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 Pinang 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
Up to 1 year
- Broaden assessments to other priority food commodity chains
- Critically assess the application of analytical framework and Pinggang Pinoy nutrition model
- Encourage synergies between farm communities and consumer segments

Intermediate
Up to 5 years
- Develop innovative information and coordination systems for food logistics
- Improve efficiency and flexibility of value chains to enhance recovery potential of food systems
- Explore and mainstream mechanisms for agriculture to support inclusive social protection
- Develop greater flexibility in smallholder farming practices
- Explore processing and storage solutions to address food waste
- Use systems approach to uncover synergies between agriculture and other relevant sectors

Longer term
Up to 10 years
- Develop national food security infrastructure that incorporates food availability, access and utilisation

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).