

30 APRIL 2020 – BULLETIN NO. 2

COVID-19 FERTILIZER WATCH











PROVIDING WEEKLY INFORMATION ON THE IMPACT OF COVID-19 ON THE EAST & SOUTHERN AFRICA FERTILIZER MARKET

HIGHLIGHTS

- Lockdown Status:** The Lockdown status of countries in the region has not changed in the past week. South Africa is looking to reduce its restrictions from total lockdown (Level 5) to Level 4 from May 1st. Zambia lifted a 48-hour lockdown on Kafue and Kenya and Uganda extended lockdowns for short terms as they try to manage the balance between limiting the spread of COVID-19 and reopening the economy. Most are following WHO guidelines for lifting the lockdowns. Tanzania and Burundi have limited restrictions in place. Many countries have received aid from various donors including grants to provide funding for medical staffing and equipment and increased testing capacity.
- Fertilizer Availability:** There have been no reported shortages of fertilizer. The cropping season in East and Southern Africa occurs from November in the South to April in the North, and so, the majority of fertilizers are in country and applied or well down the distribution channel before the impact of COVID-19. Only small amounts of top-dressing fertilizers are currently arriving.
- Ports:** All vessels entering ports are required to have an isolation time since previous port of 14 days. Ports have generally reduced shifts (1/3 operational on a 15-day cycle) and have had to modify operations that do not meet social distancing requirements. This has led to the banning of bagging at quayside at Mombasa. Product is to be bulk discharged and bagged off site. South Africa (SA) has seen backlogging of non-essential cargo at port storages due to restrictions on road freight. This is likely to clear with eased restrictions in SA from May 1st. Container freight unavailability persists but is lessening as container hub countries re-establish trade.
- Road Freight:** Issues related to freight costs, rather than availability, in the SADC region have been eased slightly since SA has re-opened up its mining sector, which allows for two-way freight efficiency. Reduced copper freight out of Durban and Dar es Salaam, resulting in more fertilizer for Zimbabwe and Zambia fertilizer being pushed through Beira.
- Border Crossing:** Transport in the Kenya/Tanzania/Uganda/Rwanda corridor is experiencing significant delays. Rwanda has closed its borders to international truck drivers, requiring transporters to have a "relay driver". Uganda is considering similar measures. Countries with labor restrictions have reduced staffing at border posts in an attempt to limit staff exposure. This is compounded by closure of some border posts, countries requiring testing at the border post and in some cases mandatory isolation crossing a border and extra documentation and checking to ensure it is "essential freight".
- Fertilizer Sector Response:** In most countries fertilizer associations and private sector companies are working closely with ministry officials to ensure efficiency in distribution channels within the needs of the COVID-19 restrictions.

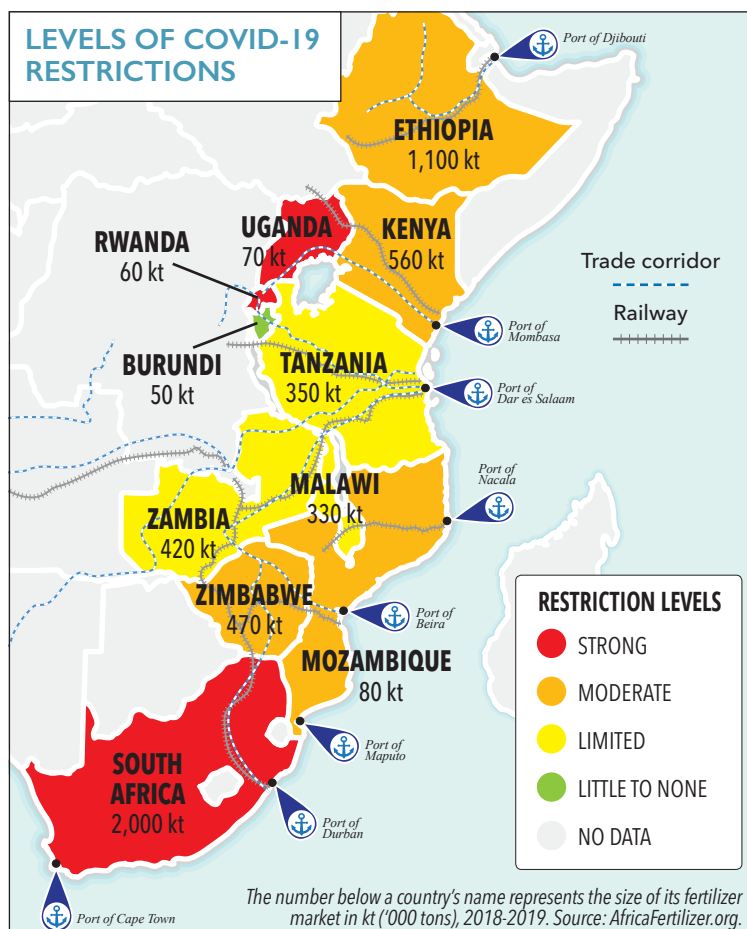
STATS

STATS

	COVID-19 CASES	PUBLIC MEASURES		MEASURES AFFECTING FERTILIZER SECTOR						
COUNTRY	 	 	     							
BURUNDI	15									
ETHIOPIA	126									
KENYA	374									
MALAWI	36									
MOZAMBIQUE	76									
RWANDA	212									
SOUTH AFRICA	4,996									
TANZANIA	300									
UGANDA	79									
ZAMBIA	95									
ZIMBABWE	32									

PANDEMIC INDICATORS:	NO CHANGE, OR IMPROVED	UP TO 25% INCREASE	25-50% INCREASE	>50% INCREASE	NO DATA REPORTED
LOGISTICS INDICATORS:	LITTLE TO NO IMPACT	LIMITED IMPACT	MODERATE IMPACT	STRONG IMPACT	NO DATA OR N/A
CONFIRMED # COVID-19 CASES	COVID-19 NEW CASES PERCENT INCREASE	HEALTH MEASURES	ECONOMIC MEASURES	PORT OPERATIONS	
DOMESTIC TRANSPORT	TRANSIT & BORDERS	AGRO INPUT RETAIL SHOPS	FERTILIZER SECTOR RESPONSE	FERTILIZER STOCKS AVAILABILITY	

LEVELS OF COVID-19 RESTRICTIONS



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