



COVID-19 FERTILIZER WATCH

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

HIGHLIGHTS

The overall impact on fertilizer supply and distribution of COVID-19 related actions in East and Southern Africa (ESA) is not causing significant supply issues presently. However, there is concern that future constraints on cash availability will arise in the on-farm sector from limited demand in the coming season due to uncertainty in export and national markets.

Lockdown Status: Countries have initiated different mitigating interventions including lockdowns as they try to balance stemming disease transmission and the economic and social impacts of mitigating measures. Recognizing that 70-80% of all income generation occurs in the informal economy, disruptions in formal and informal markets will mean a high priority for feeding families without wages. Rwanda, South Africa, Uganda have the strongest restrictions for people and movement affecting businesses and transport. Kenya, Zimbabwe, Zambia and Ethiopia have partial lockdowns; while Tanzania, Burundi and Malawi have taken less disruptive measures.

Fertilizer Availability: Regarding ESA cropping seasons occurring November-April, the majority of fertilizer supply is already in country having been applied to crops or are currently stored in distribution channels. Fertilizers for the winter crops (May-August) in South Africa, Zimbabwe and Zambia have also been covered. There are no noted shortages in supply.

Ports: All vessels entering ports are required to quarantine 14-days. Vessels arriving earlier are required to wait at anchor. Ports have reduced shifts (by one-third on a 15-day cycle), having to modify operations to meet social distancing requirements, causing delays. However, non-essential trade has been reduced. There are some issues with container freight availability.

Road Freight: Different impacts on overland freight are based on specific trade corridors. In South Africa and SADC countries where mining operations have ceased, backloading of shipments is not available, with freight significantly impacted (e.g. increased fertilizer throughput at the port of Beira, Mozambique). While fertilizer is classified as an "essential good" and is not subject to curfew/movement restrictions, drivers and transporters still restrict travel to daylight hours because of increased police checkpoints. There has been a general drop in cargo entering countries leaving spare transport capacity.

Border Crossing: Delays at border-posts are occurring due to reduced staff to limit viral transmission or for mandatory reductions. This is compounded by closure of some border posts, with some countries requiring testing prior to entry, and in some cases mandatory isolation, extra documentation and sight inspections for verification of essential freight/cargo.

Fertilizer Sector Responses: Kenya suspended the 2019-20 National subsidy program; Zimbabwe imports may be affected by foreign exchange issues. In most countries, associations of private sector fertilizer companies are working closely with ministry officials to ensure efficiency in distribution channels.

Access the full report and subscribe to IFDC's COVID-Watch:
<https://ifdc.org/2020/04/23/east-and-southern-africa-fertilizer-watch/>

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STATS

Country	COVID-19 Cases	Public Measures		Measures Affecting Fertilizer Sector							
		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
Burundi	11	Red	Yellow	Green	Green	Green	Green	Green	Green	Green	Green
Ethiopia	114	Yellow	Yellow	Green	Green	Green	Green	Green	Green	Green	Green
Kenya	296	Yellow	Yellow	Green	Green	Green	Green	Green	Green	Green	Green
Malawi	18	Yellow	Yellow	Green	Green	Green	Green	Green	Green	Green	Green
Mozambique	39	Yellow	Yellow	Green	Green	Green	Green	Green	Green	Green	Green
Rwanda	150	Yellow	Red	Green	Green	Green	Green	Green	Green	Green	Green
South Africa	3,465	Yellow	Red	Green	Green	Green	Green	Green	Green	Green	Green
Tanzania	255	Red	Yellow	Green	Green	Green	Green	Green	Green	Green	Green
Uganda	56	Yellow	Red	Green	Green	Green	Green	Green	Green	Green	Green
Zambia	70	Red	Yellow	Green	Green	Green	Green	Green	Green	Green	Green
Zimbabwe	28	Red	Yellow	Green	Green	Green	Green	Green	Green	Green	Green

PANDEMIC INDICATORS:
 Green: NO CHANGE, OR IMPROVED
 Yellow: UP TO 25% INCREASE
 Orange: 25-50% INCREASE
 Red: >50% INCREASE
 Light Blue: NO DATA REPORTED

LOGISTICS INDICATORS:
 Green: LITTLE TO NO IMPACT
 Yellow: LIMITED IMPACT
 Orange: MODERATE IMPACT
 Red: STRONG IMPACT
 Light Blue: NO DATA REPORTED

INDICATOR LEGEND:
 Person with +: CONFIRMED # COVID-19 CASES
 Person with %: COVID-19 NEW CASES PERCENT INCREASE
 Star: HEALTH MEASURES
 Bar chart: ECONOMIC MEASURES
 Ship: PORT OPERATIONS
 Train: DOMESTIC TRANSPORT
 Border: TRANSIT & BORDERS
 Shop: AGRO INPUT RETAIL SHOPS
 Gear: FERTILIZER SECTOR RESPONSE
 Gauge: FERTILIZER STOCKS AVAILABILITY

