Socioeconomic Effects of the COVID-19 in Africa: Sub-Regional Perspectives

June 2020
HEALTH IMPACTS

• The number of COVID-19 confirmed cases is spreading still in every sub-region of the continent, exceeding now 200,000 cases;

• Distribution of cases by sex and by age groups varies from country to country;
Situation of the Pandemic in Africa (10 June 2020)

POPULATION 1.2 Bn

TOTAL CASES 203,899

TOTAL DEATH 5,530

Fatality rates
Africa: 2.7%
World: 5.6%

Distribution of confirmed cases per sub-region

- Central Africa: 8.1%
- Eastern Africa: 10.0%
- North Africa: 30.8%
- West Africa: 21.0%
- Southern Africa: 26.5%

Recovered: 91,398
Active cases: 104,951

Fatality rates
Africa: 2.7%
World: 5.6%
Botswana: Disaggregation of COVID-19 cases by gender and age group

Source: Ministry of Health
Date: 06/06/2020

Eswatini: Disaggregation of COVID-19 cases by gender and age group

Source: Ministry of Health
Date: 06/06/2020
Evolving Growth Forecasts

- COVID-19 crisis is expected to cause a significant slowdown in economic growth for every country.
- However, a recovery is expected as early as 2021 if the pandemic is curbed early enough.
All RECs to experience sharp decline in GDP growth rate

2020 Growth estimates for Africa’s RECs (%)

<table>
<thead>
<tr>
<th>Region</th>
<th>Pre-COVID estimates</th>
<th>New estimates</th>
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Pre-COVID estimates | New estimates
In Central Africa, GDP is expected to contract for all countries in 2020, and recover in 2021.

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<tr>
<th>Country</th>
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Sources: IMF REOs October 2019 and April 2020; 2019 IMF Staff Reports; Africa’s projection is from ECA, April 2020.
Note: Sub-regional Averages are weighted by GDP current PPP of given year forecast in October 2019 or in April 2020.
In Eastern Africa, GDP growth will slow in 2020 for all countries; but some may recover in 2021.

### GDP Growth Forecasts Pre- and Post-COVID, 2020 and 2021

#### Eastern Africa Sub-Region

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In North Africa, almost all economies will contract in 2020, but likely to rebound in 2021

**GDP Growth Forecasts Pre- and Post-COVID, 2020 and 2021**

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In Southern Africa, significant drops in GDP growth for all countries; but expected to expand in 2021

### GDP Growth Forecasts Pre- and Post-COVID, 2020 and 2021

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Also in West Africa, GDP growth will slow for all countries in 2020; but hopeful for recoveries in 2021

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<th>West Africa Sub-Region</th>
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Price Trends

- Prices have fallen for several export commodities, including tea, coffee, cocoa
- ...and going upward for critical imports goods such as wheat
- A sharp decline in oil price: favourable for African oil importers but devastating for oil exporting countries
- Price of Gold going up, a safe heaven
Prices of some major commodities exported or imported by African countries

- **Coffee, USD per kg**
- **Tea, USD per kg**
- **Cocoa prices**
- **Base Metals, price index includes Aluminium, Cobalt, Tin**
- **Crude Oil**
- **Gold, USD per ounce**
- **Wheat USD per ton**
Impacts on sectors, enterprises and Jobs

- **Tourism** and **hospitality, aviation, and logistics** are among the most affected activities.
- Impacts vary with the **size** and **type** of Business.
- Reduction of **domestic demand** is a major challenge for businesses.
Risks of Job losses per activity

Contribution of tourism to GDP and Employment in West Africa in 2017

- Cabo Verde
- Gambia, the
- Senegal
- Mali
- Togo
- Ghana
- Benin
- Guinea
- Nigeria
- Niger
- Sierra Leone
- Burkina Faso

Tourism total contribution to GDP (%)
Tourism total contribution to employment (%)

ECA based on UNCTADStat, 2020
Magnitude of COVID Impact on businesses in Eastern and Central Africa

Average reduction in cash flows due to COVID-19, by sector (2020, %) in Eastern Africa

- Tourism & Hospitality: 92%
- Logistics: 75%
- Retail: 63%
- Real Estate: 60%
- Financial: 50%
- ICT & Events Management: 40%
- Construction: 40%
- Manufacturing: 36%
- Consultancy: 24%
- Pharmaceuticals: 0%

Source: EABC

Source: UNCDF and Makerere University
Risks of Job losses per activity (A survey from Uganda)

Actual or intended layoffs by sector of economic activity
(in percentage)

- Wholesale and retail trade: 43.7%
- Culture, sports and entertainment: 50.0%
- Manufacturing: 52.9%
- Mining and quarrying: 75.0%
- Accommodation and catering: 78.0%

Source: Uganda Business Impact Survey 2020
Transmission channels of COVID impacts on businesses:

Source: Uganda Business Impact Survey 2020

Key transmission channels (Cameroon survey)

- Finance (internal): 17.5%
- Demand (external): 20.5%
- Procurement international: 26.6%
- Prices: 61.6%
- Finance (external): 71.8%
- Procurement internal: 76.0%
- Demand (internal): 94.2%

Challenges faced by companies (Uganda) (in percentage)

- Insufficient protective equipment: 7.2%
- Existing loans cannot be extended: 9.8%
- Upstream and downstream chain disruptions: 12.5%
- Disruption of logistics: 24.9%
- Inability to deliver existing orders: 25.8%
- Increased difficulty of financing: 37.9%
- Reduction of orders: 51.3%

Source: Uganda Business Impact Survey 2020
Pre-COVID situation

- growth trends were **positive** for All sub-regions;
- however number of macroeconomic and social challenges pre-existed which could be **exacerbated** with COVID;
- COVID-19 crisis will also negatively impact progress towards the SDGs
Before COVID GDP was showing positive trends for every sub-region.

GDP growth in Africa before COVID: Growth Outlooks

Source: Index Mundi, 2020 (www.indexmundi.com)
But there were several preexisting macroeconomic and social challenges that will be exacerbated with COVID

- Low public revenues collection;
- Increasing debt burden;
- Being Net importers: with falling in Exports;
- Low reserves of foreign currencies for some countries.....
- ......vs reduced FDIs, remittances & Rising Debt levels, ....
- Low regional integration and intra-regional trade
- Lack of economic diversification and industrialization
- Unemployment and under employment;
- Limited nature of social protection and VERY high levels of informal employment (> 90 percent) (ILO).
Illustration of some preexisting challenges

Trade: Intra- and extra-group merchandise (%, average 2012-2016)

- Rest of the world
- Intra-group

Tax-to-GDP ratios across Regions

- OECD
- Africa
- Latin America and Caribbean
- Asia and Pacific

Percentage
Youth
Young people are particularly affected by the pandemic as they are those with fragile jobs

Informal sector
Informal production units have no social protection (over 50% of jobs are in informal sector)

Education
Lockdowns have seriously disturbed education: Poor internet infrastructure aggravates the problem

Food security
COVID+
Locust+
Flood
Are worsening food security threat in the Horn of Africa

Innovation
The pandemic has boosted innovation particularly from youth: How to harness it for transformational change remains a challenge
National and Regional responses

- **Response plans** have been adopted at RECs and country levels;
- They include **Health** security measures; coping measures for **Businesses, households and governments**;
- The objectives include:
  - to save **lives, livelihoods and jobs**;
  - To Support **supply and demand**
  - To Create **fiscal space** for government
Some examples of measures adopted by countries – support to businesses and Households

• Targeting: distinction made by sector; by type of entreprise and households

• Type of support measures include: Fiscal, monetary and financial
  – Subsidies
  – Flexibility in taxation and tax payment modalities
  – Reduction of tax rates (corporates, income, VAT)
  – Accelerated Payment of arrears to Private Sector
  – Loans: Zero or Low interest rates loans

• Flexibility in loans repayments
• Debt restructurings
• Provision of guarantees
• Etc;
Practical examples of measures adopted by countries

- **Central Africa: Gabon**
  - Water and electricity bills free of charge for sometime

**Eastern Africa:**

**Burundi, Seychelles:**
- Subsidies to private sector to help pay salaries in struggling sectors and avoid layoffs

**Kenya:**
- Reduction of the base corporate income tax rate from 30 to 25 %
- Reduction of the turnover tax rate on small business from 3 to 1 %
- Reduction of the standard VAT rate from 16 to 14 percent
Practical examples of measures adopted by countries

North Africa:
- Tunisia
  - Emergency fund of 100MnTD for social aid;
  - Emergency fund of 100MnTD to support those who lost their jobs;
  - Postponement of 3 months, for the repayment of bank credits;
  - Reduction in interest rate for businesses.
- Sudan:
  - Fivefold average increase in salaries of public sector employees,
  - Substantial increase in the minimum wage;
  - Subsidies for badly affected small businesses

West Africa: Cote d’Ivoire
- A response plan of 2.8 Bn USD
Exemple of Regional Responses to COVID-19: Case of SADC

Coordination of transit facilitation through:

i. removal of restrictions on cross border cargo vehicles for food; medical equipment, medicines, supplies, ppe, fuel & coal; agricultural inputs & supplies; chemicals, packaging, equipment, spares, maintenance materials; inputs for production & processing of food products; and security, emergency & humanitarian relief services;

ii. simplification & automation of trade & transport facilitation processes;

iii. introduction/enhancement of pre-clearance of goods & single window processing; and

iv. acceleration of creation of e-applications & platforms for handling imports & exports, application, issuance & renewals of licences, permits, registration of drivers, operators, vehicles & loads, payment

Prioritizing after COVID: Turn Vulnerabilities into opportunities:

- High dependence on imports of essential food, medical and pharmaceutical items to be address by enhancing local production, developing RVCs and supporting AfCFTA implementation;

-Recovery plans and Future National Development Plans To build back both demand and supply capacities (consumption and production); And promote increased investments into:

- Health & social protection systems; Digital transformation; Agricultural transformations; climate friendly activities
THANK YOU!