



Impact of COVID-19 on food systems

Philippines

Country overview July 2020



Land use

Land area: 300,000 km²
41.7% agricultural land
9.3% GDP from agriculture
and fish (2018)



Population

110 million people
53% rural
Adjusted income per capita
US\$3,835



COVID-19 and health

First recorded case: 30 January 2020
At 31 July 2020:
89,374 known cases;
1,983 recorded deaths*
Hotspot in Metro Manila



Local response to COVID-19

State of public health
emergency: 8 March 2020
Suspension of travel, schools
and work attendance in capital
Enhanced Community
Quarantine in Metro Manila
and Luzon
Bayanihan to Heal as One
Act and Social Amelioration
Program established



Agriculture and fisheries

Top staples: cereals, rice,
coconuts, bananas, maize
Agriculture and fisheries
production declining
Low farm productivity
compared to similar
ASEAN countries
One of the top fish producers;
need for more
sustainable practices



Key risk multipliers

Agricultural pests and diseases
Exposed to frequent tropical
cyclones (typhoons) each year

Assessment framed around a supply chain, with Metro Manila as the focus due to recognised health impacts from the pandemic and critical supply chain disruptions. Four representative supply chains used in the study are rice, pork, cabbage and Lakatan banana, aligning with the government's *Pinnang Pinoy* guide for healthy eating.

* The assessment reports 26,420 known cases and 1,098 recorded deaths at 15 June 2020, reflecting the situation at the time of core aspects of the research.

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Key findings



Smallholders

Limited availability of agri-inputs
Climate exposure encourages conservative farming
Logistical restrictions a common disruption to farm activities
Additional disruptions from typhoons in November and May



Supply chains

COVID-19 not predominant disruption to food availability in studied chains
Quarantine impacts significant for consumer and retail segments
Emergence of online options for agricultural trade
Programs purchasing local produce for emergency food packs



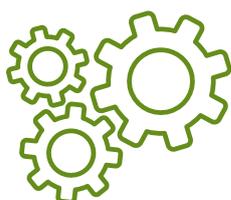
Governance

Local enforcement of restrictions creates supply chain bottlenecks
Local government able to purchase directly from farmers
National agencies purchased produce from cooperatives
Social Amelioration Program supports 20 million households



Community

Women impacted due to smaller cash flow and reserves; limited credit options
Estimated 40% decrease in remittances



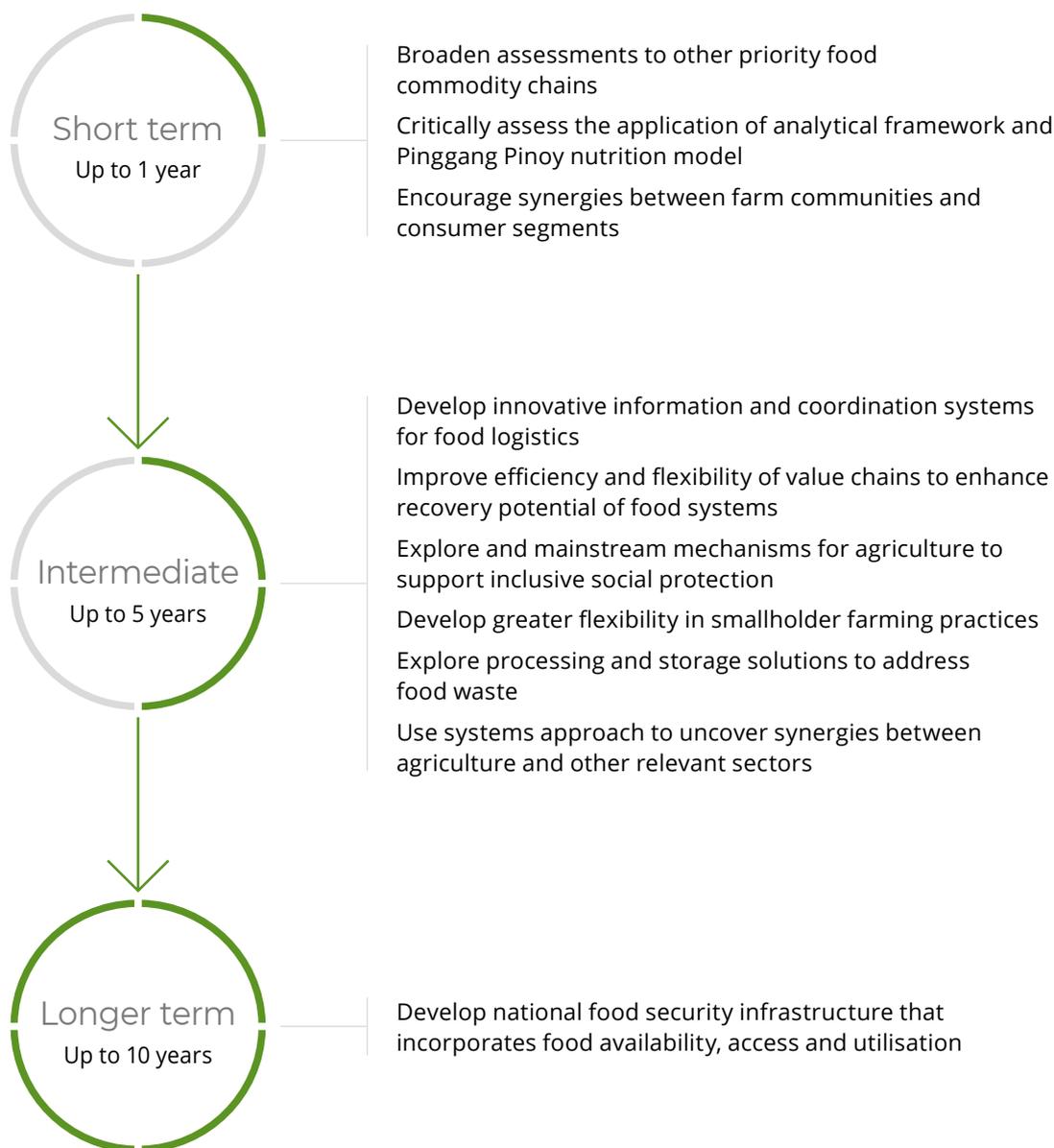
Employment

Underemployment and unemployment reduce household purchasing power
Immediate contraction in economic supply and demand from lockdown

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Suggested opportunities for action



Short-term opportunities include resource mobilisation and pivoting existing activities towards COVID-19 responses (up to 1 year). Intermediate-term opportunities include addressing gaps in knowledge, redressing negative impacts and/or boosting aspects of recovery or resilience (up to 5 years). Longer-term opportunities include research and development to address systemic challenges and options for transformational change (up to 10 years).

Visit www.aciar.gov.au/covid19-assessment-stage2 to learn more about the impacts of COVID-19 on food systems in the Philippines and the Indo-Pacific region



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