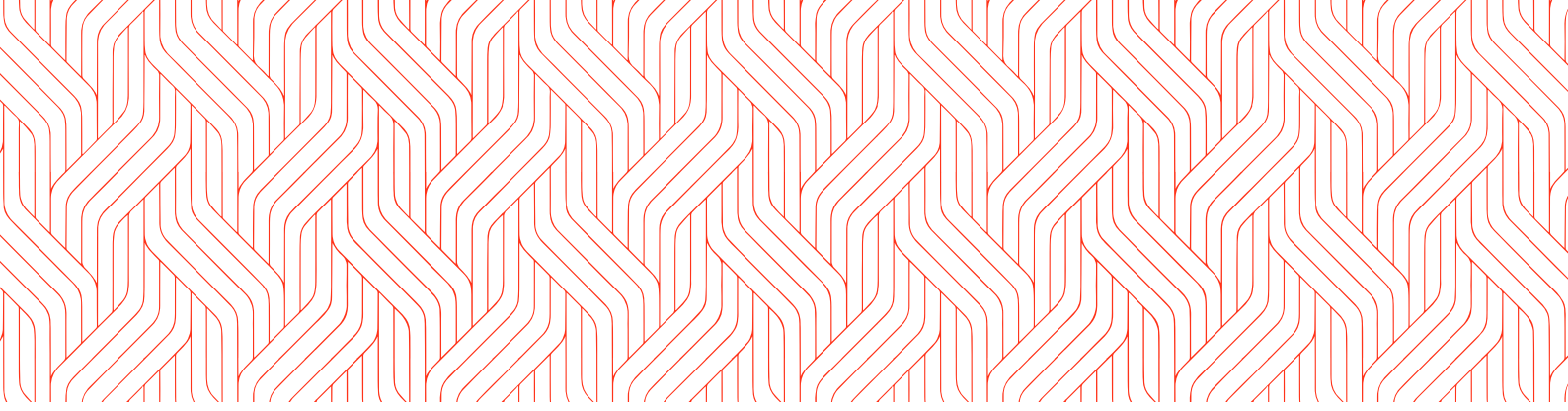
African states must expand and diversify their food reserves. **While stocks of staple commodities are essential, diversifying the selection for stockpiling will ensure healthier diets during a crisis.** More diverse public food stocks also incentivise farmers to produce a wider food basket and not focus on a single crop. Additionally, governments must buy these food stocks from local small-scale food producers at competitive prices that guarantee a living income. Public procurement programmes provide reliable local or national markets for mainly small-scale food producers.

Pooled reserves and integrated food storage strategies at the regional level in Africa are also must-haves. With additional investment, regional food reserves can be used to both alleviate food shortages and act as a market (re)adjustments instrument. These tools will be particularly valuable if democratic governance can be ensured, building on the West African precedent of co-designing management tools with farmers.

Regulate food prices: introduce price caps for staple foods and curb speculation with food to protect lives

If food prices explode as in the current crisis, they should be regulated and capped. Many African countries operate successfully with price control mechanisms for a limited number of products already. **Governments in the Global North should also implement measures to control food prices and therewith protect poor communities.** To do this international, regional, and national cooperation is key.

Only a few powerful and large corporations dominate the production, processing, distribution, and retailing of food, as evidenced by the growing corporate concentration in African food markets, despite the abundance of open-air markets. By controlling different segments of food supply chains, price gouging, and indulging in other forms of anti-competitive behavior to maximize their profits, large corporations influence how markets function. Multiple empirical studies on pricing patterns and profits of supermarkets in the Global North and South show that the fewer firms there are, the higher the prices of commodities and the more profitable these firms become



over time. Retailers and wholesalers use moments of crisis to exploit growing demand in the face of interrupted and/or dwindling supplies to push up food prices. During COVID19, price-gouging violations occurred in the pharmaceutical, food, and agricultural markets. Furthermore, although informal food vendors in the open-air food markets across the continent offer food at lower prices, they rely on domestic and transnational wholesalers to procure processed and packaged food, including staple grains and in some countries, fresh fruit and vegetables as well. This means that people buying from open-air markets are not immune to the type of price gouging observed in supermarket chain stores.

Demand-driven price hikes for particular commodities are often not identified, tracked or monitored by authorities so retailers can hike prices over the short term without backlash. So, if there is the will, **African governments could quickly implement mechanisms for consumers to report cases of price gouging that are more accessible than laying formal complaints with competition authorities. Similarly, establishing better multi-sectoral monitoring of food prices through public institutions at the sub-national and national levels will allow them to track and publish food prices based on the prices people actually pay in supermarkets and smaller food retail outlets.** In South Africa for instance, the monthly consumer price index published by the statistics authority relies on online food prices, which disregard smaller food retailers and possible distortions in online pricing and marketing. An alternative and more direct way of regulating food pricing for all is setting short-term pricing ceilings for staple foods to alleviate pressure on buyers during moments of crisis and introduce long-term VAT exemptions on a diverse selection of staple foods that make up the food basket.

When it comes to excessive speculation in food commodity futures, it is unclear whether the current regulations are fully effective against excessive speculation despite some improvements in market transparency since the 2007/2008 food crisis. The main restrictions at present in food commodity markets only relate to position limits (number of contracts an investor can hold). **Therefore, multiple policy instruments must be explored and implemented by African governments in partnership with governments in the Global North to help preserve the functioning of food commodity markets and prevent excessive speculation.** An effective entry point for regulation is ensuring transparency in the food and agricultural markets. Private food traders as well as all states should be required to disclose their food reserves regularly. Together with

this, putting policy emphasis on keeping food markets open and enhancing cooperation across nations for stock releases and strengthening regulation of financial trading in food commodities are policy measures that must be implemented collaboratively at the regional and international level. Equally important, all commodity exchanges should establish more harmonized and clearer rules and foster controls to limit the destabilizing influence of high-frequency trading.

Reduce dependency on fossil-fuel-based inputs: phase out FISP

Global food production systems need to swiftly move away from environmentally harmful fossil-fuel-based inputs, such as synthetic fertilisers, which are often subsidised. With these fossil-fuel-based inputs at or nearing record highs, there is an opportunity to explore existing alternatives. Given the importance of nitrogen to crops, bio-fertilisers and the application of oilcake are well established and so are crop rotation techniques using legumes for nitrogen fixation. Higher legume production could also satisfy dietary protein requirements at the expense of unsustainable meat, egg and dairy production. Bio-pesticides and integrated pest management (IPM) techniques have also long been established. These alternatives need to be promoted by African states. **Green Revolution subsidy programmes that support synthetic fertiliser, hybrid seed, and pesticides must be phased out.** This is also important in view of other crises such as climate change.

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Authors

Refiloe Joala and Jan Urhahn (both Rosa Luxemburg Stiftung Southern Africa)

Contributing Editors

Eva Wuchold and Jeanne Planche (both Rosa Luxemburg Stiftung Geneva Office)

Publishers

Rosa Luxemburg Stiftung Southern Africa

237 Jan Smuts Avenue
2193 Johannesburg, South Africa
Telephone: +27 (0)11 446 5445
Email: info@rosalux.co.za
Website: www.rosalux.co.za

Rosa Luxemburg Stiftung Geneva Office

Chemin de Balexert 7-9
1219 Châtelaine, Switzerland
Telephone: +41 (0)22 420 15 15
Email: info@rosalux-geneva.org
Website: www.rosalux-geneva.org

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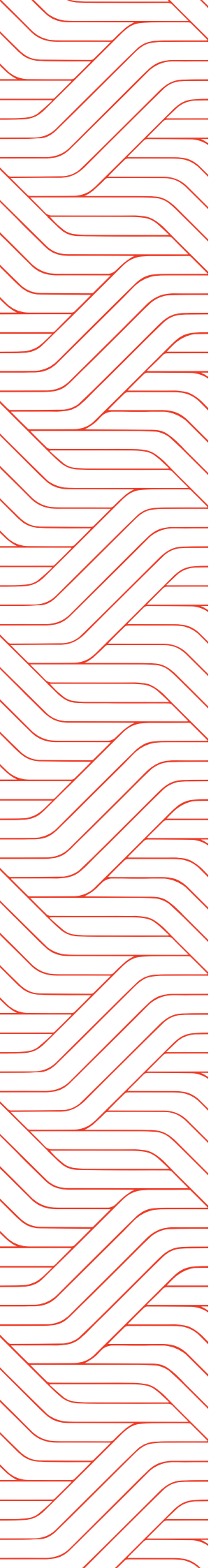
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