4. Despite COVID-19, food consumption remains steady in Addis Ababa, Ethiopia

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There is substantial concern that global food insecurity is increasing as a result of the COVID-19 pandemic. Organizations such as the Food and Agriculture Organization of the United Nations (FAO), World Food Programme (WFP), and CGIAR are trying to get a clear picture of the growing challenges people may be facing, but the nature of the pandemic makes data on food security and daily living hard to obtain. Because face-to-face surveys have largely not been possible during the pandemic, much of what we know about actual changes in food security status comes from phone surveys. These surveys suggest large proportions of respondents are facing falling incomes; the World Bank reports declines in incomes and food security where they have conducted phone surveys.

These reported income changes suggest the pandemic has affected a large proportion of the world's population and that the poor in particular face the threat of significant food insecurity. However, phone surveys typically do not allow us to quantify respondents' changes in income. In other words, we know they perceive their incomes declining, but we do not know how much they have actually declined. As a result, analysts must make assumptions about the severity of income changes.

A series of surveys we have been conducting in Addis Ababa, Ethiopia, suggests there may be reason to be cautious about such assumptions. While a majority of people have reported lower incomes in recent months, overall food consumption in our most recent survey (conducted in early August 2020) was comparable to pre-pandemic levels, though with shifts in dietary composition. These results, detailed in our discussion paper, indicate that it is easy to read too much into survey questions regarding subjective changes in incomes in the pandemic, and also that many food value chains in Ethiopia have continued to function relatively well in the crisis.

To understand how information on income changes corresponds to changes in food consumption, we have tracked a panel of households in Addis Ababa since 2019. Panel households were initially surveyed in person about their food consumption in August and September 2019, and were tracked during the COVID-19 pandemic through phone surveys in May, June, and July 2020. The August 2020 food consumption survey allows us to directly compare consumption during the pandemic with consumption at the same time of year in 2019, six months before the pandemic began in Ethiopia.

Collectively, the surveys suggest that even if incomes have declined among a majority of the city population, the value of food consumption has not. The August survey this year found that overall food consumption was similar to pre-pandemic levels. The distributions of values are nearly on top of one another, suggesting the food budget is about the same among households across income groups — even among poorer households. Moreover, we do not find a decline in food consumption among households that had reported an income decline or a lost job in the previous (July) phone survey, implying that the subjective question about an income loss does not predict changes in food security levels.

Although this finding is good news, we do find a shift in the distribution of expenditures between categories of foods (Table 1 and Table 2). Specifically, grain and staple consumption has risen on average,

TABLE 1 Mean weekly per capita consumption in birr, by food group

FOOD GROUP	SEPTEMBER 2019	AUGUST 2020	DIFFERENCE IN PERCENT
Staples	81.48	90.80	11%
Legumes and nuts	21.38	18.00	-16%
Vegetables	57.39	46.32	-19%
Fruit	17.33	19.45	12%
Meat and eggs	60.37	67.65	12%
Dairy products	12.08	10.33	-14%
All other foods	35.31	37.42	6%
Total	**285.34**	**289.97**	**2%**

TABLE 2 Mean daily per capita calorie consumption, by food group

FOOD GROUP	SEPTEMBER 2019	AUGUST 2020	DIFFERENCE IN PERCENT
Staples	1,025.9	1,263.6	23%
Legumes and nuts	160.5	130.4	-19%
Vegetables	114.7	85.3	-26%
Fruit	33.2	39.8	20%
Meat and eggs	51.0	54.4	7%
Dairy products	33.1	37.9	15%
All other foods	410.0	387.1	-6%
Total	**1,828.4**	**1,998.5**	**9%**

in both value and calorie terms, while vegetable consumption and calories consumed among "all other foods," including oils, have fallen. Although the decline in consumption of vegetables, which are high in micronutrients, is potentially concerning, consumption of other micronutrient-dense foods, such as fruits and animal-source foods, has remained steady on average.

Taken together, these results have two important implications. The first result casts some doubt on the usefulness of the types of questions being asked about subjective changes in incomes, at least in studying changes in household well-being during the pandemic. Note that even in our July survey, 64 percent of households reported an income decline relative to normal levels at that time of year. However, the questions we and others typically ask do not allow us to quantify the income loss. Our results suggest that simply reporting the proportion of households that say their incomes have declined is misleading in terms of welfare and poverty impacts, and may lead some to seriously over-exaggerate the welfare and poverty impacts of the ongoing pandemic.

The shift in consumption patterns within the overall budget, meanwhile, suggests that food prices and/or the availability of certain foods may have played an important role in changing these patterns. As overall consumption was mostly unchanged year-over-year, it is clear that food is available and many food value chains have either been or become quite resilient to the economic shock associated with the COVID-19 pandemic in Ethiopia.

For these value chains, the pandemic may have caused a temporary shock – given initial disruptions in supplies, people had to figure out new ways of interacting to exchange foods and food products as food moved from producers to consumers. In the initial phases of the crisis, our May survey showed declines in fruit, meat, and dairy consumption. We surmise that there were initially issues with the supply chain for those foods. Once those issues were resolved, overall consumption could proceed largely as it had before the pandemic. It is also worth mentioning that Ethiopia never imposed a full lockdown that severely restricted movements, which may have played a role in the resilience of some value chains or their ability to bounce back relatively quickly. Experiences might differ in countries that imposed more complete lockdowns.

However, the decline in consumption of some food categories suggests that not all value chains have been equally resilient. To the extent that these foods may play an important role in micronutrient consumption, understanding what is happening with those value chains and how to help them recover is crucial. A first step would be to analyze price data as they become available. Learning where prices have risen fastest during the crisis might help us better understand factors that could lead some value chains to break during a crisis while others continue to function.

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