

The impact of government responses in the management of Covid-19 on the food supply chain in South Africa

Mini Report – 28 August 2020

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Abstract

This mini-report provides a review of responses obtained from a variety of associations and other organizations along the food supply chain from “farm to fork”. Questionnaires and supporting documents were developed and distributed to several organizations. Ten responses were received through both written and verbal interviews. Responses were collated and critically evaluated, providing insight into the experiences of different industry sectors. There are some key similarities in the responses as well as some differences. An interesting point is that COVID-19 created opportunities for forming new and improved relationships between different industry sectors and between government and industry. COVID-19 also highlighted weaknesses in South Africa’s infrastructure at the Ports. The plight of the informal sector resonated throughout the interview process and was a significant concern for formal industry. It shows for example, that whilst South Africa has a formalised and well-structured formal food sector, there is an equally important informal sector, which was for the most part, not considered by government in the pre-lockdown phase. The mini-report ends with conclusions and provisional recommendations.

1.0 Background

This mini-report forms part of Chapter Two of a Country Report on evaluating the effectiveness of measures that were put in place by government in South Africa to combat COVID-19. More specifically, it documents current progress on the effectiveness of government’s response to COVID-19 related to the food supply chain in order to support this essential sector and to minimize disruptions. It is not a complete description of all sectors that were invited for interviewing as many could not respond by the deadline dates set due to time constraints. The report will thus require updating as work progresses. Chapter Two is currently titled “Government Leadership, Governance, Institutional Arrangements and State Capacity in Responding to COVID-19”.

2.0 Introduction

Regardless of the political system of a country, human beings, being biological organisms, need to eat to function and stay alive. Food provides nutrients, which in turn, provide:

- energy for activity, growth, and all functions of the body such as breathing, digesting food, and keeping warm;
- materials for the growth and repair of the body, and for keeping the immune system healthy (FAO, 2004).

According to the South African Human Rights Commission (SAHRC), the right to food is a basic human right under national and international law, and is enshrined in the Constitution of South Africa, Bill of Rights of 1996.

Crises of any nature send shockwaves through food systems (FAO, 2020a; FAO, 2020b). Examples of crises include climate-related disasters, outbreaks of war, human displacement and more recently, the financial crisis in 2009 and the current COVID-19 pandemic. These food shocks are manifested in different ways, but importantly, they affect the health and wellbeing of a population. The food supply and value chain is a complex web of many interactions, including seed producers, farmers, agricultural support, food processing plants and ingredient and other service suppliers, transportation as well as shipping for export and import of food, retailers, consumers, restaurants and more (FAO, 2015; FAO, 2019; FAO 2020a). It is imperative that during crises, countries keep the food supply chains going (FAO, 2020a).

In an article by Moneyweb as reported by The Citizen in 2018, the importance of informal food traders in South Africa, as part of the food value chain was highlighted. This very significant group make an estimated 8-10% contribution to the GDP of the country. In 2018, this sector made up at least 40% of the food market, whilst the formal retailers made up the remaining 60%. In the same year, the informal sector was valued at R404 billion, whilst the entire market is worth R1.02 trillion. These are typically spaza shops, home businesses and street vendors all around the country. There is therefore no doubt that this market contributes significantly to the economy. The essential service they provide is accessibility and affordability of food in that they are close to or are located within communities (convenience) and do not have the overheads of the formal sector, thereby providing a cheaper source of food.

Considering the potential impact of COVID-19 on the population of South Africa, when millions of people were already food insecure before the pandemic, it became imperative to understand the impact of the pandemic on the food supply chain and to identify related challenges.

Further information is being gathered on the impact of government measures on other important sectors to the economy of the country, such as the restaurant, alcohol, tobacco and tourism industries.

Whilst the original intent was to focus on the pre-lockdown period, many responses included at least a portion of the lockdown period. The responses were documented as provided, so as not to stifle the flow of thoughts. It is therefore important to note that there is some overlap between the different time periods.

3.0 Method

For the food supply chain, a “farm to fork” approach was used and therefore, industry associations and other organizations representing the agricultural sector (farm) through to the manufacturer, retailer and ultimately the restaurant industry (fork) were engaged.

The Department of Planning, Monitoring and Evaluation (DPME) provided researchers with a letter briefly explaining the project and the need for collecting data. The author of this mini-report prepared additional documentation that was sent to each invited interviewee as follows:

- An Information Sheet containing a more detailed explanation of this specific mini-report, introducing the researcher and addressing matters such as confidentiality of information provided, agreeing to being interviewed either in writing or verbally by virtual means – Annexure A;
- A Consent Form that the interviewee was requested to sign to consent to the interview, to decide on attribution and if done verbally, then agreeing to have the interview recorded solely for transcription purposes – Annexure B;
- A list of questions in tabulated form for ease of completion – Annexure C.

An email was sent to each organization, containing all the above-mentioned documentation and if no responses were received within 5 days, follow-up calls were made.

For recorded interviews, brief notes were made and elaborated upon by transcribing recordings of the interviews. For written interviews, a number of follow-up verbal discussions were held for clarification of some elements contained in the written responses.

4.0 Results

Whilst contact was made in the restaurant industry, responses have not yet been completed. This sector is therefore excluded from this mini-report and will form part of a following update.

The organizations that were successfully interviewed are listed below in Table 1.

Table 1: List of organizations interviewed for determining cooperation and coordination with stakeholders outside of government related to the food supply chain

Association	Scope
Agricultural Business Chamber (Agbiz)	Agri Business
AgriSA	Agriculture
Association of Meat Importers and Exporters (AMIE)	Meat Imports and Exports
Citrus Growers' Association (CGA)	Citrus Fruit
Consumer Goods Council of South Africa (CGCSA)	Food Manufacturers and Retailers
Dairy Standards Agency (DSA) including SA Milk Processors' Organization (SAMPRO) and Milk Producers' Organization (MPO)	Milk and Dairy Products
HORTGRO	Pome Fruit & Stone Fruit
Potatoes SA (PSA)	Potatoes
SA Meat Processors Association (SAMPA)	Processed Meat
SA Pork Producers' Organization (SAPPO)	Pork Producers

Collated responses from all 10 organizations listed in Table 1 are provided in Table 2.

Table 2: Collated responses from organizations interviewed

Responses
<p>Of the 10 organizations interviewed, 6 were not specifically consulted by the Minister of Agriculture, Land Reform and Rural Development (DALRRD), Minister Didiza. One organization was directly consulted by the Minister of Trade and Industry and Competition (DTIC).</p> <p>However, Agbiz and AgriSA, both of which are large agricultural organizations, were specifically consulted by the Minister of DALRRD. Three work streams were proposed by industry to government, which government accepted ie.:</p> <ul style="list-style-type: none">• Economics• Communication• Social <p>The Economics work stream led by Agbiz, focussed on determining disruptions in the food chain and used an end-to-end tracking system. This system was developed in conjunction with the Bureau for Food and Agricultural Policy (BFAP). The Communications work stream led by AgriSA, was responsible for communicating with members of both organizations, whilst the Social work stream determined issues with labour, smallholders and the more vulnerable society within the agro food system. Reporting on the major agro-food, agro-beverage and agro-fibre value chains occurred every 48 hours and any issues were identified quickly. Reports were provided to Minister of DALLRD, Minister Patel of the DTIC and to The Presidency (PMO). Through this mechanism and via interaction with B4SA and other organizations, members could bring their issues to the attention of the National Coronavirus Command Council (NCCC) within a very short time. The system was reported to operate effectively and many issues were resolved in this way. Overall, those who participated in this initiative, found that Minister Didiza worked well with the industry sectors she engaged with and showed commitment to finding solutions. Agbiz also communicated with non-members to some extent, including the dairy sector.</p> <p>Despite the system implemented by Agbiz and AgriSA, together with DALRRD, there were some organizations that did not form part of this group and were thus excluded. There was no other mechanism provided for such organizations to communicate directly with their relevant Minister, in this case more specifically, DALRRD. For those organizations, they had to make their own way, conduct own research on requirements, regulations and guidelines and develop own mechanisms for their specific industry sector. Some would receive information from several sources, which often created confusion, due mainly to different interpretations of legislation.</p> <p>In most cases, an internal COVID-19 response team in organizations was set up to assist members in conducting risk assessments on for example, transport of workers from homes to the farms, pack houses, inspections, cold storage etc. This included establishing protocols for member businesses when no guidance was available (initially). A significant</p>

challenge was that they did not know (especially during level 5) whether they were on the right track, but measures were implemented despite the uncertainty.

Some sectors experienced challenges with reduced numbers of workers in different teams so that a team could replace another if a COVID-19 positive case was found. This resulted in some teams working long hours, becoming tired and consequently making errors.

Other sectors struggled with determining how to transport workers to and from farms considering that initially government only addressed public transport. This led to some farmers hiring school buses (as schools were closed) for this purpose and implementing measures they felt were appropriate, in the absence of government guidelines.

Furthermore, whilst regulations were promulgated requiring industry to report positive cases in workers to the National Department of Health, there was no mechanism or structure provided (a promised portal system) to do so until 5 months into the lockdown.

During level 5 lockdown, the oil refineries shut down as well. This resulted in a shortage of diesel for the agricultural industry when the country moved to lockdown level 4. Mills couldn't deliver maize to retailers and distribution networks were affected. Cross-provincial border distribution was also affected. This was an excellent example of essential peripheral services that were key for the industry to operate, that were not identified by government prior to lockdown.

Ports presented a number of challenges for industries that were either exporting or importing food or other supplies in support of the food sector. There were reports of both Durban and Cape Town Ports operating at significantly lower capacities and industry was not informed of the difficulties this would create. It was felt that government did not sufficiently consider the impact that Port infrastructure and services would have on the food supply chain. The Ports were not declared an essential service at the beginning of lockdown and this created many difficulties for industry as indicated below.

- Imports: Where imported food required inspection by DALRRD, there were significant delays and disruptions. There was no communication from DALRRD on any contingency plans at the start of the lockdown. Where consignments were normally released within 72 days prior to COVID-19, delays extended up to 3-4 weeks. This resulted in significant additional costs to the importer due to port overstays and demurrage. DALRRD Import Entry Offices were given no clarity on how to adapt administrative processes in the work environment during a time of national crisis. The Durban Port is particularly relevant here as it closed 3 times in early April due to COVID-19 and no contingency plans were put in place to deal with resulting problems. Industry was not notified. Industry communicated with DALRRD at all levels, including national in an attempt to resolve

these matters and no responses were received. There was therefore no coordination or communication on exceptional procedures that could be implemented, during this time of crisis within the different levels of DALRRD and the department was seen to be unhelpful and inflexible. Consequently there was extreme disappointment in DALRRD, in that it did not do anything to ensure that during the initial lockdown period, the importation of food received priority.

Another organization reported massive congestion at three Ports i.e. Cape Town, Durban and Port Elizabeth. It was felt that this was due to lack of interpretation of regulations resulting in confusion and conflicting instructions, especially at the beginning of lockdown extending to the end of lockdown level 4. Thereafter, things settled down but the initial impact of this confusion and resulting bottle-neck, was significant, particularly on the movement of goods and increased costs.

Imports of fertilizers, seed and crop management chemicals became more expensive due to the Rand/Dollar exchange rate. This increased input costs for farmers and placed them under pressure.

- Exports: For the meat export industry, due to delays in releasing import consignments, there was a shortage of containers for export, which affected that industry negatively.

The fruit export industry was also impacted by difficulties at the Ports. At the time of the lockdown, the table grape season was almost over and the citrus season was in full swing. SA is the second largest exporter of citrus in the world and therefore, a significant number of cartons are exported. SA experienced a bumper citrus crop this season and exports were in great demand, due to the perceived effect of Vitamin C in fighting influenza viruses, including COVID-19. Because the Ports did not establish themselves as essential services, Cape Town Port was running at 30% capacity and put people on leave. This created massive congestion at the port as there were insufficient dock workers. Companies hired trucks at an additional cost to transport their produce by road to Port Elizabeth for export purposes. Ships were bypassing Cape Town completely. It was only due to Agbiz having a relationship with Mr Gordhan that a meeting was convened; only then did it become clear that there were many COVID-19 cases at the Cape Town Port, hence it running at lower capacity. This latter fact was not communicated to industry. All citrus exports were however managed effectively due to the measures that industry had put in place and with the assistance of Ministers Didiza, Gordhan and Patel, and later, with the assistance of Transnet.

Impact on the informal sector: A number of organizations raised their concerns on the impact of the lockdown on the informal market and many of them raised this with government as well, with little success. They reported that the informal sector was very badly affected, which had a knock-on effect on food security. The informal sector makes up

at least 40% of the food market. This sector includes spaza shops, “bakkie” traders, hawkers, street vendors. It has a very specific network in place, consisting of amongst other things, good distribution channels. Approximately 50% of sales from the Johannesburg Fresh Produce Market (FPM) go to the informal market. Several sources of protein such as pork and chicken are also sold by these traders, with about 30% of all broilers reared in SA sold as live fowls. Approximately 60% of all bread sold in the country is through the informal sector. These traders were initially prevented from trading and people who relied on food sold by them, were forced to purchase food from formal retailers. This resulted in a number of problems including:

- Consumers having to pay higher prices for goods they would normally purchase at far lower prices through the informal sector;
- Consumers needing at times to travel (at an additional cost) to a formal retailer instead of having the convenience of obtaining food closer to home through the informal sector;
- Workers unable to purchase hot meals from street vendors;
- Creation of a knock-on effect on FPMs, pork producers, chicken producers and similar as their products were not being sold by this sector;
- Lack of income for hundreds of households that rely on this form of trade as their sole source of income, resulting in lesser purchasing power and indeed affecting food security in those homes.

There was a higher demand for white protein which was cheaper than red protein, as well as for dry goods that had a longer shelf-life.

In addition, government required the informal vendors to register and obtain licences. This would have impacted negatively on the affordability of the food they provided as they then would have to pay taxes. Whilst paying tax would contribute immensely to the economy, it was felt by the majority of organizations interviewed, that it would result in less affordable food for the vulnerable sector of the population, the poor, which would have a greater negative impact on food security.

Overall, the feeling was unanimous that SA is not experiencing a food shortage; on the contrary, there was a surplus of many crops this year, including maize. The issue was rather the provision of food to the communities i.e. accessibility of food.

It was felt that government did not have an in-depth understanding of the importance of this sector for millions of people in SA. For example, the Gauteng provincial government wanted to set up supply channels into the townships, but did not consider displacement of traders already operating in that environment as those distribution channels existed already. Therefore, this sector needs and deserves far more attention from government, a concerted effort to

fully understand the complexity of the sector and the development of a plan to provide infrastructure and other support to ensure that it continues to be a significant contributor to the economy of the country.

It was felt that whilst it was important to flatten the curve and protect particularly the vulnerable sector of the population in terms of COVID-19, proper planning was needed prior to lockdown to ensure accessibility of food to this very same sector of the population.

One respondent stated that government did not conduct a socio-economic impact assessment on the regulations they promulgated during the disaster phase. It was fully understood that it was an emergency situation, but if government had been prepared, many things could have been averted like trade issues, supply chain effects, price increases, poverty that has resulted and disruptions in supply chains. This respondent felt that small businesses which were not part of an organised body were hit hard as they did not know where to turn to for assistance and did not necessarily have the internal capacity to obtain and interpret regulations and guidelines sufficiently.

Industry reported receiving conflicting messages from national government, including non-clarity on what constituted an essential service. A fruit-related organization operating in the Western Cape found that the provincial government did more for industry than national government, particularly in the beginning, when regulations were unclear and few to no guidelines existed.

A number of respondents claimed some intimidation, harassment and heavy-handed treatment by the SA Police Services. This occurred mainly in the beginning of the lockdown period. Trucks transporting food were stopped at provincial borders and police claimed that they were not essential services, despite all the documentation provided by the drivers, stating the opposite. A similar report was received from farmers transporting workers, when the SAPS stopped the vehicle and stated that they were operating illegally. It was felt that there was a break in communication within the SAPS, leading to inadequate or conflicting instructions as well as a lack of understanding on implementation of the regulations. An association wrote to the legal department of the SAPS to sort this matter out and found that the office was very helpful and answered calls. However, the problems experienced were at provincial and local levels in that the police officers were not clear on how to interpret or carry out their instructions.

Initially, inspectors from the Department of Employment and Labour as well as officers of the SAPS would inspect farms and pack houses for compliance, but there was no clarity on requirements and the impression was that neither did government know.

The majority of organizations felt that government was either partially or completely unsuccessful in establishing buy-in and trust. Only those that were consulted with directly by govt felt that there was trust and buy-in with one

indicating that the access to government was even better than before COVID-19. For those organizations that communicated mainly with DTIC, there was more trust and buy-in due to the more effective way DTIC communicated. Whilst all organizations responded that there was full support for the President when he announced the lockdown, some indicated that subsequent to that, their trust waned when he did not fulfil his promises of transparency, rectifying errors that government may have made and not communicating sufficiently.

Due to some issues with exports to Botswana specifically and related to testing drivers and closing the border from time to time, it was felt that government should have had a plan in place to coordinate these matters with the SADC members to which SA industry exports food.

The respondents unanimously agreed that the communication strategy from government was either insufficient or did not exist. In most cases, industry had to write the protocols that were either shared with national government as for AgriSA and Agbiz or with local government as for Potatoes SA and the Tshwane Fresh Produce Market.

In comparison to other countries and their lockdown, there was overall agreement that the initial hard lockdown was needed to flatten the curve and to gain time to prepare the health care system for anticipated surges. Generally, the respondents understood that South Africa has a significant vulnerable sector, including immuno-suppressed individuals that need protection. However, measures were still seen as draconian in comparison to international standards, particularly those banning alcohol and tobacco products. South Africa is the only country that implemented these bans without reversing them early as other countries like India did. When entering into lockdown level 4, there were varying comments:

- Other countries were able to find the middle ground with industry as there was better communication and understanding of the importance of the food sector and the need to avoid as many disruptions as possible.
- When compared with New Zealand and Australia, there were no bans on alcohol and tobacco products, so those sectors were not affected, whilst they were severely affected in South Africa.
- When comparing the citrus industry with that of Spain, Peru, USA and Australia, measures were similar, but those of SA were a little more stringent, which probably placed SA ahead of those countries.
- South Africa endured the harshest lockdown at all levels in comparison to other countries.
- The EU pork industry (25 countries) focussed on keeping the economy going and hence, opening it up as soon as possible, whilst SA took a different approach, which will affect the economy of the country.

From an economic perspective, there was concern expressed by AgriSA about the financial deficit in SA. With the fiscal cliff looming, the amount of capital that needed to be generated to pay off the loans SA has taken, was not being considered in agriculture and in the remainder of the food chain, including the tourism sector. It was felt that government needed to work on a clear strategy together with the agriculture, food industry and tourism sectors to

grow the economy accordingly. Other pressures such as the persistent drought and Foot and Mouth Disease may result in farmers, suppliers of goods and services as well as processors divesting in agriculture, which would be a blow to the industry and would put pressure on the food system. It was felt that government should extremely urgently prioritize the creation of an enabling environment to re-invest in our own economy to prevent divestment in South Africa.

5.0 Conclusions and Recommendations

Overall, COVID-19 highlighted a number of weaknesses in government structures, services, communication and decision-making processes. However, there were also some new connections made between industry and government to the benefit of both elements. It is hoped that these connections will be strengthened and not lost post-COVID-19. A number of industry associations also worked together and formed new relationships – problems were more effectively resolved in this coordinated fashion. The inter-connectedness between the formal agricultural sector and the informal food traders was also an important learning from this study.

From the interviews conducted, the larger industry organizations were approached by either DALRRD or DTIC and within those structures, there was good communication from government. However, for other organizations that were not part of the larger organizations and small businesses that were not part of formal associations, there was little to no communication, which created difficulties and much confusion prior and during the first few weeks of lockdown. Government did not have an adequate communication strategy in place.

Where industry developed protocols to share with government, they were accepted. This resulted in a greater level of trust and communication between industry and government, for those cases.

Operations at the Ports were affected extensively, with the main problems experienced at Cape Town and Durban Ports. The fact that Cape Town was operating initially at 30% capacity created significant delays and affected fruit exports. This resulted in additional costs to the industry because of transportation required to move produce to Port Elizabeth, which was running more efficiently. The DALRRD inspection services at Durban Port for imported meat as well as their inflexibility was very disappointing for that sector, resulting in 3-4 week delays, which in turn led to huge costs for that sector. The Ports should have been designated “essential services” in the planning phase leading to lockdown.

South Africa does not have a shortage of food, but rather a difficulty in providing accessibility to that food for the vulnerable. This is related to the fact that the informal traders did not receive adequate support and understanding from government and were thus not allowed to trade during the first days of the initial lockdown. This in turn impacted on affordability of and accessibility to food for the vulnerable. As informal traders are responsible for approximately 40% of food trade, a number of suppliers of agricultural products were affected negatively.

Government was found to promulgate regulations without understanding the consequences and impact of those regulations on the food supply chain. Infrastructure was lacking to support the rolling out of and compliance with regulations and requirements.

Government greatly under-estimated the knock-on effects of decisions made prior to lockdown level 5. The food industry is highly regulated and is a complex web of interactions; it is extremely inter-connected and what happens at one point in the chain, affects the entire chain, including the livelihoods of people operating in that vast industry. The food industry is organised and was therefore in a better position than government to address several important issues.

There was little coordinated communication from national government to provincial and local levels, resulting in confusion in enforcing regulations. This was evident in the intimidation experienced by some organizations by the SAPS, who were not clear on what “essential services” were. Furthermore, provinces interpreted and enforced regulations differently, creating difficulties and confusion for food businesses with facilities in several provinces.

The way in which government opened up after lockdown level 5, was not considered useful to opening up the economy and there are serious concerns in industry about the economic revival in South Africa and the ability to attract sufficient investment.

A number of broad recommendations are made:

- South Africa must develop a disaster preparedness plan in line with WHO specifications, which is tested and reviewed regularly to remain relevant. The food industry forms an essential part of the health and well-being of a nation and must be included in this process. Both the formal and informal food sector should be included. The preparedness plan should address the weaknesses and learnings documented in this mini-report.
- An effective and inclusive communication strategy is required, which should address many issues, but at the very least include a communication plan, structures and resources to effectively and

pro-actively engage with relevant organizations in the food sector. This strategy should address inter-departmental communication to avoid conflicting messages being conveyed to industry, thus creating confusion and disruption to the food supply chain.

- A mechanism to ensure the communication strategy is implemented effectively must be established, which should include effective communication channels to provincial and local government as well as to the enforcement services to ensure aligned understanding, implementation and enforcement of regulations.
- The current criteria for appointing experts to the Ministerial Advisory Committee (MAC) only provide for health care experts. These criteria should be amended to provide for the appointment of food supply chain and other food-related experts. This is essential for providing vital information and advice to Ministers related to the supply of food to feed the nation and hence, to minimize disruptions to that supply.
- Government should consider urgent investment into the infrastructure of the Ports as SA's exports and imports are growing, both of which are critical to food trade. The COVID-19 pandemic highlighted the existing weaknesses in the Port system.
- Where essential services for export and import of food are required from specific government departments, such as DALRRD, effective planning to resource remote offices together with an effective coordination mechanism should be established. This would likely apply to other government departments that have a food-related mandate.
- The informal sector requires urgent attention from government. It requires a concerted effort from government to fully understand the complexity of the sector and to develop a plan to provide infrastructure and other support to ensure that it continues to contribute significantly to the economy of the country. Furthermore, a well-run informal sector will provide an essential service to many, protect the livelihood of millions of people and enhance food security. The formal agricultural and food sectors should be included in any such discussions as they have valuable experiences that they can share.
- Government must urgently prioritize the creation of an enabling environment to re-invest in the South African economy and to prevent divestment in South Africa. In this regard, a clear strategy should be developed together with the agriculture, food industry and tourism sectors, all of which are critical to the economy of the country.

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