Covid-19: The Impact on EU Food Systems

EU Food System Strengths and Vulnerabilities during Covid-19

Forces et vulnérabilités du système alimentaire de l’Union européenne pendant la pandémie de Covid-19

Stärken und Schwächen des EU-Nahrungsmittelsektors während Covid-19

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On 3 January 2020, Chinese authorities notified the World Health Organization of an outbreak of ‘pneumonia of unknown causes’ in the city of Wuhan. A novel coronavirus (Covid-19) was identified. On 23 January, China imposed a lockdown on Wuhan and other cities in Hubei province to limit the spread of the infection. France reported the first European case on 24 January 2020. On 30 January, the WHO declared the coronavirus outbreak as a Public Health Emergency of International Concern. By late February, Italy had been harder hit than anywhere else in the EU by the outbreak. On 8 March, quarantine restrictions were introduced in Lombardy and other provinces in northern Italy and the lockdown was extended to the whole of Italy the following day. All EU Member States subsequently introduced lockdown restrictions in March although their severity varied from country to country, with Sweden a particular outlier.

Lockdown measures included requiring people to stay at home except for limited exceptions, the closure of shops, restaurants and cafes apart from supermarkets, as well as restrictions on the number of people who could gather together. EU countries reintroduced border controls and intra-EU travel bans preventing the entry of non-nationals for non-essential purposes with the potential for disruption of international trade. On 17 March 2020, EU Member States and Schengen associated countries (EU+ area) agreed on a recommendation from the European Commission to restrict non-essential travel from third countries to the EU+ area (Carrera and Chun Luk, 2020).

In subsequent months, EU economies began to relax these restrictions, including permitting travel from other European economies as well as selected non-EU countries. However, renewed clusters of infections requiring the reintroduction of local lockdowns were reappearing at the time of writing (October 2020) and countries are struggling to find ways to live with the virus on a more permanent basis.

We can distinguish between the immediate lockdown and the subsequent period of unsteady co-existence as countries seek to adjust to the virus (Table 1). This article focuses on the initial impacts

Table 1: Impacts of Covid-19 on European food systems

| Phase | Actual and potential shocks |
|-------|----------------------------|
| Phase 1. Lockdown (immediate) | - Supply chain shocks caused by closure of processing plants, shortage of seasonal workers, transport and other logistical dislocations.  
- Demand shifts due to closure of food service outlets, shifts to online deliveries, reduction in food surpluses available to food banks.  
- Specific adverse market shocks for producers due to loss of high-value sales to food service outlets both on domestic and export markets, potential food price increases due to unavailability of specific supplies. |
| Phase 2. Living with coronavirus (longer-term) | - Potential supply-side difficulties depending on whether international transport networks continue to operate without significant increases in trade costs, and on future policies towards migrant labour.  
- Demand-side shock caused by economic contraction and loss of purchasing power on both domestic and export markets as unemployment rises following the ending of economic shielding measures (wage compensation supports, liquidity support to businesses). |

Source: Author’s own construction.
of the lockdown on the EU agriculture and food sector. It first reviews the impacts on producer and consumer food prices. The next section describes the EU response to the difficulties in the agricultural sector in this initial phase. A final section looks at what lessons might be learned from the first phase of the pandemic in shaping the future framework of the Common Agricultural Policy (CAP). Many have argued that the pandemic has underlined the need to strengthen the resilience of the food system to external shocks and have concluded that this is best done by supporting more local and regional supply chains. This article argues that being integrated into a global food system increases food security by serving as a safety net in the event of any type of shock.

Consequences for food and agriculture

In the primary agricultural sector, the impact of the lockdown varied both across and within sectors. Some farmers struggled to find seasonal workers, particularly in the fruit and vegetable sectors. The closure of the food service sector reduced demand for specific products such as potatoes (for French fries), high-value meat cuts, some dairy products such as cheeses, as well as some types of poultry not usually sold through retail outlets. Wine producers were hit by the loss of export markets, exacerbated by the tariffs imposed on European wines in the US market. The flowers and ornamentals sector was one of the most impacted sectors, where COPA-COGECA reported losses of €4.1 billion over a six-week period (COPA-COGECA, 2020). The impact on prices of selected commodities is shown in Figure 1. While one must be careful to take account of normal seasonal volatility, prices of poultry, beef, pigmeat, milk and tomatoes fell in the period March–May 2020 during the Covid-19 lockdown and in May were all below the January 2018 level. Widespread reports of shortages of asparagus are reflected in a small uptick in prices in April but subsequently there is no indication that the trend in prices has been different to other years.

Prices for food (2015=100) in the euroarea increased sharply between March and May 2020 (Figure 2). One proposed explanation is that the restrictions on personal mobility in the early lockdowns allowed retailers to raise prices and markups given that consumers had fewer opportunities to shop around (Ihle et al., 2020). However, food prices were already on an upward trend. Also, the food price increase after March 2020 was not out of line with the increase in general prices excluding energy (energy prices fell sharply during those months which kept a lid on overall price increases), and it was quickly reversed as lockdowns eased. Some changes in consumer behaviour were observed during lockdown, especially growth in the food delivery and takeaway market as well as in direct deliveries from farms, but time will tell whether these changes will become more permanent.

The pandemic highlighted the key role of migrant workers both at farm level in harvesting and in processing plants, especially slaughter houses, and their often unacceptable working and living conditions (EFFAT, 2020). Several countries have taken steps to regularise the status of migrant workers, but much more action will be required. Germany has promised to use its EU presidency to push for stricter enforcement of existing protections for migrant workers by coordinating a ‘European action plan’ across the EU to improve conditions. In July 2020 the Commission published guidelines on seasonal workers in the context of the Covid-19 outbreak. The guidelines confirmed that, once in employment, seasonal workers are subject to the laws and relevant collective agreements of the host Member State and must be treated the same as nationals as regards their working conditions including remuneration, dismissal and occupational safety and health. They called on Member States to strengthen field inspections with the support of the European Labour Authority (European Commission, 2020b).

Despite some very short-term supply difficulties due mainly to panic buying and hoarding, the EU food supply chain has proved resilient. There have been no enduring supply problems or food shortages, although food prices did experience a surge for several months. The Harmonised Index of Consumer Prices for food (2015=100) in the euroarea increased sharply between March and May 2020 (Figure 2). One proposed explanation is that the restrictions on personal mobility in the early lockdowns allowed retailers to raise prices and markups given that consumers had fewer opportunities to shop around (Ihle et al., 2020). However, food prices were already on an upward trend. Also, the food price increase after March 2020 was not out of line with the increase in general prices excluding energy (energy prices fell sharply during those months which kept a lid on overall price increases), and it was quickly reversed as lockdowns eased. Some changes in consumer behaviour were observed during lockdown, especially growth in the food delivery and takeaway market as well as in direct deliveries from farms, but time will tell whether these changes will become more permanent.

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The immediate effects of the Covid-19 lockdowns are likely to be dwarfed by the longer-term consequences of the severe economic contraction brought on by the lockdown measures both in the EU itself but also in the global economy as it affects the demand for exports. Economic forecasts for the EU suggest a GDP contraction in 2020 of between 8–9 per cent (European Commission Summer 2020 Economic Forecast) and 10 per cent (IMF World Economic Outlook Update Summer 2020). As governments end wage compensation schemes and liquidity supports to business, unemployment will rise and purchasing power will decline. The shape and speed of economic recovery is very uncertain, as it is not yet clear how consumers will behave as lockdown restrictions are lifted. Also, at the time of writing (October 2020) infection rates are rising in many European countries leading to the re-introduction of targeted lockdown restrictions with negative consequences for the sectors and regions affected.

This will affect both the prospects for agricultural markets and food security. On international markets, prices for major foodstuffs are likely to remain subdued given the relatively abundant situation for food availability and the decline in purchasing power. This contrasts with the situation in the 2007–2008 Great Recession when there was a spike in food prices. That was exacerbated by export restrictions put in place by many countries which have been noticeably less frequent on this occasion; according to the International Trade Centre, food export bans were imposed by 14 countries as of end-September 2020 (ITC, 2020). Globally, the FAO is projecting that a 5–10 per cent drop in global GDP could increase the number of hungry people by between 74–120 million (FAO, 2020). Also, within Europe there are growing numbers of people turning to food banks and other sources of food assistance as unemployment bites. The EU has reacted by increasing the funding available to the European Fund for Aid to the Most Deprived (FEAD) in 2020, 2021 and 2022 to address these needs (European Union, 2020).

The EU response in the food and agricultural sector

One of the earliest measures taken by the Commission in response to the lockdown in various Member States was to issue guidance on 23 March on opening ‘green lane’ border crossings to all freight vehicles, whatever goods they were carrying (European Commission, 2020d). These enabled goods and transport workers to cross borders as needed and without delay to ensure the continued functioning of EU supply chains. A week later, on 30 March, the Commission issued further guidelines identifying workers in critical occupations, including health and food workers, for which continued free movement was deemed essential. For seasonal workers in the agricultural sector, Member States were asked to exchange information on their different needs at technical level and to establish specific procedures to ensure a smooth passage for such workers, in order to respond to

Figure 1: Price trends for selected commodities, EU average prices, January 2018–September 2020

Source: DG AGRI Agri-food data portal.

Figure 2: Inflation in the euro area, January 2018–September 2020

Source: Own computations based on Eurostat HICP domain [prc_hicp_midx].
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labour shortages as a result of the crisis.

Even before these measures took effect the agri-food supply chain appears to have held up well. Both intra-EU and extra-EU trade figures were up in March 2020 compared to the previous month (Figure 3). However, both intra-EU and extra-EU trade contracted in the following months with some signs of recovery in the June figures. Overall, intra-EU merchandise exports fell by 21 per cent between March and May 2020 compared to a fall of 18 per cent for agri-food exports. Extra-EU merchandise exports fell by 26 per cent over the same period compared to 16 per cent for agri-food exports. Extra-EU merchandise imports fell by 17 per cent between these two months, while extra-EU agri-food imports fell by 9 per cent. Against this background, the trade performance of the EU agri-food sector has been more robust than that of merchandise trade in general.

The Commission took several measures to support farm incomes during the lockdown. The Commission’s response was framed by the very limited resources available in the EU budget in the final year of the 2014–2020 Multi-annual Financial Framework (MFF). An agricultural crisis reserve had been agreed as part of the 2013 CAP reform, funded each year by withholding a part of farmers’ direct payments under the CAP which was then returned to farmers if the fund was not used. The European Parliament’s Agriculture Committee urged the Commission to activate this reserve. The Commission supported by Member State agriculture ministers refused on the grounds that support from the reserve would effectively be funded by farmers themselves. However, because the various margins under the MFF headings had already been appropriated by the Commission to fund other urgent expenditures resulting from the pandemic, there were virtually no resources in the EU budget to fund additional emergency measures for agriculture.

The Commission’s response fell into four categories: greater flexibility in the rules governing the disbursement of CAP payments; temporary derogation from EU competition rules for producer organisations allowing them to plan production; market support intervention; and direct aid. Examples of greater flexibility in payments included delaying the date for farmers to apply for direct payments in 2020, derogations from some rules on checks for direct payments and simplifying the use of financing instruments in rural development programmes.

The derogation from EU competition rules allowed operators in the milk, flowers and potato sectors to self-organise and implement market measures for a maximum period of six months. The milk sector could collectively plan milk production and the flower and potato sectors could withdraw products from the market. The Commission also allowed flexibility in the implementation of market support programmes for wine, fruits and vegetables, table olives and olive oil, apiculture and the EU’s school scheme (covering milk, fruit and vegetables). The flexibility aimed to limit available supply in each sector to lead to a rebalancing of markets (e.g. through crisis distillation measures in the wine sector). In addition, funding priorities in Operational Programmes could be re-oriented towards crisis management measures.

The EU has an extensive toolkit of market intervention measures (Wageningen Economic Research and Ecorys, 2019). The market support measures included opening of private storage aid for various dairy products as well as beef and sheep meat. This was the only measure that involved a direct cost to the EU budget with an allocation of €80 million.

The absence of resources in the EU budget meant that it was left to Member States to provide direct...
financial support to farmers, effectively a form of state aid. The Commission introduced a Temporary Framework for state aid measures to support the economy during the Covid-19 outbreak that relaxed restrictions on Member States providing national aid to farmers under the Guidelines for state aid in the agricultural and forest sectors and in rural areas (European Commission, 2020c). It increased state aid for farmers up to €100,000. This could be topped up with an additional €20,000 to €25,000 in de minimis aid, bringing potentially several billion euro extra from national budgets to the European agri-food sector.

In addition, a temporary measure supported by EAFRD allowed Member States to pay a lump sum to farmers and small agri-food businesses particularly affected by the Covid-19 crisis if they could use resources not yet committed under their rural development programmes, up to a maximum 1 per cent of their rural development envelope. The maximum amount of support was limited to €7,000 per farmer and €50,000 per SME. This could be paid on top of the de minimis aid for the agricultural sector and the increased state aid ceiling but does not involve additional funds.

The Commission has notified a list of state aid schemes approved specifically for the agricultural sector to the WTO (Table 2). This does not include de minimis aid for which there is no ex-ante requirement for notification to the European Commission, nor does it include payments to farmers under approved state aid schemes available to all sectors of the economy. Sixteen Member States have notified agricultural state aid by mid-September 2020. Notable absentees on this list include France, Germany and Spain but farmers may be covered in these countries by general aid schemes not listed here. Nonetheless, the EU has notified specific agricultural support worth over €3.8 billion by September 2020. The largest national aid schemes have been approved in Italy, Netherlands (for the Dutch horticulture and floriculture sectors), Hungary and Czechia. Although it will be some time before actual payments to farmers under national state aid schemes are known, the sums involved greatly outweigh the amount made available from the EU budget for market support.

There is a danger that the relaxation of EU state aid rules allowing countries to provide state support to their agricultural sector could lead to distortions in the single market and undermine the level playing field, particularly where the fiscal capacity of individual Member States to provide support varies greatly. Under the Temporary Framework for state aid, aid to farms must not be fixed based on the price or quantity of products put on the market, while aid under reallocated rural development funds must be paid as a lump sum. These conditions will help to limit the trade-distorting effect.

**Table 2: Member State aid measures to farmers notified to the European Commission by 17 September 2020**

| Member State | EUR million |
|--------------|-------------|
| BE           | 35.20       |
| BG           | 29.00       |
| CY           | 0.50        |
| CZ           | 402.60      |
| EL           | 61.33       |
| FI           | 30.00       |
| HU           | 481.06      |
| IE           | 50.00       |
| IT           | 1,868.00    |
| LT           | 136.20      |
| LV           | 2.64        |
| MT           | 1.50        |
| NL           | 650.00      |
| PL           | 9.00        |
| PT           | 0.01        |
| RO           | 54.80       |
| **Total**    | **3,811.84**|

Source: European notifications to the WTO G/AG/GEN/159 plus Add.1 plus Add.2.

Implications for future EU agricultural policy

The EU co-legislature is negotiating a new framework for the CAP post-2020 following publication by the Commission of draft legislation in June 2018. Progress on this file was delayed by the European Parliament elections in May 2019, the entry into office of a new Commission on 1 November 2019 and by uncertainty over the future CAP budget due to delays in agreeing on the MFF for the period 2021–2027. In June 2020, the co-legislature adopted a common position on the transitional regulation extending the current CAP rules for a further two-year period. At the time of writing, final approval of this legislation has also been delayed.

"Measures that would fragment the single market in the name of strengthening food security risk weakening it instead."

In the meantime, the Commission has launched its proposal for a European Green Deal. This has implications for agriculture that are spelled out in the Farm to Fork and Biodiversity Strategies. On top of that, the European Council has adopted a Covid-19 recovery package (Next Generation EU) that would make available significant additional sums, financed by borrowing, to countries badly affected by the coronavirus pandemic. As part of this package, the Council agreed to allocate €7.5 billion in constant 2018 prices to additional funding for the European Agricultural Fund for Rural Development (EAFRD).

Given this context and the fact that negotiations on the CAP legislation are continuing at the time of writing, what other consequences might Covid-19 have for the future design of the CAP? On one point, it strengthens pre-existing concerns that the CAP does not have an effective crisis management instrument. This does not relate to the measures that the
Commission can take in response to a crisis, which are comprehensive, but rather to the need for a more effective crisis reserve fund (Wageningen Economic Research and Ecorys, 2019).

Given that the EU budget is unable to run a temporary overdraft, this means making provision within the MFF itself for a crisis reserve, in the knowledge that this may sterilise funds that otherwise could be used for other types of CAP expenditure. In this sense, farmers will come to pay for the crisis reserve, regardless whether it is an annual instrument as at present, or a multi-annual one as is proposed for the future CAP. Here the Commission has proposed that the crisis reserve would amount to at least €400 million in current prices at the beginning of each year, initially funded by the total unused amount of the crisis reserve available at the end of 2020. Unused amounts can be carried forward without time limitation to finance the reserve in subsequent years. If the reserve needs to be replenished, this will be done as part of the normal budgetary process in the relevant year.

Resilience and local food systems

Not surprisingly in a time of crisis, there has been a rise in popular sentiment supporting local food production as a way of ensuring a more resilient food system and increasing food security. This has been couched in various ways, as a call for reshoring production, for reducing reliance on global and EU supply chains, as well as promoting shorter supply chains. This call has received some high-level support, including from the Agriculture Commissioner Janusz Wojciechowski as well as President Macron in France.

There have been some isolated actions to implement support for domestic production by national governments. Romania was one of the first countries to impose an export ban on cereals and cereal products (despite being a significant net exporter) but reversed course within a week following pressure from domestic farm groups. The Polish government has attempted to shame processors using imported milk. Bulgaria implemented a decree requiring supermarkets to buy Bulgarian farm products they normally would not buy and to have at least 90 per cent of the milk and milk products in stores from Bulgarian producers. Czech lawmakers proposed a bill that would oblige retailers to raise the share of Czech food on their shelves from 55 per cent in 2021 to 85 per cent by 2027. In many other cases, governments have used ‘rally around the flag’ rhetoric to encourage consumers to purchase domestic produce.

Some consumers wish to buy local because they believe local food is fresher, or has a lower environmental impact, or because they wish to support farmers in their local community. Industrialised food systems have been very successful in providing a cheap, safe and diverse supply of food to a growing number of consumers. However, there has been an increasing focus on their weaknesses and failings, such as poor nutritional outcomes, an unsustainable environmental footprint and uneven access to food, that existed pre-Covid-19 and which remain to be addressed following the pandemic.

Local food advocates also argue that local food systems should be supported because they are supposedly more resilient to crises such as the Covid-19 pandemic. If this gets translated into a political preference for local food by protectionist measures, it can end up weakening food security rather than strengthening it.

Evidence on the resilience of local food systems under the pandemic has been largely anecdotal. There are examples where consumer interest in subscribing to farm-to-door deliveries has increased, but that is not a demonstration that these systems are more resilient. Indeed, local food systems were particularly affected by the closure of farmers’ markets in many countries. On the other hand, the industrialised food system has performed remarkably well during the lockdown as previously documented, despite the enormous magnitude of the shock to which it was subjected, and there are good reasons for this (Lusk, 2020).

A resilient food system is one that minimises risks (vulnerabilities) while being able to cope with risks when they occur (capabilities). Vulnerability to risk is perceived to be greater with globalised food chains, not least during the Covid-19
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pandemic, because they depend on well-functioning international transport networks that were threatened by border closures. But if a food business decides to limit its supply base only to local producers, this is also a form of dependence that may undermine resilience. It is trading off vulnerability to a breakdown in international trade by increasing its vulnerability to a local supply shock.

Fully local production is hardly a recipe for resilience because disaster can also strike within a domestic economy. The ability to secure supplies through trade is an important determinant of food security. Resilience can be achieved by deliberately choosing to rely on multiple suppliers or by diversifying across customers or input suppliers to minimise exposure to risk. Both these strategies are costly, and global supply chains by focusing mainly on minimising cost may have eroded buffers and decreased flexibility. However, the recent experience in managing the crisis caused by Covid-19 underlines the significant capabilities of EU supply chains to cope with a shock of this magnitude. An important focus for future research should be understanding better the nature of these capabilities and how to strengthen them.

Drawing the right lessons from Covid-19

The sudden and unexpected emergence of the coronavirus pandemic has upended life as we knew it. The measures put in place to slow the spread of infection and to prevent health services from collapsing under the strain have plunged Europe and the world into the greatest economic contraction since the 1930s. It is not surprising that the performance of the food system during the pandemic has come under scrutiny. This article has examined some preliminary evidence on how the EU food system has performed. It has described the initial policy responses of the EU and Member States. Finally, it has reflected on what lessons might be learned for the future CAP whose framework is (at the time of writing) under negotiation in both the Council and European Parliament.

The preliminary evidence from the early lockdown period in March to June 2020 supports the view that, apart from some experiences of empty supermarket shelves in the very first days of lockdown caused by hoarding by consumers, the EU food system has been remarkably resilient. EU farmers, processors and retailers have maintained food supplies to EU consumers and adjusted to the shifts in demand caused by the lockdowns in the food service sector. Farm prices fell after
lockdowns were introduced but, with some notable exceptions such as flowers, the fall in prices has been limited. Consumer food prices, on the contrary, increased but this seems to have been a temporary phenomenon.

The response to the pandemic has revealed the limitations in the EU’s crisis response mechanism particularly where market support may be needed. The EU does not have the budgetary firepower for sustained market intervention. Instead, by relaxing state aid rules, the EU handed over responsibility to Member States which have provided billions of euros in support to their farm sectors. One fear is that differences between countries in their ability to finance aid packages could lead to unbalancing the level playing field in the EU single market.

The Commission announced in its Farm to Fork Strategy that it will assess the resilience of the food system and develop a contingency plan for ensuring food supply and food security to be put in place in times of crisis (European Commission, 2020a). Rising geopolitical tensions, expressed in US–China trade tensions in the soybean market, ongoing Russian counter-sanctions banning EU food imports, and US tariffs on EU food exports, undermine confidence in the robustness of the international trading system. The deadlock at the WTO over dispute settlement procedures and the evident difficulties in getting agreement on updated trade rules also erode trust in the multilateral trading system. Despite these risks, being integrated into a global food system increases food security by serving as a safety net in the event of any type of shock – drought, pests, disease or pandemic. Similarly, the free movement of food within the EU single market enhances the food security of individual Member States. Measures that would fragment the single market in the name of strengthening food security risk weakening it instead. Policies in the future should support firms in building more robust and resilient supply chains and not undermine food security built on misconceptions about how supply chains performed during the Covid-19 pandemic.

Further Reading

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The performance of the EU food system during the early stages of the Covid-19 pandemic is examined in this article. The preliminary evidence from the early lockdown period in March to June 2020 supports the view that, apart from some experiences of empty supermarket shelves in the very first days of lockdown caused by hoarding by consumers, the EU food system has been remarkably resilient. EU farmers, processors and retailers have maintained food supplies to EU consumers and adjusted to the shift in demand caused by the lockdowns in the food service sector. Farm prices fell after lockdowns were introduced but, with some notable exceptions, such as flowers, the fall in prices has been limited. Consumer food prices, on the contrary, increased but this seems to have been a temporary phenomenon. The response to the pandemic has revealed the limitations in the EU's crisis response mechanism particularly where market support may be needed. The argument of some EU leaders that local food systems should be supported as a way of increasing the resilience of the food system to future shocks does not have empirical support. Policies in the future should support firms in building more robust and resilient supply chains and not undermine food security built on misconceptions about how supply chains performed during the Covid-19 pandemic.

Summary

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The performance of the EU food system during the early stages of the Covid-19 pandemic is examined in this article. The preliminary evidence from the early lockdown period in March to June 2020 supports the view that, apart from some experiences of empty supermarket shelves in the very first days of lockdown caused by hoarding by consumers, the EU food system has been remarkably resilient. EU farmers, processors and retailers have maintained food supplies to EU consumers and adjusted to the shift in demand caused by the lockdowns in the food service sector. Farm prices fell after lockdowns were introduced but, with some notable exceptions, such as flowers, the fall in prices has been limited. Consumer food prices, on the contrary, increased but this seems to have been a temporary phenomenon. The response to the pandemic has revealed the limitations in the EU’s crisis response mechanism particularly where market support may be needed. The argument of some EU leaders that local food systems should be supported as a way of increasing the resilience of the food system to future shocks does not have empirical support. Policies in the future should support firms in building more robust and resilient supply chains and not undermine food security built on misconceptions about how supply chains performed during the Covid-19 pandemic.

Forces et vulnérabilités du système alimentaire de l’Union européenne pendant la pandémie de Covid-19

La performance du système alimentaire de l’Union européenne (UE) au cours des premiers stades de la pandémie de Covid-19 est examinée dans cet article. Les observations préliminaires de la période de confinement précoce de mars à juin 2020 soutiennent l’opinion selon laquelle, mis à part quelques expériences de rayons de supermarchés vides dans les tous premiers jours, provoquées par le comportement de stockage des consommateurs, le système alimentaire de l’UE a été remarquablement résilient. Dans l’union, les agriculteurs, les transformateurs et les détaillants ont maintenu l’approvisionnement alimentaire des consommateurs et se sont adaptés à l’évolution de la demande causée par les fermetures dans le secteur des services alimentaires. Les prix agricoles ont chuté après l’introduction des confinements, mais à quelques exceptions notables, comme les fleurs, la baisse des prix a été limitée. Les prix des produits alimentaires à la consommation ont au contraire augmenté, mais cela semble avoir été un phénomène temporaire. La réponse à la pandémie a révélé les limites du mécanisme de réponse aux crises de l’UE, en particulier là où le soutien du marché pourrait être nécessaire. L’argument de certains dirigeants de l’UE selon lequel les systèmes alimentaires locaux devraient être soutenus pour augmenter la résilience du système alimentaire aux chocs futurs n’a pas de fondement empirique. Les politiques pour l’avenir devraient aider les entreprises à construire des chaînes d’approvisionnement plus solides et résilientes et ne pas compromettre la sécurité alimentaire en se fondant sur des idées fausses sur la façon dont les chaînes d’approvisionnement se sont comportées pendant la pandémie de Covid-19.

Stärken und Schwächen des EU-Nahrungsmittel- sektors während Covid-19

In diesem Beitrag wird die Leistung des EU-Nahrungsmittelsektors während der frühen Phase der Covid-19-Pandemie untersucht. Die vorläufigen Erkenntnisse aus der frühen Zeit des Lockdowns von März bis Juni 2020 untermauern die Erkenntnis, dass der Nahrungsmittelsektor der EU – abgesehen von einigen Erfahrungen mit leeren Supermarktreihen in den ersten Tagen des Lockdowns, die durch Hamsterkäufe verursacht wurden – bemerkenswert widerstandsfähig war. Landwirtschaftliche Betriebe, verarbeitende Unternehmen und der Einzelhandel in der EU konnten die Lebensmittelversorgung der EU-Verbraucherinnen und -Verbraucher aufrechterhalten. Darüber hinaus haben sie sich auch auf die durch die zeitweilige Schließung der Gastronomiebetriebe verursachte Nachfrageverschiebung eingestellt. Die Agrarpreise sind nach der Einführung des Lockdowns gesunken. Dennoch hielt sich der Preisrückgang, abgesehen von einigen besonderen Ausnahmen, wie z.B. Blumen, in Grenzen. Im Gegensatz dazu verzeichneten die Lebensmittelpreise einen Anstieg; dies scheint jedoch ein vorübergehendes Phänomen gewesen zu sein. Die Reaktion auf die Pandemie hat die Grenzen des Krisenreaktionsmechanismus der EU aufgedeckt, insbesondere dort, wo eine Stützung des Marktes erforderlich werden könnte. Das Argument einiger führender EU-Politikerinnen und -Politiker, dass regionale Ernährungssysteme gefördert werden sollten, um die Widerstandsfähigkeit des Nahrungsmittelsektors gegen künftige Krisen zu erhöhen, ist empirisch nicht gesichert. Politikmaßnahmen sollten in Zukunft Unternehmen beim Aufbau robusterer und widerstandsfähigerer Lieferketten unterstützen. Dahingegen sollten sie es vermeiden, die Versorgungssicherheit mit Lebensmitteln zu untergraben, die auf falschen Vorstellungen darüber beruhen, wie die Lieferketten während der Covid-19- Pandemie funktioniert haben.